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The Travel & Tourism Competitiveness Report 2009

Managing in a Time of Turbulence

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Editors

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KLAUS SCHWAB,

Executive Chairman, World Economic Forum

The past year has been a difficult one for the Travel & Tourism (T&T) sector. High oil prices through the summer of 2008, diminished tourism demand due to the international economic crisis, and concerns about terrorism have raised many challenges for the industry. Yet, despite these difficulties, the T&T sector remains a critical one for the world economy, still accounting for a significant share of global gross domestic product and employment, and providing an important opportunity for developing countries to move up the value chain toward the production of higher value-added services. In this context, an analysis of the T&T competitiveness of individual countries around the world is particularly pertinent at this time. This is the fundamental objective of this third edition of *The Travel & Tourism Competitiveness Report* (TTCR).

For the past four years, the World Economic Forum has engaged key industry and thought leaders through its Aviation, Travel & Tourism Industry Partnership Programme to carry out an in-depth analysis of the T&T competitiveness of economies around the world. The goal is to construct a platform for multi-stakeholder dialogue to ensure the development of strong and sustainable national T&T industries capable of contributing effectively to international economic development. The theme of this third edition of the TTCR, "Managing in a time of turbulence," reflects the myriad of complexities facing the industry at this time, which must be overcome to ensure strong sectoral growth going into the future.

At the core of this year's *Report* is the third edition of the Travel & Tourism Competitiveness Index (TTCI). The aim of the TTCI, which covers a record 133 economies this year, is to provide a comprehensive strategic tool for measuring "the factors and policies that make it attractive to develop the T&T sector in different countries." By providing detailed assessments of the T&T environments in countries worldwide, the results can be used by all stakeholders to work together to improve the industry's competitiveness in their national economies, thereby contributing to national growth and prosperity. The same overall index structure used last year has been retained, making meaningful inter-year comparisons possible and allowing countries to track their progress over time in the various areas measured.

The *Report* contains detailed profiles for each of the 133 economies featured in the study, as well as an extensive section of data tables with global rankings covering over 70 indicators included in the TTCI. In addition, the *Report* includes insightful contributions from a number of industry experts. These chapters explore issues such as the impact of higher oil prices on the tourism industry, the importance of price competitiveness for attracting tourists, and the extent to which the TTCI explains differences in travel intensity among countries.

The Travel & Tourism Competitiveness Report could not have been put together without the distinguished thinkers who have shared with us their knowledge and experience. We are grateful to our Strategic Design Partner, Booz & Company, and our Data Partners Deloitte, the International Air Transport Association (IATA), the International Union for Conservation of Nature (IUCN), the World Tourism Organization (UNWTO), and the World Travel & Tourism Council (WTTC) for helping us to design and develop the TTCI and for providing much of the industry-relevant data used in its calculation. We thank our Industry Partners in this *Report*—Abercrombie & Kent, Airbus, Bombardier, British Airways, Carlson, Emirates Group, Etihad Airways, Hertz, JetAirways, NetJets Europe, Silversea, Swiss International Airlines, and Rolls-Royce—for their support in this important venture. Our thanks also goes out to our academic advisors on the *Report,* Larry Dwyer, Qantas Professor of Travel and Tourism Economics in the Australian School of Business at the University of New South Wales, and Peter Forsyth, Professor of Economics at Monash University.

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Executive Summary

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World Economic Forum

The past few years have witnessed many storms in the Travel & Tourism (T&T) industry. These have ranged from mounting concerns about terrorism in several regions to the high cost of fuel and lower tourism-based spending linked to the current economic downturn. In this context, this third edition of *The Travel & Tourism Competitiveness Report* is being released at a time when the industry finds itself at a crossroads with regard to how to address these diverse and mounting challenges.

Yet, despite the current difficulties, the Travel & Tourism sector remains a critical economic sector worldwide and one that provides significant potential for economic growth and development internationally. A growing national T&T sector contributes to employment, raises national income, and can improve a country's balance of payments. The sector is thus an important driver of growth and prosperity and, particularly within developing countries, it can play a leading role in poverty reduction.

Given the importance of the T&T sector, four years ago the World Economic Forum, together with its Industry and Data Partners, embarked on a multi-year research effort aimed at exploring various issues related to the T&T competitiveness of nations around the world. This year's *Report* is published under the theme of "Managing in a time of turbulence," reflecting the many difficulties the industry presently faces, which must be overcome to ensure strong sectoral growth going into the future. This is particularly captured by the topics covered by the analytical chapters, which will be described below.

The Travel & Tourism Competitiveness Index

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

The TTCI has been developed within the context of the World Economic Forum's Industry Partnership Programme for the Aviation, Travel and Tourism sector. The Index was developed in close collaboration with our Strategic Design Partner Booz & Company and our Data Partners Deloitte, the International Air Transport Association (IATA), the International Union for Conservation of Nature (IUCN), the World Tourism Organization (UNWTO), and the World Travel & Tourism Council (WTTC). We have also received important feedback from a number of key companies that are Industry Partners in the effort, namely Abercrombie & Kent, Airbus, Bombardier, British Airways, Carlson, Emirates Group, Etihad Airways, Hertz, JetAirways, NetJets Europe, Silversea, Swiss International Airlines, and Rolls-Royce. Several thought leaders from these organizations have also contributed insightful papers addressing various aspects of T&T competitiveness, which are described below.

The TTCI aims to measure *the factors and policies that make it attractive to develop the T&T sector in different countries.* It is based on three broad categories of variables that facilitate or drive T&T competitiveness. These categories are summarized into the three subindexes of the Index: (1) the T&T regulatory framework subindex; (2) the T&T business environment and infrastructure subindex; and (3) the T&T human, cultural, and natural resources subindex.

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

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

Each of the pillars is, in turn, made up of a number of individual variables. The dataset includes both hard data and Survey data from the World Economic Forum's annual Executive Opinion Survey. The hard data were obtained from publicly available sources, international organizations, and T&T institutions and experts (for example, IATA, the IUCN, the UNWTO, the WTTC, UNCTAD, and UNESCO). The Survey is carried out among CEOs and top business leaders in all economies covered by our research; these are the people making the investment decisions in their respective economies. The Survey provides unique data on many qualitative institutional and business environment issues, as well as specific issues related to the T&T industry and the quality of the natural environment. The exact methodology underlying the construction of the TTCI is described in Chapter 1.1.

The Travel & Tourism Competitiveness Index rankings 2009

Table 1 shows the overall ranking for the 133 countries included in this year's TTCI, comparing this year's ranking with that of last year, showing all countries ranked together. The table shows that the top three countries in the overall ranking remain the same as last year, with three European countries—Switzerland, Austria, and Germany—continuing to lead the way in T&T competitiveness.

Tables 2–5 show the rankings in a regional context, grouping countries into the following four regional groups: the Americas, Europe, Middle East and Africa, and Asia Pacific (including Central Asia). We discuss a selection of countries from each region to provide a sense of the results and how they are interpreted at the national level. More countries are discussed in detail in Chapter 1.1.

Europe

Table 2 shows the rankings for just European countries, with the first column showing the rank within the region, and the second column showing the overall rank out of all 133 countries included in the index this year. As the table shows, Switzerland is ranked first out of all countries in the 2009 TTCI, followed by Austria and Germany, the same top three countries for the past three years.

Switzerland is a country rich in cultural and natural resources, including an impressive number of World Heritage cultural and natural sites for a country of its size. A large percentage of the country's land area is protected (ranked 16th), and the natural environment is assessed as being among the most pristine in the world (ranked 9th). This natural heritage is buttressed by a strong national focus on environmental sustainability: Switzerland is ranked 2nd overall on this pillar, based on strong and well-enforced environmental legislation and with a particular focus on developing the T&T sector sustainably.

Switzerland is not only an attractive leisure tourism destination but is also an important business travel hub, with many international fairs and exhibitions held in the country each year. Staffing of the industry is also facilitated by the availability of qualified labor to work in Travel & Tourism (ranked 3rd), perhaps not surprising in a country with many of the best hotel management schools. Added to these strengths is Switzerland's excellent ground transport infrastructure (ranked 1st worldwide), with top-quality roads and railroads and an excellent domestic transport network. Also well assessed is the specific tourism infrastructure (ranked 7th), with readily available hotel rooms and automated teller machines (ATMs) for cash withdrawals. Such high-quality infrastructure makes a tourist's stay in the country easy and comfortable, an experience that is reinforced by the high level of general safety and security (ranked 8th).

Austria is ranked 2nd in Europe and out of all countries in the TTCI, a ranking attributable to its rich cultural resources, with eight World Heritage cultural sites and with many fairs and exhibitions catering to business travelers. The natural environment is also well assessed, along with the country's focus on environmental sustainability (ranked 9th). In addition, Austrians are perceived as open and welcoming to foreign travelers. Austria's tourism infrastructure is assessed as second to none, with abundant car rental facilities, hotel accommodations, and ATMs. Other strengths include Austria's assessment as one of the safest countries in the world (ranked 6th) and its excellent health and hygiene levels (ranked 5th).

Germany, ranked 3rd out of all countries, is also characterized by abundant cultural resources, ranked 4th worldwide for its 32 World Heritage cultural sites and 2nd for the number of international fairs and exhibitions held in the country. The country's infrastructure is among the best in the world, ranked 5th for the quality of its ground transport infrastructure and 7th for its air transport infrastructure. In addition, Germany gets somewhat better marks than Switzerland and Austria for the policy rules and regulations affecting the T&T industry: it is ranked 17th in this area, with transparent policymaking, well-protected property rights, and bilateral Air Service Agreements that are assessed as open.

France moves up this year by six places, ranking 4th out of all 133 countries. France attracts tourists with its rich cultural heritage (ranked 4th for the number of World Heritage cultural sites and 7th for creative industries). The country also hosts many international fairs and exhibitions (ranked 5th), thereby attracting business travelers as well. France's ground transport infrastructure is among the best in the world (ranked 3rd), with the quality of roads and railroads particularly well assessed, as well as its air transport infrastructure (ranked 5th). The country's improvement is in part attributable to a stronger perceived prioritization by the government of the sector and increased marketing of the country

Table 1: Travel & Tourism Competitiveness Index 2009 and 2008 comparisons

	2009		2008
Country/Economy	Rank/133	Score	Rank/130
Switzerland	1	5.68	1
Austria	2	5.46	2
Germany	3	5.41	3
France	4	5.34	10
Canada	5	5.32	9
Spain	6	5.29	5
Sweden	7	5.28	8
United States	8	5.28	7
Australia	9	5.24	4
Singapore	10	5.24	16
United Kingdom	11	5.22	6
Hong Kong SAR	12	5.18	14
Netherlands	13	5.09	18
Denmark	14	5.08	13
Finland	15	5.07	12
Iceland	16	5.07	11
Portugal	17	5.01	15
Ireland	18	4.99	21
Norway	19	4.97	17
New Zealand	20	4.94	19
Cyprus	21	4.92	24
Belgium	22	4.92	27
Luxembourg	23	4.92	20
Greece	24	4.91	22
Japan	25	4.91	23
Czech Republic	26	4.86	30
Estonia	27	4.83	26
Italy	28	4.78	28
Malta	29	4.77	25
Barbados	30	4.77	29
Korea, Rep.	31	4.72	31
Malaysia	32	4.71	32
United Arab Emirates	33	4.57	40
Croatia	34	4.54	34
Slovenia	35	4.53	36
Israel	36	4.50	35
Qatar	37	4.49	37
Hungary	38	4.45	33
Thailand	39	4.45	42
Mauritius	40	4.43	41
Bahrain	41	4.42	48
Costa Rica	42	4.42	44
Taiwan, China	43	4.40	52
Tunisia	44	4.37	39
Brazil	45	4.35	49
Slovak Republic	46	4.34	38
China	47	4.33	62
Latvia	48	4.31	45
Lithuania	49	4.30	47
Bulgaria	50	4.30	43
Mexico	51	4.29	55
Montenegro	52	4.29	59
Puerto Rico	53	4.27	46
Jordan	54	4.25	53
Panama	55	4.23	50
Turkey	56	4.20	54
Chile	57	4.18	51
Poland	58	4.18	56
Russian Federation	59	4.14	64
Jamaica	60	4.13	57
South Africa	61	4.10	60
India	62	4.09	65
Uruguay	63	4.09	61
Egypt	64	4.09	66
Argentina	65	4.08	58
Romania	66	4.04	69
Dominican Republic	67	4.03	63
Oman	68	4.01	76
Brunei Darussalam	69	3.99	n/a
Guatemala	70	3.90	68
Saudi Arabia	71	3.89	82
Colombia	72	3.89	71
Georgia	73	3.89	72
Peru	74	3.88	70
Morocco	75	3.86	67
Azerbaijan	76	3.84	79
Ukraine	77	3.84	77
Sri Lanka	78	3.82	73
Botswana	79	3.81	87
Macedonia, FYR	80	3.81	83
Indonesia	81	3.79	80
Namibia	82	3.77	93
Honduras	83	3.77	75
Trinidad and Tobago	84	3.75	74
Syria	85	3.73	94
Philippines	86	3.73	81
Gambia, The	87	3.72	84
Serbia	88	3.71	78
Vietnam	89	3.70	96
Albania	90	3.68	92
Armenia	91	3.65	89
Kazakhstan	92	3.65	91
Moldova	93	3.64	98
El Salvador	94	3.63	97
Kuwait	95	3.63	85
Ecuador	96	3.62	86
Kenya	97	3.60	101
Tanzania	98	3.59	88
Suriname	99	3.54	95
Zambia	100	3.53	107
Senegal	101	3.50	108
Guyana	102	3.50	109
Nicaragua	103	3.49	99
Venezuela	104	3.46	103
Mongolia	105	3.46	100
Kyrgyz Republic	106	3.45	113
Bosnia and Herzegovina	107	3.44	105
Cambodia	108	3.43	112
Tajikistan	109	3.41	114
Ghana	110	3.40	n/a
Uganda	111	3.38	110
Libya	112	3.38	104
Pakistan	113	3.33	111
Bolivia	114	3.33	106
Algeria	115	3.31	102
Madagascar	116	3.28	118
Malawi	117	3.27	n/a
Nepal	118	3.25	116
Mali	119	3.19	119
Benin	120	3.18	120
Zimbabwe	121	3.17	117
Paraguay	122	3.16	115
Ethiopia	123	3.15	121
Mozambique	124	3.12	123
Cameroon	125	3.09	126
Burkina Faso	126	3.08	124
Mauritania	127	3.07	122
Nigeria	128	3.02	125
Bangladesh	129	3.02	127
Côte d'Ivoire	130	2.99	n/a
Burundi	131	2.98	128
Lesotho	132	2.92	129
Chad	133	2.52	130

(Cont'd.)

Note that one country covered last year, Uzbekistan, is not included this year because of a lack of Survey data.

Table 2: The Travel & Tourism Competitiveness Index: Europe

				SUBINDEXES					
	OVERALL INDEX			T&T regulatory framework		T&T business environment and infrastructure		T&T human, cultural, and natural resources	
Country/Economy	Regional rank	Overall rank	Score	Rank	Score	Rank	Score	Rank	Score
Switzerland	1	1	5.68	1	6.01	1	5.49	2	5.54
Austria	2	2	5.46	4	5.91	6	5.22	7	5.24
Germany	3	3	5.41	13	5.56	3	5.44	9	5.22
France	4	4	5.34	8	5.67	7	5.22	11	5.13
Spain	5	6	5.29	29	5.29	8	5.21	5	5.36
Sweden	6	7	5.28	12	5.57	14	5.04	8	5.23
United Kingdom	7	11	5.22	28	5.29	11	5.07	6	5.30
Netherlands	8	13	5.09	22	5.44	9	5.08	17	4.75
Denmark	9	14	5.08	10	5.59	10	5.08	28	4.57
Finland	10	15	5.07	5	5.82	25	4.69	21	4.71
Iceland	11	16	5.07	3	5.92	17	4.93	39	4.37
Portugal	12	17	5.01	15	5.52	24	4.74	16	4.78
Ireland	13	18	4.99	7	5.73	22	4.79	32	4.45
Norway	14	19	4.97	9	5.64	19	4.84	36	4.42
Cyprus	15	21	4.92	25	5.35	13	5.05	37	4.38
Belgium	16	22	4.92	21	5.45	32	4.56	20	4.73
Luxembourg	17	23	4.92	20	5.47	16	4.97	42	4.30
Greece	18	24	4.91	18	5.49	27	4.66	27	4.58
Czech Republic	19	26	4.86	16	5.50	36	4.41	24	4.67
Estonia	20	27	4.83	17	5.50	21	4.81	47	4.19
Italy	21	28	4.78	46	4.96	26	4.68	22	4.71
Malta	22	29	4.77	11	5.58	31	4.58	52	4.15
Croatia	23	34	4.54	43	5.02	37	4.32	43	4.28
Slovenia	24	35	4.53	38	5.13	33	4.53	61	3.94
Hungary	25	38	4.45	26	5.35	42	4.06	59	3.95
Slovak Republic	26	46	4.34	34	5.20	54	3.78	55	4.05
Latvia	27	48	4.31	32	5.22	43	4.04	86	3.68
Lithuania	28	49	4.30	30	5.27	46	3.98	89	3.65
Bulgaria	29	50	4.30	56	4.74	48	3.96	46	4.20
Montenegro	30	52	4.29	50	4.86	66	3.57	35	4.43
Turkey	31	56	4.20	63	4.60	60	3.73	44	4.28
Poland	32	58	4.18	72	4.44	68	3.53	29	4.56
Russian Federation	33	59	4.14	79	4.35	61	3.70	38	4.37
Romania	34	66	4.04	61	4.68	64	3.61	77	3.83
Georgia	35	73	3.89	33	5.20	99	2.84	92	3.64
Ukraine	36	77	3.84	62	4.66	72	3.37	103	3.50
Macedonia, FYR	37	80	3.81	69	4.46	75	3.29	87	3.67
Serbia	38	88	3.71	78	4.35	80	3.20	96	3.57
Albania	39	90	3.68	77	4.38	104	2.76	66	3.89
Armenia	40	91	3.65	58	4.70	105	2.75	102	3.51
Moldova	41	93	3.64	67	4.53	95	2.95	110	3.43
Bosnia and Herzegovina	42	107	3.44	96	4.11	93	2.96	124	3.25

through participation in a larger number of international tourism fairs. Ensuring the sustainable development of the sector is also a significant priority for the government, with France ranked a high 4th on this pillar, with strong and well-enforced environmental legislation.

Spain is ranked just behind France within Europe, at 6th place overall. Spain is ranked 1st out of all countries for the richness of its cultural resources, with many World Heritage sites, a large number of international fairs and exhibitions, and significant sports stadium capacity. Spain's tourism infrastructure is ranked 1st internationally, with many hotel rooms, car rental facilities, and ATMs; its air transport infrastructure also gets good marks (ranked 10th). The government prioritizes the sector significantly, and the country makes strong efforts to attract tourists through strong destination-marketing campaigns and by ensuring Spain's presence at many international tourism fairs.

Greece is ranked 18th in Europe and 24th overall, with a stable performance compared with last year. The country benefits from rich cultural resources (ranked 23rd), excellent health and hygiene (ranked 19th overall), and top-notch tourism infrastructure (5th). Greece is ranked a very high 3rd in terms of the country's overall prioritization of Travel & Tourism. Further, there is a strong national affinity for tourism compared with many other European countries, including a generally open and positive attitude toward tourists (16th). The country's overall ranking is held back, however, by its policy rules and regulations that are not entirely supportive of the sector's development (ranked 57th), with stringent rules governing foreign direct investment (FDI), and with foreign ownership restrictions, as well as significant time and cost involved in starting a new company. Another area of weakness is the country's ground transport infrastructure, which is less efficient than in many other European countries (the quality of railroads and ports being of particular concern).

Italy, despite being endowed with the most World Heritage cultural sites in the world, ranks only 21st within Europe and 28th overall (the same rank as last year). As well as its cultural richness, Italy's strengths lie in areas such as the health and hygiene of the country (27th), its air transport infrastructure (27th), and especially its excellent tourism infrastructure (3rd). However, it faces a number of challenges that bring its overall rating down. These include policy rules and regulations, where Italy ranks 71st (even lower than last year) because of its very strong foreign ownership restrictions (ranked 106th) and rules governing FDI (122nd). Further, the government is not seen to be prioritizing this sector (107th), which is so important to the overall economy. In addition, ground transport infrastructure requires upgrading, there is insufficient focus on developing the sector in an environmentally sustainable way, and there are some safety and security concerns in the country (82nd).

The Americas

Table 3 shows the regional rankings for the countries in the Americas. As the table shows, **Canada** is the highest-ranked country in the region, ranked 5th out of all 133 countries and with an improvement of four places allowing it to overtake the United States this year for the top regional spot. Canada's natural resources constitute a key strength, with the country's nine World Heritage natural sites placing it 4th internationally. Its cultural resources are also a strong point, with many international fairs and exhibitions in the country and strong creative industries in particular. Canada's air transport infrastructure is ranked 1st out of all countries, and it also gets good marks for its tourism and ICT infrastructure, facilitating the online T&T environment. Canada's policy environment is very conducive to the development of the sector (ranked 5th, up three places from last year), and the government is seen to be more strongly prioritizing the sector than last year. For more details on Canada's T&T competitiveness see Box 2 in Chapter 1.1.

The United States is ranked 2nd in the Americas and 8th out of all countries, down one position from last year. The country places 2nd for the overall business environment and infrastructure and 1st for the country's human, cultural, and natural resources. In particular, the United States has an excellent air transport infrastructure (ranked 2nd) and high-quality tourism and ICT infrastructure. Its natural resources are ranked 1st out of all countries, with many nationally protected areas and many World Heritage natural sites, although a perception exists that the environment is not being sufficiently protected (ranked 106th for environmental sustainability). Safety and security, ranked 122nd, is also of concern: as well as worries about crime and violence, the country has one of the highest death rates from road traffic accidents out of all countries covered (ranked 125th).

Barbados is ranked 3rd in the region, at 30th overall, down one place from last year. Barbados is ranked 2nd overall for the country's affinity for Travel & Tourism, with a positive attitude toward tourists and toward the value of tourism in the country. The government is prioritizing the sector to a very high degree (ranked 2nd), spending a high percentage of GDP on the sector and ensuring effective destination-marketing campaigns. Further, the country has a regulatory environment that is quite conducive to the development of the sector, requiring few visitors to have visas to enter the country and with open bilateral Air Service Agreements.

Costa Rica is ranked 4th in the region and 42nd overall, up two places from last year. The country gets excellent marks for its natural resources (ranked 6th), with several World Heritage sites, a high percentage of nationally protected areas, and its very diverse fauna. Given the importance of the natural environment for the county's tourism industry, it is notable that it ranks a high 27th overall for environmental sustainability, an area of measurable improvement since last year. However, safety and security remains a concern (72nd). Further, although its tourism infrastructure is well developed (33rd), with a strong presence of major car rental companies and abundant hotel rooms, ground transport infrastructure requires significant upgrading (103rd), particularly roads and ports, making travel in the country somewhat difficult.

Brazil is ranked 5th in the Americas and 45th overall, having seen an improvement of four places since last year. The country is ranked 2nd out of all countries for its natural resources and 14th for its cultural resources, with many World Heritage sites, a great proportion of protected land area, and the most diverse fauna in the world. This is buttressed by a focus on environmental sustainability (ranked 33rd). However, the ground transport network remains underdeveloped, with the quality of roads, ports, and railroads ranked 110th, 123rd, and 86th, respectively. Safety and security continues to be of serious concern, ranked 130th overall, just behind South

Table 3: The Travel & Tourism Competitiveness Index: The Americas

				SUBINDEXES					
	OVERALL INDEX			T&T regulatory framework		T&T business environment and infrastructure		T&T human, cultural, and natural resources	
Country/Economy	Regional rank	Overall rank	Score	Rank	Score	Rank	Score	Rank	Score
Canada	1	5	5.32	23	5.41	4	5.36	10	5.19
United States	2	8	5.28	57	4.70	2	5.47	1	5.67
Barbados	3	30	4.77	19	5.47	29	4.62	45	4.21
Costa Rica	4	42	4.42	48	4.94	55	3.77	31	4.54
Brazil	5	45	4.35	95	4.12	69	3.53	4	5.40
Mexico	6	51	4.29	80	4.34	62	3.66	13	4.87
Puerto Rico	7	53	4.27	44	4.99	41	4.10	84	3.71
Panama	8	55	4.23	53	4.80	56	3.77	53	4.14
Chile	9	57	4.18	49	4.87	58	3.76	64	3.92
Jamaica	10	60	4.13	51	4.85	57	3.76	80	3.76
Uruguay	11	63	4.09	45	4.98	74	3.33	57	3.96
Argentina	12	65	4.08	74	4.40	70	3.51	41	4.34
Dominican Republic	13	67	4.03	54	4.75	71	3.46	68	3.88
Guatemala	14	70	3.90	81	4.32	81	3.20	48	4.17
Colombia	15	72	3.89	91	4.18	88	3.08	34	4.43
Peru	16	74	3.88	89	4.24	92	2.96	33	4.43
Honduras	17	83	3.77	83	4.31	87	3.08	63	3.92
Trinidad and Tobago	18	84	3.75	100	4.04	51	3.82	112	3.38
El Salvador	19	94	3.63	73	4.42	83	3.19	123	3.28
Ecuador	20	96	3.62	103	4.01	97	2.91	62	3.93
Suriname	21	99	3.54	110	3.86	91	3.01	79	3.76
Guyana	22	102	3.50	94	4.14	111	2.68	88	3.66
Nicaragua	23	103	3.49	98	4.05	101	2.79	93	3.63
Venezuela	24	104	3.46	122	3.63	86	3.12	91	3.65
Bolivia	25	114	3.33	127	3.33	110	2.70	58	3.96
Paraguay	26	122	3.16	116	3.74	130	2.44	122	3.30

Africa and Russia. The country also suffers greatly from a lack of price competitiveness (91st), attributable in part to high ticket taxes and airport charges in the country, as well as high prices and high taxation more generally. Further, the overall policy environment is not particularly conducive to the development of the sector (ranked 95th), with discouraging rules on FDI and much time required for starting a business.

Mexico is ranked just behind Brazil in the regional ranking at 6th place and comes in at 51st place overall, an improvement of four places. Mexico gets quite high marks for its natural resources (ranked 18th), and this is an area where it has shown an improvement since last year, with one more natural World Heritage site added in the interval. The country's cultural resources are also very rich (20th), with 26 World Heritage cultural sites, several international fairs and exhibitions, and strong creative industries. These inherent strengths are reinforced by the overall prioritization of the sector in the country (35th), with country-level participation at many T&T fairs and effective marketing and branding campaigns for attracting tourists. Some areas requiring attention are the tourism infrastructure (49th) and, especially, the ground transport infrastructure (84th). In addition, Mexico is ranked a low 77th for its price competitiveness, due especially to very high ticket taxes and airport charges (ranked 126th overall). Heath and hygiene issues remain to be tackled (ranked 74th), and, in particular, safety and security continues to be a major concern, ranked 126th with high levels of crime and violence, a police force that cannot be relied on to provide protection from crime, and many deaths from road traffic accidents.

Asia Pacific

Table 4 displays the regional ranking and data for the Asia Pacific region. As the table shows, **Australia** is the highest-ranked country from the region, ranked 9th overall, down five places since last year. Australia is ranked 4th for its natural resources, with the most World Heritage natural sites worldwide, many known species in the country, and a pristine natural environment. Given the importance of the environment for much of its leisure tourism, it is notable that the stringency and enforcement of its environmental regulations are well assessed. Given the country's distance from other continents and the related importance of domestic air travel to overcome the large distances between major sites, its competitiveness is also buttressed by excellent air transport infrastructure (ranked 3rd) as well as good general tourism infrastructure (ranked 9th). Australia also benefits from the strong government prioritization of

Table 4: The Travel & Tourism Competitiveness Index: Asia Pacific

				SUBINDEXES					
	OVERALL INDEX			T&T regulatory framework		T&T business environment and infrastructure		T&T human, cultural, and natural resources	
Country/Economy	Regional rank	Overall rank	Score	Rank	Score	Rank	Score	Rank	Score
Australia	1	9	5.24	27	5.31	15	5.01	3	5.42
Singapore	2	10	5.24	6	5.77	5	5.25	23	4.69
Hong Kong SAR	3	12	5.18	2	5.93	12	5.05	30	4.55
New Zealand	4	20	4.94	14	5.55	30	4.62	25	4.65
Japan	5	25	4.91	40	5.10	20	4.83	15	4.81
Korea, Rep.	6	31	4.72	41	5.06	35	4.45	26	4.64
Malaysia	7	32	4.71	42	5.03	38	4.24	14	4.86
Thailand	8	39	4.45	70	4.46	40	4.14	19	4.74
Taiwan, China	9	43	4.40	75	4.40	18	4.87	65	3.92
China	10	47	4.33	88	4.24	59	3.73	12	5.01
India	11	62	4.09	107	3.88	63	3.65	18	4.74
Brunei Darussalam	12	69	3.99	99	4.04	47	3.96	60	3.95
Azerbaijan	13	76	3.84	47	4.95	84	3.19	111	3.40
Sri Lanka	14	78	3.82	86	4.27	73	3.34	71	3.85
Indonesia	15	81	3.79	113	3.77	79	3.24	40	4.36
Philippines	16	86	3.73	85	4.27	89	3.07	70	3.86
Vietnam	17	89	3.70	92	4.15	85	3.12	76	3.83
Kazakhstan	18	92	3.65	60	4.69	96	2.93	121	3.32
Mongolia	19	105	3.46	90	4.19	107	2.72	106	3.48
Kyrgyz Republic	20	106	3.45	76	4.39	124	2.49	105	3.48
Cambodia	21	108	3.43	111	3.80	113	2.64	74	3.84
Tajikistan	22	109	3.41	84	4.30	117	2.58	117	3.37
Pakistan	23	113	3.33	124	3.59	94	2.95	108	3.46
Nepal	24	118	3.25	119	3.66	120	2.53	97	3.57
Bangladesh	25	129	3.02	130	3.16	103	2.78	130	3.11

the tourism sector and effective destination-marketing campaigns. The drop in rank since last year can be traced in large part to a perceived weakening of the prioritization of the sector in the country, a poorer assessment of the ground transport infrastructure, and weakening price competitiveness.

Australia is followed in the regional ranking by **Singapore,** which is ranked 10th overall, entering the top 10 this year and up by six places since last year. Singapore benefits from excellent transport infrastructure, with ground transport infrastructure and air transport infrastructure ranked 4th and 15th, respectively. Singapore also benefits from its top rank out of all countries for the quality of its human resources to work in the country. With regard to the policy environment, it also ranks 1st, with rules and regulations that are extremely conducive to the development of its T&T industries (policies facilitating foreign ownership and FDI, well-protected property rights, few visa restrictions). Further, it is among the safest countries of all assessed with regard to crime and security. Singapore is ranked 2nd for the overall prioritization of Travel & Tourism, an area of improvement since last year. The country's tourism and ICT infrastructure has also seen a measurable improvement since last year.

Hong Kong is ranked 3rd in the region and 12th overall, up two places since last year. Hong Kong's transport infrastructure is even better assessed than Singapore's, with ground transport and air transport infrastructures ranked 2nd and 13th, respectively. Hong Kong gets relatively good marks for cultural resources, with many international fairs and exhibitions held in the country and strong creative industries. Hong Kong's policy environment is rated second only to Singapore, and shows a strong prioritization of the tourism sector (ranked 8th). Like Singapore, Hong Kong is extremely safe from crime and violence (ranked 5th), and the country is unsurpassed for its quality of health and hygiene, where it ranks first internationally.

New Zealand is ranked 4th in the region and 20th overall. The country benefits from its rich natural resources, with several World Heritage natural sites (ranked 16th) and a very pristine natural environment (ranked 3rd) protected by strong and well-enforced environmental legislation. The overall policy rules and regulations in the country are conducive to the development of the sector (ranked 10th), with transparent policymaking and among the least time and lowest cost required to start a business of all countries. Although the country's ground transport network remains somewhat underdeveloped, the air transport infrastructure gets excellent marks (ranked 11th), and both the tourism and ICT infrastructures are quite good by international standards. New Zealand also benefits from high-quality human capital (ranked 17th) and a very safe and secure environment overall (15th).

Japan is ranked 5th regionally and 25th out of all countries in the TTCI, with excellent marks for its cultural resources (ranked 10th), attributable to its 14 World Heritage cultural sites, the many international fairs and exhibitions held in the country, and its rich creative industries. The ground transport infrastructure is among the best in the world (ranked 8th), especially railroads, and Japan continues to be a leader in the area of education and training (ranked 12th). However, Japan ranks third from the bottom for the affinity of the county for Travel & Tourism (131st), and the sector is not perceived to be a priority for the government (ranked 83rd).

Malaysia is ranked 7th regionally and 32nd overall, with its rich natural resources (ranked 21st) and good ground transport infrastructure (ranked 28th). The country also benefits from excellent price competitiveness (ranked 4th), with low comparative hotel and fuel prices, low ticket taxes and airport charges, very competitive hotel prices, and a favorable tax regime. Malaysia's policy environment is assessed as highly conducive to the development of the sector (ranked 9th), and the country is prioritizing Travel & Tourism; it markets the country at many international tourism fairs (ranked 1st) and also has an excellent evaluation for its destination-marketing campaigns (ranked 12th). With regard to weaknesses, health and hygiene indicators lag behind those of many other countries in the region, with, in particular, a low physician density (placing the country 94th).

Thailand is ranked just behind Malaysia in the region at 8th place and 39th overall, up three places since last year. It is endowed with rich natural resources and a strong affinity for Travel & Tourism (ranked 24th and 22nd, respectively), with a very friendly attitude of the population toward tourists (ranked 13th). This is buttressed by the sector's strong prioritization by the government (ranked 12th) with, similar to Malaysia, excellent destination-marketing campaigns and good price competitiveness. However, some weaknesses remain: despite the prioritization of the sector by the government, some aspects of the regulatory environment —such as stringent foreign ownership restrictions, visa restrictions for many travelers, and the long time required for starting a business in the country—are not particularly conducive to developing the sector (ranked 62nd). In addition, given the importance of the natural environment for the country's tourism, environmental sustainability should be a greater priority (ranked 99th).

China, ranked 10th regionally, has seen the largest rank improvement of all countries this year, moving up by a remarkable 15 places to 47th overall. China has been building on a number of clear strengths: it is ranked 7th for its natural resources, with many World Heritage natural sites and fauna that is among the richest in the world. It is ranked 15th for its cultural resources, with many World Heritage cultural sites, many international fairs and exhibitions held in the country, and creative industries that are unsurpassed. Moreover, the country is ranked 20th in price competitiveness and 28th for the overall prioritization of the sector. In addition, China has a relatively good air transport infrastructure (ranked 34th). However, there are some weaknesses pulling the country's ranking down. China has a policy environment that is not conducive for T&T development (ranked 87th), with strong foreign ownership restrictions and visa requirements for most visitors. Furthermore, policies related to environmental sustainability get low marks (105th). There are also some safety and security concerns (116th), as well as issues related to health and hygiene (91st), with access to improved sanitation and drinking water that is low by international standards. Ground transport infrastructure gets middling marks (55th), and its tourism infrastructure remains underdeveloped (ranked 80th), with few hotel rooms available and few ATMs, although on a positive note tourism infrastructure has seen a marked improvement since last year.

India is ranked 11th in the region and 62nd overall, up three places since last year. As with China, India is well assessed for its natural resources (ranked 14th) and cultural resources (24th), with many World Heritage sites, both natural and cultural, rich fauna, and strong creative industries in the country. India also has quite a good air transport network (ranked 37th), particularly given the country's stage of development, and a reasonable ground transport infrastructure (ranked 49th). However, some aspects of its tourism infrastructure remain somewhat underdeveloped (ranked 73rd), with very few hotel rooms per capita by international comparison and low ATM penetration. Further, despite government and industry efforts to promote the country abroad (India is ranked 1st with regard to tourism fair attendance) and the exposure given to recent promotional campaigns, the assessment of marketing and branding to attract tourists remains average (ranked 53rd). Another area of concern is the policy environment, ranked 108th, with much time and cost for starting a business, bilateral Air Service Agreements that are not assessed as open, and visas required for most visitors.

Middle East and Africa

Table 5 shows the regional ranking for the Middle East and Africa region. As the table shows, **The United Arab Emirates (UAE)** is ranked 1st in the region this year, 33rd overall, up seven places since last year, overtaking Israel and Tunisia. While the UAE is not endowed with rich natural and cultural resources (117th and 84th, respectively), it does very well in several other areas captured by the Index. For example, the country is char-

Table 5: The Travel & Tourism Competitiveness Index: Middle East and Africa

				SUBINDEXES					
	OVERALL INDEX			T&T regulatory framework		T&T business environment and infrastructure		T&T human, cultural, and natural resources	
Country/Economy	Regional rank	Overall rank	Score	Rank	Score	Rank	Score	Rank	Score
United Arab Emirates	1	33	4.57	39	5.12	23	4.79	78	3.81
Israel	2	36	4.50	37	5.13	39	4.21	51	4.16
Qatar	3	37	4.49	35	5.16	34	4.48	75	3.83
Mauritius	4	40	4.43	24	5.39	44	4.04	69	3.86
Bahrain	5	41	4.42	55	4.75	28	4.64	67	3.88
Tunisia	6	44	4.37	31	5.26	49	3.87	56	3.97
Jordan	7	54	4.25	36	5.15	67	3.55	54	4.05
South Africa	8	61	4.10	82	4.31	52	3.81	49	4.17
Egypt	9	64	4.09	52	4.84	65	3.59	73	3.84
Oman	10	68	4.01	59	4.69	53	3.80	99	3.54
Saudi Arabia	11	71	3.89	104	4.01	45	4.02	90	3.65
Morocco	12	75	3.86	64	4.59	78	3.27	83	3.73
Botswana	13	79	3.81	66	4.55	76	3.29	95	3.60
Namibia	14	82	3.77	71	4.45	77	3.27	94	3.60
Syria	15	85	3.73	68	4.48	82	3.20	100	3.53
Gambia, The	16	87	3.72	65	4.56	90	3.06	98	3.55
Kuwait	17	95	3.63	109	3.87	50	3.85	128	3.16
Kenya	18	97	3.60	93	4.15	100	2.81	72	3.84
Tanzania	19	98	3.59	102	4.03	118	2.56	50	4.17
Zambia	20	100	3.53	87	4.26	115	2.64	85	3.69
Senegal	21	101	3.50	101	4.03	108	2.71	82	3.75
Ghana	22	110	3.40	105	3.94	102	2.78	104	3.49
Uganda	23	111	3.38	115	3.75	114	2.64	81	3.76
Libya	24	112	3.38	97	4.07	109	2.71	114	3.37
Algeria	25	115	3.31	108	3.88	98	2.84	127	3.22
Madagascar	26	116	3.28	112	3.79	106	2.74	119	3.32
Malawi	27	117	3.27	106	3.91	131	2.43	107	3.47
Mali	28	119	3.19	114	3.76	126	2.48	120	3.32
Benin	29	120	3.18	117	3.66	121	2.52	116	3.37
Zimbabwe	30	121	3.17	125	3.57	125	2.49	109	3.43
Ethiopia	31	123	3.15	128	3.27	112	2.65	101	3.52
Mozambique	32	124	3.12	120	3.66	129	2.45	125	3.24
Cameroon	33	125	3.09	126	3.54	132	2.36	115	3.37
Burkina Faso	34	126	3.08	118	3.66	122	2.52	131	3.05
Mauritania	35	127	3.07	123	3.61	127	2.47	129	3.14
Nigeria	36	128	3.02	132	3.10	116	2.59	113	3.38
Côte d'Ivoire	37	130	2.99	131	3.12	123	2.50	118	3.35
Burundi	38	131	2.98	129	3.17	119	2.53	126	3.24
Lesotho	39	132	2.92	121	3.64	128	2.45	133	2.66
Chad	40	133	2.52	133	2.83	133	1.93	132	2.80

acterized by a positive attitude toward foreign travelers (10th) and is also seen as very safe from crime and violence (ranked 14th). The UAE's infrastructure also gets good marks, particularly its air transport infrastructure, which is ranked a very high 4th out of all countries assessed (up one place since last year). The government is seen as prioritizing the sector strongly (ranked 3rd), carrying out very effective destination-marketing campaigns (ranked 1st) and ensuring the presence of the country at major T&T fairs internationally. An area of clear improvement since last year is in the rules and regulations, which have been adjusted to better support the sector's development, with the UAE moving up from 81st place last year to 53rd this year.

Israel is the second-ranked country in the region, at 36th overall, showing a stable performance since last year. The country's human resources base is well evaluated (29th), providing healthy and well-trained people to work in the T&T sector. Further, its infrastructure is quite well developed compared with those of other countries in the region, especially its ICT infrastructure. Israel's rules and regulations, ranked 39th, are conducive to the development of the sector, with low foreign ownership restrictions and visas required from few countries, although it requires much time to set up a business in the country (ranked 91st). But although Israel gets excellent marks related to health and hygiene (ranked 14th), safety and security continues to be a major concern, placing the country at 73rd, primarily related to concerns about terrorism (ranked 129th).

Qatar is ranked 3rd in the region and 37th overall, directly following Israel in the full ranking. Qatar benefits from an extremely safe and secure environment (ranked 9th), high-quality human resources in the country (ranked 22nd for human capital), good tourism infrastructure (28th), and excellent air transport infrastructure (20th), in line with its increasing role as an air transportation hub. In order to further improve the country's T&T competitiveness, efforts should be made to upgrade its ground transport infrastructure (ranked 59th), more focus should be placed on environmental sustainability (69th), and further efforts should be made to improve the policy and regulatory environment (ranked 47th)—in particular, by facilitating more foreign direct investment and easing visa requirements for entering the country.

Mauritius is the fourth highest ranked country in the region, at 40th overall. Mauritius is ranked 1st out of all countries for the overall prioritization of the sector, with high government spending on the tourism industry (ranked 3rd), ensuring excellent destination-marketing campaigns to attract tourists (ranked 2nd), and ensuring the country's presence at many international tourism fairs. Along similar lines, Mauritius is ranked 3rd for its overall affinity for Travel & Tourism, with the sector representing an important part of the economy and the general attitude of the population to foreign travelers being extremely welcoming. The country's tourism infrastructure is well developed by regional standards, and the policy environment is supportive of the development of the sector (ranked 13th). Mauritius also benefits from price competitiveness (ranked 26th), with relatively low prices overall and taxation that is not overly burdensome, although this would be improved through lower ticket taxes and airport charges, and more competitive hotel prices. Safety and security levels are also good by regional standards (ranked 40th), and are on a par with countries such as Germany and Hungary. In terms of challenges, although the government is seen to be making an effort to develop the industry in a sustainable way (ranked 13th), this effort could be backed up by more stringent environmental regulations (ranked 61st).

Tunisia is ranked 6th among Middle East and African countries and 44th overall, down five places since last year. Tunisia benefits from a strong assessment of the prioritization of Travel & Tourism (15th)—similar to top-10 ranked countries such as Austria and Canada —with high government spending on the sector, effective destination-marketing campaigns, and attendance at several major international tourism fairs. Further, unlike some other countries in the region, Tunisia is perceived as relatively safe from crime and violence (ranked 31st). In addition, price competitiveness is a positive attribute, ranked 7th, with competitive hotel prices, low fuel levels, reasonable taxation, and low prices more generally. On the other hand, health and hygiene remains an area of concern (75th), with a relatively low physician density and a low concentration of hospital beds. The country's ICT infrastructure also remains underdeveloped (ranked 77th). This is an area that has seen a deterioration since last year.

South Africa is ranked 8th in the region and 61st overall, with a stable performance since last year. South Africa, together with Mauritius, make up the two sub-Saharan African countries in the top half of the overall ranking. South Africa is ranked a high 22nd for its natural resources and 45th for its cultural resources, based on its many World Heritage sites, its rich fauna, its creative industries, and the many international fairs and exhibitions held in the country. South Africa also benefits from price competitiveness, with reasonably priced hotel rooms and a favorable tax regime. Infrastructure in South Africa is also well developed for the region, with air transport infrastructure ranked 43rd and a particularly good assessment of railroad quality (37th) and road quality (40th). Overall, policy rules and regulations are conducive to the sector's development (ranked 36th), with well-protected property rights and few visa requirements for visitors. However, there are also some areas of weakness that have brought down the country's overall ranking. Safety and security is of serious concern (ranked 128th), as is the level of health and hygiene, where South Africa is ranked 94th as a result of its low physician density and concerns about access to improved sanitation in particular. Related to this, health indicators are extremely worrisome. South Africa's life expectancy is low, at 51 years, placing the country 120th overall, a ranking related in large part to the very high rates of communicable diseases such as HIV/AIDS. Improving the health of the workforce is of urgent concern for the future of the T&T sector, as well as for all sectors in the economy.

Egypt directly follows South Africa in the regional ranking at 9th place, ranked 64th overall, up two places from last year. The country is rich in cultural heritage, with seven World Heritage cultural sites and several international fairs and exhibitions held in the country. In addition to its cultural attributes, it benefits from excellent price competitiveness, ranked 1st out of all countries, with competitive hotel prices, low fuel costs, and low prices more generally. Further, there is a strong national prioritization of the sector (ranked 9th), with the government ensuring both relatively high spending on Travel & Tourism and the country's presence at major tourism fairs. On the other hand, Egypt's infrastructure needs improvement, particularly its tourism infrastructure (74th), its ground transport infrastructure (79th), and its ICT infrastructure (84th). A focus on improving education and training in the country, ranked 83rd, would also improve the country's overall T&T competitiveness.

Kenya, a country long famous for its tourism attributes, is ranked 18th regionally and 97th overall, up four places since last year. Kenya is ranked 25th for its natural resources, with two World Heritage natural sites and its rich diversity of fauna. Tourism is a strong priority within the country (ranked 12th on this pillar), with high government spending on the sector, effective destination-marketing campaigns, and country presence at several international fairs and exhibitions. In addition, there is a strong focus on environmental sustainability in the country (ranked 16th), which is particularly important for Kenya given the sector's dependence on the natural environment. On the downside, the policy environment is not at present conducive to the development of the sector (ranked 90th), with bilateral Air Service Agreements that are not open, insufficiently protected property rights, and much time and cost required for starting a business. In addition, infrastructure remains underdeveloped and health and hygiene levels require improvement. Finally, the security situation in the country remains a significant hindrance to further developing the sector (ranked 121st).

The country profiles in Part 2 of this volume provide details on the competitiveness of all 133 economies included in this year's TTCI.

Exploring issues of T&T competitiveness

As well as the TTCI analysis described above, the *Report* also features several excellent contributions from T&T industry experts that deal with issues directly related to T&T competitiveness. Several chapters focus on particular aspects of the present challenges facing the industry, providing suggestions on how to overcome them.

In their chapter "Endangered Growth: How the Price of Oil Challenges International Travel & Tourism Growth," Jürgen Ringbeck, Amit Gautam, and Timm Pietsch of Booz & Company describe how 2009 might go down in history as a "make or break" year for the Airline, Travel and Tourism sector. As the authors point out, the historically high price of crude oil in the summer of 2008, of US$147 per barrel, highlighted the vulnerability of the sector to oil prices. As the authors point out, while an oil price of US$100 per barrel was considered ruinous only a few years ago, the industry has now suffered through much higher prices than previously envisaged. And while prices have dropped significantly from the summer 2008 high, the mid-term expectation is for higher prices, requiring all players in the sector to adapt their behavior accordingly.

The authors assume a high oil price scenario over the long term in order to highlight the expected changes in consumer behavior and the competitiveness of several destinations under such a scenario. In this context, the chapter discusses the dramatic structural changes a high oil price imposes on airlines, travelers, and destination countries, which in addition must be navigated during a period of shifting or even declining travel demand. In providing a view on endangered T&T economies, the chapter also explores potential ways of coping with such a change.

As they explain, although each country must address its particular challenges individually, it is possible to identify some overarching methods of coping in a world of fundamental change. These include improvements to the operational efficiency of facilities and infrastructure within countries, the reduction of access costs, rebranding and repositioning of destinations, and leveraging funding from the international community to prepare for change. These improvement areas are intended to help national policymakers to address some of the severe challenges they are presently facing in their efforts to harness Travel & Tourism as a lever for improving general economic wellbeing.

In their chapter "The Importance of Public-Private Partnership in the Current Downturn,“ Amir Girgis and Ufi Ibrahim from the WTTC express confidence in the long-term prospects of the T&T industry, despite the present difficulties. They note that although there are many uncertainties as to how long the current crisis will continue, and how deep its impact will be on disposable incomes and business and consumer confidence in different markets, past experience has shown that Travel & Tourism always rebounds from cyclical downturns—sometimes even stronger than before.

However, the authors stress that in order to address the challenges as effectively as possible and to find solutions to overcome them, it is more critical than ever for the public and private sectors to work together. In particular, public-private sector dialogue and partnership can help to encourage a supportive policy framework for Travel & Tourism, in turn helping to stimulate demand at challenging times such as the present, thereby ensuring that Travel & Tourism continues to generate employment and stimulate economic growth, as well as contributing to the alleviation of poverty in emerging economies.

The authors give some examples of successful public-private partnerships, highlighting the essential need for such partnerships across the globe and the multiple benefits associated with healthy ones—something that will be especially relevant as the T&T sector confronts the challenges ahead. The authors conclude by noting that partnership and dialogue can lead to an improved tourism product, promoting increased competitiveness, and that, in particular, the creation of national tourism organizations can be important stepping stones in the right direction for improving these partnerships.

In "How Well Does the Travel & Tourism Competitiveness Index Explain Differences in Travel Intensity Among Countries?" Selim Ach and Brian Pearce of IATA study the relationship between the number of passengers traveling to and from a given country and the results of the Travel & Tourism

Competitiveness Index (TTCI). Their aim is to understand how well the TTCI captures the key drivers of Travel & Tourism, and therefore the contribution of the sector to the economic success of a country.

The authors begin by showing that highly ranked countries in the TTCI tend to attract a higher number of air passengers than lower ranked countries. Based on an analysis of the data and the theoretical relationships among the various factors, the authors have developed an econometric model to assess these relationships. This model provides an initial quantification of the link between the number of passengers and a country's TTCI score.

The results of their analysis show that the tourism competitiveness factors making up the TTCI are strongly related to the total number of passengers arriving at and departing from a given country. Taking into account the population by country, the econometric analysis also demonstrates that the GDP per capita of the destination country, as well as the average distance required to reach that particularly country, are the two other significant factors.

The authors conclude that efforts dedicated to improving the overall TTCI performance (by implementing an efficient regulatory framework; investing in infrastructure; improving price competitiveness; or improving its human, cultural, and natural resources) are likely to increase the total number of passengers to and from a given country. This econometric model thus provides a tool to simulate the effect of a particular policy on the number of air passengers by upgrading either the TTCI score or that of one of the subindexes or pillars. They note that, although further work is necessary to refine the analysis, it already provides a sense of the potential impact of improving the provision of key drivers of air Travel & Tourism. And this, in turn, could be expected to enhance the wider economic benefits brought about by the development of this important sector.

In "Capturing the Visitor Economy: A Framework for Success," Alex Kyriakidis, Heather Hancock, Simon Oaten, and Rashid Bashir of Deloitte describe how, in the present global economic downturn, it is more important than ever for countries to sustain and maximize the benefits of tourism. They explain that to do so, policymakers must understand the economic impact of tourism and to design and implement policies that will enable them to realize its full benefits. To this end, the authors analyze, from a public-sector perspective, the economic contribution of tourism to the wider society and explore a framework for capturing what they call the "visitor economy."

As the authors explain, the visitor economy in each country consists of two components: the direct contribution of tourism and the indirect contributions from other sectors that rely on, or support, tourism. They analyze these components and also consider the contribution made by the visitor economy to broader public policy objectives such as regeneration, social and economic inclusion, enhancing skills and employment, and attracting enterprise and investment as well as strengthening international ties.

They explore how tourism interacts with and contributes to the wider economy and society, highlighting the economic impacts (direct and indirect) of tourism as well as the key drivers, policy barriers, and market failures. They highlight those factors that can be most effectively leveraged by the industry and by policymakers, as well as more uncontrollable factors that represent specific and unusual pressures on the sector.

The authors conclude by noting that in these turbulent economic times the focus should be on longer-term, supply-oriented strategies over which policymakers can exert greater influence and realize long-term value. Specifically, visitor economies demonstrating adaptability, developing deeper domestic tourism supply chains, and focusing on higher-value "quality and skills" investments while building diversity into the destination will benefit the most.

In their chapter "Tourism Price Competitiveness," Peter Forsyth of Monash University and Larry Dwyer of the University of New South Wales review the literature on what they describe as "an essential component in the overall tourism competitiveness of a country or a destination." The fact that price is one of the most important factors in decisions about whether, and where, to undertake trips is reflected in one of the key pillars of the TTCI. Indeed, measures of tourism price competitiveness of countries or destinations (such as individual regions or cities) form part of more general work on destination competitiveness.

The authors explain that, given its importance, many have developed or used indicators of tourism price competitiveness, although the indicators vary considerably. Different indicators shed light on different aspects of competitiveness, and the measures that are most useful for a purpose depend on what questions are being explored. The authors explore several of the different indicators aimed at measuring tourism price competitiveness, describing the strengths and weaknesses of using each of them.

Specifically, some of the key aspects that influence which indicators should be used are the need for accuracy and tourism-specific detail versus timeliness; the need for cross-country (or cross-destination) comparisons of the prices tourists are actually paying; the need for estimates of changes in relative price competitiveness over time; and the need to provide overall summary measures of a country's price competitiveness at a point of time or changes in it over time. The specific measure used will therefore depend on the particular analytical and practical need.

In their chapter "National Competitiveness Council: Setting Up the Egyptian Travel & Tourism

Competitiveness Council," Ashraf Ibrahim of the Egyptian Travel & Tourism Competitiveness Council (T&TCC) and Heba Ali Zayed of the Egyptian National Competitiveness Council (ENCC) begin by describing the logic behind creating an Egyptian Competitiveness Council five years ago, a private sector–led nongovernmental organization that aims to enhance Egypt's competitiveness. The rest of the chapter then explains how this infrastructure has been used to set up an Egyptian T&TCC, focused specifically on enhancing the competitiveness of the T&T industry, a sector so crucial for Egypt's economic development.

As the authors explain, the objective of the T&TCC is to bring together stakeholders from the T&T sector to review sector developments, discuss challenges, and propose solutions for enhancing the industry's international competitiveness. The Council carries out awareness raising (both within and outside the sector), advocacy, and mobilizing efforts in cooperation with other stakeholders. Specifically, the T&TCC played an important role in disseminating this information and bringing key issues from *The Travel & Tourism Competitiveness Report 2008* into the spotlight within Egypt over the past year.

The authors see the TTCI is an essential tool for tracking and monitoring national progress within Egypt's T&T sector by providing a closer look at specific deficiencies and obstacles that must be overcome. Based in part on the challenges identified within the TTCI, the T&TCC has developed an action plan for the coming year. The three main initiatives identified as top priority are focused on human resource development, institution and capacity building for industry advocacy, and environmental sustainability.

The authors conclude by noting that the Egyptian experience is not unique and similar efforts could be replicated in other countries in order to improve the performance of national T&T sectors with the goal of boosting economic growth and prosperity.

In "Navigating Yet Another Perfect Storm: The Promise of Sustainable Travel & Tourism," Thea Chiesa of the World Economic Forum begins by describing the many challenges facing the T&T industry at the beginning of the 21st century. These range from the threat of terrorism, pandemics, and natural disasters to volatile fuel prices and, more recently, the credit crunch and economic recession across much of the world. As she notes, given the high correlation between business cycles and tourism growth rates, it is understandable that consumers are presently reducing leisure travel and businesses are scaling back their travel budgets. As a result of this contraction in consumer demand, the T&T industry will likely face consolidation and an increase in the number of industry bankruptcies.

As the author explains, this is not all bad news. On the positive side, the current financial crisis could encourage airlines to lobby governments to further liberalize markets through the adoption of global Open Skies agreements and the removal of current ownership and control restrictions, which currently hinder the airlines' ability to consolidate on a truly global scale. Many agree that airline industry consolidation would be beneficial by allowing for economies of scale and increased functional synergies.

Chiesa goes on to discuss how, in order to thrive, or even survive, in this period of uncertainty and change, both the T&T industry and destinations themselves will need to approach the challenges in a holistic and systemic manner. This would allow innovative ideas to emerge, new directions to be taken, new alliances to be forged, and profits to be reaped. Current events are reshaping the financial and industrial world, and the role of institutions and government. Together with concurrently evolving consumer behaviors toward climate change, water consumption, and food production, these factors all provide ample opportunity for innovation. More specifically, the T&T industry can take advantage of this current period of uncertainty to form increased collaboration among all actors of the T&T value chain as well as innovative partnership across different industries and create new ways of doing business. She discusses a number of promising innovative partnership ideas identified by the Forum's Aviation, Travel & Tourism community in order to illustrate these opportunities.

The author concludes by noting that the Forum will continue to engage the industry's key stakeholders in a collaborative dialogue on addressing the barriers to implementing some promising new cross-industry partnerships for carbon abatement that have been identified by the community.

In "Strengthening the Travel & Tourism Competitiveness Index," Geoffrey Lipman and John Kester of the UNWTO discuss the characteristics they would like to see integrated into the TTCI in the coming years. The authors welcome the initiatives to improve and broaden the base data and particularly to incorporate new environmental criteria and information. They are also very supportive of the new emphasis on presentation of data by regions. Yet they ask whether the Index remains entirely relevant "in a world of short-term stimulus actions and parallel, longer-term shift to a green economy, coherent with global development and climate imperatives."

The authors describe how ecotourism and greater environmental sustainability of the T&T sector, more generally, will be important for tourism competitiveness going into the future. They therefore feel that greater integration of these concepts into the TTCI would reflect the realities of government, industry, and market shifts. To this end, they note that the UNWTO will hold an open global discussion forum on these matters in the second half of 2009.

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Part 1

Selected Issues of T&T Competitiveness

CHAPTER 1.1

The Travel & Tourism Competitiveness Index 2009: Measuring Sectoral Drivers in a Downturn

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The Travel & Tourism (T&T) industry has faced a series of challenges in recent years that range from concerns about terrorism to the high cost of fuel and lower consumer spending linked to the current economic downturn. Yet the T&T sector remains a critical economic sector worldwide and one that provides significant potential for economic growth and development internationally. It is in this context that, for the past four years, the World Economic Forum has been assessing the T&T competitiveness of nations around the world. This chapter presents the third edition of the Travel & Tourism Competitiveness Index (TTCI), launched for the first time in early 2007.

The economic importance of the T&T sector should not be underestimated. According to the World Tourism Organization (UNWTO), international tourist arrivals reached 924 million in 2008, representing a growth of 2 percent compared with 2007 (tourism demand slowed in the second half of 2008, however, attributable to the deteriorating international economic situation). The World Travel & Tourism Council (WTTC) estimates that, from direct and indirect activities combined, the T&T sector now accounts for 9.9 percent of global GDP, 10.9 percent of world exports, and 9.4 percent of world investment.

A growing national T&T sector contributes to employment, raises national income, and can improve the balance of payments. Thus the sector is an important driver of growth and prosperity, and, particularly within developing countries, it can also play a role in poverty reduction.

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

This analysis aims to serve two purposes. First, by providing a cross-country analysis of the drivers of T&T competitiveness, we intend to provide the industry with useful comparative information and an important benchmarking tool for making decisions related to business and industry development. Second, and more importantly, the analysis provides an opportunity for the T&T industry to highlight to national policymakers the obstacles to T&T competitiveness that require policy attention, and to enable dialogue between the private and public sectors for improving the environment for developing the T&T industry at the national level.

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

The Travel & Tourism Competitiveness Index

The Travel & Tourism Competitiveness Index (TTCI) has been developed within the context of the World Economic Forum's Industry Partnership Programme for the Aviation, Travel and Tourism sector. The TTCI aims to measure *the factors and policies that make it attractive to develop the T&T sector in different countries.* The Index was developed in close collaboration with our Strategic Design Partner Booz & Company and our Data Partners Deloitte, the International Air Transport Association (IATA), the International Union for Conservation of Nature (IUCN), the World Tourism Organization (UNWTO), and the World Travel & Tourism Council (WTTC). We have also received important feedback from a number of key companies that are industry partners in the effort, namely Abercrombie & Kent, Airbus, Bombardier, British Airways, Carlson, Emirates Group, Etihad Airways, Hertz, JetAirways, NetJets Europe, Silversea, Swiss International Airlines, and Rolls-Royce.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

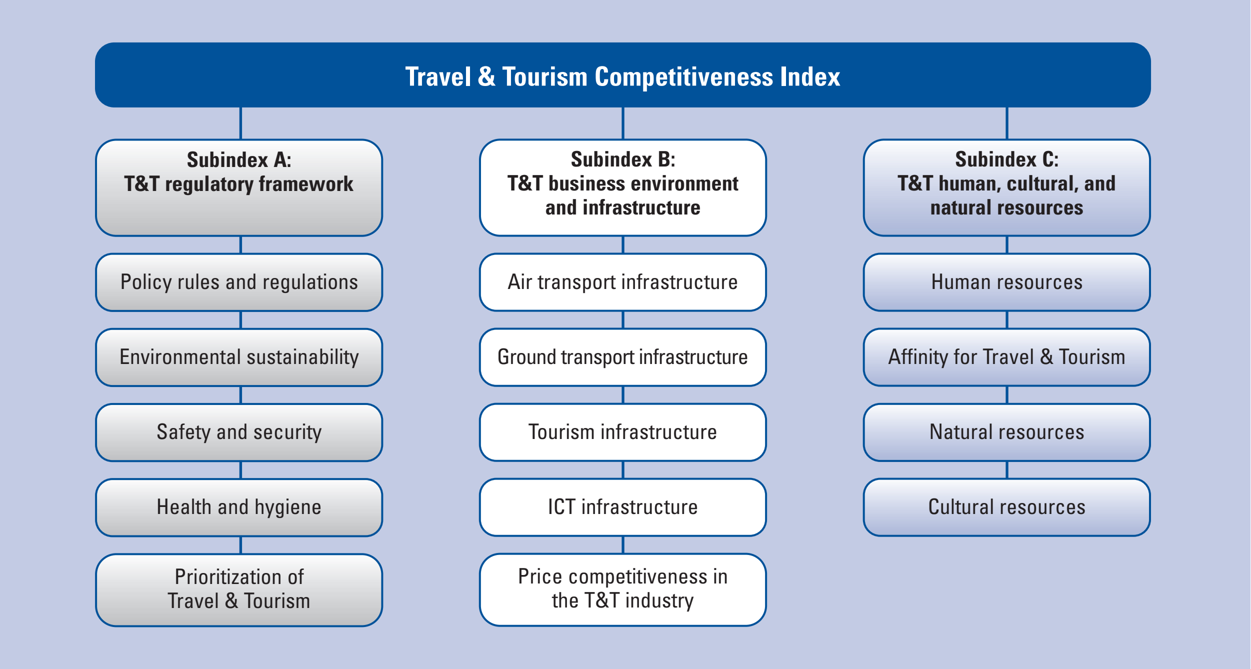
Quality ***human resources*** in the economy ensure that the industry has access to the collaborators it needs to develop and grow. This pillar takes into account the health and the education and training levels in each economy, and is made up of two specific subpillars. The ***education and training***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

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

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

Finally, the ***cultural resources*** at each country's disposal are also a critical driver of T&T competitiveness

Figure 1: Composition of the three subindexes of the TTCI



around the world. In this pillar we include the number of UNESCO cultural World Heritage sites, sports stadium seat capacity, and the number of international fairs and exhibitions in the country. In addition, we have added this year a measure of creative industries exports from the country, which provides an additional indication of cultural richness.

These 14 pillars are regrouped into the three subindexes described above, as shown in Figure 1, and the overall score for each country is derived as an unweighted average of the three subindexes. The details of the composition of the TTCI are shown in Appendix A; detailed rankings and scores of this year's Index are found in Appendix B.

Country coverage

Four new economies have been included in the analysis this year: Brunei Darussalam, Côte d'Ivoire, Ghana, and Malawi (reintroduced after a one-year absence). On the other hand, one country covered last year, Uzbekistan, is not covered this year because of a lack of Survey data. This has led to a net increase in country coverage, for a total of 133 economies this year, covering all of the world's regions and accounting for approximately 90 percent of the world's population and 98 percent of world GDP.

The Travel & Tourism Competitiveness Index rankings 2009

Table 1 shows the overall rankings of the TTCI, comparing this year's rankings with those from last year, showing all countries ranked together. The results are positively correlated with a number of T&T indicators. For example, Figures 2 and 3 show the correlation between the TTCI and tourist arrivals, and between the TTCI and tourism receipts, respectively (both shown in log form) in 2007. As the figures show, the index is quite highly correlated with both the number of tourists actually traveling to various countries and the annual income generated from Travel & Tourism, with few notable outliers. This supports the idea that the TTCI captures factors that are important for developing the T&T industry in countries.

Top three performers in each pillar of the TTCI

Table 2 shows the rankings of those economies demonstrating the top three performances in each of the 14 pillars of the TTCI. The table shows that five economies are among the top three performers in three pillars (Hong Kong, Iceland, Singapore, Sweden, and Switzerland). Four countries are among the best performers in two pillars (Denmark, Mauritius, Spain, and the United States). All other countries shown in the table demonstrate notable strengths in one area measured by the Index.

Singapore, Hong Kong, and Ireland are top ranked for policy rules and regulations. These economies have put into place overarching policy environments that are

Table 1: Travel & Tourism Competitiveness Index 2009 and 2008 comparisons

	2009		2008
Country/Economy	Rank/133	Score	Rank/130
Switzerland	1	5.68	1
Austria	2	5.46	2
Germany	3	5.41	3
France	4	5.34	10
Canada	5	5.32	9
Spain	6	5.29	5
Sweden	7	5.28	8
United States	8	5.28	7
Australia	9	5.24	4
Singapore	10	5.24	16
United Kingdom	11	5.22	6
Hong Kong SAR	12	5.18	14
Netherlands	13	5.09	18
Denmark	14	5.08	13
Finland	15	5.07	12
Iceland	16	5.07	11
Portugal	17	5.01	15
Ireland	18	4.99	21
Norway	19	4.97	17
New Zealand	20	4.94	19
Cyprus	21	4.92	24
Belgium	22	4.92	27
Luxembourg	23	4.92	20
Greece	24	4.91	22
Japan	25	4.91	23
Czech Republic	26	4.86	30
Estonia	27	4.83	26
Italy	28	4.78	28
Malta	29	4.77	25
Barbados	30	4.77	29
Korea, Rep.	31	4.72	31
Malaysia	32	4.71	32
United Arab Emirates	33	4.57	40
Croatia	34	4.54	34
Slovenia	35	4.53	36
Israel	36	4.50	35
Qatar	37	4.49	37
Hungary	38	4.45	33
Thailand	39	4.45	42
Mauritius	40	4.43	41
Bahrain	41	4.42	48
Costa Rica	42	4.42	44
Taiwan, China	43	4.40	52
Tunisia	44	4.37	39
Brazil	45	4.35	49
Slovak Republic	46	4.34	38
China	47	4.33	62
Latvia	48	4.31	45
Lithuania	49	4.30	47
Bulgaria	50	4.30	43
Mexico	51	4.29	55
Montenegro	52	4.29	59
Puerto Rico	53	4.27	46
Jordan	54	4.25	53
Panama	55	4.23	50
Turkey	56	4.20	54
Chile	57	4.18	51
Poland	58	4.18	56
Russian Federation	59	4.14	64
Jamaica	60	4.13	57
South Africa	61	4.10	60
India	62	4.09	65
Uruguay	63	4.09	61
Egypt	64	4.09	66
Argentina	65	4.08	58
Romania	66	4.04	69
Dominican Republic	67	4.03	63
Oman	68	4.01	76
Brunei Darussalam	69	3.99	n/a
Guatemala	70	3.90	68
Saudi Arabia	71	3.89	82
Colombia	72	3.89	71
Georgia	73	3.89	72
Peru	74	3.88	70
Morocco	75	3.86	67
Azerbaijan	76	3.84	79
Ukraine	77	3.84	77
Sri Lanka	78	3.82	73
Botswana	79	3.81	87
Macedonia, FYR	80	3.81	83
Indonesia	81	3.79	80
Namibia	82	3.77	93
Honduras	83	3.77	75
Trinidad and Tobago	84	3.75	74
Syria	85	3.73	94
Philippines	86	3.73	81
Gambia, The	87	3.72	84
Serbia	88	3.71	78
Vietnam	89	3.70	96
Albania	90	3.68	92
Armenia	91	3.65	89
Kazakhstan	92	3.65	91
Moldova	93	3.64	98
El Salvador	94	3.63	97
Kuwait	95	3.63	85
Ecuador	96	3.62	86
Kenya	97	3.60	101
Tanzania	98	3.59	88
Suriname	99	3.54	95
Zambia	100	3.53	107
Senegal	101	3.50	108
Guyana	102	3.50	109
Nicaragua	103	3.49	99
Venezuela	104	3.46	103
Mongolia	105	3.46	100
Kyrgyz Republic	106	3.45	113
Bosnia and Herzegovina	107	3.44	105
Cambodia	108	3.43	112
Tajikistan	109	3.41	114
Ghana	110	3.40	n/a
Uganda	111	3.38	110
Libya	112	3.38	104
Pakistan	113	3.33	111
Bolivia	114	3.33	106
Algeria	115	3.31	102
Madagascar	116	3.28	118
Malawi	117	3.27	n/a
Nepal	118	3.25	116
Mali	119	3.19	119
Benin	120	3.18	120
Zimbabwe	121	3.17	117
Paraguay	122	3.16	115
Ethiopia	123	3.15	121
Mozambique	124	3.12	123
Cameroon	125	3.09	126
Burkina Faso	126	3.08	124
Mauritania	127	3.07	122
Nigeria	128	3.02	125
Bangladesh	129	3.02	127
Côte d'Ivoire	130	2.99	n/a
Burundi	131	2.98	128
Lesotho	132	2.92	129
Chad	133	2.52	130

(Cont'd.)

Note that one country covered last year, Uzbekistan, is not included this year because of a lack of Survey data.

Figure 2: T&T competitiveness and tourist arrivals

Figure 3: T&T competitiveness and tourism receipts

Table 2: Top three performing economies per pillar

Country/Economy	Policy rules and regulations	Environmental sustainability	Safety and security	Health and hygiene	Prioritization of Travel & Tourism	Air transport infrastructure	Ground transport infrastructure	Tourism infrastructure	ICT infrastructure	Price competitiveness in the T&T industry	Human resources	Affinity for Travel & Tourism	Natural resources	Cultural resources
Australia	27	40	25	41	37	**3**	47	9	20	117	10	52	4	19
Austria	28	9	6	5	14	26	10	**1**	23	118	18	23	40	11
Barbados	24	29	26	40	19	33	12	42	26	83	32	**2**	121	59
Brazil	94	33	130	80	84	46	110	45	60	91	55	108	**2**	14
Brunei Darussalam	88	131	19	105	99	32	35	86	55	**2**	52	100	31	86
Canada	5	46	29	51	17	**1**	24	20	13	106	6	67	17	18
Denmark	4	**3**	4	28	91	12	6	23	4	131	**2**	72	77	26
Egypt	55	103	67	64	9	58	79	74	84	**1**	83	20	109	60
Finland	6	7	**1**	12	54	14	21	38	14	121	5	88	61	22
France	25	4	55	9	21	5	**3**	14	19	132	23	55	39	7
Greece	57	47	47	19	**3**	19	43	5	40	114	44	35	74	23
Hong Kong SAR	**2**	80	5	**1**	8	13	**2**	68	9	45	15	11	62	34
Iceland	21	13	**2**	4	20	18	34	13	**2**	128	**3**	17	73	50
Indonesia	123	130	119	110	10	60	89	88	102	**3**	42	78	28	37
Ireland	**3**	12	18	25	27	23	48	4	28	111	9	36	116	25
Italy	71	51	82	27	51	27	40	**3**	25	130	41	71	90	5
Lithuania	59	21	33	**2**	95	80	22	62	35	78	66	74	108	62
Malta	54	66	11	**3**	16	22	27	22	33	122	37	7	133	35
Mauritius	13	53	40	60	**1**	49	31	53	59	26	45	**3**	130	99
Montenegro	35	98	48	52	69	56	88	64	39	95	40	**1**	80	51
Norway	23	19	**3**	24	38	8	37	19	6	129	14	82	72	28
Singapore	**1**	42	10	53	**2**	15	4	37	17	27	**1**	10	94	29
Spain	74	31	66	35	4	10	20	**1**	31	96	31	48	30	**1**
Sweden	7	**1**	13	38	73	9	14	26	**1**	127	8	62	50	**2**
Switzerland	18	**2**	8	13	7	17	**1**	7	**3**	123	4	34	15	6
Tanzania	89	32	98	127	33	113	116	118	120	43	122	33	**3**	108
United Kingdom	14	10	78	46	31	6	17	12	7	133	12	99	26	**3**
United States	16	106	122	47	44	**2**	18	10	15	107	7	106	**1**	9

conducive to the development of the T&T sector, including well-protected property rights, rules attracting FDI, and little red tape required in setting up new businesses. They are joined in the top 10 by three Nordic countries: Denmark, Finland, and Sweden, as well as Canada, among the countries shown in the table.

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

Safety and security is another area dominated by European countries, and the Nordics in particular, with Finland, Iceland, and Norway holding the top three spots in this pillar. These are countries that do not suffer from high levels of crime and violence, and furthermore that are not overly concerned by the threat of terrorism, as is the case in many countries today. In addition, they benefit from police forces that are effective in providing protection from crime and violence, which is critical for the tourism industry.

Hong Kong, Lithuania, and Malta are top-ranked for the quality of health and hygiene, with high levels of access to clean drinking water and sanitation. In addition, hospital beds and doctors are readily available for those who do fall ill. They are therefore able to cater very well to a major concern for tourists when considering where to travel abroad.

Mauritius, Singapore, and Greece are the top performers in terms of the overall prioritization of the tourism industry. This is perhaps not surprising given the importance of the sector for their economies, and it is borne out through their high government expenditure on the sector, strong destination-marketing campaigns, and country-level presence at key international tourism fairs. These countries are making great efforts to successfully develop their tourism sectors.

The air transport infrastructure pillar is dominated by three predominantly English-speaking countries: Canada, the United States, and Australia. These are vast countries that are highly dependent on air transport, and indeed they are home to many airports and operating airlines, which are providing quality service and high levels of air traffic. This makes air travel easy and comfortable for tourists. Other countries shown in the table that are among the top 10 in this pillar are France, Norway, Sweden, and the United Kingdom, also countries that are highly connected to international markets through air transport.

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

The tourism infrastructure pillar is also dominated at the very top by European countries, and is most highly rated in Austria and Spain (tied for 1st place), as well as Italy. Visitors to these countries have many hotels to choose from, excellent car rental facilities, and many ATMs for withdrawing cash. In other words, visitors have choices in how they visit, travel, and move around in these countries, with the necessary facilities for a comfortable stay.

Middle Eastern and Asian countries dominate the top of the price competitiveness pillar, with Egypt, Brunei, and Indonesia ranked 1st, 2nd, and 3rd, respectively. Brunei benefits from low ticket taxes and airport charges, and low taxation more generally. Egypt and Indonesia are characterized by moderate-to-low taxes, low fuel prices, and highly competitive hotel prices. When choosing a destination, these countries benefit from many visitors' interest in getting more for their money.

Singapore, Iceland, and Denmark, three countries that have placed a significant focus on education in recent years, hold the top three spots in the human resources pillar. These countries have excellent educational systems as well as top-notch training facilities and very healthy workforces. In addition, they are characterized by flexible labor markets (for example, through the much-discussed flexicurity system in Denmark), which makes it much easier to manage the seasonal hiring so critical for the T&T industry.

The countries with the top three assessments for the affinity for Travel & Tourism are Montenegro, Barbados, and Mauritius. This is in line with the importance of tourism for their economies, with all three displaying great openness to foreign travelers and with their business communities also expressing their sense of the great value of tourism on offer in their countries. It goes without saying that the friendliness and openness to travelers is a key characteristic making destinations more appealing to tourists.

The top three countries in the natural resources pillar span three continents: the United States, Brazil, and Tanzania. These countries each have several World Heritage natural sites, much protected land area, and rich fauna as measured by the total known species living in them. Within the table we see that Australia is ranked 4th, also offering rich natural resources to visitors. These countries have the great fortune to be endowed with such inherent attractions for tourists interested in nature tourism.

Finally, Spain, Sweden, and the United Kingdom are the top three ranked countries for their cultural resources. All three have a large number of World Heritage cultural sites, strong creative industries, many international fairs and exhibitions held in the country, and significant sports stadium capacities. These attributes come together to provide a variety of cultural attractions for visitors, as is also the case in Switzerland, France, Italy, and the United States, the other countries shown in Table 2 that are among the top 10 in this pillar.

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

Regional rankings

This section will discuss some of the highlights of the rankings in a regional context, grouping countries into the following four regional groups: the Americas, Europe, Middle East and Africa, and Asia Pacific (including Central Asia). For further details for each of the 133 economies included in this Index, we provide two-page profiles in Part 2 of the *Report*. The profiles show the rankings on each subindex and pillar, as well on each of the 73 factors included in the Index.

Europe

Table 1 shows that many countries from Europe do very well in the rankings, with all of the top four places taken by European countries, and six of the top-10 countries hailing from the region. Table 3 shows the rankings just for European countries, with the first column showing the rank within the region, and the second column showing the overall rank out of all 133 countries included in the Index this year. As the table shows, Switzerland is ranked 1st out of all countries in the 2009 TTCI, followed by Austria and Germany—the same top three countries for the past three years.

Switzerland is a country rich in cultural and natural resources, including an impressive number of World Heritage cultural and natural sites for a country of its size. A large percentage of the country's land area is protected (ranked 16th) and the natural environment is assessed as being among the most pristine in the world (ranked 9th). This natural heritage is buttressed by a strong national focus on environmental sustainability: Switzerland is ranked 2nd overall on this pillar, based on strong and well-enforced environmental legislation and

Table 3: The Travel & Tourism Competitiveness Index: Europe

				SUBINDEXES					
	OVERALL INDEX			T&T regulatory framework		T&T business environment and infrastructure		T&T human, cultural, and natural resources	
Country/Economy	Regional rank	Overall rank	Score	Rank	Score	Rank	Score	Rank	Score
Switzerland	1	1	5.68	1	6.01	1	5.49	2	5.54
Austria	2	2	5.46	4	5.91	6	5.22	7	5.24
Germany	3	3	5.41	13	5.56	3	5.44	9	5.22
France	4	4	5.34	8	5.67	7	5.22	11	5.13
Spain	5	6	5.29	29	5.29	8	5.21	5	5.36
Sweden	6	7	5.28	12	5.57	14	5.04	8	5.23
United Kingdom	7	11	5.22	28	5.29	11	5.07	6	5.30
Netherlands	8	13	5.09	22	5.44	9	5.08	17	4.75
Denmark	9	14	5.08	10	5.59	10	5.08	28	4.57
Finland	10	15	5.07	5	5.82	25	4.69	21	4.71
Iceland	11	16	5.07	3	5.92	17	4.93	39	4.37
Portugal	12	17	5.01	15	5.52	24	4.74	16	4.78
Ireland	13	18	4.99	7	5.73	22	4.79	32	4.45
Norway	14	19	4.97	9	5.64	19	4.84	36	4.42
Cyprus	15	21	4.92	25	5.35	13	5.05	37	4.38
Belgium	16	22	4.92	21	5.45	32	4.56	20	4.73
Luxembourg	17	23	4.92	20	5.47	16	4.97	42	4.30
Greece	18	24	4.91	18	5.49	27	4.66	27	4.58
Czech Republic	19	26	4.86	16	5.50	36	4.41	24	4.67
Estonia	20	27	4.83	17	5.50	21	4.81	47	4.19
Italy	21	28	4.78	46	4.96	26	4.68	22	4.71
Malta	22	29	4.77	11	5.58	31	4.58	52	4.15
Croatia	23	34	4.54	43	5.02	37	4.32	43	4.28
Slovenia	24	35	4.53	38	5.13	33	4.53	61	3.94
Hungary	25	38	4.45	26	5.35	42	4.06	59	3.95
Slovak Republic	26	46	4.34	34	5.20	54	3.78	55	4.05
Latvia	27	48	4.31	32	5.22	43	4.04	86	3.68
Lithuania	28	49	4.30	30	5.27	46	3.98	89	3.65
Bulgaria	29	50	4.30	56	4.74	48	3.96	46	4.20
Montenegro	30	52	4.29	50	4.86	66	3.57	35	4.43
Turkey	31	56	4.20	63	4.60	60	3.73	44	4.28
Poland	32	58	4.18	72	4.44	68	3.53	29	4.56
Russian Federation	33	59	4.14	79	4.35	61	3.70	38	4.37
Romania	34	66	4.04	61	4.68	64	3.61	77	3.83
Georgia	35	73	3.89	33	5.20	99	2.84	92	3.64
Ukraine	36	77	3.84	62	4.66	72	3.37	103	3.50
Macedonia, FYR	37	80	3.81	69	4.46	75	3.29	87	3.67
Serbia	38	88	3.71	78	4.35	80	3.20	96	3.57
Albania	39	90	3.68	77	4.38	104	2.76	66	3.89
Armenia	40	91	3.65	58	4.70	105	2.75	102	3.51
Moldova	41	93	3.64	67	4.53	95	2.95	110	3.43
Bosnia and Herzegovina	42	107	3.44	96	4.11	93	2.96	124	3.25

with a particular focus on developing the T&T sector sustainably.

Switzerland is not only an attractive leisure tourism destination, but is also an important business travel hub, with many international fairs and exhibitions held in the country each year. Staffing of the industry is also facilitated by the availability of qualified labor to work in Travel & Tourism (ranked 3rd), perhaps not surprising in a country with many of the best hotel management schools. Added to these strengths is Switzerland's excellent ground transport infrastructure (ranked 1st worldwide), with top-quality roads and railroads and an excellent domestic transport network. Also well assessed is the specific tourism infrastructure (ranked 7th), with readily available hotel rooms and automated teller machines (ATMs) for cash withdrawals. Such high-quality infrastructure makes a tourist's stay in the country easy and comfortable, an experience that is reinforced by the high level of general safety and security (ranked 8th).

Austria is ranked 2nd in Europe and out of all countries in the TTCI, a ranking attributable to its rich cultural resources, with eight World Heritage cultural sites and with many fairs and exhibitions catering to business travelers. The natural environment is also well assessed, along with the country's focus on environmental sustainability (ranked 9th). In addition, Austrians are perceived as open and welcoming to foreign travelers. Austria's tourism infrastructure is assessed as second to none, with abundant car rental facilities, hotel accommodations, and ATMs. Other strengths include Austria's assessment as one of the safest countries in the world (ranked 6th) and its excellent health and hygiene levels (ranked 5th).

Germany, ranked 3rd out of all countries, is also characterized by abundant cultural resources, ranked 4th worldwide for its 32 World Heritage cultural sites and 2nd for the number of international fairs and exhibitions held in the country. The country's infrastructure is among the best in the world, ranked 5th for the quality of its ground transport infrastructure and 7th for its air transport infrastructure. In addition, Germany gets somewhat better marks than Switzerland and Austria for the policy rules and regulations affecting the T&T industry: it is ranked 17th in this area, with transparent policymaking, well-protected property rights, and bilateral Air Service Agreements that are assessed as open.

France moves up this year by six places, ranked 4th out of all 133 countries. France attracts tourists with its rich cultural heritage (ranked 4th for the number of World Heritage cultural sites and 7th for creative industries). The country also hosts many international fairs and exhibitions (ranked 5th), thereby attracting business travelers as well. France's ground transport infrastructure is among the best in the world (ranked 3rd), with the quality of roads and railroads particularly well assessed, as well as its air transport infrastructure (ranked 5th). The country's improvement is in part attributable to a stronger perceived prioritization by the government of the sector and increased marketing of the country through participation in a larger number of international tourism fairs. Ensuring the sustainable development of the sector is also a significant priority for the government, with France ranked a high 4th on this pillar, with strong and well-enforced environmental legislation.

Spain is ranked just behind France within Europe, at 6th place overall. Spain is ranked 1st out of all countries for the richness of its cultural resources, with many World Heritage sites, a large number of international fairs and exhibitions, and significant sports stadium capacity. Spain's tourism infrastructure is ranked 1st internationally, with many hotel rooms, car rental facilities, and ATMs, and its air transport infrastructure also gets good marks (ranked 10th). The government prioritizes the sector significantly, and the country makes strong efforts to attract tourists through strong destination-marketing campaigns and by ensuring Spain's presence at many international tourism fairs. Spain's T&T competitiveness is discussed in Box 1.

Greece is ranked 18th in Europe and 24th overall, with a stable performance compared with last year. The country benefits from rich cultural resources (ranked 23rd), excellent health and hygiene (ranked 19th overall), and top-notch tourism infrastructure (5th). Greece is ranked a very high 3rd in terms of the country's overall prioritization of Travel & Tourism. Further, there is a strong national affinity for tourism compared with many other European countries, including a generally open and positive attitude toward tourists (16th). The country's overall ranking is held back, however, by its policy rules and regulations that are not entirely supportive of the sector's development (ranked 57th), with stringent rules governing foreign direct investment (FDI), and with foreign ownership restrictions as well as significant time and cost involved in starting a new company. Another area of weakness is the country's ground transport infrastructure, which is less efficient than in many other European countries (the quality of railroads and ports being of particular concern).

Italy, despite being endowed with the most World Heritage cultural sites in the world, ranks only 21st within Europe and 28th overall (the same rank as last year). As well as its cultural richness, Italy's strengths lie in areas such as the health and hygiene of the country (27th), its air transport infrastructure (27th), and especially its excellent tourism infrastructure (3rd). However, it faces a number of challenges that bring its overall rating down. These include policy rules and regulations, where Italy ranks 71st (even lower than last year) because of its very strong foreign ownership restrictions (ranked 106th) and rules governing FDI (122nd). Further, the government is not seen to be prioritizing this sector (107th), which is so important to the overall economy. In addition, ground transport infrastructure requires upgrading, there is insufficient focus on developing the sector in an environmentally sustainable way, and there are some safety and security concerns in the country (82nd).

Croatia, a country well known for its tourism industry and that is aiming to join the European Union (EU) in the coming years, is ranked 23rd in Europe and 34th overall, on a par with countries such as Malaysia and the United Arab Emirates and well ahead of several EU members. Croatia's performance has remained stable since last year. It is endowed with six cultural and one natural World Heritage sites, and is ranked a high 9th in terms of its overall affinity for Travel & Tourism. In addition, the country's tourism-specific infrastructure is ranked 6th out of all 133 countries. On the other hand, in order to improve the sector's competitiveness further, a goal will be to further upgrade ground transport infrastructure, particularly ports (ranked 90th) as well as air transport infrastructure, and to bring policy rules and regulations in the country more in line with those that are needed for developing the sector (presently ranked 80th).

Turkey is ranked 31st in Europe and 56th in the TTCI, down two places since last year. The country certainly benefits from its rich cultural heritage, with 11

Box 1: Will Spain's Travel & Tourism miracle stand the test of time?

For many years, the tourism industry has been critical to Spain's economy, an importance that has increased over recent years, as shown in the figure. In 2008, the tourism industry—which includes the activities of traditional providers such as airlines and hotels—accounted for US$102 billion and 7 percent of total employment. Overall the sector accounts for 23 percent of the country's total export earnings, significantly affecting Spain's current account.[1] Largely as a result of the government's continuous efforts to promote the tourism sector, in 2007 Spain placed as the second most important tourism destination worldwide according to the UNWTO, with nearly 60 million visitor arrivals, and raising nearly US$58 billion in tourism receipts.

Spain certainly is one of the countries with the strongest T&T competitiveness in the world, ranking 6th in the 2009 Travel & Tourism Competitiveness Index (TTCI). Given the importance of the sector for Spain's economy, it is perhaps not surprising to see that the country strongly prioritizes the T&T sector (ranking 4th in this pillar). In 2008, the Spanish government's expenditure on tourism was among the highest internationally, accounting for 6.4 percent of its overall budget. Spain was also present at most of the main international tourism fairs (ranked 3rd) and has effective destination-marketing and branding campaigns to attract tourists (ranked 16th). Madrid and Barcelona, Spain's two principal cities, were ranked 13th and 7th, respectively, out of 40 cities in the Anholt City Brand Index in 2007, which measures the perceived attractiveness of the most important cities worldwide.[2]

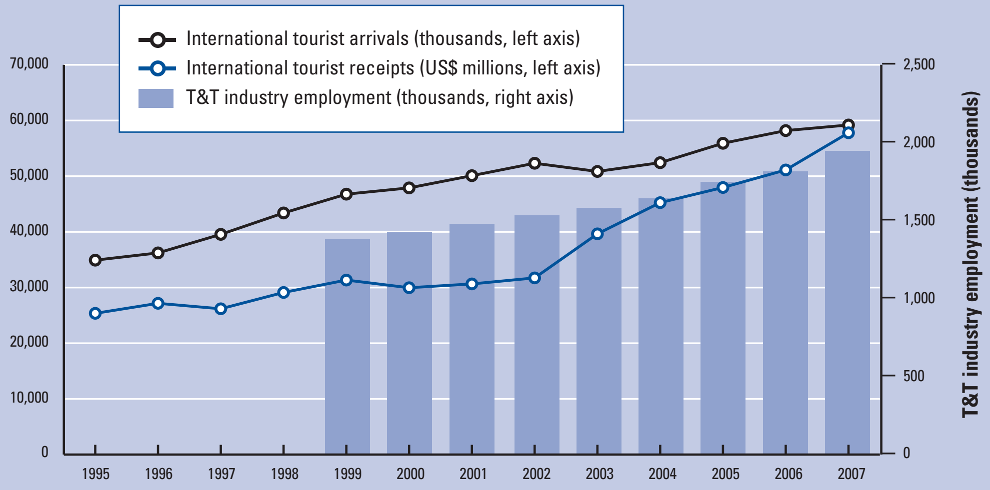
As a tourism leader, Spain has developed a strong T&T business environment and infrastructure, for which it is ranked 8th overall. Spain is notably ranked 1st in the tourism infrastructure pillar, being 1st overall for both the presence of car rental companies and the number of ATMs accepting Visa cards in the country, and 7th for available hotel rooms. Yet it is important to note that the build-up of the country's accommodation infrastructure has in some regions come at the expense of creating overcrowded tourist locations and damaging the quality of the environment.

In fact, with regard to environmental sustainability, Spain demonstrates a more nuanced performance (ranked 31st in this pillar). On one hand, the government is making a statement of its commitment to environmental protection by ratifying the great majority of the most important environmental treaties (ranked 2nd). However, the actual stringency and enforcement of the country's environmental regulation is not as evident, ranking 36th and 37th, respectively. And indeed, in terms of environmental indicators, the rankings are low: the percentage of threatened species is ranked 96th and carbon dioxide emissions is ranked 94th. Overall, Spain should consider enhancing its environmental performance in order to ensure that the growth of its T&T sector takes place in a sustainable manner, enabling the country to reap the long-term benefits of its development.

Regarding Spain's transportation sector, the country has very good air transportation infrastructure (10th), with 134 airlines operating in the country (ranked 6th) and a large airline passenger-carrying capacity, as measured by available seat kilometers (ranked 10th for domestic and 6th for international flights). The country also boasts good ground transport infrastructure, with an extensive network of roads and trains. However, despite this good assessment of the quantity of transport infrastructure, the Spanish Institute for Tourism Studies (*Instituto de Estudios Turisticos*) identifies improving its quality

(Cont'd.)

Selected T&T indicators for Spain, 1995–2007



Source: International tourist receipts and arrivals, UNWTO; Workers on the payroll and registered for Social Security in characteristic tourism activities, Spanish Minister of Industry, Tourism and Trade.

Box 1: Will Spain's Travel & Tourism miracle stand the test of time? *(cont'd.)*

through better international air connections and stronger ground modes interconnectivity as areas for improvement.[3] This is echoed by the national plan for the development of the tourism industry (*Plan de Turismo 2020*), which deplores the insufficient international air connections (ranked 41st in the TTCI), particularly with important international markets such as Asia.[4]

Spain is ranked a high 5th for its T&T human, cultural, and natural resources. Among its strengths to attract tourists, Spain has a healthy and qualified labor force and a rich cultural offering, with a remarkable 39 World Heritage cultural sites (ranked 2nd on this indicator). As an example of Spain's efforts to preserve its national heritage, the Ministry of Tourism has created a state-owned company called *Paradores de España,* which is in charge of the management and conservation of important state properties, many of which have been transformed into hotels. Furthermore, Spain is one of the largest exporters of creative products such as films, fashion, and literature and the country hosts a large number of international fairs and conferences every year. In addition, the Spanish soccer league is among the most prestigious in the world, attracting many fans. All the autonomous governments have invested in building large capacity sports stadiums in the main capitals (ranked 15th nationally) hosting internationally recognized teams such as FC Barcelona and Real Madrid.

As well as reinforcing the country's environmental management, Spain should also improve the policy rules and regulations affecting its tourism industry, an area where it ranks just 74th. In particular, the country should focus on ensuring greater openness through the bilateral Air Service Agreements into which it has entered (ranked 84th) and reducing the time needed to start a business in the country (ranked 109th).

Finally, as is the case for many European countries, price competitiveness has become a challenge for Spain. This is a pillar where the country is ranked 96th, due in part to an expensive euro and rising prices more generally. This is reflected in the relatively high price of hotel rooms (Spain is ranked 63rd in the hotel price index) and low purchasing power (111th). Fuel prices are also among the highest in the world (ranked 91st), increasing the price of travel in the country.

To summarize, Spain provides many examples of T&T best practices. The country's *Plan de Turismo 2020* clearly aims to address many of the challenges identified by the TTCI, notably the creation of friendlier policies for the sector and a stronger focus on environmental sustainability. Making these improvements will be critical for Spain in ensuring continued T&T competitiveness going into the future, in the context of ever-increasing competition among destinations.

Notes

1 WTTC 2008b.

2 *The Anholt City Brands Index 2007, How the World Views Its Cities,* Third Edition, 2007. See http://www.simonanholt.com/ for further information.

3 Turismo 2020 2008.

4 Turismo 2020 2008.

World Heritage cultural sites, several international fairs and exhibitions, and strong creative industries. However, its overall T&T competitiveness is held back by worries about safety and security (92nd), particularly related to terrorism and road safety, and by increasing concerns about the ability of the police to provide protection from crime and violence. Health and hygiene is also a comparative weakness (62nd), as well as ground transport infrastructure inadequacies (especially railroads and ports). In addition, further attention must be placed on protecting the country's natural resources (it is ranked 104th for environmental sustainability).

Russia is ranked 33rd in Europe and 59th overall, up five places since last year. The country gets relatively high marks for natural resources (23rd) and cultural resources (30th), due in particular to its many World Heritage sites. It also has a quite well developed air transport infrastructure (30th), an assessment that has improved somewhat since last year. However, ground transport infrastructure (81st) and tourism infrastructure (60th) get lower marks, with few available hotel rooms in particular. Safety and security issues are also of serious concern (129th), with a high level of crime and violence, a lack of trust in the police to provide protection from crime, and a high mortality rate from road traffic accidents. Most strikingly, Russia is assessed as having a very unconducive policy environment (114th) due, for example, to extremely high foreign ownership restrictions, property rights that are not well protected, and visa requirements for visitors from many countries. A lack of focus on environmental sustainability, ranked 114th, is also an area of concern. More generally, the sector is not seen to be a priority of the government, ranked a low 127th overall.

At the bottom of the European rankings are a number of Balkan countries (**Macedonia, Serbia, Albania,** and **Bosnia and Herzegovina),** as well as **Armenia** and **Moldova.** In line with their less-advanced development, these countries will require significant

Table 4: The Travel & Tourism Competitiveness Index: The Americas

				SUBINDEXES					
	OVERALL INDEX			T&T regulatory framework		T&T business environment and infrastructure		T&T human, cultural, and natural resources	
Country/Economy	Regional rank	Overall rank	Score	Rank	Score	Rank	Score	Rank	Score
Canada	1	5	5.32	23	5.41	4	5.36	10	5.19
United States	2	8	5.28	57	4.70	2	5.47	1	5.67
Barbados	3	30	4.77	19	5.47	29	4.62	45	4.21
Costa Rica	4	42	4.42	48	4.94	55	3.77	31	4.54
Brazil	5	45	4.35	95	4.12	69	3.53	4	5.40
Mexico	6	51	4.29	80	4.34	62	3.66	13	4.87
Puerto Rico	7	53	4.27	44	4.99	41	4.10	84	3.71
Panama	8	55	4.23	53	4.80	56	3.77	53	4.14
Chile	9	57	4.18	49	4.87	58	3.76	64	3.92
Jamaica	10	60	4.13	51	4.85	57	3.76	80	3.76
Uruguay	11	63	4.09	45	4.98	74	3.33	57	3.96
Argentina	12	65	4.08	74	4.40	70	3.51	41	4.34
Dominican Republic	13	67	4.03	54	4.75	71	3.46	68	3.88
Guatemala	14	70	3.90	81	4.32	81	3.20	48	4.17
Colombia	15	72	3.89	91	4.18	88	3.08	34	4.43
Peru	16	74	3.88	89	4.24	92	2.96	33	4.43
Honduras	17	83	3.77	83	4.31	87	3.08	63	3.92
Trinidad and Tobago	18	84	3.75	100	4.04	51	3.82	112	3.38
El Salvador	19	94	3.63	73	4.42	83	3.19	123	3.28
Ecuador	20	96	3.62	103	4.01	97	2.91	62	3.93
Suriname	21	99	3.54	110	3.86	91	3.01	79	3.76
Guyana	22	102	3.50	94	4.14	111	2.68	88	3.66
Nicaragua	23	103	3.49	98	4.05	101	2.79	93	3.63
Venezuela	24	104	3.46	122	3.63	86	3.12	91	3.65
Bolivia	25	114	3.33	127	3.33	110	2.70	58	3.96
Paraguay	26	122	3.16	116	3.74	130	2.44	122	3.30

investments in upgrading the infrastructure needed to support healthy and growing T&T sectors.

The Americas

Table 4 shows the regional rankings for the countries in the Americas. As the table shows, **Canada** is the highest-ranked country in the region, ranked 5th out of all 133 countries and with an improvement of four places allowing it to overtake the United States this year for the top regional spot. Canada's natural resources constitute a key strength, with the country's nine World Heritage natural sites placing it 4th internationally. Its cultural resources are also a strong point, with many international fairs and exhibitions in the country and strong creative industries in particular. Canada's air transport infrastructure is ranked 1st out of all countries, and it also gets good marks for its tourism and ICT infrastructure, facilitating the online T&T environment. Canada's policy environment is very conducive to the development of the sector (ranked 5th, up three places from last year), and the government is seen to be more strongly prioritizing the sector than last year. For more details on Canada's T&T competitiveness see Box 2.

The United States is ranked 2nd in the Americas and 8th out of all countries, down one position from last year. The country places 2nd for the overall business environment and infrastructure and 1st for the country's human, cultural, and natural resources. In particular, the United States has an excellent air transport infrastructure (ranked 2nd) and high-quality tourism and ICT infrastructure. Its natural resources are ranked 1st out of all countries, with many nationally protected areas and many World Heritage natural sites, although a perception exists that the environment is not being sufficiently protected (ranked 106th for environmental sustainability). Safety and security, ranked 122nd, is also of concern: as well as worries about crime and violence, the country has one of the highest death rates from road traffic accidents out of all countries covered (ranked 125th).

Barbados is ranked 3rd in the region, at 30th overall, down one place from last year. Barbados is ranked 2nd overall for the country's affinity for Travel & Tourism, with a positive attitude toward tourists and toward the value of tourism in the country. The government is prioritizing the sector to a very high degree (ranked 2nd), spending a high percentage of GDP on the sector and ensuring effective destination-marketing campaigns. Further, the country has a regulatory environment that is quite conducive to the development of the sector, requiring few visitors to have visas to enter the country and with open bilateral Air Service Agreements.

Box 2: Revitalizing Canadian tourism growth

With its rich cultural resources and diverse and beautiful landscapes, Canada has become an internationally popular tourist destination. According to the UNWTO, in 2007 Canada earned more than US$15 billion in tourism receipts and was the world's 13th most important tourist destination, attracting almost 18 million tourists. In 2008, Canada's tourism industry accounted for 3 percent of GDP and 3.4 percent of the country's total employment.[1] Canada places 5th in the 2009 Travel & Tourism Competitiveness Index (TTCI), the highest ranked country in the Americas, with strong performances in many areas measured.

Canada's natural attractions are plentiful. In terms of natural resources, the country boasts nine World Heritage natural sites, placing it a high 4th in this indicator. The country is also home to several World Heritage cultural sites and a significant share of creative industry exports (8th), and hosts many international fairs and exhibitions. As an example of the government's efforts to further promote cultural tourism, the Canada Tourism Commission (CTC) has been working on a proposal for Aboriginal Tourism, which has been identified as a potential attraction for tourists.[2]

Canada has many positive attributes beyond the cultural and natural. The country is ranked 5th for policy rules and regulations related to the tourism sector, based on factors such as the low cost (5th) and little time required (6th) to start a business in the country, as well as the openness of the bilateral Air Service Agreements into which Canada has entered (10th). Its human resources are among the best in the world (6th), with highly educated and well-trained workers, although the CTC deplores the shortage of labor in the tourism sector.[3]

Canada's transport infrastructure is also world class. Canada ranks 1st out of all countries for its air transport infrastructure, based in particular on the large number of airlines operating in the country and its well-functioning international air transport network. Canada also has an excellent ground transport network, with high-quality roads, railroads, and ports, which are connected seamlessly, making it easy for travelers to move around the country.

Canada also boasts good ICT infrastructure (ranked 13th overall), with one of the highest rates of Internet users worldwide (4th) and extensive Internet use by businesses (8th). The Canadian government has supported efforts toward creating and promoting online tools that will help to attract a larger number of potential travelers. During the last two years, Canadians have invested in e-marketing and other online tools such as the provision of relevant content in the sites telling stories about the country, a toolkit available for stakeholders to help them use Canada's brand and test the quality of their products, and online surveys to learn about the different type of tourists to match their needs. All these tools allow the various industry actors to interact and create common strategies for promoting the different regions and ensuring a standard quality of services across the country.[4]

Recent analysis by the CTC showed 81 percent of visitors consider Canada to be an environmentally friendly country.[5] Yet some areas for improvement do remain for boosting the country's T&T competitiveness further and ensuring its continuity into the future. Canada's results with regard to environmental sustainability are mixed, resulting in a middling rank of 46 in this pillar. On one hand, business executives perceive that the government has put into place relatively stringent and well-enforced environmental regulations, ranked 20th and 17th, respectively, although they are somewhat less positive about efforts to specifically ensure the sustainability of the T&T industry (31st). Some environmental indicators are worrisome, such as high carbon dioxide emissions (121st) and the percentage of threatened species (50th). This is of particular concern given the importance of the natural environment for Canada's tourism, coupled with the fact that, in recent years, sustainable tourism has become a sensitive issue among consumers.

Finally, Canada appears near the bottom of the ranking with regard to price competitiveness (ranked a low 106th). The exchange rate has been identified as one of the main challenges for the sector's price competitiveness. In order to make the country a more price attractive destination for tourists, in 2006 the government reduced taxes on goods and services. Yet, despite efforts made in this area, the Canadian dollar is still generally high against the yen and the US dollar, making travelers from the United States and Japan, two of Canada's main markets, less eager to visit the country.[5]

As a demonstration of its commitment to the sector, in 2006 the Minister of Tourism developed a national strategy to promote Canada as an even more accessible and appealing destination through the facilitation of border crossing and transportation, the development of new tourism products, ensuring sufficient labor availability to meet the sector's demand, and improvement of the main tourism statistics.[6] This has been coupled with efforts to improve destination marketing to attract tourists to the country: in 2007, the CTC launched the global tourism campaign *Canada: Keep Exploring* in an effort to improve and differentiate the Canada brand. In addition, the CTC has developed a marketing strategy targeted at the winter Olympic Games to be held in Vancouver in 2010.[7] The CTC has been targeting tourists from a wide range of markets, focusing on those from the Americas, Asia, and Europe in an effort to ensure a regional diversification of revenues.[8] With such concerted efforts, the outlook overall seems quite positive for Canada's T&T development going into the future.

Notes

1 WTTC 2008c.
2 Canadian Tourism Commission 2008.
3 Canadian Tourism Commission 2008.
4 Canadian Tourism Commission 2008.
5 Canadian Tourism Commission 2008.
6 Canadian Tourism Commission. 2007a.
7 OECD 2008.
8 Canadian Tourism Commission. 2007b.

Costa Rica is ranked 4th in the region and 42nd overall, up two places from last year. The country gets excellent marks for its natural resources (ranked 6th), with several World Heritage sites, a high percentage of nationally protected areas, and its very diverse fauna. Given the importance of the natural environment for the county's tourism industry, it is notable that it ranks a high 27th overall for environmental sustainability, an area of measurable improvement since last year. However, safety and security remains a concern (72nd). Further, although its tourism infrastructure is well developed (33rd), with a strong presence of major car rental companies and abundant hotel rooms, ground transport infrastructure requires significant upgrading (103rd), particularly roads and ports, making travel in the country somewhat difficult.

Brazil is ranked 5th in the Americas and 45th overall, having seen an improvement of four places since last year. The country is ranked 2nd out of all countries for its natural resources and 14th for its cultural resources, with many World Heritage sites, a great proportion of protected land area, and the most diverse fauna in the world. This is buttressed by a focus on environmental sustainability (ranked 33rd). However, the ground transport network remains underdeveloped, with the quality of roads, ports, and railroads ranked 110th, 123rd, and 86th, respectively. Safety and security continues to be of serious concern, ranked 130th overall, just behind South Africa and Russia. The country also suffers greatly from a lack of price competitiveness (91st), attributable in part to high ticket taxes and airport charges in the country, as well as high prices and high taxation more generally. Further, the overall policy environment is not particularly conducive to the development of the sector (ranked 95th), with discouraging rules on FDI and much time required for starting a business.

Mexico is ranked just behind Brazil in the regional ranking at 6th place and comes in at 51st place overall, an improvement of four places. Mexico gets quite high marks for its natural resources (ranked 18th), and this is an area where it has shown an improvement since last year, with one more natural World Heritage site added in the interval. The country's cultural resources are also very rich (20th), with 26 World Heritage cultural sites, several international fairs and exhibitions, and strong creative industries. These inherent strengths are reinforced by the overall prioritization of the sector in the country (35th), with country-level participation at many T&T fairs and effective marketing and branding campaigns for attracting tourists. Some areas requiring attention are the tourism infrastructure (49th) and, especially, the ground transport infrastructure (84th). In addition, Mexico is ranked a low 77th for its price competitiveness, due especially to very high ticket taxes and airport charges (ranked 126th overall). Health and hygiene issues remain to be tackled (ranked 74th), and, in particular, safety and security continues to be a major concern, ranked 126th with high levels of crime and violence, a police force that cannot be relied on to provide protection from crime, and many deaths from road traffic accidents.

Puerto Rico is ranked 7th in the region and 53rd overall, down seven places since last year. Puerto Rico has a number of strengths, which include a policy environment that is conducive to the development of the sector (15th) and efforts to ensure environmental sustainability (11th). Puerto Rico's air and ground transport infrastructure are also well assessed (ranked 29th and 30th, respectively). The quality of human resources is a comparative strength as well, particularly by regional standards, with Puerto Rico ranked 35th on this pillar. On the other hand, its T&T competitiveness could be strengthened by upgrading its tourism-specific infrastructure (48th) as well as its ICT infrastructure (52nd). Other areas of concern include safety and security in the territory (65th) and health and hygiene issues (63rd). Further, an area of measurable weakening, in part explaining the overall decline in rank, is in the prioritization of the sector: Puerto Rico has slipped from 52nd to 71st place in this area, notably attending even fewer international tourism fairs than it had in the past.

Chile is ranked 9th in the region and 57th overall, slipping six places since last year. The country has notable cultural resources, with five World Heritage cultural sites and several international fairs and exhibitions held in the country. In addition, policy rules and regulations are conducive to the development of the T&T sector (19th), with few foreign ownership restrictions, a liberal visa regime, and open bilateral Air Service Agreements, although the time and cost for starting new businesses remains relatively high. The country also benefits from good safety and security by regional standards (38th). However, Chile's T&T competitiveness would be strengthened by upgrading transport and tourism infrastructure and a greater focus on developing the industry in an environmentally sustainable way. The decline in rank can mainly be traced to a weaker assessment of the country's prioritization of the sector, as well as the overall affinity toward Travel & Tourism in the country.

Argentina is in the middle of the regional ranking and placed 65th overall, down seven ranks since last year. Argentina is among the highest-ranked countries for its natural resources (13th), with four World Heritage sites and very diverse fauna. The country also benefits from a relatively high airport density, abundant seat kilometers, and a number of operating airlines, although the quality of air transport is highlighted as a problem area (ranked 123rd). Some aspects of the quality of human resources are also strengths, such as the high primary enrollment rate and the relative ease of hiring foreign labor. However, a number of weaknesses are pulling the country's overall score down. For example, several government policies—such as weak property rights (ranked 127th) and stringent rules on FDI (ranked

125th)—are not supporting the development of the sector. Further, environmental regulation is not sufficiently stringent (ranked 121st) or well enforced (ranked 123rd), which is of concern given the importance of natural resources for the country's tourism industry. The drop in rank overall is traced to a weakening across most areas measured by the Index, especially policy rules and regulations, environmental sustainability, price competitiveness, and the country's human resources.

Venezuela, despite its top-10 status for its endowment of natural resources (with much protected land area and diverse fauna), is ranked third from last in the region, at 104th overall, with a stable performance since last year. Among the significant weaknesses are a lack of safety and security (ranked 127th), a low prioritization of the tourism industry (116th), and the lowest rank of all countries regarding the overall national affinity for Travel & Tourism (133rd). In addition, infrastructure is in need of upgrading, particularly ground transport infrastructure (ranked 127th). The policy environment is also not very conducive to the development of the T&T sector. Property rights are not well protected in the country, and FDI is also not encouraged (ranked 132nd for both indicators).

Asia Pacific

Table 5 displays the regional ranking and data for the Asia Pacific region. As the table shows, **Australia** is the highest-ranked country from the region, ranked 9th overall, down five places since last year. Australia is ranked 4th for its natural resources, with the most World Heritage natural sites worldwide, many known species in the country, and a pristine natural environment. Given the importance of the environment for much of its leisure tourism, it is notable that the stringency and enforcement of its environmental regulations are well assessed. Given the country's distance from other continents and the related importance of domestic air travel to overcome the large distances between major sites, its competitiveness is also buttressed by excellent air transport infrastructure (ranked 3rd) as well as good general tourism infrastructure (ranked 9th). Australia also benefits from the strong government prioritization of the tourism sector and effective destination-marketing campaigns. The drop in rank since last year can be traced in large part to a perceived weakening of the prioritization of the sector in the country, a poorer assessment of the ground transport infrastructure, and weakening price competitiveness.

Australia is followed in the regional ranking by **Singapore,** which is ranked 10th overall, entering the top 10 this year and up by six places since last year. Singapore benefits from excellent transport infrastructure, with ground transport infrastructure and air transport infrastructure ranked 4th and 15th, respectively. Singapore also benefits from its top rank out of all countries for the quality of its human resources to work in the country. With regard to the policy environment, it also ranks 1st, with rules and regulations that are extremely conducive to the development of its T&T industries (policies facilitating foreign ownership and FDI, well-protected property rights, few visa restrictions). Further, it is among the safest countries of all assessed with regard to crime and security. Singapore is ranked 2nd for the overall prioritization of Travel & Tourism, an area of improvement since last year. The country's tourism and ICT infrastructure has also seen a measurable improvement since last year.

Hong Kong is ranked 3rd in the region and 12th overall, up two places since last year. Hong Kong's transport infrastructure is even better assessed than Singapore's, with ground transport and air transport infrastructures ranked 2nd and 13th, respectively. Hong Kong gets relatively good marks for cultural resources, with many international fairs and exhibitions held in the country and strong creative industries. Hong Kong's policy environment is rated second only to Singapore, and shows a strong prioritization of the tourism sector (ranked 8th). Like Singapore, Hong Kong is extremely safe from crime and violence (ranked 5th), and the country is unsurpassed for the quality of health and hygiene, where it ranks first internationally.

New Zealand is ranked 4th in the region and 20th overall. The country benefits from its rich natural resources, with several World Heritage natural sites (ranked 16th) and a very pristine natural environment (ranked 3rd) protected by strong and well-enforced environmental legislation. The overall policy rules and regulations in the country are conducive to the development of the sector (ranked 10th), with transparent policymaking and among the least time and lowest cost required to start a business of all countries. Although the country's ground transport network remains somewhat underdeveloped, the air transport infrastructure gets excellent marks (ranked 11th), and both the tourism and ICT infrastructures are quite good by international standards. New Zealand also benefits from high-quality human resources (ranked 17th) and a very safe and secure environment overall (15th).

Japan is ranked 5th regionally and 25th out of all countries in the TTCI, with excellent marks for its cultural resources (ranked 10th) attributable to its 14 World Heritage cultural sites, the many international fairs and exhibitions held in the country, and its rich creative industries. The ground transport infrastructure is among the best in the world (ranked 8th), especially railroads, and Japan continues to be a leader in the area of education and training (ranked 12th). However, Japan ranks third from the bottom for the affinity of the county for Travel & Tourism (131st), and the sector is not perceived to be a priority for the government (ranked 83rd).

Korea is ranked 31st, just ahead of Malaysia in both the regional and the overall rankings, as was the case last year. Korea's strengths lie in the quality of its human

Table 5: The Travel & Tourism Competitiveness Index: Asia Pacific

				SUBINDEXES					
	OVERALL INDEX			T&T regulatory framework		T&T business environment and infrastructure		T&T human, cultural, and natural resources	
Country/Economy	Regional rank	Overall rank	Score	Rank	Score	Rank	Score	Rank	Score
Australia	1	9	5.24	27	5.31	15	5.01	3	5.42
Singapore	2	10	5.24	6	5.77	5	5.25	23	4.69
Hong Kong SAR	3	12	5.18	2	5.93	12	5.05	30	4.55
New Zealand	4	20	4.94	14	5.55	30	4.62	25	4.65
Japan	5	25	4.91	40	5.10	20	4.83	15	4.81
Korea, Rep.	6	31	4.72	41	5.06	35	4.45	26	4.64
Malaysia	7	32	4.71	42	5.03	38	4.24	14	4.86
Thailand	8	39	4.45	70	4.46	40	4.14	19	4.74
Taiwan, China	9	43	4.40	75	4.40	18	4.87	65	3.92
China	10	47	4.33	88	4.24	59	3.73	12	5.01
India	11	62	4.09	107	3.88	63	3.65	18	4.74
Brunei Darussalam	12	69	3.99	99	4.04	47	3.96	60	3.95
Azerbaijan	13	76	3.84	47	4.95	84	3.19	111	3.40
Sri Lanka	14	78	3.82	86	4.27	73	3.34	71	3.85
Indonesia	15	81	3.79	113	3.77	79	3.24	40	4.36
Philippines	16	86	3.73	85	4.27	89	3.07	70	3.86
Vietnam	17	89	3.70	92	4.15	85	3.12	76	3.83
Kazakhstan	18	92	3.65	60	4.69	96	2.93	121	3.32
Mongolia	19	105	3.46	90	4.19	107	2.72	106	3.48
Kyrgyz Republic	20	106	3.45	76	4.39	124	2.49	105	3.48
Cambodia	21	108	3.43	111	3.80	113	2.64	74	3.84
Tajikistan	22	109	3.41	84	4.30	117	2.58	117	3.37
Pakistan	23	113	3.33	124	3.59	94	2.95	108	3.46
Nepal	24	118	3.25	119	3.66	120	2.53	97	3.57
Bangladesh	25	129	3.02	130	3.16	103	2.78	130	3.11

resources (ranked 19th), its excellent ground transport and ICT infrastructure (ranked 15th and 8th, respectively), and its rich cultural resources (ranked 13th). On the other hand, its overall T&T competitiveness is held back by a weak affinity for Travel & Tourism (ranked a low 114th), its relative costliness as a destination (ranked 102nd), and its underdeveloped tourism infrastructure (ranked 71st).

Malaysia is ranked 7th regionally and 32nd overall, with its rich natural resources (ranked 21st) and good ground transport infrastructure (ranked 28th). The country also benefits from excellent price competitiveness (ranked 4th), with low comparative hotel and fuel prices, low ticket taxes and airport charges, very competitive hotel prices, and a favorable tax regime. Malaysia's policy environment is assessed as highly conducive to the development of the sector (ranked 9th), and the country is prioritizing Travel & Tourism; it markets the country at many international tourism fairs (ranked 1st) and also has an excellent evaluation for its destination-marketing campaigns (ranked 12th). With regard to weaknesses, health and hygiene indicators lag behind those of many other countries in the region, with, in particular, a low physician density (placing the country 94th). For more on Malaysia's T&T competitiveness, see Box 3.

Box 3: Realizing the potential of Malaysia's T&T sector

Malaysia is ranked 32nd in the 2009 Travel & Tourism Competitiveness Index (TTCI). According to the UNWTO, in 2007, almost 21 million tourists visited Malaysia, earning the country US$14 billion in tourism receipts. In 2008, readers of *Global Traveler,* a magazine aimed at US business executives, acknowledged Malaysia as the "best international destination" for the third consecutive year.[1] Among Malaysia's assets and tourist attractions are its modern architecture, exotic jungles, lively historical ports, and ancient colonial heritage as well as the country's intercultural Asian atmosphere. The country's capital, Kuala Lumpur, itself offers many attractions, ranging from the most modern high rise architecture to traditional markets and religious monuments.[2]

The Malaysian Tourism Board was established in 1992, but it was not until 2004 that the government created the Ministry of Tourism. Malaysia strongly prioritizes the tourism sector (ranked 23rd in the related pillar), ensuring its presence in all major international tourism fairs (ranked 1st). Furthermore, the country has effective destination-marketing and branding campaigns (ranked 12th), with, for example, the Kuala Lumpur Convention Centre winning the 2008 Brand Laureate Award acknowledging "excellence in product

(Cont'd.)

Box 3: Realizing the potential of Malaysia's T&T sector *(cont'd.)*

branding" granted by the Asia and Pacific Brands Foundation.[3] Government efforts to ramp up its international promotional effort to new markets have included the development of a targeted television campaign aimed at attracting tourists from the Middle East region,[4] for which the country offers many attractions, including the fact that it is a predominantly Muslim country. Key source markets such as those of the United States are also being targeted with promotional campaigns to attract consumers who are currently less familiar with Malaysia's tourism offering than they are with some other Southeast Asian tourism destinations.[5]

Malaysia has a large offering of cultural resources, with its many religious and ethnic groups making Malaysia a culturally diverse country.[6] The government has made significant efforts to preserve its cultural heritage while at the same time supporting the development of new hotels, convention centers, and tourist attractions. An example of the successful promotion of Malaysia's historical and national heritage was the inclusion in 2008 of the historic cities of Mekala and Georgetown in the UNESCO World Heritage list.[7] Malaysia also has rich natural resources (ranked 21st), including the oldest rainforest in the world and two World Heritage Natural sites, both located in the on the island of Borneo.[8]

Malaysia's policies and regulations affecting the tourism industry are conducive to the sector's development, a pillar where it ranks 9th overall. Specifically, the country is characterized by well-protected property rights, transparent government policymaking, and relatively little time required to start a business. Furthermore, Malaysia requires tourist visas from very few countries, making the country an accessible destination for tourists from almost all UN countries. In terms of price competitiveness in the T&T industry, Malaysia stands out as a highly affordable destination (ranked 4th in this pillar) with low ticket taxes and airport charges, low fuel price levels, and very competitive hotel prices (ranked 6th on the hotel price index).

Ranked 35th for its air transport infrastructure, Malaysia has a large number of operating airlines, high-quality air transport infrastructure, and an international air transport network that provides connections to the country's key international overseas markets. In an effort by the Malaysian tourism minister to connect with even more international destinations, Air Malaysia and Air Mauritius have enrolled in a partnership in which they share flights to different destinations within Malaysia, thus increasing the importance of Kuala Lumpur as a gateway to other important destinations such as Australia, Thailand, and China.[9] Further, Malaysia is ranked 28th for the quality of its ground transport infrastructure, with its roads and railroads particularly noted for their high quality.

Malaysia ranks a reasonable 36th for the availability of qualified labor to work in the sector, although the Ministry of Tourism deplores the significant labor shortage in the T&T sector; according to the WTTC, in 2008 this sector accounted for approximately 5 percent of total employment in the country. Recent research has shown a low turnout of job applicants to numerous vacancies. This situation can be in part explained by the fact that many tourism professionals choose to work in neighboring countries such as Singapore, Hong Kong, Macau, and China, where higher salaries and other benefits such as full board are often offered. In an effort to address the shortage of national qualified T&T professionals, the government has been easing the laws related to hiring foreign workers (ranked 50th).[10]

Malaysia has been working to improve the quality of hotel accommodations in the country as well as to increase their capacity (ranked 45th for the availability of hotel rooms). An example of efforts to address this shortcoming is found in Kuching, the capital of the country's largest state of Sarawak, where a project has been undertaken to double the number of rooms to 10,000 in 2009.[11] In addition, new five-star hotels have been built in the heart of Kuala Lumpur. Among these are the Royale Chulan Kuapa Lumpur,[12] and one sponsored by the prestigious St. Regis brand.[13]

MICE (meetings, incentive, conference and exhibition) strategies are also part of the government's plan to enhance the T&T infrastructure. The goal is to provide adequate accommodation and meeting rooms with large capacities, equipped for business meetings in different hotels and conference centers.[14] Last year, the government created a program called *MyCEB* (Malaysian Convention and Exhibition Bureau) in order to promote the country as a host for international conferences and exhibitions. Although visitors of this type tend to be lower in number, they are an important potential source of revenue given that, on average, they spend more than leisure tourists.[15] At the moment, Malaysia hosts an average of 82 international fairs and exhibitions every year, ranked 30th on this indicator.

Overall, Malaysia's T&T industry would appear to have much growth potential. Improvement in areas highlighted above, such as increasing the availability of professional labor for the industry, carrying out better promotion to key markets, and further developing the tourism infrastructure will help to ensure the healthy development of the sector going into the future.

Notes

1 *Global Traveler* 2008.

2 See the Malaysia Ministry of Tourism, http://www.virtualmalaysia.com/visit_malaysia/ (accessed December 2008).

3 The Brand Laureate: The Grammy Awards for Branding. Available at http://www.thebrandlaureate.com/winners-tbl.asp?view=pb.

4 Sulaiman 2008a.

5 Alcantara 2008.

6 Sulaiman 2008a.

7 UNESCO, World Heritage Center. See http://whc.unesco.org/en/list.

8 Malaysia Ministry of Tourism. virtualmalaysia.com. Available at http://www.virtualmalaysia.com/visit_malaysia/ (accessed December 2008).

9 *eTurboNews* 2008a.

10 Sulaiman 2008b.

11 Payne 2008.

12 *eTurboNews* 2008b.

13 *eTurboNews* 2008c.

14 *eTurboNews* 2008b.

15 Sulaiman 2008c.

Thailand is ranked just behind Malaysia in the region at 8th place and 39th overall, up three places since last year. It is endowed with rich natural resources and a strong affinity for Travel & Tourism (ranked 24th and 22nd, respectively), with a very friendly attitude of the population toward tourists (ranked 13th). This is buttressed by the sector's strong prioritization by the government (ranked 12th) with, similar to Malaysia, excellent destination-marketing campaigns and good price competitiveness. However, some weaknesses remain: despite the prioritization of the sector by the government, some aspects of the regulatory environment—such as stringent foreign ownership restrictions, visa restrictions for many travelers, and the long time required for starting a business in the country—are not particularly conducive to developing the sector (ranked 62nd). In addition, given the importance of the natural environment for the country's tourism, environmental sustainability should be a greater priority (ranked 99th).

China, ranked 10th regionally, has seen the largest rank improvement of all countries this year, moving up by a remarkable 15 places to 47th overall. China has been building on a number of clear strengths: it is ranked 7th for its natural resources, with many World Heritage natural sites and fauna that is among the richest in the world. It is ranked 15th for its cultural resources, with many World Heritage cultural sites, many international fairs and exhibitions held in the country, and creative industries that are unsurpassed. Moreover, the country is ranked 20th in price competitiveness and 28th for the overall prioritization of the sector. In addition, China has a relatively good air transport infrastructure (ranked 34th). However, there are some weaknesses pulling the country's ranking down. China has a policy environment that is not conducive for T&T development (ranked 87th), with strong foreign ownership restrictions and visa requirements for most visitors. Furthermore, policies related to environmental sustainability get low marks (105th). There are also some safety and security concerns (116th), as well as issues related to health and hygiene (91st), with access to improved sanitation and drinking water that is low by international standards. Ground transport infrastructure gets middling marks (55th), and its tourism infrastructure remains underdeveloped (ranked 80th), with few hotel rooms available and few ATMs, although on a positive note tourism infrastructure has seen a marked improvement since last year.

India is ranked 11th in the region and 62nd overall, up three places since last year. As with China, India is well assessed for its natural resources (ranked 14th) and cultural resources (24th), with many World Heritage sites, both natural and cultural, rich fauna, and strong creative industries in the country. India also has quite a good air transport network (ranked 37th), particularly given the country's stage of development, and a reasonable ground transport infrastructure (ranked 49th). However, some aspects of its tourism infrastructure remain somewhat underdeveloped (ranked 73rd), with very few hotel rooms per capita by international comparison and low ATM penetration. Further, despite government and industry efforts to promote the country abroad (India is ranked 1st with regard to tourism fair attendance) and the exposure given to recent promotional campaigns, the assessment of marketing and branding to attract tourists remains average (ranked 53rd). Another area of concern is the policy environment, ranked 108th, with much time and cost for starting a business, bilateral Air Service Agreements that are not assessed as open, and visas required for most visitors.

Indonesia is ranked 15th in the regional ranking and 81st overall. In terms of strengths, Indonesia places 28th for its natural resources, with several World Heritage natural sites and the richness of its fauna as measured by the known species in the country. Indonesia also has rich cultural resources (ranked 37th), with five World Heritage cultural sites, a number of international fairs and exhibitions held in the country, and strong creative industries. Further, the country is ranked 3rd overall on price competitiveness in the T&T industry because of its competitive hotel prices (ranked 7th), low ticket taxes and airport charges, and favorable fuel prices. In addition, it is ranked 10th for the national prioritization of Travel & Tourism. However, these strengths are held back by weaknesses such as underdeveloped infrastructure in the country, including to a certain extent air transport (60th) and especially ground transport (89th), tourism infrastructure (88th), and ICT infrastructure (102nd). There are also some concerns related to safety and security, particularly a lack of trust of police services and the prevalence of deaths from road traffic accidents. In addition, the country is not prioritizing the sustainable development of the tourism sector (ranked 130th), of particular concern given the sector's dependence on the quality of the natural environment in the country.

The Philippines is ranked just behind Indonesia regionally and 86th overall, down five places since last year. Among the country's strengths are its natural resources: it is ranked 23rd for the number of World Heritage natural sites and 40th for the total known species in the country. The Philippines also benefits from excellent price competitiveness (ranked 16th), with low prices overall, particularly hotel prices, and low ticket taxes and airport charges. There are also some aspects of the policy rules and regulations regime that are conducive to the development of the sector, such as few visa requirements for foreign visitors (ranked 3rd) and bilateral Air Service Agreements that are assessed as comparatively open (28th), although other areas—such as the protection of property rights, rules related to foreign investment, and the difficulty of starting a business in the country—remain a challenge. Other matters of concern are safety and security (ranked 113th), health and hygiene levels (87th), and transport, tourism, and ICT infrastructures that require upgrading.

Middle East and Africa

Table 6 shows the regional ranking for the Middle East and Africa region. As the table shows, **The United Arab Emirates (UAE)** is ranked 1st in the region this year, at 33rd overall, up seven places since last year, overtaking Israel and Tunisia. While the UAE is not endowed with rich natural and cultural resources (117th and 84th, respectively), it does very well in several other areas captured by the Index. For example, the country is characterized by a positive attitude toward foreign travelers (10th) and is also seen as very safe from crime and violence (ranked 14th). The UAE's infrastructure also gets good marks, particularly its air transport infrastructure, which is ranked a very high 4th out of all countries assessed (up one place since last year). The government is seen as prioritizing the sector strongly (ranked 3rd), carrying out very effective destination-marketing campaigns (ranked 1st) and ensuring the presence of the country at major T&T fairs internationally. An area of clear improvement since last year is in the rules and regulations, which have been adjusted to better support the sector's development, with the UAE moving up from 81st place last year to 53rd this year.

Israel is the second-ranked country in the region, at 36th overall, showing a stable performance since last year. The country's human resources base is well evaluated (29th), providing healthy and well-trained people to work in the T&T sector. Further, its infrastructure is quite well developed compared with those of other countries in the region, especially its ICT infrastructure. Israel's rules and regulations, ranked 39th, are conducive to the development of the sector, with low foreign ownership restrictions and visas required from few countries, although it requires much time to set up a business in the country (ranked 91st). But although Israel gets excellent marks related to health and hygiene (ranked 14th), safety and security continues to be a major concern, placing the country at 73rd, primarily related to concerns about terrorism (ranked 129th).

Qatar is ranked 3rd in the region and 37th overall, directly following Israel in the full ranking. Qatar benefits from an extremely safe and secure environment (ranked 9th), high quality human resources in the country (ranked 22nd for human resources), good tourism infrastructure (28th), and excellent air transport infrastructure (20th), in line with its increasing role as an air transportation hub. In order to further improve the country's T&T competitiveness, efforts should be made to upgrade its ground transport infrastructure (ranked 59th), more focus should be placed on environmental sustainability (69th), and further efforts should be made to improve the policy and regulatory environment (ranked 47th), in particular by facilitating more foreign direct investment and easing visa requirements for entering the country.

Mauritius is the fourth highest ranked country in the region, at 40th overall. Mauritius is ranked 1st out of all countries for the overall prioritization of the sector, with high government spending on the tourism industry (ranked 3rd), ensuring excellent destination-marketing campaigns to attract tourists (ranked 2nd), and ensuring the country's presence at many international tourism fairs. Along similar lines, Mauritius is ranked 3rd for the country's overall affinity for Travel & Tourism, with the sector representing an important part of the economy and the general attitude of the population to foreign travelers being extremely welcoming. The country's tourism infrastructure is well developed by regional standards, and the policy environment is supportive of the development of the sector (ranked 13th). Mauritius also benefits from price competitiveness (ranked 26th), with relatively low prices overall and taxation that is not overly burdensome, although this would be improved through lower ticket taxes and airport charges, and more competitive hotel prices. Safety and security levels are also good by regional standards (ranked 40th), and are on a par with countries such as Germany and Hungary. In terms of challenges, although the government is seen to be making an effort to develop the industry in a sustainable way (ranked 13th), this effort could be backed up by more stringent environmental regulations (ranked 61st).

Tunisia is ranked 6th among Middle East and African countries and 44th overall, down five places since last year. Tunisia benefits from a strong assessment of the prioritization of Travel & Tourism (15th)—similar to top-10 ranked countries such as Austria and Canada—with high government spending on the sector, effective destination-marketing campaigns, and attendance at several major international tourism fairs. Further, unlike some other countries in the region, Tunisia is perceived as relatively safe from crime and violence (ranked 31st). In addition, price competitiveness is a positive attribute, ranked 7th, with competitive hotel prices, low fuel levels, reasonable taxation, and low prices more generally. On the other hand, health and hygiene remains an area of concern (75th), with a relatively low physician density and a low concentration of hospital beds. The country's ICT infrastructure also remains underdeveloped (ranked 77th). This is an area that has seen a deterioration since last year.

South Africa is ranked 8th in the region and 61st overall, with a stable performance since last year. South Africa, together with Mauritius, make up the two sub-Saharan African countries in the top half of the overall ranking. South Africa is ranked a high 22nd for its natural resources, and 45th for its cultural resources, based on its many World Heritage sites, its rich fauna, its creative industries, and the many international fairs and exhibitions held in the country. South Africa also benefits from

Table 6: The Travel & Tourism Competitiveness Index: Middle East and Africa

				SUBINDEXES					
	OVERALL INDEX			T&T regulatory framework		T&T business environment and infrastructure		T&T human, cultural, and natural resources	
Country/Economy	Regional rank	Overall rank	Score	Rank	Score	Rank	Score	Rank	Score
United Arab Emirates	1	33	4.57	39	5.12	23	4.79	78	3.81
Israel	2	36	4.50	37	5.13	39	4.21	51	4.16
Qatar	3	37	4.49	35	5.16	34	4.48	75	3.83
Mauritius	4	40	4.43	24	5.39	44	4.04	69	3.86
Bahrain	5	41	4.42	55	4.75	28	4.64	67	3.88
Tunisia	6	44	4.37	31	5.26	49	3.87	56	3.97
Jordan	7	54	4.25	36	5.15	67	3.55	54	4.05
South Africa	8	61	4.10	82	4.31	52	3.81	49	4.17
Egypt	9	64	4.09	52	4.84	65	3.59	73	3.84
Oman	10	68	4.01	59	4.69	53	3.80	99	3.54
Saudi Arabia	11	71	3.89	104	4.01	45	4.02	90	3.65
Morocco	12	75	3.86	64	4.59	78	3.27	83	3.73
Botswana	13	79	3.81	66	4.55	76	3.29	95	3.60
Namibia	14	82	3.77	71	4.45	77	3.27	94	3.60
Syria	15	85	3.73	68	4.48	82	3.20	100	3.53
Gambia, The	16	87	3.72	65	4.56	90	3.06	98	3.55
Kuwait	17	95	3.63	109	3.87	50	3.85	128	3.16
Kenya	18	97	3.60	93	4.15	100	2.81	72	3.84
Tanzania	19	98	3.59	102	4.03	118	2.56	50	4.17
Zambia	20	100	3.53	87	4.26	115	2.64	85	3.69
Senegal	21	101	3.50	101	4.03	108	2.71	82	3.75
Ghana	22	110	3.40	105	3.94	102	2.78	104	3.49
Uganda	23	111	3.38	115	3.75	114	2.64	81	3.76
Libya	24	112	3.38	97	4.07	109	2.71	114	3.37
Algeria	25	115	3.31	108	3.88	98	2.84	127	3.22
Madagascar	26	116	3.28	112	3.79	106	2.74	119	3.32
Malawi	27	117	3.27	106	3.91	131	2.43	107	3.47
Mali	28	119	3.19	114	3.76	126	2.48	120	3.32
Benin	29	120	3.18	117	3.66	121	2.52	116	3.37
Zimbabwe	30	121	3.17	125	3.57	125	2.49	109	3.43
Ethiopia	31	123	3.15	128	3.27	112	2.65	101	3.52
Mozambique	32	124	3.12	120	3.66	129	2.45	125	3.24
Cameroon	33	125	3.09	126	3.54	132	2.36	115	3.37
Burkina Faso	34	126	3.08	118	3.66	122	2.52	131	3.05
Mauritania	35	127	3.07	123	3.61	127	2.47	129	3.14
Nigeria	36	128	3.02	132	3.10	116	2.59	113	3.38
Côte d'Ivoire	37	130	2.99	131	3.12	123	2.50	118	3.35
Burundi	38	131	2.98	129	3.17	119	2.53	126	3.24
Lesotho	39	132	2.92	121	3.64	128	2.45	133	2.66
Chad	40	133	2.52	133	2.83	133	1.93	132	2.80

price competitiveness, with reasonably priced hotel rooms and a favorable tax regime. Infrastructure in South Africa is also well developed for the region, with air transport infrastructure ranked 43rd and a particularly good assessment of railroad quality (37th) and road quality (40th). Overall, policy rules and regulations are conducive to the sector's development (ranked 36th), with well-protected property rights and few visa requirements for visitors. However, there are also some areas of weakness that have brought down the country's overall ranking. Safety and security is of serious concern (ranked 128th), as is the level of health and hygiene, where South Africa is ranked 94th as a result of its low physician density and concerns about access to improved sanitation in particular. Related to this, health indicators are extremely worrisome. South Africa's life expectancy is low, at 51 years, placing the country 120th overall, a ranking related in large part to the very high rates of communicable diseases such as HIV/AIDS. Improving the health of the workforce is of urgent concern for the future of the T&T sector, as well as for all sectors in the economy.

Egypt directly follows South Africa in the regional ranking at 9th place, ranked 64th overall, up two places from last year. The country is rich in cultural heritage, with seven World Heritage cultural sites and several international fairs and exhibitions held in the country. In addition to its cultural attributes, it benefits from excellent price competitiveness, ranked 1st out of all countries, with competitive hotel prices, low fuel costs, and low prices more generally. Further, there is a strong national prioritization of the sector (ranked 9th), with the government ensuring both relatively high spending on Travel & Tourism and the country's presence at major tourism fairs. On the other hand, Egypt's infrastructure needs improvement, particularly its tourism infrastructure (74th), its ground transport infrastructure (79th), and its ICT infrastructure (84th). A focus on improving education and training in the country, ranked 83rd, would also improve the country's overall T&T competitiveness.

Morocco is ranked 12th in the regional ranking and 75th overall, down eight places since last year. Morocco receives a good evaluation for aspects of its cultural resources, and is notably ranked 19th for the number of World Heritage cultural sites in the country. In addition, the country is seen to be prioritizing the development of the sector (ranked 30th), and the government is making efforts to develop the T&T sector in a sustainable way, protecting the natural environment. In order to improve the industry's competitiveness further, efforts should be made to improve health and hygiene levels in the country and upgrade the educational system, as well as make further improvements to the country's transport and tourism infrastructure. Since last year, areas that have seen a marked deterioration are aspects of safety and security and the country's price competitiveness.

Botswana is ranked just behind Morocco in the regional ranking and 79th overall, showing an improvement of eight places since last year. The country, known for its beautiful natural parks, is ranked 34th out of all countries for its natural resources, with much nationally protected land area (ranked 13th), rich fauna, and a lack of environmental damage. The country also benefits from excellent price competitiveness, where it is ranked 9th because of low ticket taxes and airport charges, a favorable tax regime in the country, and low prices more generally. In addition, the country has seen a marked improvement in the measured prioritization of the tourism sector over the past year, with significantly higher government expenditure on the sector and presence at more international tourism fairs. However, Botswana does face some challenges that lead to its rather low ranking overall. The policy regime is not extremely conducive to the development of the sector. The country's bilateral Air Service Agreements are not evaluated as open (103rd), and much time is required for starting a new business (78 days, placing the country 123rd). Further, Botswana's transport infrastructure is somewhat underdeveloped, as well as its tourism infrastructure, with a low hotel room concentration (72nd), a limited presence of international car rental companies (73rd), and relatively few ATMs (70th). There are also some concerns in the area of health and hygiene, attributable to a low physician density (103rd) and limited access to improved sanitation (102nd). Associated with this, the greatest comparative weakness relates to the health of the workforce, where life expectancy of just 52 years places the country 119th, although, on a positive note, this has been improving significantly in recent years.

Gambia is ranked 16th in the region and 87th overall. Gambia's government places great priority on tourism (ranked 11th), with nearly 10 percent of its budget devoted to the sector (ranking the country 9th on this indicator). Further, developing the industry sustainably to protect the natural environment is also seen to be a priority for the government (ranked 3rd). In addition, Gambia benefits greatly from price competitiveness, ranked 1st out of all countries both for the hotel price index as well as for its overall low price levels (purchasing power parity). The country is also perceived to be safe from crime and violence (ranked 27th), another important feature. On the other hand, there are a number of areas requiring attention to increase Gambia's competitiveness. Although the ground transport infrastructure is somewhat developed by regional standards (ranked 58th), it could be upgraded. Efforts should be made to improve the air transport infrastructure (85th) and general tourism infrastructure (124th). Attention should also be placed on improving the health of the workforce and upgrading the educational system. Finally, policy rules and regulations are not conducive to the industry's development at present (ranked 85th), with visas required for many visitors and much time and cost required for starting a business in the country.

Kenya, a country long famous for its tourism attributes, is ranked 18th regionally and 97th overall, up four places since last year. Kenya is ranked 25th for its natural resources, with two World Heritage natural sites and its rich diversity of fauna. Tourism is a strong priority within the country (ranked 12th on this pillar), with high government spending on the sector, effective destination-marketing campaigns, and country presence at several international fairs and exhibitions. In addition, there is a strong focus on environmental sustainability in the country (ranked 16th), which is particularly important for Kenya given the sector's dependence on the natural environment. On the downside, the policy environment is not at present conducive to the development of the sector (ranked 90th), with bilateral Air Service Agreements that are not open, insufficiently protected property rights, and much time and cost required for starting a business. In addition, infrastructure remains underdeveloped and health and hygiene levels require improvement. Finally, the security situation in the country remains a significant hindrance to further developing the sector (ranked 121st).

Tanzania is ranked just behind Kenya regionally and 98th overall, down 10 places since last year. Tanzania is ranked 3rd worldwide for its natural environment, with several World Heritage natural sites, rich fauna, and so much protected land area as to place the country 5th on that indicator. This is buttressed by an important focus in the country on environmental sustainability (ranked 32nd), particularly as it pertains to the development of this industry. There is also a general affinity of the population to Travel & Tourism, and it is clearly seen to be an overall national priority (ranked 33rd on both pillars). On the other hand, its policy environment is not sufficiently supportive of the development of the sector, and is measurably less so than last year. Other issues of concern are security levels in the country, and a focus must be placed on improving the health of the workforce, upgrading the educational system, and improving all types of infrastructure on which the industry is dependent.

Zimbabwe is ranked further down in the rankings, at 121st place overall. This is a low ranking for a country that was until recently a popular tourist destination. Indeed, Zimbabwe is ranked 35th for natural resources overall, with a number of World Heritage natural sites, much nationally protected land area, and rich fauna. Despite these strengths, which have attracted tourists to Zimbabwe over the years, the Index mainly highlights the country's weaknesses in all of the other areas. After years of political mismanagement, the policy environment is the worst in the world (ranked 133rd), with rock bottom assessments for laws related to FDI and property rights. Safety and security is also a major concern, with high crime and violence and a lack of trust in the reliability of police services to provide protection from crime (130th), reflecting the general breakdown in law and order in the country in recent years. There are also concerns related to human resources, with low enrollment rates in primary and secondary education by international standards, and among the worst health indicators in the world: life expectancy is just 43 years now in the country, placing it 131st. Better governance will be imperative to get the country back on track for improved T&T competitiveness.

Conclusions

This chapter has assessed the T&T competitiveness of 133 economies, spanning all regions of the world, based on the World Economic Forum's Travel & Tourism Competitiveness Index (TTCI). The TTCI represents our best efforts to capture the complex phenomenon of T&T competitiveness, demonstrating that a whole array of reforms and improvements in different areas are required for improving the T&T competitiveness of nations.

By highlighting success factors and obstacles to T&T competitiveness in economies around the world, the TTCI is a tool that can be used to identify the competitive strengths of individual countries as well as the barriers that impede the development of the sector. For the first time this year it is possible to make inter-year comparisons of each country's performance, as the structure of the Index has remained sufficiently constant since last year. We plan to maintain the structure going into the future, which will allow countries to track their progress over time.

It is our hope that the TTCI will continue to be used as a platform for dialogue between the business community and national policymakers working together to improve the T&T competitiveness of their respective economies, and thus contribute to improving the growth prospects and prosperity of their citizens.

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Appendix A: Composition of the Travel & Tourism Competitiveness Index

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

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

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

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

Subindex A: T&T regulatory framework

Pillar 1: Policy rules and regulations

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

Pillar 2: Environmental sustainability

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

Pillar 3: Safety and security

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

Pillar 4: Health and hygiene

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

Pillar 5: Prioritization of Travel & Tourism

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

Subindex B: T&T business environment and infrastructure

Pillar 6: Air transport infrastructure

6.01 Quality of air transport infrastructure
6.02 Available seat kilometers, domestic (hard data)[2]
6.03 Available seat kilometers, international (hard data)[2]
6.04 Departures per 1,000 population (hard data)
6.05 Airport density (hard data)
6.06 Number of operating airlines (hard data)
6.07 International air transport network (hard data)

Pillar 7: Ground transport infrastructure

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

Pillar 8: Tourism infrastructure

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

Pillar 9: ICT infrastructure

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

Pillar 10: Price competitiveness in the T&T industry

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

(Cont'd.)

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

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

Pillar 11: Human resources

Education and training

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

Availability of qualified labor

11.06 Hiring and firing practices
11.07 Ease of hiring foreign labor
11.08 HIV prevalence (hard data)[3]
11.09 Business impact of HIV/AIDS[3]
11.10 Life expectancy (hard data)

Pillar 12: Affinity for Travel & Tourism

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

Pillar 13: Natural resources

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

Pillar 14: Cultural resources

14.01 Number of World Heritage cultural sites (hard data)
14.02 Sports stadiums (hard data)
14.03 Number of international fairs and exhibitions (hard data)
14.04 Creative industries exports (hard data)

Notes

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

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

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

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

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

2 Variables 6.02 Available seat kilometers, domestic and 6.03 Available seat kilometers, international combine to form one single variable.

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

Appendix B: Travel & Tourism Competitiveness Index 2009 detailed rankings

In this appendix we present the detailed rankings and scores of the Travel & Tourism Competitiveness Index for 2009 for all 133 countries covered this year. This complements the regional rankings shown in the chapter.

Table B1: The Travel & Tourism Competitiveness Index 2009

			SUBINDEXES					
	OVERALL INDEX		T&T regulatory framework		T&T business environment and infrastructure		T&T human, cultural, and natural resources	
Country/Economy	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Albania	90	3.68	77	4.38	104	2.76	66	3.89
Algeria	115	3.31	108	3.88	98	2.84	127	3.22
Argentina	65	4.08	74	4.40	70	3.51	41	4.34
Armenia	91	3.65	58	4.70	105	2.75	102	3.51
Australia	9	5.24	27	5.31	15	5.01	3	5.42
Austria	2	5.46	4	5.91	6	5.22	7	5.24
Azerbaijan	76	3.84	47	4.95	84	3.19	111	3.40
Bahrain	41	4.42	55	4.75	28	4.64	67	3.88
Bangladesh	129	3.02	130	3.16	103	2.78	130	3.11
Barbados	30	4.77	19	5.47	29	4.62	45	4.21
Belgium	22	4.92	21	5.45	32	4.56	20	4.73
Benin	120	3.18	117	3.66	121	2.52	116	3.37
Bolivia	114	3.33	127	3.33	110	2.70	58	3.96
Bosnia and Herzegovina	107	3.44	96	4.11	93	2.96	124	3.25
Botswana	79	3.81	66	4.55	76	3.29	95	3.60
Brazil	45	4.35	95	4.12	69	3.53	4	5.40
Brunei Darussalam	69	3.99	99	4.04	47	3.96	60	3.95
Bulgaria	50	4.30	56	4.74	48	3.96	46	4.20
Burkina Faso	126	3.08	118	3.66	122	2.52	131	3.05
Burundi	131	2.98	129	3.17	119	2.53	126	3.24
Cambodia	108	3.43	111	3.80	113	2.64	74	3.84
Cameroon	125	3.09	126	3.54	132	2.36	115	3.37
Canada	5	5.32	23	5.41	4	5.36	10	5.19
Chad	133	2.52	133	2.83	133	1.93	132	2.80
Chile	57	4.18	49	4.87	58	3.76	64	3.92
China	47	4.33	88	4.24	59	3.73	12	5.01
Colombia	72	3.89	91	4.18	88	3.08	34	4.43
Costa Rica	42	4.42	48	4.94	55	3.77	31	4.54
Côte d’Ivoire	130	2.99	131	3.12	123	2.50	118	3.35
Croatia	34	4.54	43	5.02	37	4.32	43	4.28
Cyprus	21	4.92	25	5.35	13	5.05	37	4.38
Czech Republic	26	4.86	16	5.50	36	4.41	24	4.67
Denmark	14	5.08	10	5.59	10	5.08	28	4.57
Dominican Republic	67	4.03	54	4.75	71	3.46	68	3.88
Ecuador	96	3.62	103	4.01	97	2.91	62	3.93
Egypt	64	4.09	52	4.84	65	3.59	73	3.84
El Salvador	94	3.63	73	4.42	83	3.19	123	3.28
Estonia	27	4.83	17	5.50	21	4.81	47	4.19
Ethiopia	123	3.15	128	3.27	112	2.65	101	3.52
Finland	15	5.07	5	5.82	25	4.69	21	4.71
France	4	5.34	8	5.67	7	5.22	11	5.13
Gambia, The	87	3.72	65	4.56	90	3.06	98	3.55
Georgia	73	3.89	33	5.20	99	2.84	92	3.64
Germany	3	5.41	13	5.56	3	5.44	9	5.22
Ghana	110	3.40	105	3.94	102	2.78	104	3.49
Greece	24	4.91	18	5.49	27	4.66	27	4.58
Guatemala	70	3.90	81	4.32	81	3.20	48	4.17
Guyana	102	3.50	94	4.14	111	2.68	88	3.66
Honduras	83	3.77	83	4.31	87	3.08	63	3.92
Hong Kong SAR	12	5.18	2	5.93	12	5.05	30	4.55
Hungary	38	4.45	26	5.35	42	4.06	59	3.95
Iceland	16	5.07	3	5.92	17	4.93	39	4.37
India	62	4.09	107	3.88	63	3.65	18	4.74
Indonesia	81	3.79	113	3.77	79	3.24	40	4.36
Ireland	18	4.99	7	5.73	22	4.79	32	4.45
Israel	36	4.50	37	5.13	39	4.21	51	4.16
Italy	28	4.78	46	4.96	26	4.68	22	4.71

(Cont’d.)

Appendix B: Travel & Tourism Competitiveness Index 2009 detailed rankings *(cont'd.)*

Table B1: The Travel & Tourism Competitiveness Index 2009 *(cont'd.)*

			SUBINDEXES					
	OVERALL INDEX		T&T regulatory framework		T&T business environment and infrastructure		T&T human, cultural, and natural resources	
Country/Economy	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Jamaica	60	4.13	51	4.85	57	3.76	80	3.76
Japan	25	4.91	40	5.10	20	4.83	15	4.81
Jordan	54	4.25	36	5.15	67	3.55	54	4.05
Kazakhstan	92	3.65	60	4.69	96	2.93	121	3.32
Kenya	97	3.60	93	4.15	100	2.81	72	3.84
Korea, Rep.	31	4.72	41	5.06	35	4.45	26	4.64
Kuwait	95	3.63	109	3.87	50	3.85	128	3.16
Kyrgyz Republic	106	3.45	76	4.39	124	2.49	105	3.48
Latvia	48	4.31	32	5.22	43	4.04	86	3.68
Lesotho	132	2.92	121	3.64	128	2.45	133	2.66
Libya	112	3.38	97	4.07	109	2.71	114	3.37
Lithuania	49	4.30	30	5.27	46	3.98	89	3.65
Luxembourg	23	4.92	20	5.47	16	4.97	42	4.30
Macedonia, FYR	80	3.81	69	4.46	75	3.29	87	3.67
Madagascar	116	3.28	112	3.79	106	2.74	119	3.32
Malawi	117	3.27	106	3.91	131	2.43	107	3.47
Malaysia	32	4.71	42	5.03	38	4.24	14	4.86
Mali	119	3.19	114	3.76	126	2.48	120	3.32
Malta	29	4.77	11	5.58	31	4.58	52	4.15
Mauritania	127	3.07	123	3.61	127	2.47	129	3.14
Mauritius	40	4.43	24	5.39	44	4.04	69	3.86
Mexico	51	4.29	80	4.34	62	3.66	13	4.87
Moldova	93	3.64	67	4.53	95	2.95	110	3.43
Mongolia	105	3.46	90	4.19	107	2.72	106	3.48
Montenegro	52	4.29	50	4.86	66	3.57	35	4.43
Morocco	75	3.86	64	4.59	78	3.27	83	3.73
Mozambique	124	3.12	120	3.66	129	2.45	125	3.24
Namibia	82	3.77	71	4.45	77	3.27	94	3.60
Nepal	118	3.25	119	3.66	120	2.53	97	3.57
Netherlands	13	5.09	22	5.44	9	5.08	17	4.75
New Zealand	20	4.94	14	5.55	30	4.62	25	4.65
Nicaragua	103	3.49	98	4.05	101	2.79	93	3.63
Nigeria	128	3.02	132	3.10	116	2.59	113	3.38
Norway	19	4.97	9	5.64	19	4.84	36	4.42
Oman	68	4.01	59	4.69	53	3.80	99	3.54
Pakistan	113	3.33	124	3.59	94	2.95	108	3.46
Panama	55	4.23	53	4.80	56	3.77	53	4.14
Paraguay	122	3.16	116	3.74	130	2.44	122	3.30
Peru	74	3.88	89	4.24	92	2.96	33	4.43
Philippines	86	3.73	85	4.27	89	3.07	70	3.86
Poland	58	4.18	72	4.44	68	3.53	29	4.56
Portugal	17	5.01	15	5.52	24	4.74	16	4.78
Puerto Rico	53	4.27	44	4.99	41	4.10	84	3.71
Qatar	37	4.49	35	5.16	34	4.48	75	3.83
Romania	66	4.04	61	4.68	64	3.61	77	3.83
Russian Federation	59	4.14	79	4.35	61	3.70	38	4.37
Saudi Arabia	71	3.89	104	4.01	45	4.02	90	3.65
Senegal	101	3.50	101	4.03	108	2.71	82	3.75
Serbia	88	3.71	78	4.35	80	3.20	96	3.57
Singapore	10	5.24	6	5.77	5	5.25	23	4.69
Slovak Republic	46	4.34	34	5.20	54	3.78	55	4.05
Slovenia	35	4.53	38	5.13	33	4.53	61	3.94
South Africa	61	4.10	82	4.31	52	3.81	49	4.17
Spain	6	5.29	29	5.29	8	5.21	5	5.36
Sri Lanka	78	3.82	86	4.27	73	3.34	71	3.85
Suriname	99	3.54	110	3.86	91	3.01	79	3.76
Sweden	7	5.28	12	5.57	14	5.04	8	5.23
Switzerland	1	5.68	1	6.01	1	5.49	2	5.54
Syria	85	3.73	68	4.48	82	3.20	100	3.53
Taiwan, China	43	4.40	75	4.40	18	4.87	65	3.92
Tajikistan	109	3.41	84	4.30	117	2.58	117	3.37
Tanzania	98	3.59	102	4.03	118	2.56	50	4.17
Thailand	39	4.45	70	4.46	40	4.14	19	4.74

(Cont'd.)

Appendix B: Travel & Tourism Competitiveness Index 2009 detailed rankings *(cont'd.)*

Table B1: The Travel & Tourism Competitiveness Index 2009 *(cont'd.)*

			SUBINDEXES					
	OVERALL INDEX		T&T regulatory framework		T&T business environment and infrastructure		T&T human, cultural, and natural resources	
Country/Economy	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Trinidad and Tobago	84	3.75	100	4.04	51	3.82	112	3.38
Tunisia	44	4.37	31	5.26	49	3.87	56	3.97
Turkey	56	4.20	63	4.60	60	3.73	44	4.28
Uganda	111	3.38	115	3.75	114	2.64	81	3.76
Ukraine	77	3.84	62	4.66	72	3.37	103	3.50
United Arab Emirates	33	4.57	39	5.12	23	4.79	78	3.81
United Kingdom	11	5.22	28	5.29	11	5.07	6	5.30
United States	8	5.28	57	4.70	2	5.47	1	5.67
Uruguay	63	4.09	45	4.98	74	3.33	57	3.96
Venezuela	104	3.46	122	3.63	86	3.12	91	3.65
Vietnam	89	3.70	92	4.15	85	3.12	76	3.83
Zambia	100	3.53	87	4.26	115	2.64	85	3.69
Zimbabwe	121	3.17	125	3.57	125	2.49	109	3.43

Appendix B: Travel & Tourism Competitiveness Index 2009 detailed rankings *(cont'd.)*

Table B2: The Travel & Tourism Competitiveness Index: Regulatory framework

			PILLARS									
	T&T REGULATORY FRAMEWORK		1. Policy rules and regulations		2. Environmental sustainability		3. Safety and security		4. Health and hygiene		5. Prioritization of Travel & Tourism	
Country/Economy	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Albania	77	4.38	92	3.99	88	4.24	63	5.21	59	4.86	107	3.62
Algeria	108	3.88	111	3.69	116	3.90	97	4.60	81	4.17	124	3.04
Argentina	74	4.40	98	3.91	119	3.85	102	4.45	43	5.64	79	4.15
Armenia	58	4.70	77	4.27	113	3.93	45	5.60	30	6.02	104	3.67
Australia	27	5.31	27	5.09	40	4.88	25	5.94	41	5.71	37	4.91
Austria	4	5.91	28	5.09	9	5.56	6	6.47	5	6.87	14	5.55
Azerbaijan	47	4.95	65	4.44	72	4.39	37	5.81	39	5.80	66	4.31
Bahrain	55	4.75	32	5.04	129	3.42	30	5.87	55	5.06	63	4.37
Bangladesh	130	3.16	117	3.45	125	3.64	131	3.10	115	2.27	117	3.33
Barbados	19	5.47	24	5.14	29	5.08	26	5.94	40	5.77	19	5.43
Belgium	21	5.45	20	5.23	8	5.59	21	6.01	16	6.55	92	3.88
Benin	117	3.66	124	3.24	38	4.88	68	5.12	125	1.64	115	3.42
Bolivia	127	3.33	131	2.62	126	3.62	104	4.40	104	3.09	128	2.94
Bosnia and Herzegovina	96	4.11	119	3.40	115	3.92	57	5.30	56	4.99	126	2.95
Botswana	66	4.55	70	4.36	62	4.60	49	5.52	97	3.43	43	4.82
Brazil	95	4.12	94	3.97	33	4.96	130	3.36	80	4.20	84	4.11
Brunei Darussalam	99	4.04	88	4.04	131	3.32	19	6.08	105	3.02	99	3.76
Bulgaria	56	4.74	95	3.95	76	4.35	87	4.71	15	6.56	78	4.15
Burkina Faso	118	3.66	110	3.72	71	4.41	83	4.83	122	1.83	110	3.51
Burundi	129	3.17	128	2.83	75	4.36	106	4.35	118	2.08	133	2.23
Cambodia	111	3.80	122	3.33	107	4.00	88	4.68	126	1.56	18	5.44
Cameroon	126	3.54	120	3.37	110	3.98	80	4.88	112	2.47	125	3.00
Canada	23	5.41	5	5.50	46	4.81	29	5.89	51	5.38	17	5.47
Chad	133	2.83	132	2.52	128	3.58	115	4.03	132	1.07	127	2.95
Chile	49	4.87	19	5.24	64	4.56	38	5.79	66	4.58	77	4.15
China	88	4.24	87	4.08	105	4.03	116	4.02	91	3.89	28	5.19
Colombia	91	4.18	60	4.53	84	4.26	125	3.72	86	4.07	67	4.30
Costa Rica	48	4.94	48	4.75	27	5.13	72	5.08	65	4.59	29	5.16
Côte d'Ivoire	131	3.12	115	3.51	102	4.10	124	3.74	119	2.03	132	2.24
Croatia	43	5.02	80	4.21	39	4.88	42	5.70	33	5.97	64	4.35
Cyprus	25	5.35	69	4.38	43	4.83	12	6.25	45	5.61	11	5.69
Czech Republic	16	5.50	46	4.76	23	5.18	44	5.63	6	6.82	32	5.10
Denmark	10	5.59	4	5.58	3	5.83	4	6.50	28	6.10	91	3.95
Dominican Republic	54	4.75	26	5.10	108	4.00	101	4.50	68	4.52	13	5.63
Ecuador	103	4.01	126	3.20	86	4.24	99	4.54	73	4.40	106	3.65
Egypt	52	4.84	55	4.60	103	4.08	67	5.13	64	4.59	9	5.81
El Salvador	73	4.42	40	4.89	58	4.63	112	4.14	92	3.86	56	4.56
Estonia	17	5.50	31	5.06	30	5.08	20	6.02	23	6.26	34	5.05
Ethiopia	128	3.27	100	3.86	109	3.98	117	3.99	133	1.02	111	3.50
Finland	5	5.82	6	5.45	7	5.62	1	6.75	12	6.63	54	4.64
France	8	5.67	25	5.12	4	5.76	55	5.32	9	6.74	21	5.40
Gambia, The	65	4.56	85	4.11	52	4.71	27	5.92	107	2.80	25	5.25
Georgia	33	5.20	56	4.58	56	4.65	32	5.86	29	6.06	40	4.85
Germany	13	5.56	17	5.26	6	5.68	39	5.77	7	6.79	65	4.33
Ghana	105	3.94	84	4.13	48	4.76	69	5.12	117	2.11	108	3.59
Greece	18	5.49	57	4.55	47	4.77	47	5.59	19	6.39	3	6.14
Guatemala	81	4.32	45	4.76	95	4.19	114	4.09	88	4.01	55	4.56
Guyana	94	4.14	118	3.43	50	4.74	111	4.16	84	4.13	72	4.25
Honduras	83	4.31	41	4.87	59	4.63	89	4.68	103	3.23	83	4.13
Hong Kong SAR	2	5.93	2	6.03	80	4.30	5	6.48	1	7.00	8	5.84
Hungary	26	5.35	37	4.92	24	5.14	41	5.75	11	6.64	68	4.30
Iceland	3	5.92	21	5.19	13	5.37	2	6.71	4	6.91	20	5.41
India	107	3.88	108	3.73	74	4.37	120	3.91	111	2.57	42	4.84
Indonesia	113	3.77	123	3.27	130	3.40	119	3.91	110	2.58	10	5.70
Ireland	7	5.73	3	5.68	12	5.47	18	6.10	25	6.22	27	5.20
Israel	37	5.13	39	4.89	81	4.30	73	5.06	14	6.57	41	4.85
Italy	46	4.96	71	4.36	51	4.73	82	4.88	27	6.18	51	4.68
Jamaica	51	4.85	8	5.40	93	4.21	96	4.60	85	4.09	5	5.98
Japan	40	5.10	38	4.91	49	4.74	84	4.83	21	6.29	49	4.73
Jordan	36	5.15	61	4.52	35	4.93	17	6.13	58	4.89	24	5.28
Kazakhstan	60	4.69	86	4.10	117	3.89	76	4.98	8	6.77	101	3.73
Kenya	93	4.15	90	4.00	16	5.34	121	3.88	121	1.86	12	5.68
Korea, Rep.	41	5.06	34	5.03	55	4.67	71	5.10	37	5.84	52	4.67
Kuwait	109	3.87	101	3.82	133	2.79	28	5.92	76	4.38	131	2.44
Kyrgyz Republic	76	4.39	102	3.82	89	4.24	90	4.67	50	5.44	97	3.77
Latvia	32	5.22	51	4.71	14	5.34	35	5.82	26	6.21	88	4.00

(Cont'd.)

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

			PILLARS									
	T&T REGULATORY FRAMEWORK		1. Policy rules and regulations		2. Environmental sustainability		3. Safety and security		4. Health and hygiene		5. Prioritization of Travel & Tourism	
Country/Economy	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Lesotho	121	3.64	112	3.64	90	4.23	95	4.61	113	2.31	114	3.42
Libya	97	4.07	125	3.23	122	3.75	34	5.82	77	4.26	120	3.28
Lithuania	30	5.27	59	4.53	21	5.25	33	5.84	2	6.96	95	3.78
Luxembourg	20	5.47	12	5.33	15	5.34	7	6.43	22	6.28	89	3.98
Macedonia, FYR	69	4.46	76	4.28	83	4.27	64	5.19	42	5.65	129	2.93
Madagascar	112	3.79	83	4.13	65	4.53	93	4.62	131	1.14	57	4.54
Malawi	106	3.91	106	3.79	60	4.62	53	5.34	108	2.68	123	3.11
Malaysia	42	5.03	9	5.38	54	4.69	59	5.29	69	4.47	23	5.31
Mali	114	3.76	116	3.50	70	4.46	77	4.93	124	1.76	76	4.17
Malta	11	5.58	54	4.64	66	4.52	11	6.31	3	6.94	16	5.48
Mauritania	123	3.61	107	3.79	96	4.17	75	4.98	128	1.39	100	3.74
Mauritius	24	5.39	13	5.30	53	4.70	40	5.75	60	4.86	1	6.34
Mexico	80	4.34	58	4.54	101	4.11	126	3.60	74	4.39	35	5.03
Moldova	67	4.53	82	4.16	82	4.29	52	5.36	48	5.53	118	3.30
Mongolia	90	4.19	91	3.99	124	3.68	74	5.03	72	4.42	94	3.80
Montenegro	50	4.86	35	4.96	98	4.15	48	5.53	52	5.35	69	4.30
Morocco	64	4.59	50	4.73	36	4.90	79	4.89	100	3.28	30	5.14
Mozambique	120	3.66	99	3.89	57	4.65	103	4.43	130	1.27	85	4.05
Namibia	71	4.45	79	4.22	26	5.13	60	5.26	102	3.24	62	4.41
Nepal	119	3.66	127	3.06	87	4.24	123	3.81	114	2.30	39	4.87
Netherlands	22	5.44	11	5.37	5	5.68	36	5.82	20	6.38	90	3.96
New Zealand	14	5.55	10	5.37	22	5.20	15	6.19	31	5.99	36	5.00
Nicaragua	98	4.05	97	3.92	41	4.87	56	5.31	109	2.62	109	3.51
Nigeria	132	3.10	113	3.64	61	4.61	133	2.85	129	1.28	122	3.13
Norway	9	5.64	23	5.16	19	5.30	3	6.63	24	6.22	38	4.90
Oman	59	4.69	49	4.73	78	4.33	16	6.14	78	4.23	86	4.05
Pakistan	124	3.59	81	4.19	118	3.88	132	3.06	98	3.38	113	3.45
Panama	53	4.80	30	5.06	34	4.94	70	5.11	83	4.14	48	4.73
Paraguay	116	3.74	121	3.35	121	3.84	105	4.39	99	3.36	98	3.76
Peru	89	4.24	63	4.47	85	4.26	108	4.26	96	3.56	53	4.64
Philippines	85	4.27	72	4.34	73	4.38	113	4.12	87	4.02	59	4.51
Poland	72	4.44	75	4.30	63	4.58	91	4.65	67	4.54	82	4.13
Portugal	15	5.52	29	5.09	18	5.33	22	6.01	32	5.97	26	5.20
Puerto Rico	44	4.99	15	5.28	11	5.49	65	5.16	63	4.74	71	4.25
Qatar	35	5.16	47	4.75	69	4.48	9	6.37	49	5.47	45	4.75
Romania	61	4.68	64	4.46	37	4.89	62	5.26	54	5.09	102	3.72
Russian Federation	79	4.35	114	3.52	114	3.93	129	3.45	10	6.65	75	4.17
Saudi Arabia	104	4.01	73	4.34	123	3.71	81	4.88	93	3.83	121	3.26
Senegal	101	4.03	103	3.82	67	4.52	43	5.67	120	1.89	70	4.28
Serbia	78	4.35	67	4.42	127	3.61	85	4.81	44	5.63	119	3.29
Singapore	6	5.77	1	6.24	42	4.85	10	6.33	53	5.19	2	6.26
Slovak Republic	34	5.20	33	5.03	25	5.14	46	5.59	17	6.53	103	3.70
Slovenia	38	5.13	66	4.44	20	5.27	24	5.95	36	5.85	80	4.14
South Africa	82	4.31	36	4.96	44	4.83	128	3.51	94	3.80	60	4.45
Spain	29	5.29	74	4.32	31	5.04	66	5.16	35	5.91	4	6.04
Sri Lanka	86	4.27	68	4.39	112	3.94	107	4.35	90	3.95	47	4.74
Suriname	110	3.86	129	2.78	77	4.35	61	5.26	82	4.17	130	2.74
Sweden	12	5.57	7	5.42	1	6.22	13	6.22	38	5.82	73	4.19
Switzerland	1	6.01	18	5.25	2	5.89	8	6.40	13	6.62	7	5.88
Syria	68	4.48	93	3.98	111	3.97	23	5.95	89	3.97	58	4.52
Taiwan, China	75	4.40	42	4.85	92	4.21	51	5.47	101	3.28	74	4.18
Tajikistan	84	4.30	109	3.72	97	4.15	54	5.33	61	4.82	112	3.49
Tanzania	102	4.03	89	4.00	32	4.99	98	4.59	127	1.51	33	5.06
Thailand	70	4.46	62	4.48	99	4.13	118	3.94	71	4.42	22	5.34
Trinidad and Tobago	100	4.04	52	4.69	132	3.18	110	4.20	70	4.46	105	3.67
Tunisia	31	5.26	22	5.19	17	5.34	31	5.86	75	4.38	15	5.52
Turkey	63	4.60	44	4.79	104	4.08	92	4.63	62	4.78	46	4.75
Uganda	115	3.75	105	3.79	28	5.09	109	4.25	123	1.81	93	3.83
Ukraine	62	4.66	104	3.80	79	4.31	86	4.74	18	6.44	87	4.03
United Arab Emirates	39	5.12	53	4.68	120	3.84	14	6.22	57	4.91	6	5.97
United Kingdom	28	5.29	14	5.30	10	5.55	78	4.93	46	5.59	31	5.10
United States	57	4.70	16	5.27	106	4.01	122	3.85	47	5.56	44	4.80
Uruguay	45	4.98	78	4.24	68	4.52	50	5.51	34	5.94	50	4.69
Venezuela	122	3.63	130	2.72	91	4.23	127	3.58	79	4.22	116	3.39
Vietnam	92	4.15	96	3.92	100	4.13	100	4.53	95	3.77	61	4.42
Zambia	87	4.26	43	4.80	45	4.82	58	5.29	116	2.24	81	4.14
Zimbabwe	125	3.57	133	2.29	94	4.20	94	4.62	106	2.99	96	3.77

Appendix B: Travel & Tourism Competitiveness Index 2009 detailed rankings *(cont'd.)*

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

			PILLARS									
	T&T BUSINESS ENVIRONMENT AND INFRASTRUCTURE		6. Air transport infrastructure		7. Ground transport infrastructure		8. Tourism infrastructure		9. ICT infrastructure		10. Price competitiveness in T&T industry	
Country/Economy	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Albania	104	2.76	104	2.40	113	2.53	85	2.17	89	2.33	84	4.35
Algeria	98	2.84	110	2.29	101	2.74	95	1.95	97	2.11	32	5.11
Argentina	70	3.51	72	2.87	105	2.71	52	3.82	53	3.28	52	4.87
Armenia	105	2.75	96	2.53	95	2.86	106	1.67	107	1.93	63	4.76
Australia	15	5.01	3	5.86	47	4.08	9	6.35	20	4.90	117	3.85
Austria	6	5.22	26	4.52	10	6.02	1	7.00	23	4.76	118	3.81
Azerbaijan	84	3.19	78	2.75	45	4.10	99	1.92	87	2.40	62	4.76
Bahrain	28	4.64	28	4.38	16	5.48	47	3.93	44	3.76	6	5.62
Bangladesh	103	2.78	111	2.26	60	3.72	132	1.01	125	1.56	18	5.36
Barbados	29	4.62	33	4.23	12	5.68	42	4.16	26	4.63	83	4.41
Belgium	32	4.56	31	4.27	7	6.10	41	4.18	22	4.81	126	3.46
Benin	121	2.52	121	2.11	104	2.71	116	1.54	118	1.67	74	4.56
Bolivia	110	2.70	114	2.23	124	2.25	104	1.76	109	1.87	13	5.40
Bosnia and Herzegovina	93	2.96	130	1.86	126	2.23	57	3.66	66	2.87	100	4.16
Botswana	76	3.29	83	2.69	66	3.48	79	2.50	93	2.19	9	5.57
Brazil	69	3.53	46	3.76	110	2.59	45	4.00	60	3.06	91	4.24
Brunei Darussalam	47	3.96	32	4.24	35	4.30	86	2.17	55	3.24	2	5.88
Bulgaria	48	3.96	90	2.60	75	3.23	18	5.84	47	3.59	73	4.57
Burkina Faso	122	2.52	124	2.03	82	3.15	110	1.62	128	1.50	87	4.28
Burundi	119	2.53	120	2.13	86	3.04	123	1.40	131	1.46	71	4.64
Cambodia	113	2.64	106	2.39	107	2.67	125	1.27	122	1.60	21	5.30
Cameroon	132	2.36	126	2.01	114	2.52	114	1.56	124	1.56	104	4.13
Canada	4	5.36	1	6.74	24	4.91	20	5.72	13	5.30	106	4.11
Chad	133	1.93	131	1.69	131	2.09	131	1.01	133	1.36	125	3.52
Chile	58	3.76	51	3.51	57	3.80	69	3.21	49	3.41	53	4.86
China	59	3.73	34	4.21	55	3.85	80	2.46	68	2.81	20	5.33
Colombia	88	3.08	65	3.06	108	2.66	93	2.03	65	2.90	66	4.74
Costa Rica	55	3.77	42	3.88	103	2.72	33	4.48	61	2.96	57	4.82
Côte d'Ivoire	123	2.50	88	2.65	71	3.34	133	1.00	113	1.77	120	3.76
Croatia	37	4.32	69	3.00	54	3.87	6	6.64	38	3.97	103	4.13
Cyprus	13	5.05	21	4.70	19	5.27	8	6.55	32	4.29	82	4.42
Czech Republic	36	4.41	50	3.51	25	4.88	24	5.11	29	4.39	97	4.18
Denmark	10	5.08	12	5.10	6	6.27	23	5.21	4	5.77	131	3.04
Dominican Republic	71	3.46	47	3.72	99	2.83	51	3.83	83	2.44	81	4.49
Ecuador	97	2.91	86	2.67	119	2.36	89	2.10	85	2.41	40	5.03
Egypt	65	3.59	58	3.32	79	3.19	74	2.97	84	2.43	1	6.02
El Salvador	83	3.19	74	2.81	78	3.20	87	2.10	74	2.69	31	5.13
Estonia	21	4.81	59	3.27	29	4.77	15	6.10	16	5.16	64	4.75
Ethiopia	112	2.65	97	2.51	117	2.47	122	1.42	132	1.45	15	5.39
Finland	25	4.69	14	5.03	21	5.25	38	4.31	14	5.25	121	3.62
France	7	5.22	5	5.54	3	6.55	14	6.19	19	4.95	132	2.86
Gambia, The	90	3.06	85	2.69	58	3.80	124	1.37	100	2.07	14	5.40
Georgia	99	2.84	100	2.48	67	3.48	115	1.54	96	2.12	72	4.57
Germany	3	5.44	7	5.48	5	6.50	17	5.99	11	5.43	119	3.79
Ghana	102	2.78	101	2.47	96	2.85	105	1.76	114	1.77	36	5.06
Greece	27	4.66	19	4.75	43	4.14	5	6.67	40	3.85	114	3.91
Guatemala	81	3.20	71	2.92	92	2.89	82	2.33	78	2.60	23	5.26
Guyana	111	2.68	112	2.26	109	2.63	128	1.08	82	2.44	41	5.00
Honduras	87	3.08	66	3.05	77	3.20	103	1.82	95	2.12	30	5.22
Hong Kong SAR	12	5.05	13	5.08	2	6.58	68	3.21	9	5.44	45	4.97
Hungary	42	4.06	68	3.00	33	4.41	27	4.88	36	4.05	112	3.94
Iceland	17	4.93	18	4.83	34	4.40	13	6.20	2	5.86	128	3.36
India	63	3.65	37	4.17	49	4.06	73	3.07	104	2.00	46	4.96
Indonesia	79	3.24	60	3.22	89	2.97	88	2.10	102	2.06	3	5.86
Ireland	22	4.79	23	4.63	48	4.07	4	6.78	28	4.51	111	3.95
Israel	39	4.21	52	3.45	36	4.28	32	4.49	24	4.69	101	4.15
Italy	26	4.68	27	4.39	40	4.21	3	6.88	25	4.66	130	3.25
Jamaica	57	3.76	55	3.35	41	4.17	70	3.20	48	3.42	68	4.68
Japan	20	4.83	24	4.62	8	6.09	40	4.23	21	4.89	86	4.29
Jordan	67	3.55	63	3.16	69	3.47	65	3.36	70	2.75	42	4.99
Kazakhstan	96	2.93	89	2.61	87	3.01	91	2.05	72	2.73	93	4.22
Kenya	100	2.81	77	2.77	98	2.85	98	1.93	110	1.87	70	4.65
Korea, Rep.	35	4.45	39	3.98	15	5.49	71	3.17	8	5.47	102	4.14
Kuwait	50	3.85	64	3.08	52	3.96	50	3.86	58	3.09	24	5.25
Kyrgyz Republic	124	2.49	127	2.01	112	2.55	129	1.06	98	2.11	65	4.74
Latvia	43	4.04	53	3.38	44	4.12	36	4.38	43	3.77	76	4.55

(Cont'd.)

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

			PILLARS									
	T&T BUSINESS ENVIRONMENT AND INFRASTRUCTURE		6. Air transport infrastructure		7. Ground transport infrastructure		8. Tourism infrastructure		9. ICT infrastructure		10. Price competitiveness in T&T industry	
Country/Economy	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Lesotho	128	2.45	132	1.65	121	2.34	113	1.59	117	1.69	44	4.97
Libya	109	2.71	102	2.46	122	2.29	107	1.67	91	2.21	48	4.93
Lithuania	46	3.98	80	2.75	22	4.95	62	3.49	35	4.18	78	4.54
Luxembourg	16	4.97	41	3.92	13	5.62	21	5.68	10	5.43	92	4.22
Macedonia, FYR	75	3.29	119	2.15	76	3.20	63	3.44	67	2.86	59	4.80
Madagascar	106	2.74	93	2.58	115	2.48	84	2.28	127	1.50	55	4.85
Malawi	131	2.43	129	1.90	106	2.70	126	1.20	126	1.55	60	4.79
Malaysia	38	4.24	35	4.19	28	4.80	77	2.74	46	3.63	4	5.85
Mali	126	2.48	118	2.16	100	2.83	119	1.46	116	1.72	89	4.26
Malta	31	4.58	22	4.66	27	4.82	22	5.57	33	4.26	122	3.59
Mauritania	127	2.47	128	1.97	128	2.16	112	1.60	115	1.75	54	4.86
Mauritius	44	4.04	49	3.53	31	4.55	53	3.79	59	3.07	26	5.24
Mexico	62	3.66	40	3.98	84	3.06	49	3.91	69	2.80	77	4.55
Moldova	95	2.95	122	2.10	111	2.57	90	2.09	73	2.70	22	5.27
Mongolia	107	2.72	76	2.79	130	2.13	108	1.66	105	1.97	37	5.04
Montenegro	66	3.57	56	3.35	88	3.00	64	3.37	39	3.95	95	4.21
Morocco	78	3.27	67	3.01	70	3.36	72	3.07	88	2.36	79	4.53
Mozambique	129	2.45	116	2.21	129	2.14	117	1.51	129	1.49	51	4.88
Namibia	77	3.27	54	3.38	51	3.99	83	2.33	106	1.95	67	4.70
Nepal	120	2.53	109	2.30	123	2.26	130	1.06	130	1.49	10	5.55
Netherlands	9	5.08	16	4.99	9	6.05	25	5.00	5	5.76	124	3.59
New Zealand	30	4.62	11	5.14	53	3.92	29	4.67	18	5.03	85	4.33
Nicaragua	101	2.79	103	2.41	133	2.05	81	2.42	111	1.85	29	5.22
Nigeria	116	2.59	95	2.53	118	2.39	121	1.42	108	1.93	69	4.68
Norway	19	4.84	8	5.35	37	4.27	19	5.74	6	5.52	129	3.31
Oman	53	3.80	57	3.33	46	4.10	61	3.50	75	2.67	17	5.37
Pakistan	94	2.95	99	2.49	73	3.29	102	1.84	101	2.07	35	5.06
Panama	56	3.77	36	4.18	74	3.25	56	3.67	76	2.66	33	5.09
Paraguay	130	2.44	133	1.63	132	2.06	127	1.17	99	2.08	25	5.24
Peru	92	2.96	92	2.58	125	2.24	78	2.50	81	2.52	47	4.94
Philippines	89	3.07	73	2.87	90	2.95	96	1.94	92	2.20	16	5.37
Poland	68	3.53	79	2.75	68	3.47	59	3.51	41	3.82	105	4.12
Portugal	24	4.74	38	4.13	26	4.86	11	6.31	34	4.24	99	4.16
Puerto Rico	41	4.10	29	4.37	30	4.70	48	3.93	52	3.33	98	4.17
Qatar	34	4.48	20	4.74	59	3.75	28	4.86	37	4.05	39	5.03
Romania	64	3.61	81	2.74	83	3.11	34	4.46	42	3.78	110	3.98
Russian Federation	61	3.70	30	4.37	81	3.17	60	3.51	50	3.39	108	4.05
Saudi Arabia	45	4.02	48	3.56	61	3.68	43	4.13	56	3.17	8	5.58
Senegal	108	2.71	82	2.73	93	2.88	94	2.00	103	2.06	115	3.90
Serbia	80	3.20	105	2.40	91	2.91	58	3.53	63	2.91	90	4.25
Singapore	5	5.25	15	5.03	4	6.50	37	4.37	17	5.11	27	5.23
Slovak Republic	54	3.78	108	2.34	50	4.02	31	4.59	45	3.67	88	4.27
Slovenia	33	4.53	70	2.92	23	4.94	16	6.01	27	4.59	94	4.22
South Africa	52	3.81	43	3.87	64	3.58	46	3.96	80	2.58	38	5.03
Spain	8	5.21	10	5.23	20	5.26	1	7.00	31	4.34	96	4.20
Sri Lanka	73	3.34	87	2.65	32	4.50	92	2.04	90	2.27	28	5.22
Suriname	91	3.01	91	2.59	120	2.34	67	3.24	86	2.40	80	4.50
Sweden	14	5.04	9	5.26	14	5.54	26	4.90	1	6.04	127	3.43
Switzerland	1	5.49	17	4.90	1	6.58	7	6.60	3	5.78	123	3.59
Syria	82	3.20	98	2.50	63	3.60	97	1.94	94	2.16	5	5.79
Taiwan, China	18	4.87	45	3.79	11	5.71	35	4.44	12	5.34	34	5.08
Tajikistan	117	2.58	117	2.18	102	2.73	120	1.45	121	1.62	49	4.89
Tanzania	118	2.56	113	2.23	116	2.48	118	1.49	120	1.64	43	4.97
Thailand	40	4.14	25	4.54	56	3.82	39	4.27	71	2.74	19	5.35
Trinidad and Tobago	51	3.82	61	3.18	38	4.25	66	3.26	62	2.94	12	5.46
Tunisia	49	3.87	62	3.18	42	4.16	54	3.79	77	2.62	7	5.60
Turkey	60	3.73	44	3.83	62	3.63	44	4.02	57	3.13	109	4.03
Uganda	114	2.64	125	2.01	94	2.86	101	1.88	119	1.65	61	4.78
Ukraine	72	3.37	94	2.57	72	3.32	55	3.71	51	3.37	116	3.88
United Arab Emirates	23	4.79	4	5.81	39	4.24	30	4.63	30	4.36	50	4.88
United Kingdom	11	5.07	6	5.52	17	5.39	12	6.21	7	5.48	133	2.76
United States	2	5.47	2	6.35	18	5.31	10	6.35	15	5.23	107	4.10
Uruguay	74	3.33	115	2.23	65	3.55	76	2.80	54	3.27	58	4.81
Venezuela	86	3.12	75	2.81	127	2.22	75	2.82	64	2.91	56	4.84
Vietnam	85	3.12	84	2.69	80	3.19	109	1.65	79	2.59	11	5.49
Zambia	115	2.64	107	2.38	97	2.85	111	1.62	112	1.78	75	4.56
Zimbabwe	125	2.49	123	2.05	85	3.05	100	1.90	123	1.57	113	3.91

Appendix B: Travel & Tourism Competitiveness Index 2009 detailed rankings *(cont'd.)*

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

			PILLARS							
	T&T HUMAN, CULTURAL, AND NATURAL RESOURCES		11. Human resources		12. Affinity for Travel & Tourism		13. Natural resources		14. Cultural resources	
Country/Economy	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Albania	66	3.89	62	5.10	4	6.44	129	2.06	79	1.96
Algeria	127	3.22	101	4.52	132	3.62	105	2.54	69	2.19
Argentina	41	4.34	73	5.02	94	4.52	13	4.91	43	2.92
Armenia	102	3.51	81	4.91	46	4.97	118	2.25	82	1.91
Australia	3	5.42	10	5.86	52	4.88	4	5.77	19	5.15
Austria	7	5.24	18	5.68	23	5.40	40	4.05	11	5.83
Azerbaijan	111	3.40	67	5.07	89	4.56	113	2.39	104	1.56
Bahrain	67	3.88	39	5.32	45	4.98	104	2.57	55	2.66
Bangladesh	130	3.11	110	4.30	126	4.06	102	2.60	110	1.46
Barbados	45	4.21	32	5.45	2	6.64	121	2.20	59	2.54
Belgium	20	4.73	13	5.80	42	5.00	120	2.20	8	5.93
Benin	116	3.37	111	4.25	98	4.51	60	3.33	118	1.38
Bolivia	58	3.96	103	4.48	125	4.08	12	4.97	66	2.32
Bosnia and Herzegovina	124	3.25	109	4.36	92	4.54	123	2.19	81	1.92
Botswana	95	3.60	120	3.96	49	4.92	34	4.24	126	1.25
Brazil	4	5.40	55	5.17	108	4.41	2	6.37	14	5.64
Brunei Darussalam	60	3.95	52	5.17	100	4.51	31	4.26	86	1.86
Bulgaria	46	4.20	65	5.09	18	5.45	68	3.11	36	3.13
Burkina Faso	131	3.05	129	3.60	101	4.47	71	3.06	131	1.09
Burundi	126	3.24	127	3.75	16	5.49	97	2.70	133	1.02
Cambodia	74	3.84	108	4.37	15	5.52	58	3.45	77	2.00
Cameroon	115	3.37	123	3.88	97	4.51	42	3.92	129	1.17
Canada	10	5.19	6	5.96	67	4.73	17	4.73	18	5.33
Chad	132	2.80	132	3.33	120	4.16	99	2.67	132	1.02
Chile	64	3.92	47	5.23	111	4.39	63	3.20	48	2.87
China	12	5.01	43	5.25	127	4.00	7	5.26	15	5.51
Colombia	34	4.43	64	5.09	104	4.44	5	5.51	56	2.66
Costa Rica	31	4.54	24	5.63	27	5.36	6	5.42	89	1.77
Côte d'Ivoire	118	3.35	126	3.76	116	4.26	32	4.26	130	1.12
Croatia	43	4.28	53	5.17	9	5.84	69	3.11	41	2.99
Cyprus	37	4.38	27	5.58	5	6.40	111	2.44	38	3.09
Czech Republic	24	4.67	28	5.51	59	4.85	84	2.89	17	5.41
Denmark	28	4.57	2	6.20	72	4.69	77	2.99	26	4.40
Dominican Republic	68	3.88	92	4.78	14	5.55	55	3.53	95	1.66
Ecuador	62	3.93	98	4.59	117	4.24	19	4.71	71	2.16
Egypt	73	3.84	83	4.90	20	5.44	109	2.49	60	2.53
El Salvador	123	3.28	75	5.01	84	4.60	127	2.13	117	1.38
Estonia	47	4.19	38	5.36	31	5.29	45	3.83	67	2.26
Ethiopia	101	3.52	124	3.86	121	4.16	36	4.17	83	1.91
Finland	21	4.71	5	6.00	88	4.56	61	3.29	22	5.00
France	11	5.13	23	5.64	55	4.87	39	4.06	7	5.98
Gambia, The	98	3.55	102	4.51	13	5.58	101	2.62	107	1.48
Georgia	92	3.64	51	5.17	37	5.07	115	2.31	76	2.01
Germany	9	5.22	21	5.65	68	4.73	29	4.29	4	6.23
Ghana	104	3.49	114	4.14	56	4.86	57	3.47	105	1.49
Greece	27	4.58	44	5.25	35	5.10	74	3.02	23	4.96
Guatemala	48	4.17	85	4.90	40	5.03	20	4.71	74	2.06
Guyana	88	3.66	60	5.11	38	5.06	64	3.18	122	1.30
Honduras	63	3.92	76	4.99	44	4.99	38	4.07	97	1.63
Hong Kong SAR	30	4.55	15	5.74	11	5.64	62	3.25	34	3.55
Hungary	59	3.95	77	4.99	115	4.30	103	2.60	31	3.92
Iceland	39	4.37	3	6.16	17	5.45	73	3.03	50	2.84
India	18	4.74	90	4.82	96	4.51	14	4.89	24	4.73
Indonesia	40	4.36	42	5.26	78	4.63	28	4.43	37	3.12
Ireland	32	4.45	9	5.88	36	5.10	116	2.30	25	4.51
Israel	51	4.16	29	5.50	60	4.84	49	3.73	57	2.58
Italy	22	4.71	41	5.28	71	4.69	90	2.79	5	6.08
Jamaica	80	3.76	78	4.97	8	6.13	114	2.32	98	1.62
Japan	15	4.81	20	5.67	131	3.78	41	3.94	10	5.83
Jordan	54	4.05	59	5.13	6	6.39	87	2.84	87	1.85
Kazakhstan	121	3.32	74	5.01	112	4.33	106	2.53	116	1.40
Kenya	72	3.84	100	4.55	50	4.91	25	4.47	114	1.42
Korea, Rep.	26	4.64	19	5.68	114	4.32	91	2.78	13	5.79
Kuwait	128	3.16	61	5.11	128	3.97	131	1.97	100	1.58
Kyrgyz Republic	105	3.48	94	4.76	28	5.36	107	2.49	121	1.30
Latvia	86	3.68	79	4.95	73	4.66	75	3.00	73	2.11

(Cont'd.)

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

			PILLARS							
	T&T HUMAN, CULTURAL, AND NATURAL RESOURCES		11. Human resources		12. Affinity for Travel & Tourism		13. Natural resources		14. Cultural resources	
Country/Economy	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Lesotho	133	2.66	133	3.31	119	4.19	132	1.92	128	1.22
Libya	114	3.37	104	4.45	110	4.39	124	2.17	61	2.45
Lithuania	89	3.65	66	5.08	74	4.66	108	2.49	62	2.39
Luxembourg	42	4.30	26	5.59	12	5.63	67	3.12	46	2.87
Macedonia, FYR	87	3.67	70	5.03	69	4.71	92	2.76	70	2.19
Madagascar	119	3.32	107	4.38	93	4.53	70	3.09	123	1.30
Malawi	107	3.47	117	4.03	80	4.62	46	3.81	115	1.41
Malaysia	14	4.86	30	5.50	21	5.43	21	4.62	32	3.89
Mali	120	3.32	125	3.83	54	4.87	88	2.82	91	1.75
Malta	52	4.15	37	5.37	7	6.22	133	1.84	35	3.16
Mauritania	129	3.14	119	3.98	76	4.63	98	2.70	127	1.25
Mauritius	69	3.86	45	5.25	3	6.59	130	2.01	99	1.60
Mexico	13	4.87	63	5.10	90	4.55	18	4.73	20	5.10
Moldova	110	3.43	80	4.93	30	5.30	122	2.19	120	1.32
Mongolia	106	3.48	96	4.69	64	4.76	76	3.00	109	1.47
Montenegro	35	4.43	40	5.28	1	6.68	80	2.97	51	2.77
Morocco	83	3.73	95	4.75	29	5.30	125	2.17	52	2.70
Mozambique	125	3.24	130	3.54	95	4.52	56	3.49	113	1.43
Namibia	94	3.60	128	3.70	25	5.38	44	3.84	106	1.48
Nepal	97	3.57	118	4.02	61	4.79	37	4.09	119	1.36
Netherlands	17	4.75	11	5.81	63	4.79	81	2.93	16	5.45
New Zealand	25	4.65	17	5.70	24	5.40	27	4.43	39	3.08
Nicaragua	93	3.63	91	4.82	86	4.57	53	3.55	101	1.58
Nigeria	113	3.38	113	4.22	124	4.10	51	3.61	103	1.57
Norway	36	4.42	14	5.78	82	4.61	72	3.05	28	4.24
Oman	99	3.54	84	4.90	107	4.41	82	2.91	80	1.96
Pakistan	108	3.46	115	4.09	129	3.97	83	2.90	44	2.89
Panama	53	4.14	87	4.89	58	4.86	9	5.16	96	1.63
Paraguay	122	3.30	97	4.63	130	3.89	66	3.12	102	1.57
Peru	33	4.43	71	5.03	85	4.57	8	5.21	42	2.92
Philippines	70	3.86	69	5.05	53	4.87	65	3.14	63	2.38
Poland	29	4.56	56	5.16	102	4.46	54	3.53	21	5.08
Portugal	16	4.78	34	5.40	39	5.05	86	2.85	12	5.81
Puerto Rico	84	3.71	35	5.39	41	5.01	96	2.71	92	1.73
Qatar	75	3.83	22	5.64	51	4.90	119	2.23	58	2.54
Romania	77	3.83	58	5.15	105	4.44	85	2.87	49	2.85
Russian Federation	38	4.37	88	4.84	123	4.14	23	4.58	30	3.92
Saudi Arabia	90	3.65	50	5.19	118	4.21	47	3.78	112	1.44
Senegal	82	3.75	105	4.42	87	4.57	33	4.24	90	1.75
Serbia	96	3.57	54	5.17	83	4.60	126	2.14	64	2.36
Singapore	23	4.69	1	6.29	10	5.66	94	2.72	29	4.07
Slovak Republic	55	4.05	48	5.22	91	4.54	48	3.73	53	2.69
Slovenia	61	3.94	36	5.39	70	4.70	79	2.98	54	2.68
South Africa	49	4.17	112	4.23	43	5.00	22	4.59	45	2.87
Spain	5	5.36	31	5.45	48	4.95	30	4.26	1	6.77
Sri Lanka	71	3.85	49	5.22	65	4.76	59	3.41	75	2.01
Suriname	79	3.76	99	4.56	103	4.44	43	3.90	72	2.15
Sweden	8	5.23	8	5.88	62	4.79	50	3.70	2	6.56
Switzerland	2	5.54	4	6.15	34	5.12	15	4.88	6	6.02
Syria	100	3.53	93	4.77	32	5.23	128	2.12	78	2.00
Taiwan, China	65	3.92	16	5.71	77	4.63	110	2.45	47	2.87
Tajikistan	117	3.37	86	4.89	113	4.33	78	2.98	125	1.26
Tanzania	50	4.17	122	3.91	33	5.15	3	6.13	108	1.48
Thailand	19	4.74	57	5.16	22	5.41	24	4.54	33	3.84
Trinidad and Tobago	112	3.38	89	4.84	122	4.14	100	2.63	85	1.91
Tunisia	56	3.97	33	5.44	26	5.38	95	2.71	65	2.34
Turkey	44	4.28	72	5.02	47	4.96	89	2.82	27	4.32
Uganda	81	3.76	116	4.06	79	4.62	11	5.05	124	1.29
Ukraine	103	3.50	68	5.07	66	4.74	112	2.40	88	1.79
United Arab Emirates	78	3.81	25	5.60	19	5.45	117	2.28	84	1.91
United Kingdom	6	5.30	12	5.81	99	4.51	26	4.45	3	6.43
United States	1	5.67	7	5.91	106	4.43	1	6.46	9	5.88
Uruguay	57	3.96	46	5.24	57	4.86	93	2.76	40	2.99
Venezuela	91	3.65	106	4.41	133	3.30	10	5.16	93	1.71
Vietnam	76	3.83	82	4.91	81	4.61	52	3.60	68	2.19
Zambia	85	3.69	121	3.92	75	4.64	16	4.74	111	1.45
Zimbabwe	109	3.43	131	3.45	109	4.40	35	4.20	94	1.70

CHAPTER 1.2

Endangered Growth: How the Price of Oil Challenges International Travel & Tourism Growth

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The year 2009 may go down in history as the year of "make or break" for the Airline and the Travel & Tourism (T&T) sector as a whole. The historically high price of crude oil—of US$147 per barrel—in the summer of 2008 clearly highlighted the vulnerability of the sector to mid- and long-term oil prices. An oil price of US$100 per barrel was considered ruinous only a few years ago; now this has emerged as a realistic scenario to which all players in the T&T sector have to adapt. At such a high level, the price of oil will become even more critical to almost every part of the tourism value chain.

Although weak global demand, caused by global economic recession, resulted in a steep oil price decline to US$45 per barrel by the fourth quarter of 2008, this will not change the mid- to long-term oil forecast. Several economic analysts predict an end to the recession in the next one to two years. The International Energy Agency (IEA) estimates that oil prices will recover to more than US$100 per barrel as soon as the economies around the world recover from recession. According to that agency, strong growth in the emerging economies of China and India, along with the maturing of several oil fields, will soon rally the oil price again.

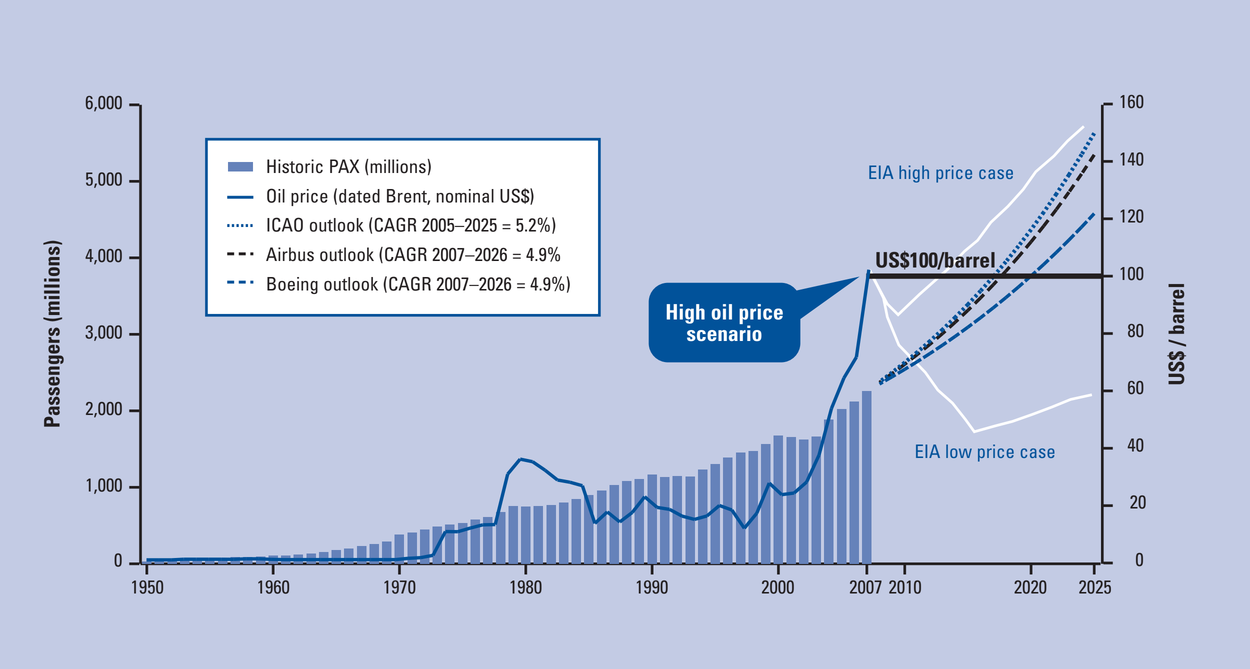
This chapter discusses the dramatic structural change a high oil price imposes on airlines, travelers, and destination countries, all of which will have to navigate through times of shifting or even declining travel demand. In providing a view of endangered T&T economies, the chapter also draws attention to potential ways of coping with change. A high oil price scenario is assumed in the long term in order to highlight the changes such a scenario would mean for consumer behavior and the competitiveness of several destinations.

US$100 per barrel: A critical challenge for the air travel growth?

Since the inception of the air transport (jet-engine based) industry in the 1950s, passenger traffic has grown steadily at 7.8 percent per annum (compound annual growth rate, CAGR, 1950–2007) driven by rising levels of disposable income, the opening of international borders, higher consumer awareness about tourism, and steady economic growth in Europe and North America. This has led to the creation of a global T&T economic sector, one of the first fully integrated economic sectors in which destination countries compete for incoming tourists on an international basis.

Oil price spikes in the 1970s and early 1980s did not hinder the growth of international air travel, but its growth has been strongest between 1980 and 2004—a period with stable and relatively moderate oil prices. The emergence of the low-cost carrier business model in the 1990s further fueled air travel growth by capturing untapped demand such as weekend leisure travel to cities using mostly secondary airports.

Figure 1: Historical development and future outlook for oil price and air passenger transport



Source: ICAO, 2007; BP, 2008; Bloomberg.
Note: 2008 oil price value represents average January to end November 2008.

However, the “tourism growth party” is now being spoiled by high oil prices. Although oil prices have dropped drastically from their momentous high in the summer of 2008, they are still at levels above the historical average. Several key trends—such as the emergence of China and India as large energy consumers, the ongoing geopolitical tensions in the oil exporting regions, and long-term “peak oil” supply-side effects (i.e., saturation and maturing of major oil fields)—will conspire to keep oil prices high in the mid to long term (see Figure 1). Additionally, a potential carbon tax or emission trading scheme penalty on CO_2 emissions may add a further item to fuel costs. In the European Union, commercial aviation will be included in the Emission Trading Scheme (ETS) from 2012 onward. Forecasts from leading air transport organizations such as Airbus, Boeing, IATA, and ICAO suggest a constant increase in international air travel demand broadly in line with past growth. This growth aspiration is challenged both because oil price levels are expected to remain high rather than going back to earlier lows, and because carbon offsetting costs are being introduced.

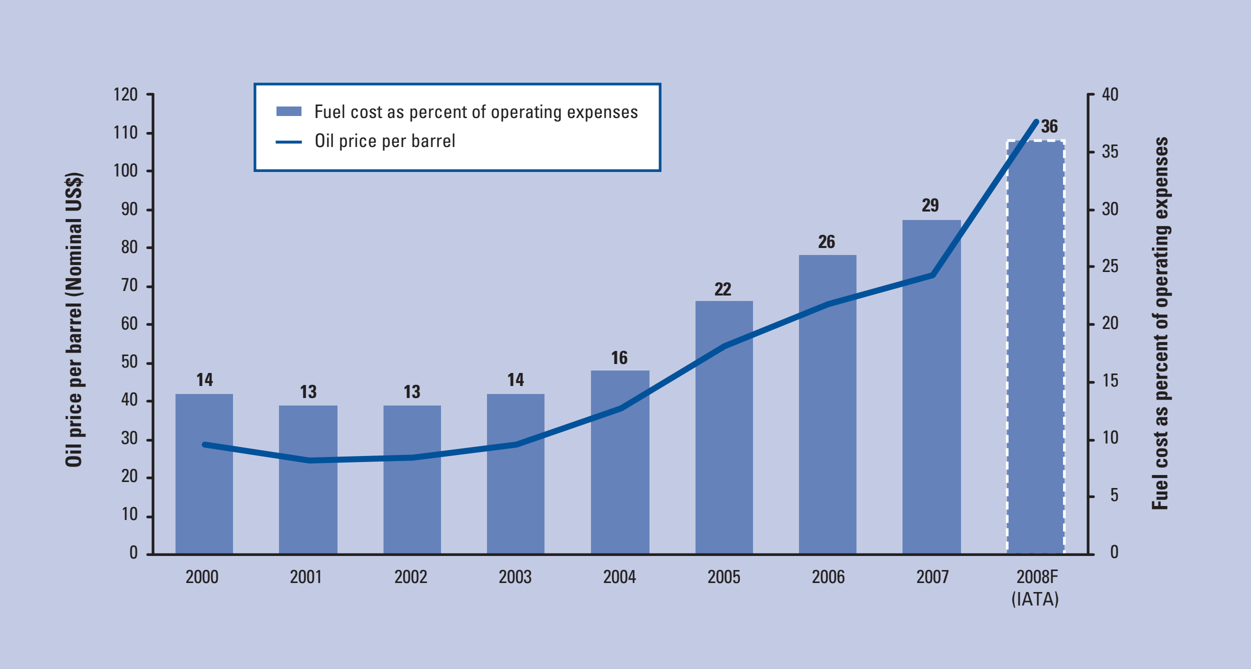
Given various mega trends, it is reasonable to assume a high oil price scenario with prices in the region of US$100 per barrel in the medium to long term; this will have a structural impact on the T&T sector in the foreseeable future. The scenario analysis is not an exercise to forecast the actual oil price but rather a framework to understand how the T&T sector will respond if the oil price remains at peak level in the medium to long term. Oil is assumed to be the main energy source for the aviation sector for the next 30 years. Although second-generation biofuels seem to be on the horizon, the economics as well as the production scalability and infrastructure requirements for aviation biofuels still remain a major challenge.

Until recently, the only factors to have affected air travel growth negatively in the last half century were singular external shocks such as 9/11, the severe acute respiratory syndrome (SARS) crisis, or regional geopolitical conflicts. Airlines have just barely managed, until now, to adapt to higher fuel bills without passing additional costs to their customers. However, this is changing and the industry has already seen steep ticket price hikes that will have an impact on the travel behavior of consumers.

No more cheap airline tickets: Travel behavior affected

The obvious impact of a high oil price is an increase in the operating costs of airlines. Fuel costs were only an average 18 percent of airlines’ operating costs between 2000 and 2007, according to IATA estimates.[1] With prices of more than US$100 per barrel, as seen during 2008, fuel accounts for more than a third of the total operating cost for an average airline, thus representing the single most important cost item in expenditures (Figure 2). Low-cost carriers are even more exposed to fuel prices than their higher-cost counterparts, as kerosene expenditures represent more than 50 percent of their total cost base.

Figure 2: Historical and estimated impact of oil prices on airlines



Source: IATA, 2008a.
Note: *Oil price* refers to crude oil price (Brent oil) according to IATA Economic Briefing (September 2008).

Fuel costs as a percentage of airline operating costs vary significantly based on the length of the flight. The longer the flight, the higher the fuel costs as a percentage of the airline operating cost (see Figure 3). For example, fuel is 16.5 percent of the operating costs for intra Europe trips (flights of less than 1,500 kilometers) and 29.6 percent for North America to Asia-Pacific trips (flights of more than 7,500 kilometers), according to analysis from ICAO.[2] From an airline's perspective, long-haul flights represent the most critical challenge to profitable operations because the share of fuel on these flights, compared with other cost items, is largest. Already today ultra long haul services—those above 10,000 kilometers per stage length, which were introduced only a couple of years ago—have been significantly reduced because of the unfavorable fuel economics due to fuel costs even at high-load factors. For instance, Thai Airways dropped its non-stop Bangkok–US flights in the summer of 2008 for commercial reasons, because fuel reached operating cost levels of 55 percent on this route—a cost burden that could not be passed on to their customers.[3]

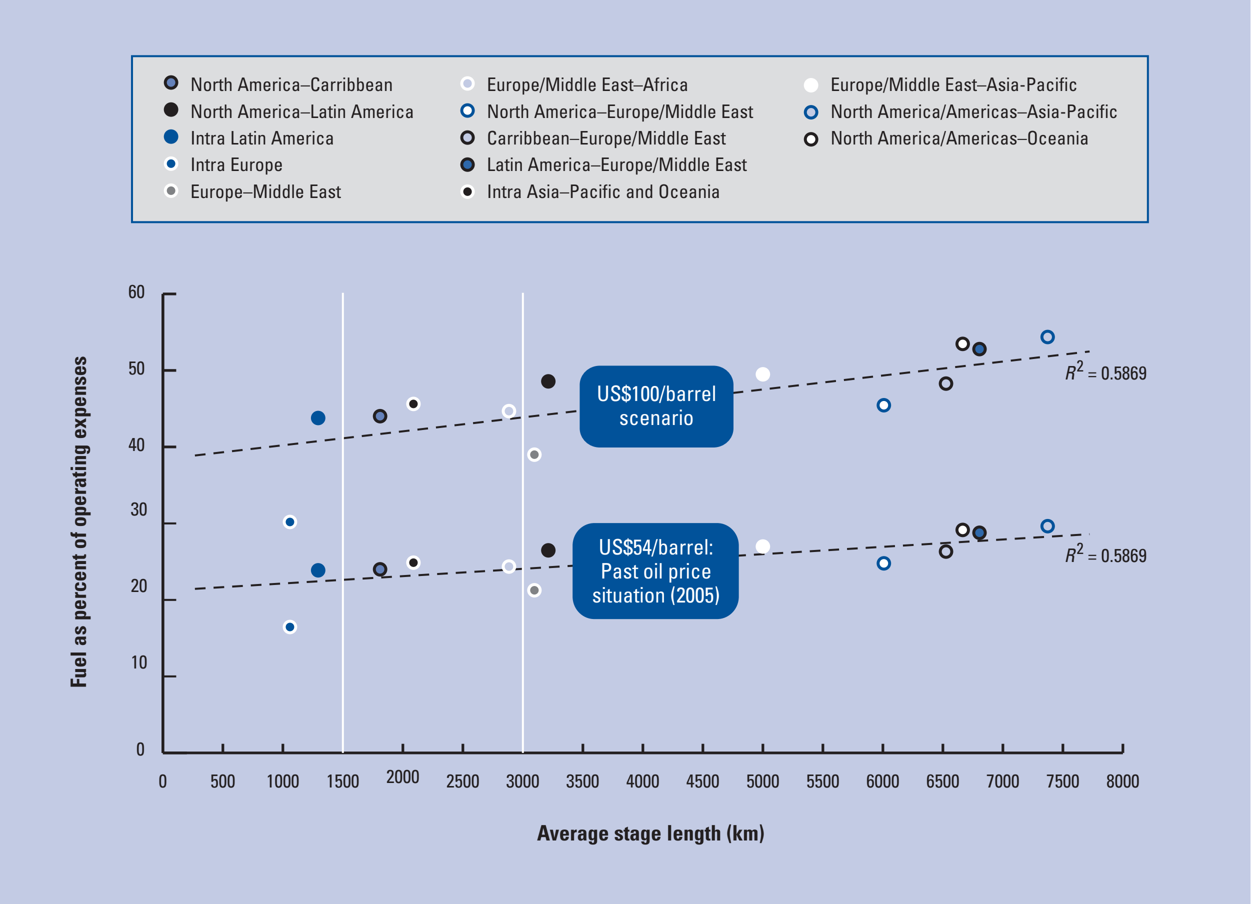
Under normal conditions with short-term oil price hikes, airlines have responded to high oil prices by improving their operational efficiency and driving down non-fuel costs. However, given the chronically low margins of 3–5 percent in this industry along with a long-term structural shift in oil price, the airlines are now facing the choice of either passing the costs to the consumers or suffering more losses. Already, the airline industry is very much in the red. Net losses are expected to be US$5.2 billion dollars in 2008 and anticipated to be US$4.1 billion in 2009.[4] So, except for capacity reductions, the only remaining option for the industry is to pass costs on to the customers.

Indeed, ticket prices have become more expensive during 2008 as airlines have imposed significant fuel surcharges on airfares to compensate for higher operating costs, especially on long-haul routes. For example, fuel surcharges per roundtrip to most European countries (except Germany) from the United States increased from US$150 in 2007 to US$350 in the summer of 2008, representing an astonishing increase of 133 percent in less than a year.[5]

The airlines are already resorting to desperate measures to control their costs. The imposition of check-in baggage fees by North American airlines and the decision by major Indian airlines to charge travel agent commission fees of 5 percent per ticket price to the consumers are just two examples of how seriously airlines are struggling to keep afloat.

Higher ticket prices do not necessarily translate to lower volumes—it depends on the price sensitivity (elasticity) of the passengers. Even the consumer price sensitivity is not static and changes with new market conditions. Tourists are more price sensitive now than ever before for several reasons. First, more options for near-shore or domestic travel are available, especially in the well-established European or US markets. For example, replacing a long-haul trip with several shorter

Figure 3: Average stage length vs. fuel cost relative to operating costs



Source: ICAO, 2008; Booz & Company analysis.

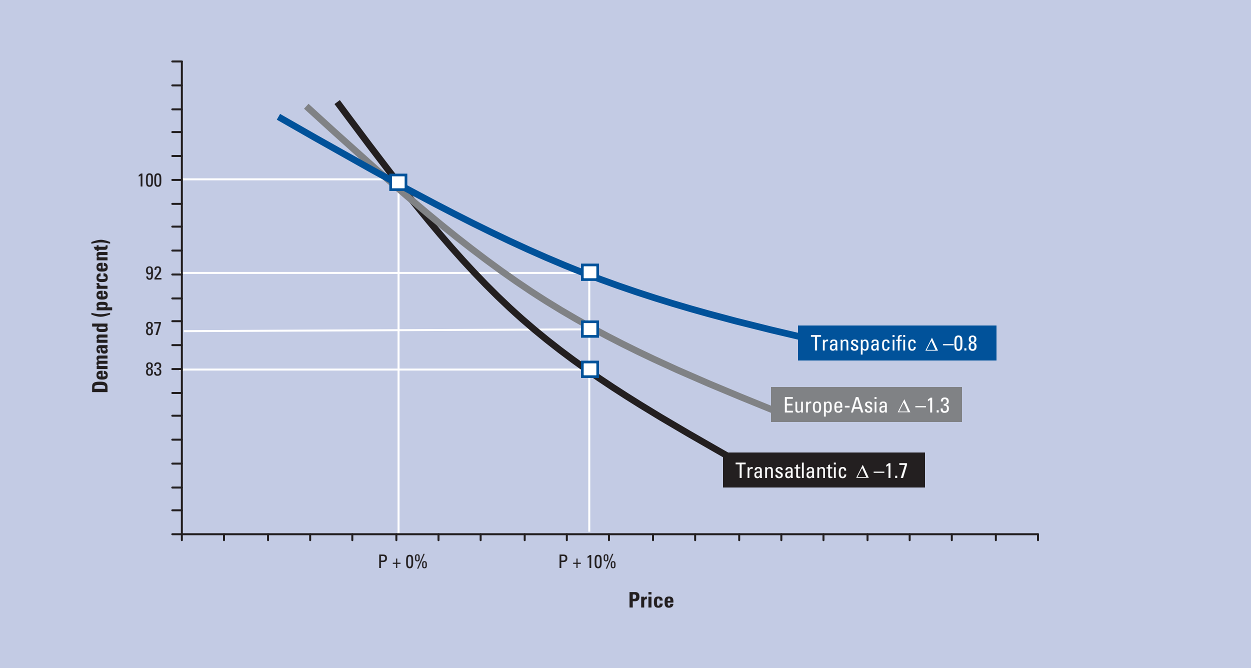
"local" trips has been a common way for many consumers to adapt to changing market conditions. As an example, domestic travel is already today by far the largest segment in the German travel market. Second, increased competition among tour operators, online travel agencies, and destination countries has driven down prices and created a "value-for-money" mindset among travelers instead of seeing tourism as a pure luxury. Finally, economic uncertainties and recession have an impact on individuals' travel budgets. In tough economic situations, the first things consumers cut back on are nonessential luxury items such as exclusive holiday trips. Past growth that has been fueled by the emerging low-cost segment also drops away as airline tickets rise. For example, on highly competitive transatlantic routes, a price increase of 10 percent would imply a reduction in air travel demand by 17 percent (see Figure 4).

Given the evidence that airlines will increase ticket fares to reflect the new cost structure, it is crucial to understand the marginal effect of this increase on the consumer's travel budget. In order to appreciate the magnitude of the effect, a typical vacation package, including a long-haul air trip from Frankfurt to Miami, is analyzed. Two cost scenarios are created: a base scenario with oil prices of US$40 per barrel and a high oil scenario with prices of US$100 per barrel (Figure 5).

In the base scenario, air travel represents only a 17 percent share of the total travel budget. However, air travel costs increase to 24 percent of the total under the high oil scenario, assuming additional fuel costs are fully passed on to the consumer. This implies an overall increase of 20 percent in the total travel budget. Price-sensitive leisure consumers on the transatlantic route will surely cut back on their travel if faced with such a steep price rise. Lower passenger yield, in turn, increases the operating cost per passenger, building cost pressure on the airlines. Higher energy costs also raise the operating cost across other elements of the tourism value chain (hotels, resorts, rental cars), although the effect there is marginal.

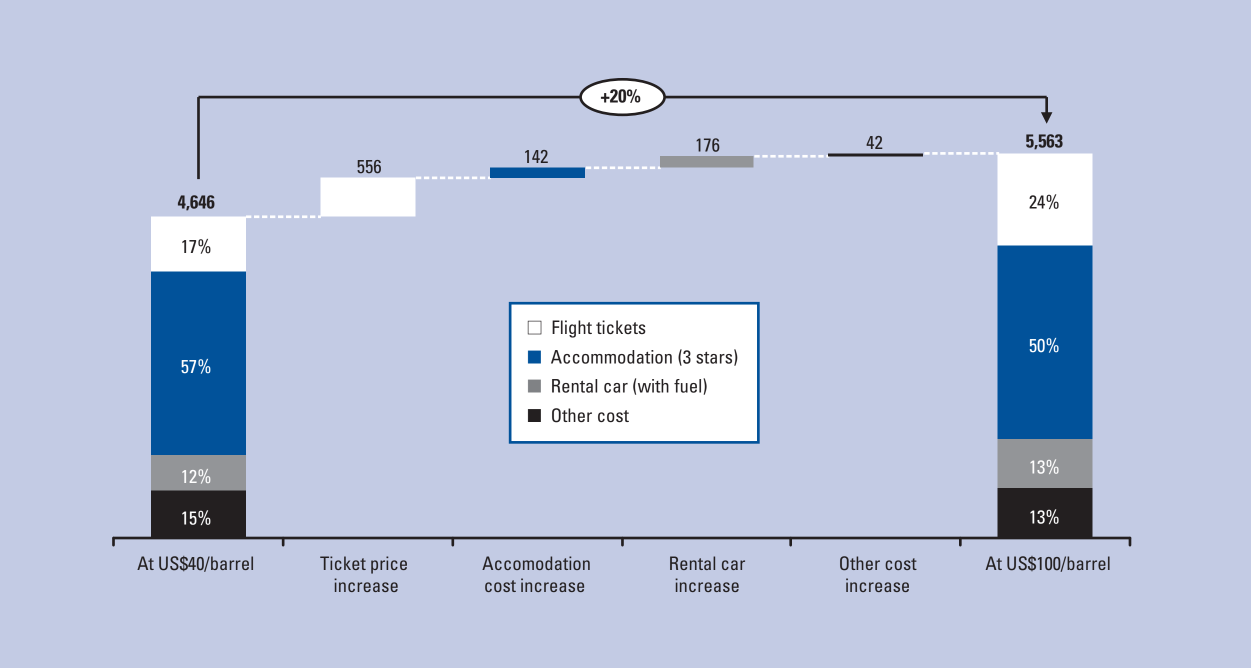
Because of the significant effect of a high oil price on air travel costs and the total travel budget, consumers are likely to cut back on expensive long-haul holiday destinations and decide for a near-shore destination during their well-deserved holiday season. In the United States, domestic travel spending accounts for more than 80 percent of total tourism expenditures, according to the Travel Industry Association of America,[6] while

Figure 4: Estimated price elasticity of passenger demand at route/market level



Source: Pearce, 2008.

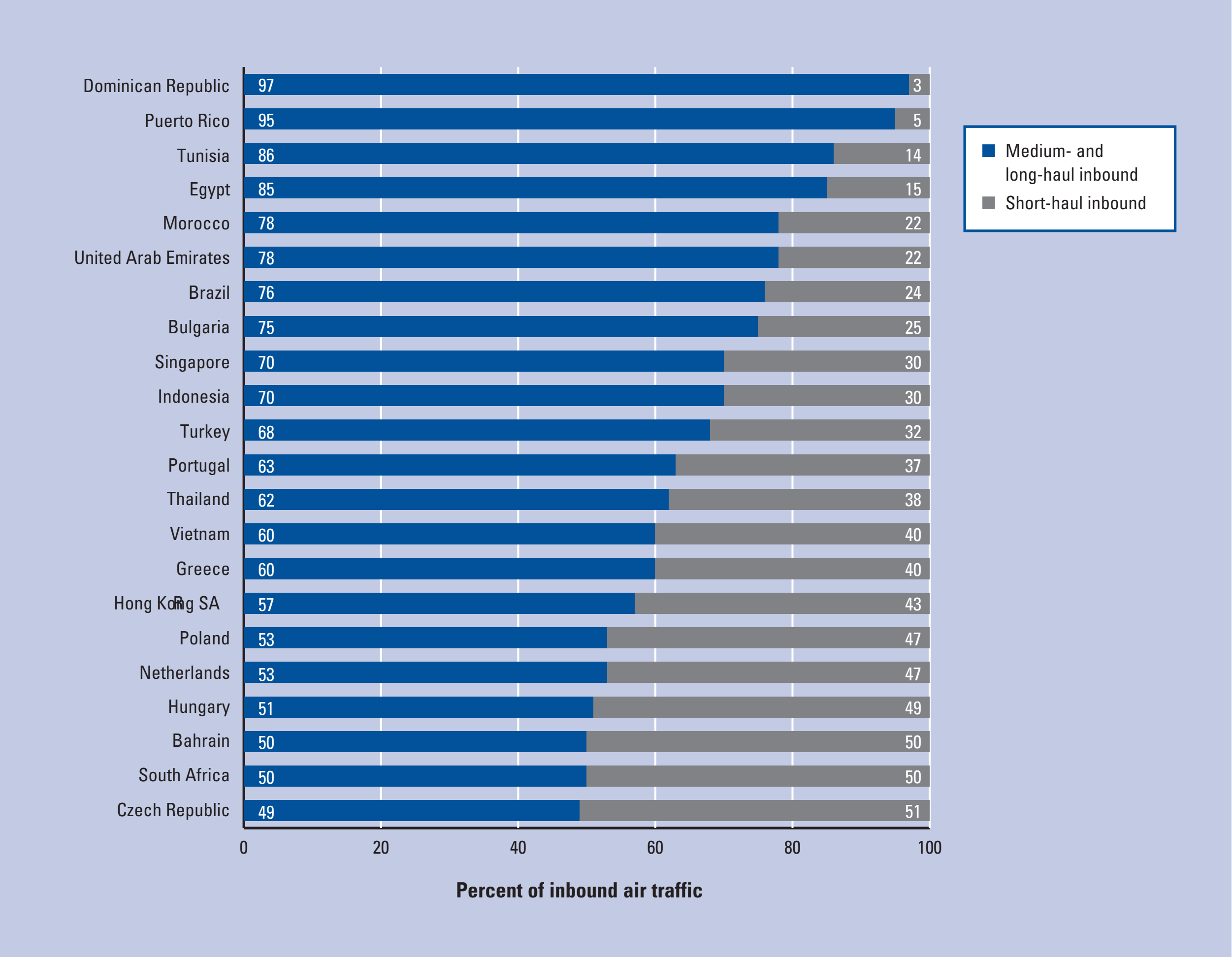
Figure 5: Estimated price increase of a typical long-haul travel package



Source: Booz & Company analysis.

Note: *Price* refers to the cost per person of a two-week trip from Germany to Miami in March, 2009 (if booked in October, 2008). Exchange rate: €1 = US$1.504. Assumption: oil price increases are passed on to consumers.

Figure 6: Countries most dependent on long-haul inbound air traffic (percent)



Source: IATA, 2008c: UNWTO, 2008; Booz & Company analysis.
Note: *Short haul* is defined as < 1,000 kilometers; *medium haul* is 1,000–3,000 kilometers; *long haul* is > 3,000 kilometers.

travelers tend to make more, shorter trips to nearby destinations. In Europe, short-haul travel to near-shore countries, such as Croatia, plays an ever-increasing role.

Another crucial impact of high oil price is the substitution effect it has on transportation choice. In large tourism destinations such as Western Europe, Australia, or India, rail tourism begins to develop, moving from a niche segment for enthusiasts to a viable transport alternative to short-haul flights.

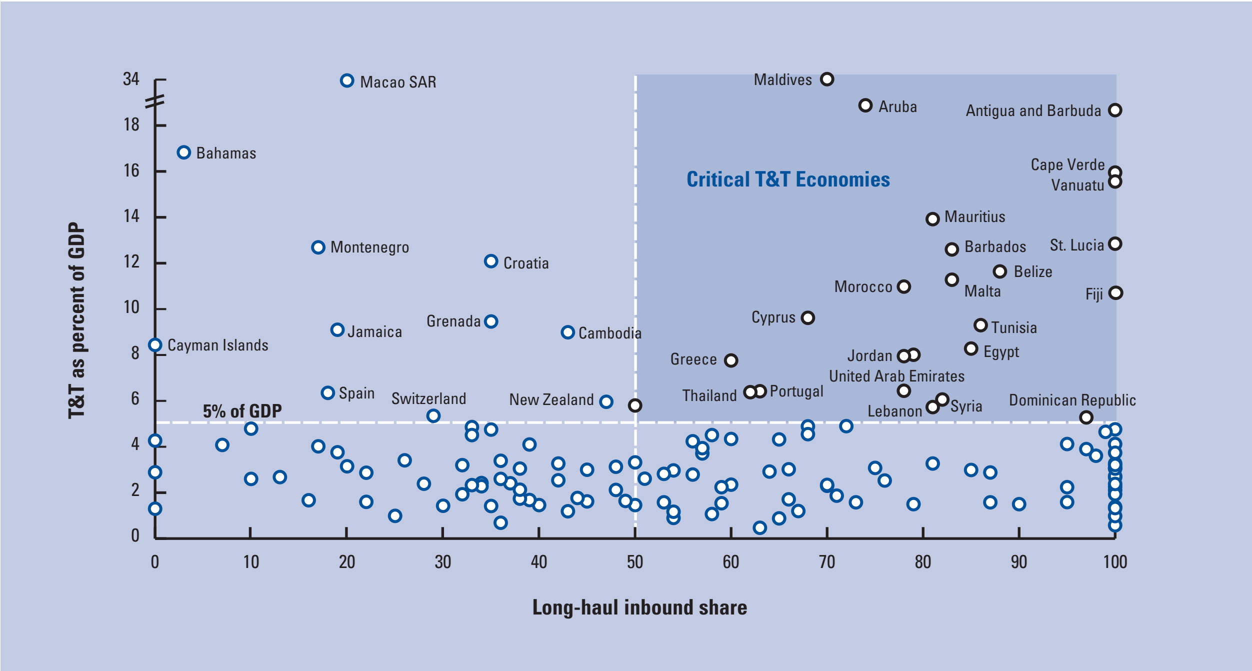
Winners and losers of changing travel patterns

The vast majority of international tourism traffic originates in the key source markets of North America and Western Europe. Travelers from these source markets travel to near-shore as well as distant destinations. As discussed earlier, long-haul travelers may face a steep price increase in airline ticket price, resulting in an increase of as much as 15 to 20 percent in their overall travel costs. The effect of such an increase on long-haul destinations would be a critical structural change of tourism flows. More importantly, the effect would be acute for destinations that have a large percentage of their inbound tourism arriving by long-haul air travel.

Geographical exclusivity may turn from an important value proposition into a liability that will cut far-off destination countries from major source markets. Naturally, this will affect small island states such as the Dominican Republic, Puerto Rico, the Maldives, Seychelles, and Mauritius, but it will also affect inland destinations such as Morocco or Egypt that are served by medium- to long-haul flights from their key source markets (see Figure 6).

Simultaneously, destinations with key source markets in their backyards will benefit from the potential "re-regionalization" of global tourism flows. Emerging tourism destinations such as Montenegro, Croatia, or Cambodia have profited from their geographic proximity to major source markets that are within the reach of land-based transport to facilitate access of tourists. Several of these "local" destinations have actively promoted themselves as high-class alternatives to established

Figure 7: Long- and medium-haul inbound air travel dependency vs. economic importance of the T&T sector, 2008



Source: IATA, 2008c; WTTC, Booz & Company analysis.

Note: Share of all inbound air transport passengers in 2008 on medium- and long-haul connections, including domestic traffic, is based on IATA data. *Short haul* is defined as < 1,000 kilometers; *medium haul* is 1,000–3,000 kilometers; *long haul* is > 3,000 kilometers.

destination countries. In addition, the long-haul inbound traffic to classic destinations such as Spain, Switzerland, or the United States accounts for less than 30 percent of all inbound air traffic.

The worst-affected destinations in the high oil scenario are those that not only depend heavily on long-haul air travel for inbound tourism flow, but that also have a greater dependency on the T&T sector for their economic growth (see Figure 7). These nations, such as Aruba, Cape Verde, and the Maldives, can be broadly defined as *critical economies,* and the international community must pay special attention to proactively supporting these economies during the upcoming challenging times.

How can nations manage the change proactively?

The affected destination countries have several strategic options to prepare for the potential decline of travel demand, or even develop new opportunities for growth, in a high oil price world. Each nation should carefully study its own situation and external factors before deciding on a future course of action. The options are:

1. **Transform cost structure of destination specific operations (hotels, resorts, tour operators, restaurants).** The critical destination countries need to take a more proactive, and leading role in high oil price scenarios. These nations should engage the key destination operators in the T&T value chain—hotels, resorts, restaurants, theme parks—to structurally transform their operating costs. Their governments should systematically analyze key cost levers—the energy efficiency of buildings, hotel operations, the sourcing of consumables, infrastructure, and technology use—to lower the destination costs for the travelers so as to compensate for the high air travel costs. Thus, the increase of an airline ticket could be compensated for by other tourist expenditures to some extent. Focusing on energy-efficient operations and using "green" technologies may cushion these destinations from the worst effects of a high oil price scenario. Some innovative ways to reduce costs could be joint sourcing of consumables by various hotel chains, local sourcing of foods and beverages, and greater use of information and communication technologies (ICT) to improve operational efficiency.

2. **Reduce destination access cost.** Besides transforming destination-related costs, the critical economies also need to address the "access" cost of the destinations. This implies removing restrictions to allow major international airlines to fly to destinations, considering international alliances of the local carrier with international

carriers to provide better customer service, and encouraging the use of more fuel-efficient planes and operational improvements of the local carrier. Several of these destinations depend on international airlines for access, especially for touristic traffic.

3. **Target premium customers (re-positioning of location as sustainable high-end destination).** In a difficult economic situation, price-sensitive customers are the first to cut their travel budgets. An important strategy to cushion against increasing travel costs is to re-brand and upgrade the destinations to high-quality vacation spots and target more premium customers. It may be beneficial for certain destinations to cater to high-yield customers with relatively low price sensitivity rather than the mass market. In addition, the destination should proactively monitor changing consumer preferences and trends to tailor their destinations to the new needs. For example, increasing numbers of consumers are looking for greener ways of traveling or ecotourism, underpinning their concern for sustainability of resources. Destinations will need to "upgrade" their infrastructure and operations before authentically re-positioning themselves as luxury and sustainable destinations.

4. **Engage the international community to seek mitigation and adaptation funding for major infrastructure projects.** Most of the critical destinations are small island states or least-developed countries and will be most vulnerable to the effects of changing or even declining travel demand. These nations should aim to leverage development funds provided by institutions such as the World Bank or the Organisation for Economic Co-operation and Development (OECD) to support the development of their respective tourism sectors. Going forward, it will become increasingly important to adhere to environmental sustainability criteria when asking for support from the international community. Thus, demonstrating a clear strategy intended to balance ecological sustainability with tourism development will be key for countries to gain access to development funds.

Destination countries should proactively engage with the international community to secure adaptation and mitigation climate funding for infrastructure projects. This will require identifying adaptation and mitigation projects, developing political consensus around them, and showcasing them to international organizations to secure funding. In order to address both issues adequately, infrastructure projects will have to be sustainable (e.g., fulfilling future CO_2 emission requirements) as well as cater to the needs of a changed demand structure.

Conclusion

Despite the recent economic downturn and a significant drop in oil prices, oil market fundamentals suggest a mid- to long-term oil price of US$100 per barrel or more, which will impose a fundamental structural change on the T&T sector—especially the airline industry. Already struggling with eroded profit margins, airlines clearly need to pass oil price increases on to their customers in order to stay in business. Increased "access" costs endanger destinations that are costly to reach and that largely depend on Travel & Tourism as a key sector in their economies.

In these markets, policymakers face severe challenges in using Travel & Tourism as a lever to improve general economic well-being. Although each country has to address its challenges individually, some overarching ways to cope in a world of fundamental change have been laid out in this chapter. Among them are improving operational efficiency of facilities and infrastructure within the country, reducing access costs, rebranding and repositioning the destination, and leveraging funding from the international community to prepare for change.

Notes

1 IATA 2008a.

2 ICAO 2008.

3 *Bangkok Post* 2008.

4 IATA 2008a.

5 Bestfares.com 2008.

6 TIA 2004.

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CHAPTER 1.3

The Importance of Public-Private Partnership in the Current Downturn

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UFI IBRAHIM

World Travel & Tourism Council (WTTC)

Following the spread of the US credit crunch to many key tourism source markets around the world in 2008, not to mention the turmoil in financial markets and the volatility in commodity prices and exchange rates, the outlook for the world economy has become very uncertain. The crucial question is no longer whether there *will* be a recession, but how widespread, how deep, and how prolonged it will be. And the answer will clearly have a significant impact on Travel & Tourism demand.

Over the last 25 years, international tourist arrivals have tended to grow about one percentage point faster than world real GDP. However, they have also tended to fluctuate more than GDP, with higher peaks in the "good" years and deeper troughs in the "bad" years. Arrivals may well, therefore, have increased by less than the 2 percent forecast by the World Tourism Organization (UNWTO) in 2008, especially since economic growth is currently concentrated in emerging and developing countries with relatively low propensities to travel. As for 2009, it is almost anybody's guess at the moment.

Sailing in uncharted waters

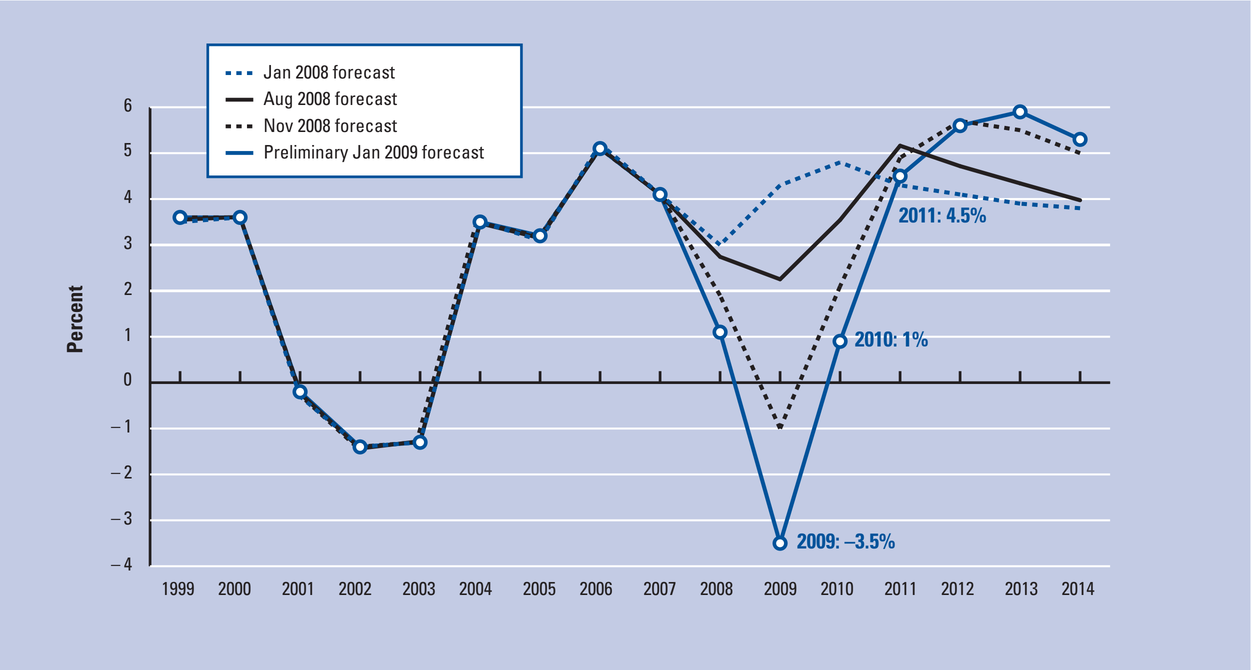
Today's Travel & Tourism industry is sailing in uncharted waters. It has no experience of financial systems on the brink of collapse, nor of currencies (and assets and inputs necessary to the industry) fluctuating in value by 25 percent over the course of a few days. On the other hand, the boom in tourism, based on low-cost travel, globalization, higher disposable incomes in emerging markets, and higher propensities to travel in developed markets, has been very resilient in the past. Under these circumstances, forecasts can be only very tentative, especially regarding the depth and length of the current downturn.

A number of powerful factors have been affecting, and will continue to affect, world tourism—not least international oil prices (which have fallen back from their historic peaks since July 2008 to little more than US$40 in January 2009) and relative exchange rates (which have seen massive changes in the past few months).

According to WTTC's latest research—conducted in association with its partner, Oxford Economics—the deterioration in the macroeconomic environment and the marked slowdown in the monthly indicators of tourism activity in the last months of 2008 resulted in a much more pronounced cycle in Travel & Tourism economy GDP than envisaged in January 2008, as shown in Figure 1.

The relatively resilient first-half 2008 performance, plus the lead time between holiday bookings and actual vacations, meant that the impact on growth in 2008 was limited, but provisional estimates point to an increase of just 1 percent in Travel & Tourism economy GDP last year—two percentage points below WTTC's January 2008 forecast.

Figure 1: World Travel & Tourism economy (percent change)



Source: WTTC and Oxford Economics.

WTTC's research suggests that the impact on Travel & Tourism will nevertheless be much greater in 2009. In fact, Travel & Tourism economy GDP is now expected to contract this year, by around 3.5 percent—a much weaker performance than initially expected. Moreover, even this forecast—like macroeconomic prospects generally—carries downside risks if the economic downturn and intensified credit crunch extend through the whole of 2009.

Helping to ensure a rapid recovery

However, WTTC remains confident in the long-term prospects of the Travel & Tourism industry, thanks to the continued rapid expansion of emerging destinations along with the global increase in per capita income and the rising propensity for foreign travel.

Although there are many uncertainties as to how long the current crisis will continue, and how deep its impact will be on disposable incomes as well as business and consumer confidence in different markets, past experience has shown that Travel & Tourism always rebounds from cyclical downturns—sometimes even stronger than before. Moreover, although severe, this crisis cannot be compared with past crises due to events such as 9/11, SARS, or even the Gulf War. Today, people still want to travel and, once the economic recovery starts, there is likely to be huge pent-up demand.

In the meantime, the industry is by no means at a standstill as some would lead us to believe. Today's leaders of Travel & Tourism have been confronted by many challenging periods in the past, and they are used to making the most of downturns to plan for the future. It will take some time to re-establish the balance between supply and demand, and it is going to be a very different world out there when we do see the end of the current crisis. But there is no doubt that it will come and that the long-term future of Travel & Tourism will be assured.

However, in order to address the challenges as effectively as possible, and to try to find solutions, it is more critical than ever for the public and private sectors to work together. This is one major reason why WTTC is taking its annual Global Travel & Tourism Summit to Santa Catarina in Brazil this year. As one of the large emerging-market BRIC countries, Brazil has huge potential for development, and it is clear that there is growing interest from foreign private investors in Brazil's tourism industry.

But, most importantly, public-private dialogue and partnership can help to encourage a supportive policy framework for Travel & Tourism generally, in turn helping to stimulate demand at challenging times such as the one we are now facing, thereby ensuring that Travel & Tourism continues to generate employment and stimulate economic growth, as well as contributing to the alleviation of poverty in emerging economies. Encouraging such public-private dialogue is one of the key goals of the present *Report*.

The rationale for public-private partnership

Although the level and success of public-private partnerships (PPPs) in different countries varies sharply, their role and importance in Travel & Tourism has increasingly been recognized by industry and governments. To a large degree, this is due to the changing roles and responsibilities of the different sectors: governments, business, and society in general. To quote the World Bank speaking a few years ago about its Business Partners for Development initiative:

> With the advent of globalisation, the reduction in the cost of telecommunications, expansion of market economies throughout the world, and the endurance of democracy, the roles of the three sectors have become increasingly interdependent.
>
> "We have moved from a world where the state had sole responsibility for the public good and business maximised profits independent of the interests of society at large, to a world where success depends on the close synergy of interests among business, (civil) society and government.[1]

Today, most companies accept that their long-term investment goals can be achieved only within stable social and financial environments. They are therefore supporting a range of activities—that is, in the area of community development, environmental protection and enhancement, and culture and heritage preservation. While not their core businesses, the success of these activities is essential to the success of their overall business.

Society's role and influence are also expanding. Local communities have a growing influence on the behavior of governments, businesses, and individuals. As pointed out by the World Bank, society is playing an increasingly key role in assessing the business community's contribution to community development and well-being, rewarding community-friendly behavior and criticizing the opposite.

The public sector, meanwhile, has had to reinvent itself. It is withdrawing from the production of goods and the provision of services, and is taking a more strategic approach to its role in society. Government's role is increasingly to foster the trust that creates social capital and mobilizes social forces and energy from all its stakeholders.

Travel & Tourism has not been immune to this change in stakeholders' roles and responsibilities, which is affecting all sectors of the economy. Governments have traditionally played a key role in the development of tourism and in the promotion of their countries as tourism destinations. Their role is clearly more important in developing countries, or in countries in which tourism is in a transition stage—where its support can be crucial to kick-starting growth.

In countries at high levels of economic development, there is arguably less need for public-sector support of the tourism industry. Nevertheless, it is generally recognized that, for tourism to develop in a sustainable manner, an appropriate physical, regulatory, fiscal, and social framework is required—something that can, of course, be provided only by governments or public-sector local authorities. These entities also usually provide the basic physical infrastructure necessary for tourism—such as roads, airports, and communications—and create the legal framework within which the industry operates.

This helps to explain why few national governments or central administrations have any serious doubts as to the rationale for their continued involvement in tourism generally, although there have been increasing signs of states' disengagement from tourism over the last decade.

Different forms of PPPs

In order to gain a better understanding of current trends and to identify different forms of PPPs, the UNWTO commissioned a study on the subject in 2000. This included a survey that was widely distributed to representatives of both the public and private sectors. A total of 234 completed questionnaires were received from respondents in over 90 countries worldwide.[2]

A breakdown of the completed questionnaires received showed that they came from the following Travel & Tourism segments: ministries of tourism (14 percent), national tourism organizations (20.9 percent), state tourism offices (6.8 percent), educators (20.9 percent), consultants (9.8 percent), international organizations (9.8 percent), transport companies (3.8 percent), hoteliers (5.6 percent), and tour operators (8.1 percent) —in other words, a good balance in terms of sector and demographic split. An overwhelming 98 percent of respondents rated PPPs as "very important" or "important" in enhancing tourism industry competitiveness.

According to the respondents, the most critical areas for PPPs within the Travel & Tourism industry are improving destination image and preserving cultural and heritage resources. Also high up the ranking are education and training, safety and security, and environmental protection. These variables, considered influential by effective PPPs, are included in the Travel & Tourism Competitiveness Index (TTCI) described in Chapter 1.1 of this volume.

Public-private partnership helps ensure a supportive framework in challenging times

Experience has shown that, when times have been tough, Travel & Tourism has often been seen as a cash cow by governments to help fill their treasuries' empty coffers. Policymakers need to be wary about placing extra burdens on this dynamic sector, particularly at such crucial periods.

As an example, the UK government's decision in 2008 to increase the air passenger duty (APD) from UK airports shows that it continues to underestimate the economic importance of Travel & Tourism and demonstrates a short-sighted approach. Travel & Tourism has the potential to kick-start economic recovery by stimulating continued spending, and by generating much needed employment because of its labor-intensive characteristics. The increased APD, which is being implemented in two stages—from November 2009 and November 2010—primarily penalizes long-haul travelers and will mean a 112 percent rise in departure tax on a flight out of the United Kingdom to Australia from the end of 2010. The move could, however, backfire since UK passengers planning long-haul journeys could opt for airports in continental Europe as their departure point for their long-haul journey. This will increase short-haul flights out of the United Kingdom and could potentially increase total global carbon emissions as passengers opt for an additional stopover in their search for the most cost-effective means of reaching their final (long-haul) destination.

The growth of Travel & Tourism is of unquestionable relevance to both private- and public-sector stakeholders. And the need for effective PPPs has never been more crucial than in today's globalized world. To explain the nature of the problem, we can analyze the underlying issue behind PPP using basic game theory. Imagine a game in which each sector behaves as a player. Although collaboration and partnership would produce the optimal outcome, what often happens is that, since each player has an incentive to deviate or must at times rely on the other player to act first, the optimal outcome is not always achieved.

Tourism destination marketing is the most common area for PPPs and is complex in that it involves multiple stakeholders. Interdependency among these stakeholders requires well-structured alliances and should not be left to chance. A lack of cooperation can lead to a shortage of resources as well as the mismanagement of existing funds. Successful collaborations, on the other hand, have seen the creation of highly successful tourism destination campaigns such as "100% Pure New Zealand" or "Amazing Thailand."[3]

It is important to explore the impact of failed PPPs, using our existing game analogy. Failed games destroy the very attractions that the industry sells. Examples of failed games often occur within the financing mechanism for major tourism projects. The public sector might at times be required to facilitate investment—by assisting private entities to overcome initial barriers and providing much-needed financial solutions to initiate a major tourism project. During the current depressed economic climate, the need for public-sector assistance to overcome financial constraints and provide further development in the industry is more critical than ever.

As suggested by the UNWTO study, the evidence supports the fact that various Travel & Tourism segments can be improved by the existence of healthy PPPs, and so countries can potentially improve their performance in the TTCI by focusing on developing a strong PPP. Since no accepted methodology to assess the nature of PPP exists, we will use a simplified approach that will incorporate dummy variables based on the existence of a national tourism organization (NTO). Following this approach we will assign a score of 1 if a country has an existing NTO, while those countries that do not have an NTO are assigned a score of 0. The existence and creation of well-functioning and evolving NTOs is a good starting point for any healthy public-private partnership. Although a homogenous structure is not advised for all countries, WTTC believes that the existence of an NTO is the minimum requirement for any healthy PPP.

Table 1: Impact of national tourism organizations on TTCI rank

NTO status	Average score in TTCI ranking
43 countries with no existing NTOs	3.59
88 countries with existing NTOs	4.32

Table 1 highlights the fact that countries with NTOs perform substantially better than those that do not have them, receiving, on average, a 20 percent higher TTCI score than countries without NTOs. This is not surprising; PPPs are believed to improve the very fundamentals that are assessed by the TTCI. Further detailed research could develop an in-depth assessment with the aim of quantifying the performance of the existing NTOs in order to examine the relationship between the performance of existing NTOs and the TTCI ranking.

Pro-poor tourism and partnership

The need for partnership is not necessary only between the public and private sectors. The types of partnership can vary widely across the industry as a result of the diversity of stakeholders. Worthy of mention, for example, is the need for partnership for pro-poor tourism (PPT). PPT is an approach to tourism development that ensures that local communities are able to secure and share the economic benefits from tourism. A key aspect to this approach is the linkages between the private sector and local communities.

Researchers have advocated that the private sector should be given support to contribute a given percentage of its profits toward community improvement projects and also toward supporting infrastructure development —actions that would benefit not only the private sector but also the community, thus improving the destination's overall competitiveness. Governments should engage the private sector to do this through schemes such as build-operate-transfer (BOT) and foreign direct investment.

Foreign enterprises operating in local communities should also play a critical role in the development of PPT because their objectives and behavior have implications for the economic development of their destination. These enterprises should ensure that their investments, employment, operating, and other business decisions take full account of the long-term development and economic sustainability of the destinations in which they operate.

Conclusions

The importance of involving public and private stakeholders and creating a platform for dialogue is undoubtedly receiving growing recognition. The purpose of this chapter is not to showcase successful partnerships but rather to highlight the essential need for partnership across the globe and the multiple benefits associated with healthy public-private partnerships—something that will be especially relevant as we address the challenges ahead.

Partnership and dialogue can lead to an improved tourism product, promoting increased competitiveness. And our findings illustrate that the existence of an NTO is a stepping-stone in the right direction for improving public-private partnership.

WTTC will continue to play its part by building awareness of the industry and by consistently advocating the need for partnerships throughout the industry.

Notes

1 Quoted by the World Tourism Organization Business Council report on Public-Private Sector Co-operation in Tourism. See UNWTO 2001.

2 UNWTO 2001.

3 Indeed, in the indicator measuring the effectiveness of marketing and branding campaigns, New Zealand is ranked 7th and Thailand 14th out of 133 countries. The results for all countries are shown in Table 5.03 of section 2.2 of this *Report.*

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CHAPTER 1.4

How Well Does the Travel & Tourism Competitiveness Index Explain Differences in Travel Intensity Among Countries?

SELIM ACH

BRIAN PEARCE

International Air Transport Association (IATA)

The Travel & Tourism (T&T) industry is a significant contributor to the development of many sectors of the economy. According to the UNWTO,[1] all countries' receipts for international tourism arrivals were estimated to be around US$856 billion in 2007, and in the same period international tourists' arrivals were about 903 million, up 6.6 percent compared with 2006.

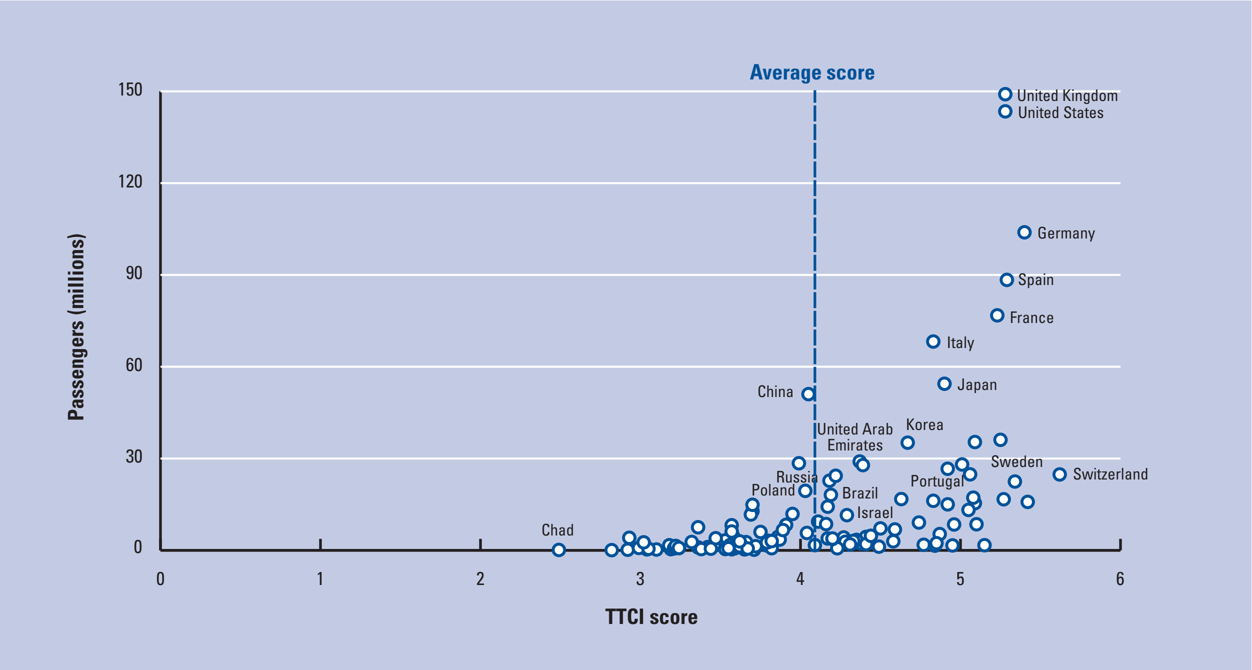
Scope of the research

Research by IATA has shown the importance of high-quality international air connections in underpinning inward investment and business productivity.[2] The year 2008 saw weak growth in the T&T industry, the result of the uncertainties posed by the global economy affecting consumers' confidence and constraining their disposable income. Tourist numbers are likely to be falling in 2009 because of widespread recession in many major economies. From a long-term perspective, however, once recession is past, total tourists arrivals are still expected to grow robustly. By 2010, international arrivals are expected to reach 1 billion, and 1.6 billion by 2020. The Asia Pacific region, Africa, and the Middle East are expected to grow at rates of over 5 percent per year, above the world average of 4 percent. Europe and the Americas are forecast to slow down, growing at a lower rate, below the world average. Europe will maintain the highest share of world arrivals, but will decline from 60 percent in 1995 to 46 percent in 2020.

This chapter reports on a study of the relationship between the number of passengers to/from a given country and the Travel & Tourism Competitiveness Index (TTCI) score. The objective is to understand how well the TTCI indicates the key drivers of Travel & Tourism, and therefore how well it indicates the contribution of the sector to the economic success of a country.

The TTCI score, which is composed of three different subindexes, captures the ease of developing the T&T sector of a given country based on characteristics of its business environment and infrastructure and its regulatory framework as well as its human, cultural, and natural resources. In addition to the factors covered by the TTCI, travel is driven by incomes and factors such as distance or travel costs. Based on an analysis of the data and the theoretical relationships among the factors, an econometric model was developed to assess these relationships.[3] This model is used in the last section of the chapter to provide an initial quantification of the link between the number of passengers and improving a country's TTCI score by improving its performance on key travel drivers such as infrastructure, taxation, and regulations.

Figure 1: Total TTCI score and number of passengers, 2007



Source: IATA; World Economic Forum, 2008.

What are the drivers of the air passenger travel?

This research is motivated by the need to provide some quantification of the observation that the total number of air passengers arriving at and leaving a country is linked to the ‘‘attractiveness’’ of the country—that is, to the value of the TTCI score, as well as to factors such as incomes and travel distance.

Figure 1 confirms that highly ranked countries are likely to attract a higher number of air passengers than others. During the 2008 exercise, the average TTCI score recorded for all the countries under study was 4.08, shown by the average line in Figure 1. Countries to the right of the line were ranked above average, while those to the left were below average.

Figure 1 also suggests that countries might be classified into three main groups:

- The first group is composed of countries with a high TTCI score and a high number of air passengers.

- The second one includes countries with a high TTCI score and a relatively small number of air passengers.

- The third group of countries, to the left of the figure’s average line, has low TTCI scores and few air travelers—below 10 million passengers for the year 2007.

The United Kingdom and the United States are the two countries with the greatest number of travelers, followed by Germany, Spain, and France. China is located just at the average line with around 50 million air travelers, but appears to enjoy a relatively high travel intensity given its TTCI score. Switzerland, which is the best performer on the Index, records a TTCI score of 5.63 with around 25 million arrivals and departures during the full year 2007. Another group of countries—Iceland, Luxembourg, and Malta—enjoys quite high TTCI scores, respectively 5.16, 4.95, and 4.86, but with less than 5 million passengers.

One observation from Figure 1 is that high-income countries such as the United Kingdom, the United States, and other European countries are located in the top right of the graph. Low- or medium-income countries are located in the bottom left of the graph. We know from previous studies of travel demand that incomes are the principal driver of travel.[4] Incomes are not one of the indicators that make up the TTCI, but this analysis may suggest that high-income countries have been better able to invest in measures to attract tourists.

It appears also that there is a ‘‘hub’’ effect. Some countries show a high number of travelers but a relative low TTCI score level compared with other countries. For instance, the United Kingdom shows a higher number of travelers than France, which has a similar total Index value (5.28 against 5.23) and a comparable country size in terms of population and GDP. The United Kingdom is a major hub in Europe and a major gateway for the United States, which could explain this difference in number of passengers.

Another major factor that may account for the differences in the relationship between passenger numbers and the TTCI score shown in Figure 1 is the cost. Because of the difficulties in obtaining consistent and comprehensive price data, we proxy travel costs by distance between origin and destination. It is expected that air passenger traffic between two countries decreases the farther away the countries are from each other, and so the cost to reach distant countries is expected to be higher than to reach closer destinations.

Figure 1 suggests also that the size of the countries that might be approximated by the population is another important parameter to consider. It is likely that the larger the population of a country, the higher the expected number of travelers from and to this country (everything else considered equal). For example, this is the case for Albania, which is about seven times smaller than Australia in terms of population, and for which the total number of air travelers is about fifteen times lower than Australia.

A country's travel intensity and its TTCI score

Focusing more specifically on *travel intensity*, defined as the number of air passengers (arrivals and departures) divided by the population of the country, we analyzed the relationship between travel intensity and the TTCI score, GDP per capita, and distance.

The analysis of Figures 2, 3, and 4 supports the points outlined above.

It is clear in Figure 2 that, once the size of a country's population is allowed for, its air passenger numbers have a clearer and more consistent relationship with its TTCI score. The high levels of passenger numbers shown for the United Kingdom and the United States in Figure 1, relative to their TTCI score, are shown to be the result of their population size. As expected, the TTCI score has a positive relationship with travel intensity; this is confirmed by Figure 2. There is also a clear and positive relationship between GDP per capita and travel intensity. On the other hand, distance has a negative effect for almost all countries. Countries such as New Zealand or Japan, which are more distant from other destinations than European countries, such as Switzerland, show lower levels of travel intensity. The distance—and hence, the cost—of travel is a part of the explanation for differences in travel intensity relative to a country's TTCI score.

Interestingly, these three figures also suggest that there are several countries for which the TTCI score, GDP per capita, and distance are not the only variables that are related to the total number of passengers. This group of outliers is composed of several countries from the Middle East—the United Arab Emirates, Qatar, and Bahrain—and also by Barbados and Cyprus as well as Malta. These countries are attracting a high number of passengers with respect to their population and they are ranked in the first quartile of the best performer countries:

- The United Arab Emirates, Qatar, and Bahrain record a TTCI score of 4.39, 4.44, and 4.29, respectively, which is above the TTCI average of 4.08. These three countries are very strongly rated in terms of price competitiveness in the T&T industry and human resources, and also in terms of safety and security. These countries, and the Middle East in general, have been investing intensively in air transport infrastructure in the last few years, and air transport has been growing strongly in double digits. The United Arab Emirates is a perfect example, with Dubai international airport, being a major hub in the region, enjoying more than 34 million air passengers during the full year 2007.

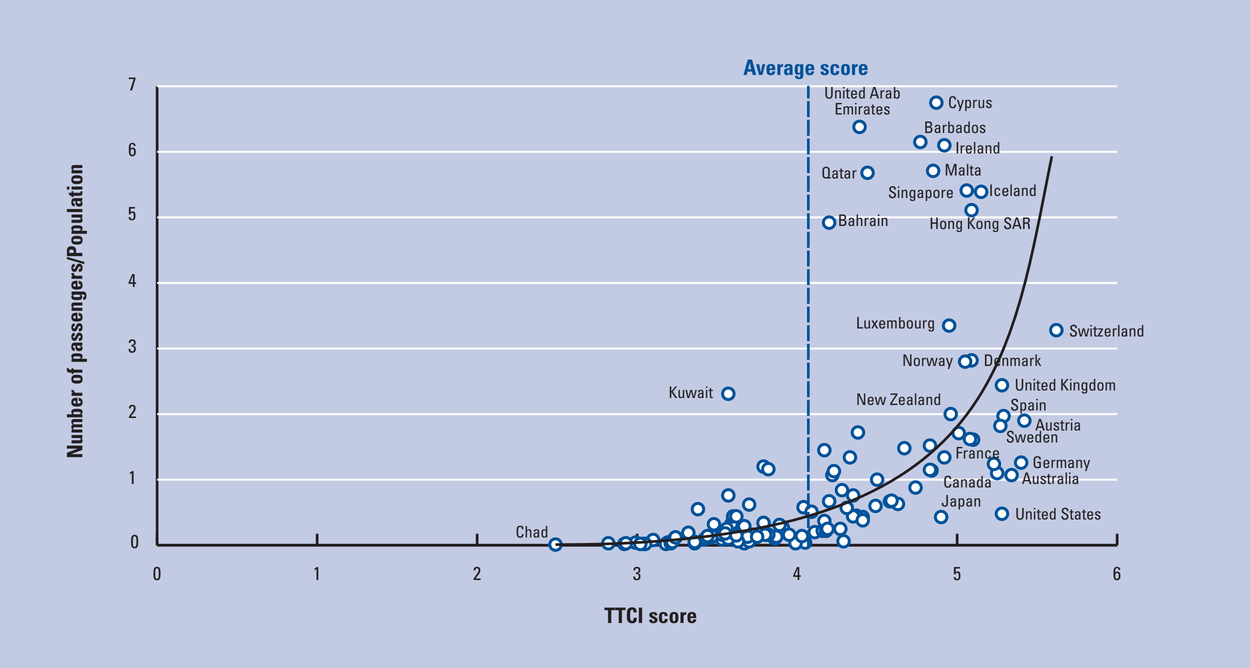
- Barbados, Cyprus, and Malta represent a major destination for tourism and record a TTCI score above the average, equal to 4.77, 4.87, and 4.86, respectively. In addition, these countries enjoy a very high value of the "affinity for Travel & Tourism" pillar, with scores of 6.57, 6.35, and 6.22, respectively, out of 7. This pillar is captured in the subindex of human, cultural, and natural resources, which assesses the tourism openness and the attitude of population toward foreign visitors, as well as whether or not an extension of business trips is recommended.

For other countries, such as Hong Kong SAR and Singapore, the distance to destination seems not to be related to the intensity to travel. A part of the explanation is that travel intensity for these countries is likely to be driven mostly by their historic positions as key trade hubs and their TTCI scores. Compared with that of New Zealand, for example, which is of similar size in terms of population and average distance flown, Hong Kong SAR and Singapore enjoy a quite high TTCI—5.09 and 5.06, respectively, while that of New Zealand is 4.96.

Of course it is impossible to disentangle the separate effects on travel intensity of the TTCI score and other factors through casual graphic analysis. In order to assess the weight of each of these drivers—that is, their relationship with the intensity of travel—an econometric model was developed.

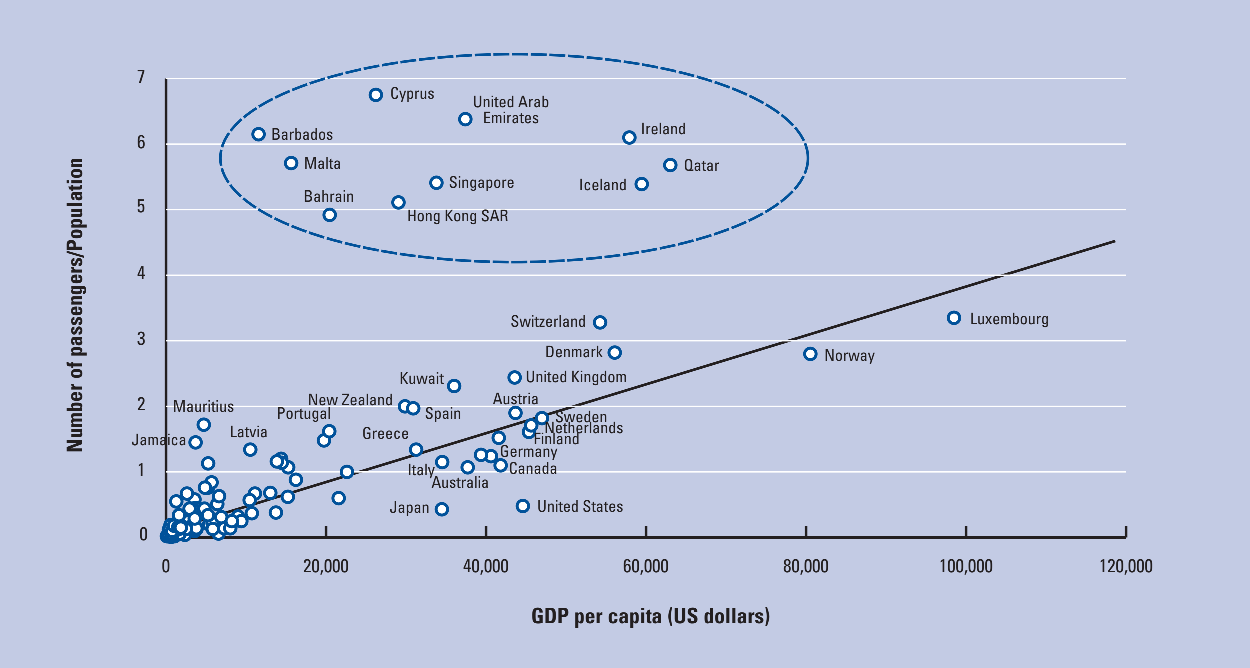
The results of the analysis with this model are broadly in line with our expectations. The model explains a large proportion of the variation of the data (77 percent of the overall variance).[5] The total Index score and GDP per capita have a positive impact on the intensity to travel. The distance from destination, which is used as a proxy of the cost to travel to a given country, has a negative effect on the intensity to travel.

Figure 2: Travel intensity and TTCI score, 2007



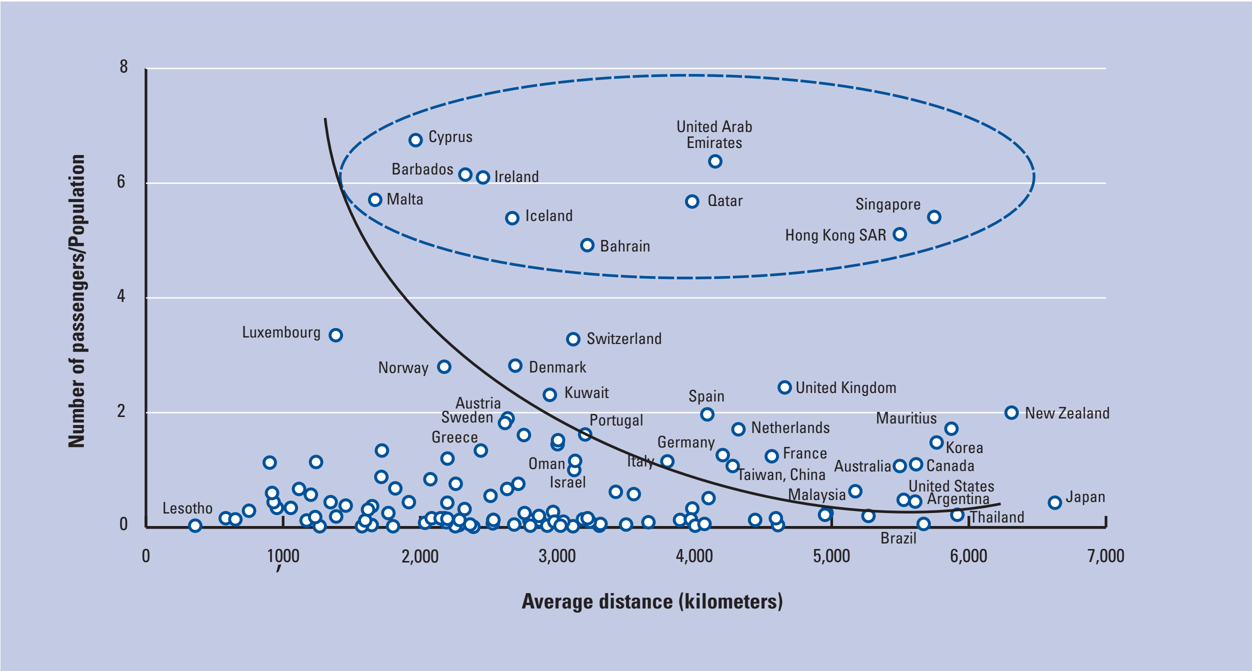
Source: IATA; World Economic Forum, 2008.

Figure 3: Travel intensity and GDP per capita, 2007



Source: IATA; World Economic Forum, 2008.

Figure 4: Travel intensity and distance, 2007



Source: IATA; World Economic Forum, 2008.

The TTCI score appears to be the most important factor explaining variations in travel intensity between countries. GDP per capita counts for a larger weight than distance, which is consistent with other research showing that travel has a higher elasticity with respect to income than price.[6] Considering all else being equal, the model suggests that improving the total Index score by 10 percent would lead to an increase in travel intensity by 33 percent.

We used results of this model to simulate the outcome of improving the value of the TTCI score for several countries, through raising the performance of key drivers such as infrastructure, airport costs, and regulation. Because the TTCI score is calculated as an unweighted average of the three subindexes, the improvement might be achieved by upgrading the score of the subindexes and associated pillars. Obviously, the results that will be obtained with this simulation depend on the particular situation of each country in terms of the population, GDP per capita, distance to destinations, and the current value of the TTCI. Indeed, subindexes and associated pillars are affecting the T&T industry of each country differently.

India, for example, might increase the total number of its passengers in the model by 2 percent if it were able to upgrade its TTCI score to the regional average score of 4.02, which represents an improvement of 0.8 percent. This in theory might be achieved by upgrading the business environment and infrastructure performance from 3.70 to 3.78, through more competitive ticket taxes and airport charges, or by increasing the number of "available seat kilometers."

Mauritius, ranked 41st last year, enjoys a TTCI score of 4.38, which is above the African average. The model suggests that this country could increase its number of air passengers by 14 percent if it could reach the European average TTCI score (4.60), representing an upgrade of just 5 percent. This is might correspond to an upgrade of the ICT infrastructure, which is, according to last year's evaluation, at the bottom of the table (2.73 out of 7).

China is also an interesting example to investigate because it records a TTCI of 4.06, which is just below the TTCI average score for all countries of our sample. This country is rated relatively low on the overall T&T business environment and infrastructure (scoring 3.45 out of 7), where the tourism infrastructure and the ICT infrastructure pillars are particularly weak, with scores of 1.53 and 2.62 out of 7, respectively. All else being considered equal, if it were possible to raise this particular subindex to reach the TTCI European average, the model suggests that China might see an increase of the number of arriving and departing passengers of about 44 percent. Overall TTCI score averages, by region, are provided in Table 1 for comparison.

Table 1: Average overall TTCI score, by region

Region	Number of countries	Average TTCI score
Africa	27	3.40
Americas	23	4.03
Asia Pacific	25	4.02
Europe	41	4.60
Middle East	10	4.04
Total average	**126**	**4.08**

Source: TTCI 2008.

The next section will focus on analyzing the relationship between upgrading particular subindexes and associated pillars or indicators with the total number of passengers.

Policy implications

The main aim of this research is to provide a quantitative tool to measure the extent to which policies dedicated to improving the business environment and infrastructure; the regulatory framework; or the human, cultural, and natural resources component of a country might be expected to increase the number of air passengers and travel intensity by a country.

The results of last year's *Report* show that the scores recorded for the three subindexes are markedly different across regions (Table 2). For the sample under study, Africa has the lowest score in terms of business environment and infrastructures, while the Asia Pacific region, which is similar in terms of number of countries, is more highly ranked.

Europe, the larger sample with 41 countries, records the highest score for each of the three subindexes.

Table 2: Average T&T subindex scores, by region

		Average TTCI score		
Region	Number of countries	Subindex A: T&T regulatory framework	Subindex B: T&T business environment and infrastructure	Subindex C: Human, cultural, and natural resources
Africa	27	3.88	2.87	3.44
Americas	23	4.32	3.60	4.18
Asia Pacific	25	4.41	3.62	4.02
Europe	41	5.08	4.36	4.37
Middle East	10	4.43	3.98	3.70
Total average	**126**	**4.50**	**3.73**	**4.01**

Source: TTCI 2008.

Air transport infrastructure

High-quality air transport infrastructure is a key driver of competitiveness for the tourism industry and also for the whole economy of a country.[7] It allows for the reduction of the distance barrier between countries and connects national markets to the rest of the world.

Air transport infrastructure is a component of the TTCI score and is captured in the 6th pillar. This pillar is made of six different indicators, including both quantitative and qualitative measurements: the quality of the air transport infrastructure, the number of available seat kilometers, the number of departures per 1,000 population, airport density, the number of operating airlines, and the quality of the international air transport network.

Results of last year's *Report* indicate that the score for this particular indicator varies widely across countries and regions.

African countries are suffering from a lack of air transport infrastructure, with the lowest regional average score of just 2.43 for this pillar, while the Asia Pacific region, which is of comparable sample size, enjoys an average score level of 3.41 (Table 3).

Table 3: Average score for the air transport infrastructure pillar

Region	Number of countries	Average score
Africa	27	2.43
Americas	23	3.34
Asia Pacific	25	3.41
Europe	41	3.75
Middle East	10	3.63
Total average	**126**	**2.43**

Source: TTCI 2008.

We used our econometric model to simulate the results of hypothetical programs to upgrade the air transport infrastructure pillar for two African countries. This improvement might be achieved by upgrading one or several of the six indicators. It should be noted that the objective of this exercise is to indicate the scale of increased activity that such an improvement in air transport infrastructure might bring. Governments will need to assess the costs and benefits of investing in air transport against other public works. However, this analysis does provide important data that could be used to help measure the benefits of such investment in a cost-benefit assessment.

Mali, according to the value of the 6th pillar, shows a deficit of air infrastructure with a score equal to 2.10 out of 7. Among the lowest country performances in this pillar are the number of available seats offered and the airport density, with scores of 1.05 and 1.03, respectively. Our model suggests that the number of passengers arriving and departing could be raised if it were possible to invest in creating new airport capacity and/or create the necessary regulatory conditions for airlines to increase air transport capacity. Assuming that all other pillars remain unchanged, this country might see an increase of 2 percent (representing a total of about 635,132 passengers) of the number of passengers if it could upgrade its air transport infrastructure to the African average. According to the 12th pillar measurement, capturing affinity for Travel & Tourism, this country already enjoys a favorable position for tourism (a score of 4.88 out of 7) with a very friendly attitude of population toward foreigners (6.8 out of 7). Upgrading the air transport infrastructure might support a further expansion of the T&T industry.

Mauritania is the other example we look at in Africa. It has one of the poorest measured quality and quantity of air transport infrastructure, with a score of just 2.12. According to this indicator, this country records a poor quality of air transport infrastructure (3.1 out of 7) as well as a low level of available seat kilometers (1.02 out of 7). Here again, the model suggests Mauritania would benefit from a 2 percent rise in the number of air passengers, representing around 317,000 passengers, if it were able to raise its infrastructure score to the African average.

The implementation of policies aimed at upgrading air transport infrastructure is obviously not the only means to improve countries' T&T competitiveness, but it should be considered as a part of a basket of policy measures. Improving air transport infrastructure and the transport infrastructure in general, including road, railroads, and ports, is certainly a catalyst for less-developed countries to ensure, on the one hand, an effective functioning of their economy; on the other hand, it constitutes a good means of providing improved access to their market and attracting foreign investments.

At the other end of the scale, Europe as a whole records the best air transport infrastructure according to this measurement, with a score of 3.75. France, Germany, and Spain are among the highest ranked countries within this region.

Yet several countries in Eastern Europe record a low score in terms of air transport infrastructure. This is the case for Albania (2.20) and Bosnia and Herzegovina (1.97). If they were able to upgrade their transport infrastructure to the European average—for example, by creating the conditions for an increase of the number of available seat kilometers or by improving their international air transport network connectivity—these countries might increase the number of passengers by 9 percent and 11 percent, respectively.

Middle Eastern countries are very well ranked on the provision of air transport infrastructure, making the region, which is composed of 10 countries in our sample, the second best performer after Europe. The best performer in the region is the United Arab Emirates, with 5.50 (well above the European average).

Ticket taxes and airport charges

The ticket taxes and airport charges indicator is a part of the 10th pillar, namely price competitiveness in the T&T industry, along with hotel prices, fuel costs, relative consumer prices, and taxation.

For the T&T industry, this indicator, even if it counts for the same weight as the other 24 indictors of the second subindex and thus represents a small share in the TTCI score, is an important issue for a country in terms of attractiveness of tourist arrivals. For a country, applying high ticket taxes and airport charges would raise the cost of travel and might divert traffic to another, cheaper destination (Table 4).

Table 4: Average TTCI score for ticket taxes and airport charges

Region	Number of countries	Average score	Ranking
Africa	27	5.22	Most expensive
Americas	23	5.23	
Asia Pacific	24	5.82	
Europe	40	5.69	
Middle East	10	6.30	Least expensive
Total average	**124**	**5.58**	

Source: TTCI 2008.
Note: Data are not available for Montenegro or Kazakhstan.

The Middle East region enjoys the best performance, as ticket taxes and airport charges paid by passenger and airlines are lower than in the other regions. Bahrain, the United Arab Emirates, both with scores of 6.78, and Qatar, at 6.68 out of 7, are the top three countries of this region. These countries have attracted a great proportion of the air passenger's traffic in the region by applying, among other factors such as their favorable geographical location, a policy prioritizing a competitive ticket taxes and airport charges.

Asia Pacific countries are also very attractive from this indicator's point of view, with an average score of 5.82 out of 7. Some of the cheapest countries in this region are India (8th), Malaysia (11th), Indonesia (12th), and Taiwan China (13th).

Europe enjoys a lower average score (5.69). France, the United Kingdom, and Bosnia and Herzegovina are the most expensive European countries according to this indicator. On the other side, Luxembourg (6.82) is the cheapest country of our entire sample.

African and Latin America countries have weaker scores in this area. There is here a significant potential for attracting air passenger traffic by reducing tickets taxes and airport charges. Calculations made using our econometric model demonstrate that Ecuador, one of the countries with the highest tickets taxes and airport charges level in our sample, might see an increase of 3 percent of the number of passengers (up to about 2.7 million) if it were to improve its rank to the average European scores—this corresponds to upgrading the overall ranking of price competitiveness (10th pillar) by 4 percent.

The same exercise has been performed for Mali, and results demonstrate here again that the number of passengers might be increased by 5 percent if this country were able to raise its price competitiveness by 18 percent. This would need to take place on a number of fronts since, if it were to be achieved by reducing ticket taxes and airport charges alone, it would correspond to taxes and charges about seven times lower than is the current situation.

Regulatory framework

The regulatory framework, which is the first subindex of the TTCI, is made of five pillars capturing many elements related to government policies. Those elements include the openness of bilateral Air Service Agreements, policy rules and regulations, environmental sustainability, safety and security, health and hygiene, and also the prioritization of Travel & Tourism. This is the most complex subindex of the TTCI, as it is constructed on a basis of 27 individual indicators (against 24 for the second subindex and 20 for the third).

In the 2008 TTCI, Europe enjoys the most favorable regulatory framework, with the top four countries in this region being Switzerland, Germany, Spain, and the United Kingdom. However, several Eastern European countries are ranked at a lower level than the European average: Bosnia and Herzegovina, Macedonia, Albania, and Russia are at the bottom of the ranking for this particular subindex.

One part of the explanation is that these countries seem not to implement policies aimed at prioritizing the T&T industry. Indeed, the 5th pillar, which captures this element, shows a relatively low score for these countries. Looking in more detail—at the indicator of government prioritization of the T&T industry—we notice also that the score is quite low for these four countries, below 4 out of 7 for Bosnia and Herzegovina, Macedonia, and Russia, and 4.7 for Albania.

Using our model, we simulate for these countries the impact of upgrading their overall regulatory framework scores to the European average that could be achieved through the improvement of one or several pillars of subindex B (Table 5). Bosnia and Herzegovina shows the greatest potential to improve to its overall TTCI ranking and attract an estimated additional 34 percent air travel passengers if it were able to implement regulatory policies that result in an improvement of about 26 percent of the subindex A score.

Table 5: Impact of upgrading the TTCI score, Eastern European countries

	Percent increase	
Country	TTCI score	Number of Passengers
Albania	10	33
Bosnia and Herzegovina	10	34
Macedonia, FYR	4	11
Russian Federation	7	23

Source: TTCI 2008.

African countries are most hampered from a regulatory point of view, with an average subindex score of 3.88. Burundi, Cameroon, Chad, and Lesotho are the countries that record the lowest subindex A. For these countries we also simulate the impact of improving the ranking by improving the policy rules and regulations pillar (See Table 6).

Table 6: Impact of upgrading the TTCI score, African countries

	Percent increase	
Country	TTCI score	Number of passengers
Burundi	8	27
Chad	14	51
Cameroon	7	21
Lesotho	6	18

Source: TTCI 2008.

We did a similar exercise for the Asia Pacific region. Several countries within this region are suffering from an inefficient regulatory framework, according to the first subindex ranking. Among the countries that would be the most affected is India, with a score of just 3.78, below the regional average score of 4.41. This country has the potential to increase the number of air passenger by 17 percent if it could upgrade its regulatory policies to the regional average.

The other important indicator that facilitates air transport connections between two countries is the openness of bilateral Air Service Agreements (see Table 7). This is captured in the policy rules and regulations pillar.

Table 7: Average score for openness of bilateral Air Service Agreements

Region	Number of countries	Average score
Africa	27	2.31
Americas	23	4.02
Asia Pacific	23	2.67
Europe	39	2.79
Middle East	10	2.64
Total average	**122**	**2.88**

Source: TTCI 2008.
Note: Data are not available for Montenegro, Serbia, Tajikistan, or Taiwan, China.

Latin American countries, such as El Salvador, Honduras, and the Dominican Republic, enjoy the highest scores for this indicator, creating positive incentives to facilitate air transport connections with other countries. Last year's results indicate that all other regions benefit from a comparable level of openness with similar scores, although it is mainly African and Eastern European countries that are at the bottom the TTCI table—for example, Estonia and Algeria, among others. For these two countries, our simulation shows that the number of passengers might be raised by 4 percent and 9 percent, respectively, through an improvement of all the policy rules and regulation measures to their regional averages.

Conclusion

This modeling demonstrates that the tourism competitiveness factors making up the TTCI are strongly related to the total number of passengers arriving and departing for a given country. Taking into account the population by country, the econometric analysis demonstrates also that the GDP per capita of the destination country and the average distance traveled to reach that particular country are two other significant factors. Efforts dedicated to improving the overall TTCI ranking (by implementing an efficient regulatory framework; investing in infrastructure; improving price competitiveness; or improving human, cultural, and natural resources) are likely to increase the total number of passengers arriving and departing for a given country, according to the model estimation. The econometric model developed provides a tool to simulate the effect of a particular policy on the number of air passengers either by upgrading the overall TTCI score or the score of one of the subindexes and pillars.

Further work is necessary to refine the analysis, but already it provides some quantification of the effects that governments and other stakeholders might expect if they improve the provision of key drivers of Travel & Tourism. These drivers could be used to help improve the wider economic benefits brought through the development of this important sector.

Notes

1 UNWTO 2008.

2 IATA 2007.

3 The econometric model is based on the data collected during the 2008 edition of the *Travel &Tourism Competitiveness Report* using a sample of 126 countries (the following countries are not included in the analysis: Guatemala, Kyrgyz Republic, Puerto Rico, and Nicaragua. International passengers data for the full year 2007 were not available for these countries). The total number of air travelers for a country is calculated on an origin and destination basis for each country and is extracted from IATA's Passenger Intelligence Services (PaxIS) database (2007). All data sources are listed in the appendix.

4 See IATA 2008.

5 See Appendix A: Description of the Model.

6 IATA 2008.

7 Please note that this pillar is comprised of six indicators in *The Travel &Tourism Competitiveness Report 2008;* this year, the number of available seat kilometers has been divided into two separate indicators, domestic and international, so that there are now seven indicators that make up the pillar. This section cites results and scores listed in the 2008 *Report*.

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Appendix A: Description of the Model

The model estimates the total number of passengers arriving and departing from a country (weighted by the population) with respect to the overall TTCI score, the GDP per capita, and the distance to destination countries.

For a given country, the total number of passengers (arriving and departing) divided by the population of that country is the dependant variable. The overall TTCI score, the GDP per capita for that country, and the average distance flown to reach this country are the explanatory variables.

The following log-log specification form indicating the intensity of travel between country X and country Y (where Y is all countries except X) is used:

$$\log \frac{(Total\ nb.\ Pax)_{XY}}{Pop_X} = c_1 + c_2.\log(TotalIndex)_X + c_3.\log(GDPperCapita)_X + c_4.\log(Dist)_{XY} + \varepsilon_{XY}$$

The dependant variable is defined as follows:

- *Total nb.Pax/Pop* is the total number of passengers (arriving and departing from a given country X to the rest of the world, denoted Y) divided by the population of the country X

The explanatory variables are defined as follows:

- *TotalIndex* refers to the TTCI score calculated for country X
- *GDPperCapita* is the GDP divided by the population for country X
- *Dist* is the average distance flown from country X and all other countries, denoted Y
- ε_{XY} is the error term of the regression

The following estimation is obtained:

	Explanatory variables	Coefficients
c_1	Constant	–8.05
c_2	TTCI score	2.97
c_3	GDP per capita	0.59
c_4	Distance	–0.27

Note: Coefficients are estimated using a log-log model.

The model has been tested for autocorrelation and heteroskedasticity.

Data sources

TTCI scores: *The Travel & Tourism Competitiveness Report 2008: Balancing Economic Development and Environmental Sustainability*

Distance between countries: IATA, Scheduled Reservation System database

Number of passengers: IATA, PAxIS database, 2007

Population by country: The World Bank, 2007, 2006 online database

Real GDP per capita by country: The World Bank, 2007, 2006 online database

CHAPTER 1.5

Capturing the Visitor Economy: A Framework for Success

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Tourism is one of the largest industries in the global economy and has been both a key driver and a beneficiary of the prolonged period of economic growth seen in recent years. It also has significant social and cultural benefits because of its potential to promote understanding and international relationships. These socioeconomic dimensions make tourism a vital component of globalization.

The importance of the sector worldwide is demonstrated by the liberal business environment that exists in most countries, with more than 130 WTO members having made commitments to open up their tourist industry—more than any other service sector.[1]

International tourist volumes increased by 6 percent in 2007, reaching almost 900 million arrivals and delivering the fourth year of uninterrupted expansion. The first half of 2008 saw a further volume increase of 4 percent, but a sharp slowdown in the second half led to an estimated growth of 2–3 percent for the year as a whole.[2]

As the global economy enters deeper into a climate of uncertainty in 2009 with reduced investment and declining consumer spending, coupled with an increasing focus on fiscal policy to stimulate economic activity, it becomes more important than ever for countries to sustain and maximize the benefits of tourism.

It is vital for policymakers to understand the economic impact of tourism and to design and implement policies that will enable them to realize its full benefits. In this chapter, we analyze, from a public sector perspective, the economic contribution of tourism to the wider society and explores a framework for capturing the "visitor economy."

What is the visitor economy?

The visitor economy in each country consists of two key components.[3] The core element is formed by the direct contribution of tourism: the value generated by the provision of tourism-related goods and services. This measure is in line with the concept used by the United Nations World Tourism Organization (UNWTO) Tourism Satellite Accounts (TSA).

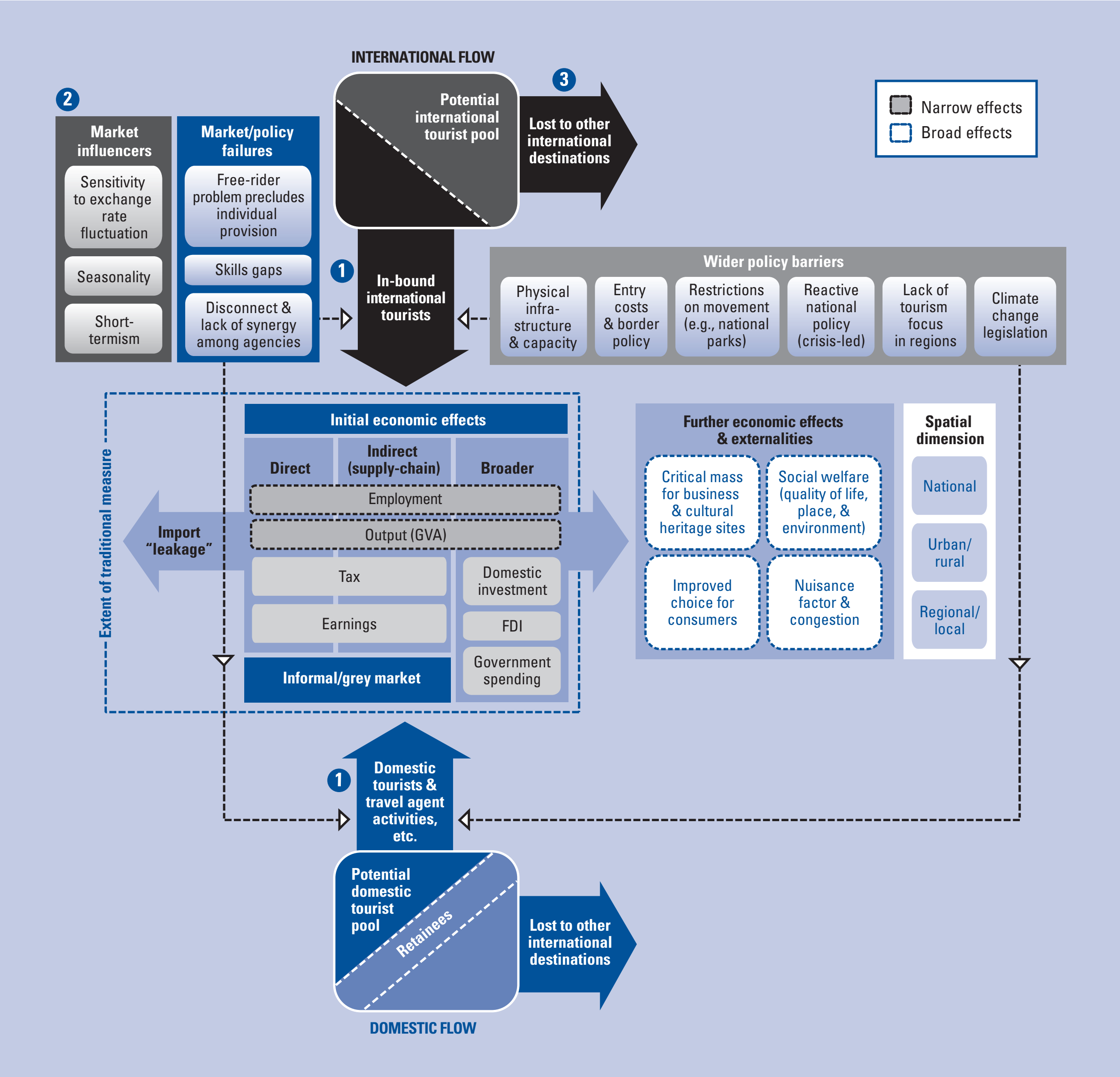
A second, broader component takes into account indirect contributions from other sectors that rely on, or support, tourism (for example, through the supply chain). This component also includes the impact of capital investment and collective government expenditure on behalf of the tourism industry.

In this chapter we analyze these components of the visitor economy and also consider its contribution to broader public policy objectives such as regeneration, social and economic inclusion, enhancing skills and employment, and attracting enterprise and investment as well as strengthening international ties.

Deloitte has developed the "visitor economy analysis framework" to describe and understand how tourism interacts with and contributes to the wider economy and society. This framework highlights the economic impacts (direct and indirect) of tourism as well as its key drivers, policy barriers, and market failures. It identifies those factors that can be most effectively leveraged by the industry and by policymakers, along with more uncontrollable factors that represent specific and unusual pressures on the sector. The key elements of the framework are outlined in Figure 1 and explored in more detail throughout the rest of the chapter.

To varying extents in different countries, these drivers influence both the number of in-bound visitors and the extent to which domestic residents are retained

Figure 1: Visitor economy analysis framework



Source: Deloitte.

Note: Framework outline:

① **Domestic and international tourists:** The economic impact of tourism is driven by the number of tourists and the amount they spend. Both domestic and international tourists add value to an economy.

However, domestic visitors contribute in an economic sense only if their alternative choice would be to travel abroad; otherwise they represent a redistribution of expenditure within the domestic economy.

② **Market influencers and market failures:** These have an impact on economic outcomes by affecting the number of tourists visiting or remaining in a given country.

Key market influences include exchange rate fluctuations affecting the relative cost of a trip, and seasonality affecting the attractiveness of a destination—for example, there are significant variations in visitor numbers during summer and winter seasons, or for special events.

Market failures affect the level of information available to prospective visitors and thus their behavior, as well as the ability of the industry to undertake coordinated and effective marketing; this in turn influences the number and type of visits. Market failures can also affect the ability of visitors to fulfill their (spending) expectations once in the country—for example, through accessibility to varied locations.

③ **Wider policy barriers:** These also have external effects on the economic impact of tourism, influencing both visitor numbers and expenditure. These include physical infrastructure and capacity, entry costs and border policy, and climate change legislation.

as tourists. This determines the extent of the economic contribution of the sector.

The challenge for policymakers is to concentrate resources on those drivers that can be influenced and that will deliver the greatest economic benefits to the sector itself and to the wider economy. An example of the way this economy works in a particular country is seen in Box 1.

Economic impact

As identified at the beginning of this chapter, the economic impact of tourism is wide ranging and falls into distinct classifications. Taking the example of tourism-related activity in restaurants, the figure in Box 2 illustrates the different categories of impact on the overall economy in terms of quantifiable effects.

In addition, tourism has a number of non-quantifiable effects on the wider policy agenda. Examples include global image, culture, and heritage, as well as tourism's contribution to enhancing the attractiveness of a place for inward investment.

Understanding the supply chain

The example in Figure 2 illustrates that through direct, secondary, and induced effects, any change in tourist expenditure can have consequences for many sectors of the economy. Understanding the tourism supply chain is the key to grasping these consequences.

There are numerous stakeholders involved in the tourism industry. Any single transaction extends beyond its direct effects, creating ripples throughout the lengthy supply chain. Tourism is therefore an important component of sustaining a healthy, diversified economy, and as an industry sector it should be a primary consideration for policymakers. Countries need to understand the relative importance of the visitor economy and how to maximize the benefits of tourism for the supply chain as a whole, in addition to generating wider public good and the economic benefits derived from tourism.

Leakage threat

There is a significant missed opportunity in the economic impact of tourism where a country lacks an indigenous supply chain for the sector. Examples of missed opportunities include tourism establishments that import food from outside the country, a sector that employs large transient expatriate populations who repatriate the majority of their earnings, and a destination where the majority of services are provided "within resort" by foreign-owned entities.

In such examples, the economic benefits of tourism can be surprisingly low because of the high degree of

Box 1: The visitor economy framework applied to the United Kingdom

The Deloitte framework can be applied to any country. It was recently used in the United Kingdom as part of a study commissioned by VisitBritain and the Tourism Alliance.

The UK visitor economy delivers a significant direct contribution to the economy—currently £52 billion or 3.7 percent of GDP.[1] This takes into account the value added that is generated by the provision of tourism-related goods and services. Moreover, the visitor economy directly supported over 1.36 million jobs in 2007. Total spending in the visitor economy has risen, in nominal terms, from £85 billion in 2005 to £86 billion in 2007.

The UK visitor economy also has significant indirect impact through its interaction with other businesses in the supply chain. The total (direct and indirect) impact of the visitor economy was 8.2 percent of national GDP in 2007—equivalent to around £114 billion. These indirect impacts arise because activity and output in the visitor economy create jobs and growth in the wider economy as other sectors sell to or purchase from it. There is also further impact through interactions with suppliers of investment goods to the visitor economy. All of these other sectors, to some extent, benefit from the visitor economy. The United Kingdom has a strong domestic supply chain and, as a result, its capacity to absorb indirect economic benefits is high.

While the sector has the potential for continued strong growth, it faces a series of short-term and longer-term challenges as international competition increases and the world economy deteriorates. In the longer term, the sector's economic impact could grow to £188 billion by 2018, although still accounting for around 8 percent of GDP. The London Olympics in 2012 is expected to provide a particularly significant boost to tourism revenues.

Although the longevity and depth of the current recession remain unclear, it is expected that, as a result of the global economic downturn, gross value added for the visitor economy could be £11 billion lower over the next three years, with 114,000 fewer jobs created than would otherwise have been the case.

Notes

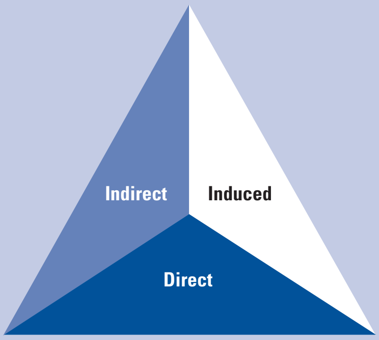
1 Deloitte 2008; see the financial forecasting model in Annex B of that report.

Box 2: Understanding the economic effects of tourism

Direct effects are those changes in production that are connected with immediate effects of changes in tourism expenditure. Tourists spending money in restaurants directly result in increased sales in the hospitality sector. The additional sales and consequent changes in salaries, taxes, supplies, and so on are direct effects of tourist expenditure.

Indirect (secondary) effects are those changes in production resulting from spending of the restaurant's receipts in other linked parts of the supply chain—that is, goods and services used by the restaurant. Changes in sales, jobs, and so on in the food and beverage supply industry represent the indirect effect of changes in the restaurant industry. Additionally, there are a multitude of suppliers to the food and beverage industry that represent another stratum of indirect effects.

Induced effects describe those changes in economic activity that result from the spending of employee income earned through participation in the tourism industry. Restaurant employees supported by tourist expenditure subsequently spend their income in the region in which they live on goods such as utilities, food, accommodation, and so on. The revenues, salaries, and jobs that are a consequence of household spending of additional income arising from tourism are known as *induced effects*.



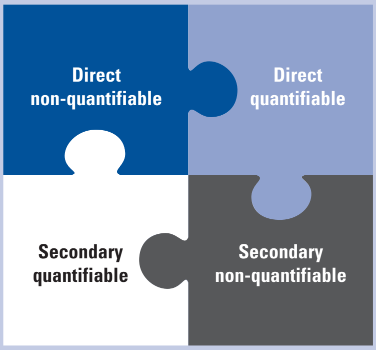


Figure 2: Tourism supply chain

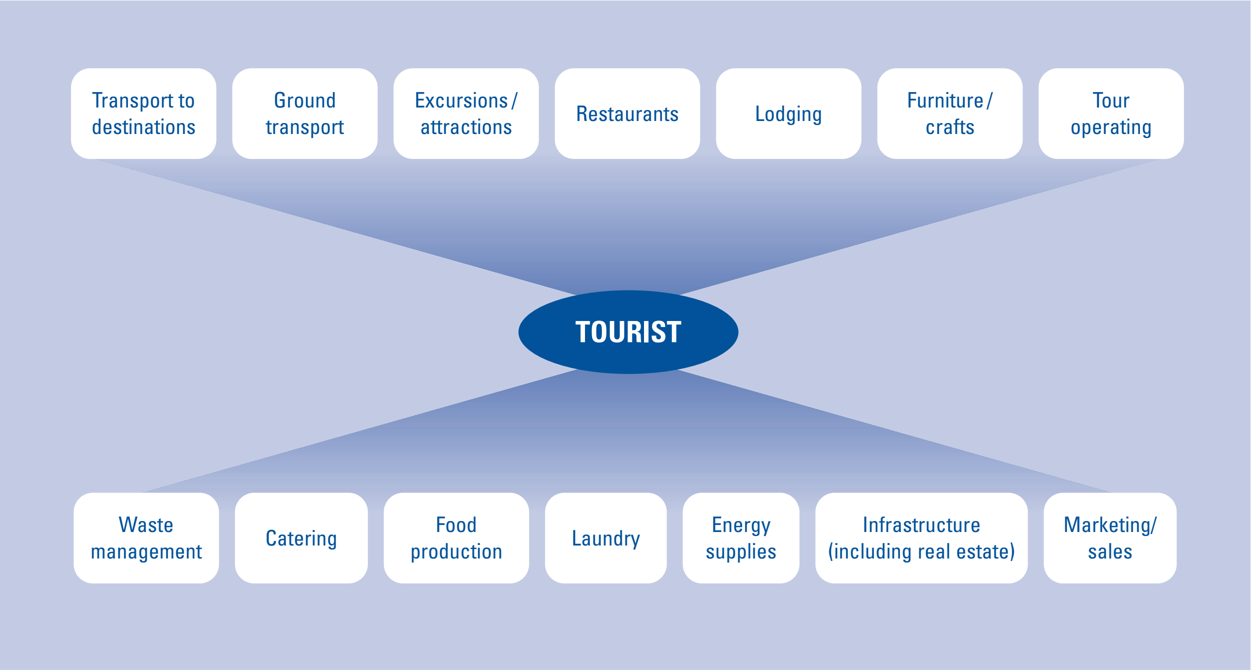
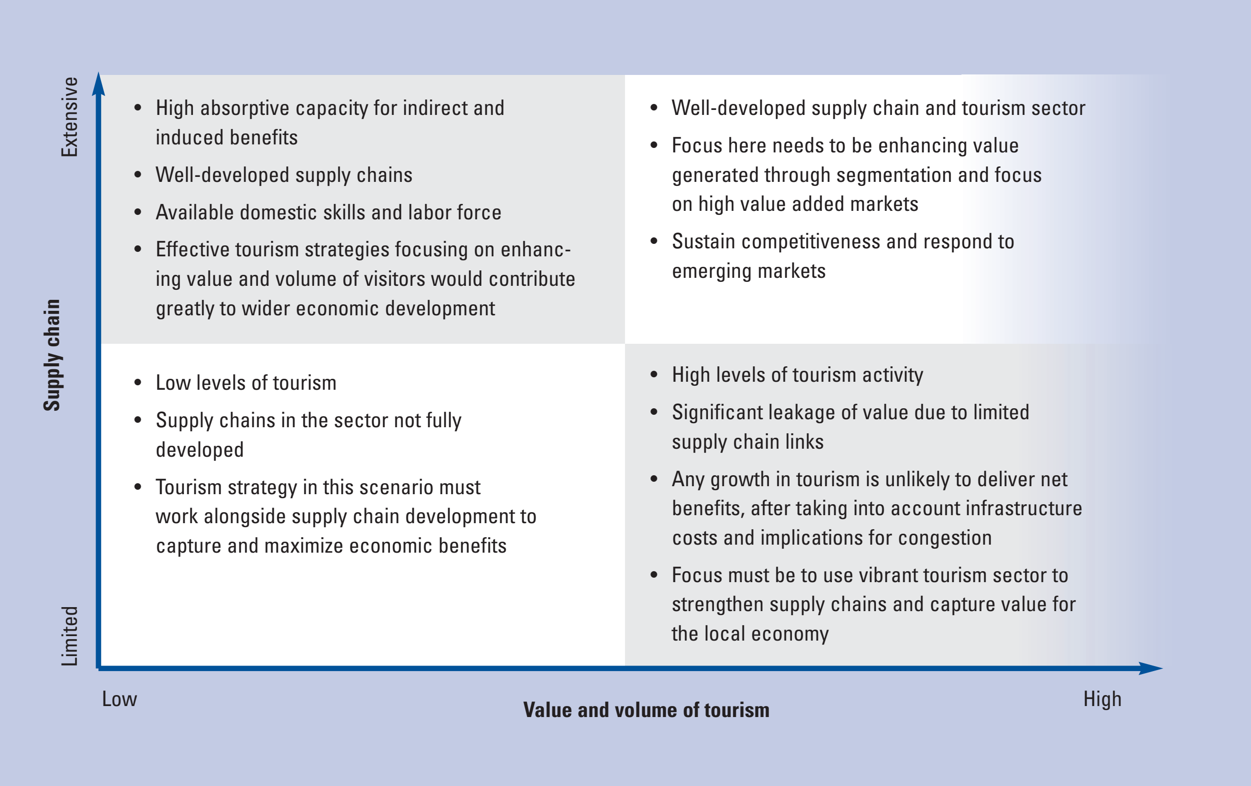


Figure 3: Supply chain and tourism volume



- High absorptive capacity for indirect and induced benefits
- Well-developed supply chains
- Available domestic skills and labor force
- Effective tourism strategies focusing on enhancing value and volume of visitors would contribute greatly to wider economic development

- Well-developed supply chain and tourism sector
- Focus here needs to be enhancing value generated through segmentation and focus on high value added markets
- Sustain competitiveness and respond to emerging markets

- Low levels of tourism
- Supply chains in the sector not fully developed
- Tourism strategy in this scenario must work alongside supply chain development to capture and maximize economic benefits

- High levels of tourism activity
- Significant leakage of value due to limited supply chain links
- Any growth in tourism is unlikely to deliver net benefits, after taking into account infrastructure costs and implications for congestion
- Focus must be to use vibrant tourism sector to strengthen supply chains and capture value for the local economy

Source: Deloitte analysis.

"leakage" outside the domestic market. The lack of a domestic tourism supply chain significantly dilutes the value of the visitor economy, but offers clear opportunities for increasing the capture of these benefits if corrective action is taken.

Figure 3 illustrates the interaction of the supply chain with the levels of tourism in a given country.

Spillover benefits

Beyond the supply chain, tourism has close links with other parts of the economy, creating spillover benefits for a number of diverse sectors. Examples of sectors that gain include retail, manufacturing, and health and life sciences.

Retailers who are not directly associated with the tourism industry may develop targeted strategies for tourist areas to maximize sales of goods and services specific to visitors. For example, in the United Kingdom, although only 1 percent of overseas visitors come to London for shopping, they represent around a quarter of all shoppers in central London and account for £1.0–1.7 billion of retail spending annually.

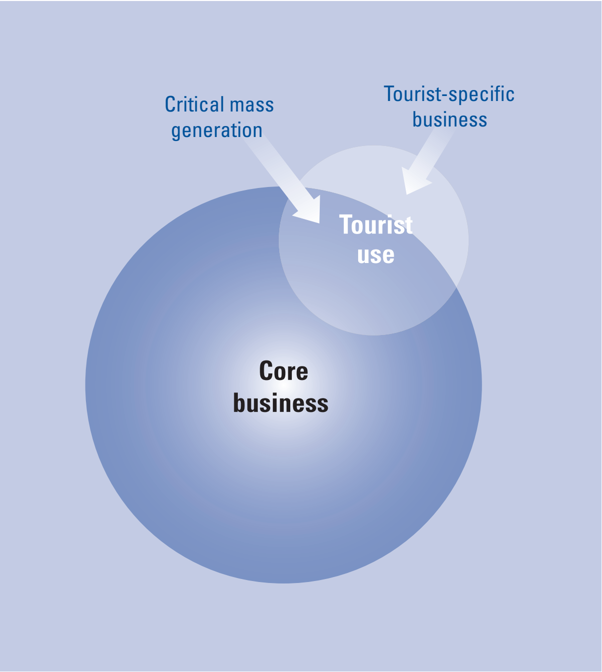
While the contribution of the visitor economy to the manufacturing sector is not immediately obvious, Deloitte research reveals crucial links through the supply chain. These links are particularly strong for manufacturing in the transport sector, food and beverages, and hotel equipment.

Well-developed health-care systems and improvements in technology have also supported the growth of medical tourism, with consumers traveling specifically to receive treatments such as surgery, dentistry, cosmetic surgery, and infertility treatment.

Deloitte has also found evidence of a "critical mass viability" effect, whereby tourism and its associated expenditure create further benefits for local businesses and consumers (Figure 4.) For example, some business services are aimed specifically at tourists, but there is often significant cross-over and in some cases even cross-subsidization, benefiting local residents.

This effect is partly tangible through additional choices made available to residents or through the investment in conservation efforts to enhance a country's heritage, as can be seen in the United Kingdom. It is also partly intangible in terms of its contribution to the "vibe" of a place such as Dubai.

Figure 4: The critical mass viability



Source: Deloitte analysis.

Wider contribution

The visitor economy can also contribute to the wider socioeconomic policy agenda. Tourism can promote economic and social inclusion by providing a point of entry to the labor market for those with low or no skills, those who can only work part-time, or those who might not otherwise engage with the labor market. Once employed, these workers can be "up-skilled" and moved further up the value chain.

The visitor economy supports strong entrepreneurial activity and new business formation in many countries. This is helped by the comparatively limited barriers to entry in most areas of the tourism industry; this is particularly the case for small- and medium-sized enterprises.

The visitor economy contributes significantly to the sustainable development of many rural areas in terms of direct tourism-related activity. Anecdotal evidence also suggests that local supply chain links are likely to be stronger in these areas. For both these points, though, it is important not to overstate the case for the contribution made by "lifestyle businesses," where normal business drivers toward growth and higher value may be at odds with more personal motivations for the style and scale of tourism business being created.

Tourism has also been a catalyst for wider regeneration and development in a number of urban areas across the world, from the Las Vegas Strip to Singapore's Clarke Quay.

In assessing the economic impact of the visitor economy, it is important to understand not just the benefits of the sector but also the costs, both to the tourism industry itself and to the wider economy. For example, if the government chooses to develop an airport to better serve tourists, this represents a fiscal cost as well as an asset.

Society may bear the cost and negative consequence of increased congestion resulting from higher volumes of tourism. "Joined-up" thinking to connect policy at the local, regional, and national levels is therefore of great importance in ensuring that the positive economic benefits are maximized while negative impacts are dealt with effectively.

And finally, tourism can be a powerful tool to facilitate international understanding and enable broader cultural horizons. This will help in building cosmopolitan and globally aware communities.

Five key areas for policymakers

Tourism must clearly be seen from the perspective of the broader economy. The framework focuses on five key areas to assist countries in developing a strategy that will maximize the value of the visitor economy within this broader context: macro factors, international competition, market failures, policy barriers, and policy considerations.

Macro factors

The economic impact of the visitor economy is primarily driven by tourist numbers and associated spending. These are likely to be influenced by a number of factors:

- The cost of visiting or remaining in a destination—for example, as determined by exchange rates—is a key influence on both domestic and international travelers.

- Consumer spending is a main driver for both domestic and inbound tourism.

- The health of the domestic economy as measured by the gross domestic product (GPD) is a main determinant of activity in the tourism industry. This is particularly relevant in relation to business travel spending.

- The "brand image" and attractiveness of a destination, and the impact of any improvements made in tourism policy and infrastructure, are a large part of the reason for the viability of the destination as a tourism destination. This includes less tangible aspects such as the cultural offerings, vitality, and vibe of a destination; the mix of visitor opportunities, and the overall quality of the environment on offer as a place to visit. This is likely to have a medium- to long-term effect. (The Travel & Tourism Competitiveness Index discussed in Chapter 1.1 offers the most useful indicator here. Although not designed as a measure of destination attractiveness, there is a direct correlation between this Index and visitor numbers).

- Consideration should also be given to investment in tourism infrastructure (e.g., hotels, airplanes, recreation sites) as well as public investment in areas supporting tourism (e.g., transport infrastructure).

The relationship between these macro factors is complex and interdependent. It is useful to distinguish between typically short- to medium-term drivers and longer-term drivers of the visitor economy.

In the short to medium term, those drivers influencing demand are likely to dominate. Exchange rate fluctuations, consumer sentiment, and prospects for economic activity in the domestic market and the main source markets will drive outcomes for tourism.

In the longer term, the development of the tourism industry largely depends on supply side factors such as the effective delivery of infrastructure and the relative attractiveness of the destination. These factors will also influence overall economic activity and GDP over the long term.

The long-term drivers can be addressed through policy interventions. However, short-term drivers—such as cyclical fluctuations in output, consumer spending, and exchange rates—are less easy for policymakers to influence directly.

International competition

The intensification of international competition throws down a challenge to all countries to sustain and enhance their status as tourism destinations.

Success is not always about increasing the volume of visitors. In a country whose popular tourist venues are close to capacity, the same number of visitors spending more on a per capita basis may yield better overall outcomes than more visitors spending the same amount. In other words, extracting higher value from existing visitors and retaining it within the local economy is often more important than pursuing absolute growth in visitor numbers.

Emerging markets such as the Gulf States and Singapore, as well as many traditional destinations such as Greece and Turkey, are differentiating their products and pursuing expansionary tourism policies. For each individual country there is a need to assess the position of their visitor economy in terms of the wider policy context.

As illustrated in Figure 5, investment in tourism remains strong and does not correlate with a country's competitive ranking. International benchmark comparisons of countries' tourism offerings, government expenditure on Travel & Tourism (T&T), and the size of the T&T sector highlight some key challenges with respect to the activities of other countries. Figures 5a and 5b show the linkages (or otherwise) between these factors.

Figure 5a shows that there is a strong positive relationship between the size of a country's T&T industry (relative to GDP) and the relative expenditure by that country's government on T&T support (relative to GDP). The direction of causality is not clear: this could be a case either of governments backing winners or of governments attempting to create winners. Figure 5b shows that the quality of the tourism offering (measured by competitiveness rank) in a country is not particularly related to the level of government expenditure, which suggests that this is related more closely to the endowment of visitor economy capital (not natural assets and long-term investment) and that throwing expenditure at a country's visitor economy offer does not necessarily result in relative success, particularly in the short term.

Market failures

In many countries, tourism is a large industry with significant scope to grow further given appropriate levels of investment. However, there are also a number of market failures in the sector that, if not addressed, could prevent the visitor economy from optimizing its full potential (see Box 3).

Box 3: What is market failure?

Market failure occurs when a market, left to itself, does not allocate resources efficiently. Economists have identified four main sorts or causes of market failure:

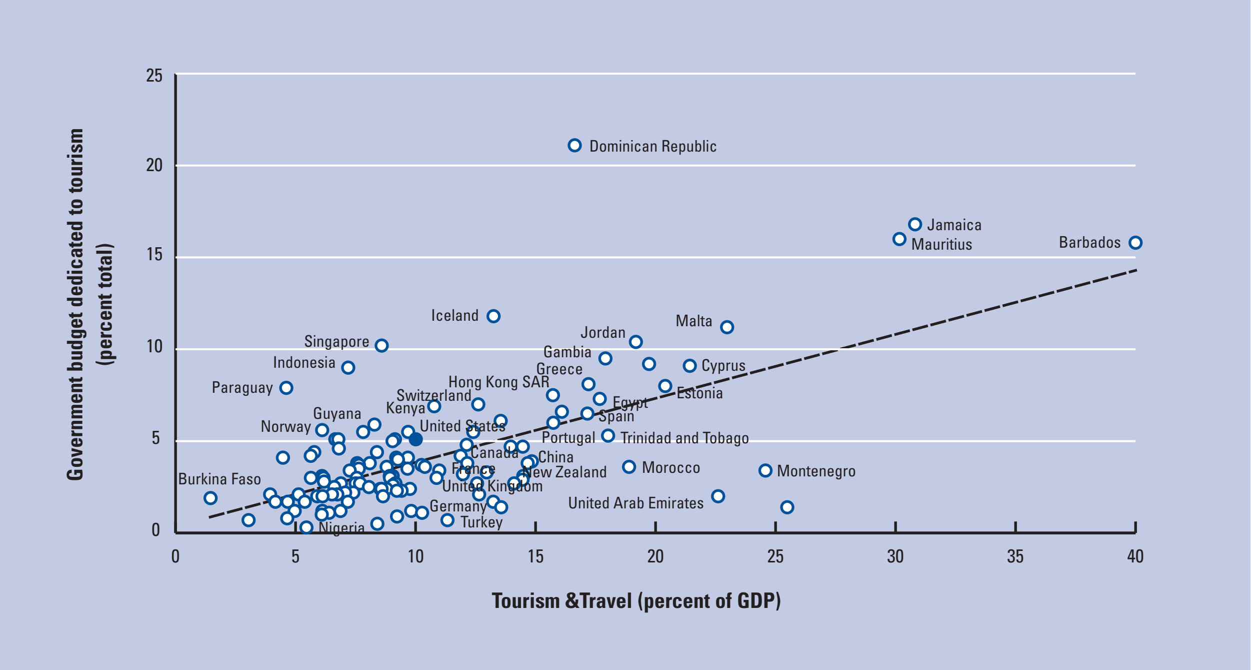
- market power,
- lack of provision (public goods),
- externalities, and
- asymmetric information (uncertainty).*

Policy intervention occurs where market failure is deemed serious enough to warrant expenditure to improve (allocative) efficiency. Thus, if the net benefits of intervention outweigh the costs associated with market failure and costs of intervention, there is a case for intervention.

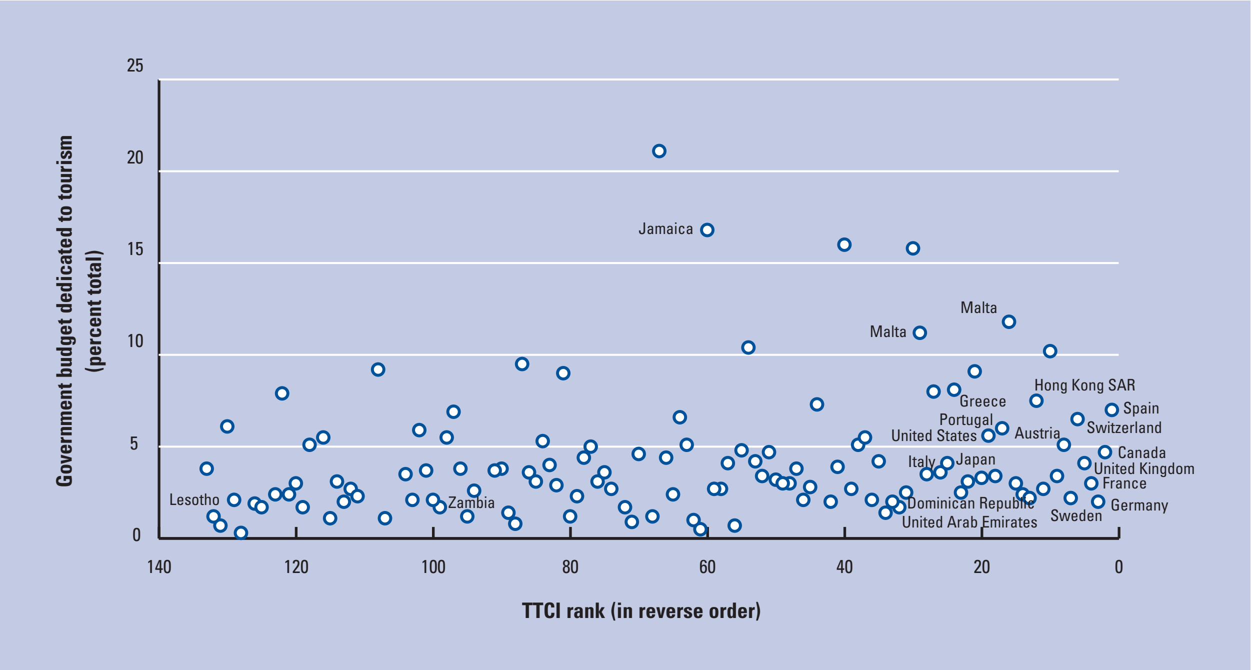
*Adapted from economist.com.

Figure 5: Relative government expenditure vs. visitor economy contribution and tourism offering, selected countries, 2008

a. Government expenditure vs. T&T percent of GDP



b. Government expenditure vs. TTCI competitiveness rank



Source: The Travel &Tourism Competitiveness Index 2009; World Travel & Tourism Council; Deloitte analysis.

Freeriders

The freerider problem is a major market failure within many visitor economies. Because of the fragmented nature of the industry, marketing is often uncoordinated and insufficient. Individual operators or groups of businesses are unlikely to market a destination (country, city, or region) to international or domestic tourists. Many tourism providers also see themselves as being in direct competition with their immediate neighbors rather than with other destinations and products (Box 4).

Box 4: The freerider problem

"If the number of people willing to pay for a service is not enough to cover the cost of providing it, the service might not be produced at all or in sufficient quantity, even though it would be beneficial for the economy as a whole to have it." *

*Adapted from economist.com.

Information gap

Other market failures occur when both consumers and businesses in the visitor economy suffer from information gaps (called *asymmetries*), and potential visitors (both overseas and domestic) do not have the relevant information to use in making their decisions.

Although information is unlikely to ever be perfect, there are significant failures where both consumers and businesses in the visitor economy suffer from information gaps. From the business perspective, firms know what their offering is and how attractive it is for tourists. What they do not know is the tourist's willingness to visit and pay. Businesses are therefore operating in an environment where they have incomplete information. From the visitor perspective, tourists know broadly about a destination but have incomplete information about the range of offerings and why exactly they should visit a particular destination relative to competitor destinations. Therefore, without some degree of information provision and coordination, bringing the two together is difficult; a failure exists as there is no incentive to provide information.

Externalities

The visitor economy also generates positive and negative externalities (benefits and costs for those not directly engaged in market-based tourist activity).

There are significant positive externalities arising from the visitor economy—where other businesses and consumers benefit from tourism activity. For instance, from a British residents perspective, the "critical mass" provided by tourist expenditure leads to increased leisure choice—for options such as theater, restaurants, and heritage. The positive externalities are the increased choice for domestic residents and preservation of the United Kingdom's heritage.

The existence of positive externalities can lead to too little of the good or service being produced, as there is a lack of incentive for private-sector firms to produce these goods and services. Consequently, the lack of incentives to invest in the activity without government support would lead to a level of provision that is below the optimal level for society.

However, there are also significant negative externalities that are likely to exist. The first example is that of congestion, particularly where transport infrastructure is unable to support the visitor traffic in popular destinations.

In addition, the activities in the visitor economy can generate negative externalities in the form of environmental costs (Box 5). For instance, open access to spaces can lead to both economic and environmental overexploitation of the natural environment. This can, in turn, affect the overall visitor economy because demand can be affected by accommodation and environmental quality.

The visitor economy gives rise to both positive and negative externalities. Positive externalities exist where other businesses and consumers benefit from tourism activity. Negative externalities occur where other businesses and consumers are adversely affected by tourism.

Box 5: The honeypot effect

This form of market failure may have spatial dimensions. The honeypot effect sees tourists flocking to a limited number of increasingly congested destinations. Although in the short term this is beneficial for economic growth, it can create negative externalities such as congestion and environmental erosion.

It is uncertain how far demand can be distributed to counter this honeypot effect. Tourists may not visit alternative areas because of information failure, or because they truly cannot compete with the attractions of the honeypot areas.

Skills gap

The *skills gap* is a further market failure. The provision of skills in the hospitality industry is critical to the success of a competitive visitor economy. Large businesses provide training for specialized skills, but the majority of small businesses in the sector are not able to support the development of necessary skills.

Because of labor mobility and the seasonality of tourism employment, businesses have few incentives to invest in skills where employee turnover is high, and where skill development opportunities are a limited factor in decisions to leave employment. This is a key contributor to the quality of a destination.

The above market failures are specific to the tourism sector and corrective policies need to be tailored accordingly. However, the required policy response to these failures would include interventions across the public sector and would not be specific to the visitor economy alone.

Policy barriers

Policy barriers occur when policy interventions in economic spheres other than tourism impinge on outcomes in the visitor economy. For example, policies affecting the capacity and quality of transport infrastructure, including airport, port, road, and rail networks as well as service provision, have significant impacts on the visitor economy.

The cost and ease of accessing a destination have also been identified as key barriers for international visitors to countries such as the United Kingdom, the United States, and the United Arab Emirates. International visits are, in effect, "pure exports" and represent a substantial economic contribution to the host. Recent research has singled out taxes and visas as costs that prevent higher levels of inbound tourism and limit this contribution.

Environmental and climate change considerations are now a major factor for providers and consumers of tourism services and thus for the sustainability of the visitor economy. The tourism industry will have to work within the context of new climate change legislation, which will vary considerably across the globe.

The impact of environmental and climate change considerations differ with different perspectives. This impact could be considered positive (for example, an increased number of people choosing local destinations instead of flying abroad), or the same impact could be considered negative (for example, a decline in foreign visitors). It may also change the nature of the product being offered in response to consumer demand; examples are more environmentally friendly tourism services. Whether such services can continue to command a price premium in the face of challenging economic circumstances, however, remains to be seen.

Government policies in many countries often focus on higher productivity industries, and gross value added (GVA) growth targets create incentives for investment in more productive sectors. As a relatively low per-worker-productivity sector, the visitor economy has tended to receive lower priority in economic development than many other sectors.

Policy considerations

The above policy areas are clearly driven by wider socioeconomic objectives and highlight the importance of considering tourism within the wider context of the economy. Tourism implications should be factored into the process of policy impact analysis before changes are implemented in these areas.

A key consideration for the future is how countries can retain and develop their individual visitor economies. Any policy agenda and intervention strategy must be informed by the key factors influencing visitor behaviour. Figure 6 highlights some of the pre-trip and post-trip factors that affect the decision making of visitors.

Effecting change: Leverage points

When formulating policy, the most important factors to consider are those that will have the most significant—and sustainable—impact on the future performance of the tourist sector. Figure 7 identifies those factors likely to have the largest potential impact, balanced against the capacity of stakeholders to influence them in the future. This enables policymakers to identify a number of key leverage points, where their interventions are most likely to maximize the economic benefits of the visitor economy.

The two quadrants at the top of Figure 7 contain factors where the potential impact is likely to be high, while the quadrants on the right hand-side contain factors that have a higher potential to influence.

The initial policy focus should therefore be on factors in the top right-hand side quadrant, which include the leverage points that may offer some quick wins for the tourism supply chain.

The factors in the top left-hand quadrant are harder for stakeholders to influence. Nevertheless, these factors will have a significant impact and they should be monitored by the tourism industry to ensure that it is able to adapt to future changes and respond as required.

Future agenda

Some of the factors noted in this chapter are easier to influence through policy interventions than others. However, the following policy considerations should be at the heart of any future agenda for the development of the visitor economy:

Focus on volume, value, or both

A successful future for the visitor economy involves targeting both the volume and the value of visitors.

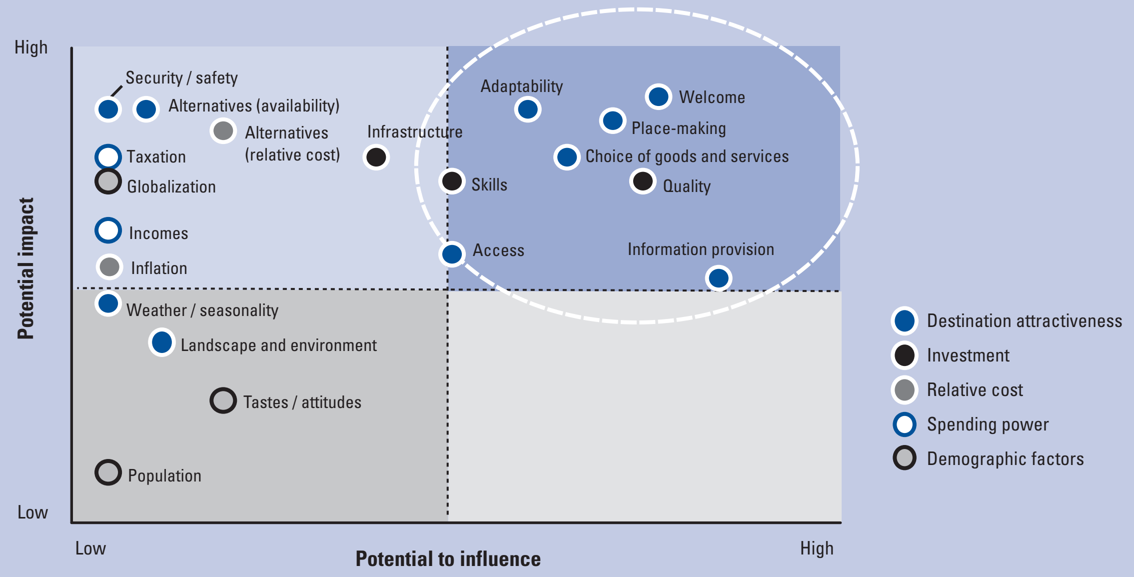
Targeting value will increase economic benefits without contributing to congestion in a crowded country. However, it can be difficult to rely on artificial barriers in an attempt to discriminate against lower-value tourists. There are also social equity implications when applying this to domestic visitors.

Figure 6: Factors influencing visitor behavior

FACTOR	PRE-TRIP FACTORS	POST-TRIP FACTORS
POLITICAL	• Perceptions about safety and security • Globalization • Capacity (airports, water, sanitation) • Marketing of country • Open Skies agreements	• Experience with safety and security • Taxation on goods and services
ECONOMIC	• Incomes • Inflation • Exchange rates • Migration • Taxation	• Competitive prices for good and services • Impact of taxation • Impact of inflation
SOCIAL	• Socio-environmental awareness/consciousness • Family composition • Tastes—e.g., holiday type: historic vs. beach • Reputation for extreme weather—e.g., rain, flooding, wildfires	• Available choice of goods and services • General experience on trip—e.g., quality • Experience with weather/seasonality—e.g., rain, flooding, wildfires • Culture clash/agreement
INFRASTRUCTURE/ ASSETS	• Internet • Low cost airlines • Digital information/mobile technology as a substitute for business travel/online shopping • Natural environment/landscape	• Ease of travel during trip • Integrated systems—e.g., fast-tracking

Source: Deloitte analysis.

Figure 7: Tourism leverage points



Source: Deloitte analysis.

Note:

Destination attractiveness is the relative attractiveness of a tourist destination over time and attempts to quantify the impact of any improvements made in policy, tourism infrastructure, and so on.

Investment refers to tourism infrastructure (hotels, airplanes, recreation sites, etc.) as well as public investment in areas supporting tourism (e.g., transport infrastructure) and the development of the tourism supply chain.

Relative cost is a key factor influencing decisions of both domestic and international travelers. The recent significant appreciation of the dollar is a clear example of this at play.

Spending power is a significant driver of tourism amongst both domestic and source market residents.

Demographic factors comprise overall population growth, the dynamics of specific socioeconomic segments, and trends such as the aging of the population in many developed economies.

If the supply is not constrained, then targeting volume may be the most effective method of driving the visitor economy. Prioritizing volume also means maximizing the chances that new markets will adopt social norms that would increase the likelihood of visits to the country. It may also be possible to leapfrog these new target markets into a high-value category from the very beginning. It is essential to recognize that a tipping point exists for any destination, where volume of visitors directly and negatively affects the attractiveness of the destination.

Targeting these early adapters from emerging economies may help to maximize those economies' future economic contribution, while also delivering shorter-term volume.

Adapt to survive

Globalization, climate change, and emerging markets (both as destinations and as export markets) offer major challenges to countries' tourist industries. The scale and pace of change means that current contributions cannot be assumed to be an accurate indicator of future contributions. The ability to adapt to these changes is critical.

Invest for long-term gain

Factors that affect long-term productivity such as infrastructure, innovation, and skills will need to be major priorities for the sector. Higher skill levels in particular are associated with higher productivity and higher rates of labor force utilization, leading to stronger economic outcomes for the economy as a whole.

Enhance the tourism supply chain

In economies with underdeveloped tourism supply chains, policies that extend the domestic supply chain should be adopted where feasible.

Focusing on the higher-value components of the supply chain will significantly enhance the economic value of the visitor economy through reduced leakage. This should be high on the agenda for emerging economies, and it highlights the importance of considering the impact of tourism within the context of the wider society.

Coordinate policies

Joined-up thinking and coordinated action are keys to promoting all of the above aims. The use of such a connected approach to policymaking also applies to the structures that coordinate the activities of industry operators.

True value

In these turbulent economic times, the focus should be on longer-term, supply-oriented strategies over which policymakers can exert greater influence and realize long-term value. Visitor economies demonstrating adaptability, developing deeper domestic tourism supply chains, and focusing on higher-value quality and skill investments while building diversity into the destination will benefit the most.

Capturing the visitor economy takes time. Policymakers should not lose sight of their long-term focus in this challenging economic climate but should bring greater resolve to bear on the task ahead. Ultimately true value is sustainable value.

Notes

1 OECD 2008.

2 UNWTO.2008.

3 There is no official definition for the visitor economy, although there are a number of sectors that are directly related to it but classified separately in statistical definitions. Estimates presented are based on an extension of the methodology used under the United Nations World Tourism Organization (UNWTO) Tourism Satellite Accounts (TSA) definition, which includes government spending related to tourism. For comparative purposes, calculations made using the definition of tourism adopted by the UNWTO's TSA valued the industry at 3.4 percent of the United Kingdom's gross domestic product (GDP) in 2007.

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CHAPTER 1.6

Tourism Price Competitiveness

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Price competitiveness is an essential component in the overall tourism competitiveness of a country or a destination. There is widely accepted evidence that prices are one of the most important factors in decisions about whether, and where, to undertake trips. This is reflected in the Travel & Tourism Competitiveness Index (TTCI), where, in pillar 10, price competitiveness is assessed using four sets of hard data—on ticket taxes and airport charges (indicator 10.01), national purchasing power parity prices (10.03), fuel price levels (10.04), and the hotel price index (10.05).

Not surprisingly given its importance, many have developed or used indicators of tourism price competitiveness. These indicators vary considerably. It is possible to find indicators based on detailed prices that tourists pay in different countries, along with some highly aggregated and proxy measures. Different indicators shed light on different aspects of competitiveness, and the measures that are most useful for a purpose depend on what questions are being explored.

Some of the key aspects that affect which indicators should be used are:

- The need for accuracy and tourism-specific detail versus timeliness. More detailed and accurate measures involve more data collection and processing, and thus they take longer to produce. If timeliness is of essence, it may be necessary to rely on broader proxies that can be obtained readily for price competitiveness.

- The need for cross-country (or cross-destination) comparisons of the prices tourists are actually paying. If cross-country comparisons of tourism competitiveness at a particular point of time are required, it is necessary to obtain data on the prices of tourism goods and services in different countries. There are relatively few sources of these data, and they tend to appear with a lag.

- The need for estimates of changes in relative price competitiveness over time. For some purposes, only the change in relative price competitiveness of countries is needed. If so, changes in the patterns of competitiveness can be estimated using price change data (often obtained from countries' consumer price index, or CPI, statistics) and exchange rate data. These are much more easily obtained than actual cross-country price comparisons.

- The need to provide overall summary measures of a country's price competitiveness at a point of time or changes in it over time. It may be useful to have summary measures that can tell whether, overall, a country's price competitiveness in tourism has risen or fallen. Such measures require that the detailed measures of price competitiveness be aggregated in some way.

Measures of tourism price competitiveness of countries or specific destinations (such as individual regions or cities) form part of more general work on destination competitiveness. *Destination competitiveness* is a general concept that encompasses price differentials coupled with exchange rate movements, productivity levels of various components of the tourist industry, and qualitative factors affecting the attractiveness or otherwise of a destination. The development of the TTCI allows tourism stakeholders in both the private and public sector to identify key strengths and weaknesses of their destination from the visitor perspective, highlight opportunities for tourism development, and develop strategies to counter possible threats to future visitation. The focus of this review is country or destination *price* competitiveness.

In this chapter we outline a range of tourism price competitiveness indicators that have been developed and used. Some are more useful and valuable than others; all have their advantages and disadvantages. We begin by motivating the review with a discussion of the importance of price as a factor determining competitiveness. We then explore some comprehensive measures of cross-country price competitiveness. After this, we note some measures that can be used for examining changes in patterns of competitiveness over time, and in patterns of competitiveness in specific sectors. Next we outline some summary measures that can be used to track a country's or sector's competitiveness over time. The determinants of price competitiveness are then briefly reviewed, and its effects on government policy and macroeconomic conditions are briefly discussed. We conclude by putting the measures into perspective with a review of the properties and potential uses of the different measures.

The importance of price competitiveness

In their destination choice decision, tourists consider the price (cost of living) at the destination relative to the costs of living at the origin and substitute destinations. Thus, two types of prices have to be considered in estimating the price competitiveness of a destination. The first one is relative price between the receiving and the origin country; the second is relative price between different competing destinations, which generates the substitution price effect.

Tourists incur costs within the destination that they visit that include accommodation, food, tours, and shopping. They compare prices at the destination with those in their home country or region, deciding whether or not to visit that destination depending on the relative costs of living between the two areas. Although prices do change between cities and regions within a country, they differ more obviously and markedly between countries.

Tourism demand is relatively responsive to price factors.[1] Several other research findings are of interest. One is that price elasticity varies as a function of the country of origin and the destination. The residents of large countries, offering a wider diversity of travel experiences within their own borders, are likely to be more price sensitive in their international travel behavior than tourists from geographically small countries whose choice is much more limited.[2] The rarer the qualities of the destination, the less price elastic is its demand.[3] A lower price elasticity is to be expected also for more differentiated destinations.[4] It also appears that tourists have become less price sensitive over time. This may be a result of an increased emphasis on destination differentiation strategies.[5] Destinations that compete closely with others, however, are associated with higher price elasticities of tourism demand.[6]

The relative price variable that is normally used in the demand for tourism function is the ratio of the consumer price indexes between the receiving and the origin countries, adjusted by the bilateral exchange rate. A higher exchange rate in favor of the origin country's currency can result in more tourists visiting the destination from the origin country. When the exchange rate–adjusted CPI ratio is used to measure the changes in relative prices of goods and services in the destination, the impacts of inflation and exchange rate movements are measured through one "relative price" variable, referred to as the *real exchange rate.*[7] It has been argued, however, that tourists are reasonably well informed of changes in exchange rates, whereas information on price levels and price changes in destinations is generally not known in advance.[8] With imperfect knowledge, tourists may respond to exchange rate movements but not to changes in relative inflation rates when they make their decision to travel. Thus, exchange rates are sometimes introduced into tourism demand models in addition to, and separately from, the relative price variable. Since the exchange rate is most important in costing tours and accommodation, and is a main component of price fluctuations, it may be an important proxy for the relative price of tourism in smaller open economies with floating exchange rates.[9] Note that this involves a measure of *changes* in price competitiveness, but it does not measure the *actual level* of price competitiveness.

The impact of competing destinations has a positive influence on the demand for international tourism, meaning that a rise in price to one destination will boost visitor numbers to substitute destinations.[10] Tourists may consider a range of competing destinations before choosing any particular one. They may compare the cost of living in the choice destination with the costs of living in the competing destinations. Some destinations may be complements rather than substitutes, and so may gain visitors if the cost of living in the other destination is low.

Researchers model this consumer thinking in either of two ways. One way to allow for the substitution between the destination and, separately, a number of possible competing destinations is to specify the tourists' cost of a visit variable in the form of the possible destination value relative to the origin value.[11] This allows for substitution between tourist visits to the foreign destination under consideration and domestic tourism, therein acknowledging that domestic tourism is the most important substitute for foreign tourism.

The other way is to calculate the cost of a visit at any substitute destination relative to a weighted average cost of visits in the different competing destinations, adjusted by the relevant exchange rates. The weight assigned reflects the relative market share (arrivals or expenditures) in each competing destination. This approach allows for the impact of price changes in competing foreign destinations. This is the approach used more often in empirical studies, as fewer variables are incorporated into the model, and therefore more degrees of freedom are available for the model estimation.[12]

Whatever method is adopted, the problem remains that the CPI is an imperfect measure of the changes in prices faced by tourists. Existing studies use too aggregative a measure, whereas a more disaggregative measure is required. We must therefore consider what an ideal price competitiveness measure might look like.

Comprehensive tourism price competitiveness measures

It is useful to start by setting out what the most comprehensive and detailed indicator of tourism price competitiveness would involve, and then to examine actual indicators in the light of such a measure or group of measures. For a given origin country, the ideal indicator would show just how much a trip to a range of different destination countries would cost in the origin country's currency. Ideally, the cost of the trip would include both the travel costs, such as airfare, and the various elements of the ground component. This type of competitiveness indicator could be calculated for different countries at a point of time, and also for the same countries over time. Thus, a "typical" trip from the United States might cost US$4,000 to Japan and US$2,000 to Thailand at a point of time—clearly, Thailand is more price competitive than Japan for US tourists. Five years later, the cost of the same trip might have changed to be US$4,500 to Japan and US$3,000 to Thailand—while Thailand is still more competitive than Japan, its relative competitiveness has slumped.

Any index or indicator essentially involves two elements: the basic price data and a weighting structure.

Conceptually, price data do not pose many problems. What we would like is information on the prices actually paid by tourists for the goods and services they buy. Cross-country price data were originally difficult to come by, but in recent years, comprehensive data sources have become available. In particular, there is the World Bank International Comparison Program, (ICP), which collects the prices of a comprehensive range of commodities for most developed and many developing countries for various selected base years.[13] This information is used, among other things, for the estimation of purchasing power parity (PPP) exchange rates, such as that used in the TTCI. Thus, the price paid for a unit of food or motor fuel in different countries is collected, and thus it is possible to determine how much a bundle of goods and services will cost in each country, converted to the currency of a base country, such as the US dollar. One limitation of the data for our purposes is that the prices collected may not be the same as those paid by tourists—thus the price of accommodation to tourists (who may use higher-quality accommodation than local residents) may not be accurately captured by the ICP data. This could be more of a limitation with developing countries. Nevertheless, the ICP provides a very extensive and useful data source on prices indifferent countries.

The ICP produces data only for selected base years. However, it is possible to update the data and produce estimates of prices in non base years, if price change data are available for a country. For most developed countries, CPI data are produced for a detailed range of commodities. Using the CPI, it is possible to estimate prices to be used in competitiveness indicators for non base years and to update competitiveness indicators to almost the present time.

The weighting problem is more difficult, both conceptually and from the practical perspective of obtaining data. The weights for an indicator of competitiveness will be based on tourists' patterns of expenditure. These differ markedly from origin to origin and from type of tourist to type of tourist. There is no single tourism product the price of which can be compared from country to country, or over time. The patterns of spending of a US visitor to any country or destination will differ from those of Japanese visitors. Further, the patterns of spending of a US visitor may be different in Thailand than in Japan. A Swiss traveler to France may see the sights of Paris, while a Swiss visitor to Australia may be a backpacker, with a very different pattern of spending. Indicators of competitiveness need to reflect this—for example, different indicators might be developed for different origins or types of visitor. Given the heterogeneous nature of tourism, it is not possible to develop some general overall measure of competitiveness that is accurate for all purposes.

Another limitation is that data on tourists' expenditure patterns are available in detail only for a few countries. Some countries collect detailed information on a regular basis about how much, and on what, their inbound tourists spend. However, most countries do not collect much information at all. Indicators of price competitiveness might be constructed using the data from countries that do collect them, or on the basis of a hypothetical standardized bundle of tourism expenditures (e.g., 30 percent accommodation, 20 percent food, and so on).

An example of a comprehensive approach to measuring tourism price competitiveness is that by Dwyer et al. (2000). This study takes Australia as the base country and estimates the cost of purchasing a bundle of tourism goods and services in a range of competitor destinations from ICP data. Recognizing that accommodation prices in the ICP database may not be reflective of prices paid by tourists, the study also uses hotel price surveys for accommodation prices. The weights for an index of competitiveness are taken from detailed expenditure pattern data collected for inbound tourists to Australia. Different origin countries have different expenditure patterns, and thus indexes were calculated for each origin country. Since expenditure patterns for visitors to competitor destinations were not available, the expenditure patterns in Australia were used. Thus, the competitiveness index is a measure of how much the goods and services purchased by a visitor from an origin country, say Japan, in Australia, would cost in Australia and competitor destinations. As a consequence, this index measures the price of the Australian tourism "product" in competitor countries.

Establishment of a correspondence between tourist purchasing patterns and price data enables derivation of PPPs for each category of tourist expenditure. PPPs indicate the levels of expenditure required in different countries or destinations to purchase the same basket of tourism goods and services. The PPPs are adjusted by exchange rates to derive price competitiveness indexes. The index measures the level of prices of goods and services in a competitor destination, relative to prices in a selected destination, and then adjusts for exchange rates, as follows:

$$\text{Price Competitive Index} = \text{PPP/Exchange Rate} \times 100/1$$

Interpretation of the price competitiveness index is straightforward. A particular destination is taken as base and its index is 100. For any destination, a price competitiveness index less than 100 indicates that destination to be more price competitive than the selected destination. Similarly, a figure above 100 indicates that the destination is less price competitive than the selected destination.

The values of the indexes allow destinations to be ranked according to their price competitiveness. The absolute values of the indexes can also be compared to determine the extent to which different destinations vary in price competitiveness in tourism. Both types of information can thus be used to measure the destination's price competitiveness in tourism in *relative* and *absolute* terms.

The index was calculated for 19 destination countries, including Australia, and for 13 origin countries, both for the ground component of trips and for travel (airfares). The base year used was 1997, though the index was calculated for other years. A sample of the results is shown in Table 1.

Table 1: Competitiveness indexes, ground component, selected countries, 1997

Destination/origin	United Kingdom	Japan	Singapore
Australia	100	100	100
United States	110	116	111
Thailand	31	26	33

Source: Dwyer et al., 2000a, 2002.
Note: Australia is the base destination (=100).

Table 1 indicates how the different destination countries compared in price competitiveness. Australia was more price competitive than the United States for all origin countries, but Thailand was much more price competitive than both Australia and the United States—as might be expected. Thailand was most price competitive for visitors from Japan.

Advantages of price competiveness indexes

This approach can be based on the most detailed and accurate price data available on a cross-country basis, and thus it can provide the most accurate measures of comparative competitiveness.

Destination price competitiveness in absolute and relative terms can be estimated from the perspective of visitors from different national origin markets, and from the perspective of visitors having different journey purpose or special interest.[14]

This measure can make a detailed estimate of the price of the tourism bundle in different countries. Since the tourism bundle is different from the pattern of goods and services in GDP in general, the approach can provide a more accurate measure of tourism competitiveness.

The price competitiveness indexes have substantial policy relevance. For example, destination price competitiveness indexes can be used to explore questions of how the price competitiveness of destinations change over time, and what causes this change. This is because they enable the changing sources of tourism price competitiveness to be identified and analyzed. They can be decomposed to determine the relative influences on destination competitiveness of exchange rate changes and domestic inflation rates.[15] It is helpful for both industry and government to know how price competitiveness is changing and why these changes are occurring.

Industry stakeholders can employ these results to help assess the impacts of alternative government policies on destination price competitiveness—for example, impacts of tourist taxes or climate change adaptation policies on the prices of tourism-related goods and services.

The price competitiveness indexes also have particular relevance for destination marketing. They indicate that a destination may be price competitive from the perspective of some tourists but not for others, depending on the purpose of the visit and associated purchasing patterns.

Disadvantages of price competitiveness indexes

The data requirements of this approach are extensive. Destinations vary considerably in the comprehensiveness and accuracy of the visitor expenditure data that they collect. The more comprehensive the visitor expenditure data, the more detailed and accurate the price competitiveness indexes that can be constructed for that destination. Very few countries publish detailed tourism expenditure data.

Where the data used are economy-wide data, there may well be significant variations in tourism prices across regions within a country. For example, the prices charged to tourists in Bali may differ substantially from those charged elsewhere in Indonesia, or prices along the coast may vary from those of another destination that is located inland. But all aggregate, economy-wide statistics have this problem. The methodology for constructing price competitiveness indexes allows such indexes to be completed for different regions within a tourist destination.

There is no single, all-encompassing measure of tourism price competitiveness—however, this reflects the reality that the tourism product is quite heterogeneous.

Time series and sectoral price competitiveness

Changes in competitiveness-CPI measures

The majority of researchers have used CPI as a measure of the change in destination price competitiveness.[16] The two limitations of this measures are that it is excessively aggregate (and need not reflect the prices that tourists pay), and that it can capture only *changes* in price levels, not the levels themselves.

On the first point, this price competitiveness measure, however, is only as good as its implicit assumption that the goods and services purchased by tourists are similar to those purchased by the representative household on which the CPI is constructed. However, the CPIs of the origin country and the destination may not reflect the prices of goods that tourists actually purchase, because the expenditure pattern of a tourist is quite different from that of the average household.[17] Indeed, the basket of goods and services included in the price indexes of a given country could differ significantly from the one consumed by its short-term tourists. Another assumption underlying the use of the CPI is that prices of tourism goods and services tend to move in the same direction as overall consumer prices. However, as Divisekera (2003) points out, trends in general price levels as implied by CPI measures may not necessarily coincide with that of tourism. Moreover, there is no uniformity among countries in the coverage, weights, and/or the components included in the relevant price indexes, depending as they do on the particular socioeconomic characteristics and consumption habits of the residents of the destination in question.

The second limitation is that CPI statistics provide no information on the *levels* of prices in a different country or destination—it is not possible to use them to determine whether a country is more or less price competitive than another.

While the CPI can serve as a proxy for the change in cost of tourism at a destination, given the lack of more suitable data, it would be more appropriate to use data relating to the price of the basket of goods and services that tourists actually purchase if these are available.

Price indexes of tourism bundles

A preferable measure of destination price competitiveness involves estimating the costs of the specific goods and services that tourists purchase. As Lim (2006) notes, since there are likely to be substantial measurement errors associated with the use of the CPI as a proxy for relative tourism prices, some researchers have preferred to use a specific tourist cost-of-living variable—such as drink and tobacco price indexes; shopping/meals/entertainment and hotel price indexes; or weighted prices of food, accommodation, transport, entertainment, and other variables—as proxies, or the average spending on travel goods and services as the composite tourism price. Kwack (1972) and Kliman (1981) use the implicit consumer expenditure deflator to measure the disparity between the origin, destination, and competing destinations' prices.

Although the tourism price index approach is preferable to the use of the CPI, in that it more accurately reflects the ways tourism prices are changing, it still faces that limitation that it can be used to measure only changes in price competitiveness between different countries or destinations over time, and cannot measure whether prices in one country are higher or lower than in another country. This limitation can be addressed using comprehensive tourism price competitiveness indexes, as described above, or by using various proxy measures.

Package tour price studies

The costs of package tours have been used in some studies as proxies for tourism prices.[18] This does, however, involve a major data-gathering exercise, since prices are not readily obtainable from comprehensive sources.

Rather, they must be obtained from brochures and advertisements for tours. Once collated, it must be recognized that package tours are not a standardized product—they differ in duration, accommodation standard, tours included, and amount of internal travel. With information about the costs of package tours, it would be possible to regress price on these factors and estimate the price of a standardized package.

It is also possible to use a synthetic approach, using actual price data (e.g., from the ICP) to estimate how much a package tourist of particular characteristics would cost in different countries.[19] In Dwyer et al. (2000c), the authors used a "bottom up" approach, which involved getting information about the cost shares of the various components that make up a tour package.

Big Mac Index

The most frequently quoted index of price competitiveness of different countries is the "Big Mac Index." *The Economist* magazine regularly publishes the price of "Big Mac" hamburgers in about 60 different countries. These prices are converted into a single currency and give an indication of the cost of buying a standardized product in different countries.

It is tempting to read more into the Big Mac Index than there is really there—to see it as an indicator of the general price competitiveness of the country. In fact, this index tells us little more than the price of a particular brand of hamburger in the different countries. The Big Mac is a simple product with ingredients in fixed proportions, whereas the tourism product is a very complex one comprising different components depending on tourist expenditure patterns. There is no equivalent tourism product offered across countries, as the nature of the product is tailored to the origin market, expenditure levels, and the length of the trip involved. The key issue is that of how to standardize the products being compared so as to determine their relative price competitiveness.

Purchasing power parity

Another indicator of relativities in general prices across countries (which is used in the TTCI) is the ratio of the PPP conversion factor to the official exchange rate. The simplest way to calculate PPP between two countries is to compare the price of a "standard" good that is, in fact, identical across countries. If a "representative" consumption basket costs US$1,200 in the United States and £800 in the United Kingdom, the PPP exchange rate would be US$1.50/£1. If the actual nominal rate was US$1.80/£1, this would indicate that the pound is overvalued by 20 percent, or, equivalently, the dollar is undervalued by 16.7 percent. PPPs can be used to estimate the amount of adjustment needed on the exchange rate between countries in order for the exchange to be equivalent to each currency's purchasing power. In other words, it provides a measure of the overall price level in different countries.

The purchasing power parity theory of exchange rates is based on the assumption that, in ideally efficient markets, identical goods should have only one price. In the absence of transportation and other transaction costs, competitive markets will equalize the price of an identical good in two countries when the prices are expressed in the same currency. The main reasons that different measures do not perfectly reflect destination price competitiveness are that PPP numbers can vary with the specific basket of goods used, making it a rough estimate. One of the key problems is that people in different countries consume very different sets of goods and services, making it difficult to compare the purchasing power between countries. Also differences in the quality of goods between countries are not sufficiently reflected in PPP measures.

Sectoral price indicators

It is feasible to collect price data across countries for specific sectors that are important for tourism, such as fuel for transport and hotel prices. These data can be useful directly, and they can be used to adapt more general indicators, such as PPP measures, to make them more relevant for tourism. General price competitiveness indexes, such as those described above in the section on comprehensive tourism price competitiveness measures, can be disaggregated in respect of key tourism products and services so as to provide information on a destination's price competitiveness in different sectors of its tourism industry. This is to recognize that a tourism destination's overall price competitiveness depends on the price competitiveness of each of the sectors that deliver goods and services to visitors (accommodation, entertainment, conventions, and so on). These subindexes can provide the basis for tourist industry policy to enhance destination price competitiveness through studies of the productivity and efficiency of different tourism industry sectors.[20]

Two useful sectoral price indicators involve fuel prices and hotel prices.

Fuel price levels

Fuel prices impact the price of transport, which is a major component of tourism expenditure. They also affect general price levels of all other goods and services in an economy. Fuel prices are readily available from general world statistical sources, such as the World Bank *World Development Indicators* (various years).

Hotel price index

Given that accommodation is a very important component of tourism expenditure, it is necessary to compile accommodation prices from sources in the tourist industry to enable greater accuracy in estimating destination price competitiveness. Average room rates can serve as a useful guide to accommodation price relativities and are likely to be more accurate the ICP price relativities for accommodation. This index measures the average room rates calculated for first-class branded hotels in each country.

There are a number of issues that make the collection of accommodation prices very challenging. Data used are economy-wide data, and there are significant variations in tourism prices across countries. Thus, hotel prices in Marseilles differ from hotel prices in Paris. It is not the case that rates for every hotel in every region in Thailand are lower than for every hotel in every region in Australia. Nevertheless, rates in Thailand are, on average, lower than in Australia (and for similar types of accommodation, Thai rates will be lower than Australian ones). All aggregate, economy-wide statistics have this problem. Other key stumbling blocks include: different hotels use different grading systems in different countries; prices paid for hotel rooms vary depending upon the country of purchase; prices paid vary depending upon the classification of the booking (group, corporate, individual, etc.); prices obtained vary depending upon which booking source is used (e.g., Computer Reservations Systems, Dawsons, Internet, via Airline or direct); prices vary depending upon seasonal factors both from the perspective of the hotel's season and the season of the origin market; although negotiated rates may be the same, different bonus systems may apply; and different rooms attract different rates (e.g., rates depend upon size, view, etc).

Overall measures of changes in price competitiveness

What is often needed is a simpler—and easier and quicker to calculate—measure of how changes in exchange rates are impacting a country's overall tourism price competitiveness.

Tourism Trade Weighted Index (TTWI)

The best known international measure of the competitiveness of a country's industries is the trade weighted index of exchange rates (TWI). The TWI is a general index of the competitiveness of the country, weighting different countries' exchange rates according to their relative importance in trade, both in terms of exports and imports. This index uses data on a large number of exchange rates (and for real TWIs, price changes) and aggregates them into a single indicator of a country's competitiveness position. A simple and easy way to update measure of a country's tourism competitiveness can be obtained by developing a tourism-specific TWI: the Tourism Trade Weighted Index (TTWI). The TTWI is an index of exchange rates with the weights determined by the importance of the different countries in tourism inbound and outbound expenditures.

The TTWI can be calculated for inbound and outbound tourism, and an overall index can be calculated reflecting both directions of tourism.

- The *Inbound TTWI* consists of exchange rates for those countries or currency areas, representing the main sources of visitors to a destination, weighted by the total expenditure in that destination from each of the source countries.

- The *Outbound TTWI* reflects patterns of expenditure by a country's outbound travelers in different destinations.

- The *Overall TTWI* averages these two, but it does not provide as much information as the separate inbound and outbound TTWI.

The TTWI is similar in structure to the TWI, which is a readily available and well-understood indicator of the trading position of a country. It is a simple, aggregate measure of the change in the home country's general price level relative to those in a group of source countries or destination countries. The TTWI can be calculated in either real or nominal terms, just as the standard TWI can. As an indicator of how a country compares in price terms with its source or destination markets, a real TTWI will be more useful since it provides policymakers with an ongoing monitor of the home country's price competitiveness.

The authors have developed a TTWI for Australia covering the years 1990–2004. Table 2 contains estimates for selected years.

Table 2: Nominal and real Tourism Trade Weighted Indexes of exchange rates for Australia, selected periods 2000–08

	Nominal TTWI		Real TTWI	
Period	Inbound	Outbound	Inbound	Outbound
2000 (June)	111.814	115.550	106.325	103.782
2005 (December)	128.086	132.102	129.325	119.268
2006 (December)	130.607	132.821	134.397	121.280
2007 (December)	139.483	143.109	142.392	127.993
2008 (March)	140.031	153.657	142.493	129.803
2008 (June)	149.151	133.853	154.401	141.275
2008 (September)	130.303	123.798	135.515	124.252
2008 (December)	116.598	126.778	118.122	111.942

Source: Author estimates.
Note: 1995 = 100.00; December 2008 figures are preliminary.

Interpretation of the TTWI is straightforward. The TTWI is a weighted average of exchange rates. If the inbound TTWI increases by 10 percent, this means that prices in the home country have risen by 10 percent relative to those of a weighted average of source country prices. On average, the home country has become 10 percent more expensive to visit. To this extent, the TTWI, and especially the real TTWI, is a measure of competitiveness in tourism markets.

When the inbound TTWI rises, this can be taken as a leading indicator of a fall in inbound tourism. When the outbound TTWI increases, the cost of overseas travel falls and more residents of a country will make overseas trips; these overseas trips are made to some extent at the expense of domestic tourism. As Table 2 indicates, both the nominal and real TTWI for inbound travel rose from June 2005 until the first quarter of 2008. The rise in the TTWI indicates a significant loss in competitiveness by the Australian tourism industry. This was very much associated with the appreciation of the Australian dollar, particularly relative to the US dollar. In the third and fourth quarters of 2008, the TTWI fell substantially. This was associated with a dramatic fall in the value of the Australian dollar, particularly against the US dollar. This indicates a substantial gain in the competitiveness of Australian tourism. In real terms, the cost of visiting Australia, excluding airfares, fell by 21.8 percent over this period. During the same six-month period in late 2008, the real outbound TTWI fell by 20.8 percent, indicating the increased competitiveness of an overseas holiday for residents compared with a domestic tourism experience.

The TTWI indicates that, during the period investigated, Australia lost and then regained its price competitiveness as a tourism destination, while outbound tourism also lost and then rapidly regained its competitiveness relative to domestic tourism.

One of the key properties of the TTWI is that it can be calculated very quickly—in fact, almost instantaneously for the nominal index. The real index depends on data on prices that are only published with a lag, but good estimates of price indexes can be projected for a quarter or two using recent inflation rates. The result is that the TTWI provides an up-to-the-minute summary measure of the international competitive position of a country's tourism industry.

The TWI is normally quoted only in nominal terms—an advantage of the TTWI is that the more accurate real TTWI can be calculated very easily. The TTWI can be calculated both on a nominal basis and on a real basis—the latter allows for different price rises in different countries, and is to be preferred as a measure of the underlying change in the international price of a destination.

Aviation Trade Weighted Index (ATWI)

The authors have developed an Aviation Trade Weighted Index of exchange rates (ATWI).[21] The ATWI seeks to provide an indicator of the change in the international competitive pressure on a country's aviation sector resulting from exchange rate changes. It weights different currencies according to how important different countries' airlines are as competitors in markets operated in by home country airlines.

The ATWI is a measure of the changes in relative cost competitiveness that come about as a result of changes in nominal and real exchange rates. A rise in the exchange rate will make the airlines less cost competitive—if their competitiveness position is to be restored, they will have to improve their efficiency or lower the input cost they face (perhaps by sourcing inputs offshore).

The authors have developed an ATWI for Australia covering the years 1990–2008. Table 3 contains estimates for selected quarters in selected years, providing a measure of how the real exchange rates of Australia and the 16 most important competitor countries on Australia's international air routes have varied over this decade.

Table 3: Aviation Trade Weighted Index for Australia, selected periods 2000–08

Period	Real ATWI	Nominal ATWI
2000 (June)	101.83	105.28
2005 (December)	128.28	124.44
2006 (December)	132.36	127.32
2007 (December)	140.35	136.70
2008 (March)	140.05	138.66
2008 (June)	149.40	147.01
2008 (September)	130.35	127.36
2008 (December)	111.27	110.23

Source: Forsyth and Dwyer 2007, updated.
Note: 1995 = 100.00; December 2008 figures are preliminary.

The ATWI is calculated for Australian international airlines, and it reveals that there has been a significant loss of competitiveness in recent years—the result of the appreciation of the Australian dollar relative to currencies of key airline competitor countries. The results indicate that, from June 2000 to June 2008, the Australian dollar appreciated relative to those countries whose airlines the home airlines are in close competition. This made Australia-based airlines progressively less competitive relative to airlines based elsewhere. Since June 2008, the situation has reversed, with Australia's international airlines becoming more competitive than rival airlines. Between June and December 2008, the competitiveness of Australian-owned airlines increased by 25.5 percent, an increase that can be expected to boost inbound travel.

The ATWI indicates that, except for the December quarter of 2008, the change in the real index over the period is slightly higher than the nominal index, implying that the nominal index understates the competitive pressure.

These indexes are simple and quick to calculate, and provide ready information on one of the critical determinants of a country's airlines' cost competitiveness. They indicate how an airline's input costs have changed relative to those of its competitors as a result of exchange rate changes.

The ATWI picks up only the exchange rate effect—if it is necessary to examine all determinants of cost competitiveness, a full cost competitiveness index is required.[22] This is often not necessary, however. If a country's exchange rate is changing, it may be important to determine how this is affecting its airlines' cost competitiveness. A rise in the exchange rate will make the airlines less cost competitive—if their competitiveness position is to be restored, they will have to improve their efficiency or lower the input cost they face (perhaps by sourcing inputs offshore). The ATWI sums up the size of the immediate problem or opportunity facing airlines as a result of recent exchange rate changes. Exchange rates change instantaneously; airlines do respond, though their responses take considerable time—generally the response is spread out over more than a year.

The ATWI is a relative measure that gives an overall measure of competitiveness by weighting all the country's airlines' competitiveness by their market shares in the country's routes. An airline's relative cost competitiveness may have changed, but how significant an impact on its competitive position this has will depend on how its cost competitiveness has altered relative to those of the airlines with which it competes closely. Cost competitiveness indexes can be aggregated in the same way as the ATWI components are aggregated; this could be a useful exercise.

Determinants of tourism price competitiveness

Tourism price competitiveness is essentially a matter of the prices of the goods and services that tourists buy, expressed in some common currency. Several factors impinge in different ways on tourism price competitiveness.

Exchange rates: Exchange rates are the first and most obvious factor influencing tourism competitiveness. Other things being equal, if a country's exchange rate rises, its tourism competitiveness falls. Exchange rates do tend to reflect relative price levels at home and in other countries: when a country's prices rise relative to those of competitors, its exchange rate tends to fall. However, many other factors influence exchange rates, especially in the short term. Exchange rates can be quite volatile, even for industrial countries with stable trading patterns, as recent experience shows. The result is that patterns of tourism price competitiveness would have changed quite significantly over the six-month period from June through December 2008.

Inflation and overall price levels: As noted above, higher general price levels in a country tend to be canceled out by exchange rate depreciations—but only up to a point. General prices—and the prices that tourists are paying—may be rising, but export prices may not be increasing to the same extent. In such a situation, a country's exchange rate may not move much, and it may lose price competitiveness in tourism.

Labor prices: These prices are a key determinant of long-term price competitiveness in tourism. Countries with low wages tend to have low prices for goods and services, even when these are converted into other currency terms using market exchange rates. Prices in US dollar terms are lower in China than in the United States, for example—as a result of this, international comparisons need to use PPP measures, not just market exchange rates. Low-income countries are thus price competitive in tourism. Over time, growth in per capita incomes alters patterns of tourism price competitiveness; in this way, the tourism price competitiveness of Asian tiger countries such as Singapore has been eroded over time.

Productivity performance of tourism industries: The more productive a tourism industry is, the lower will be its output prices given its input prices. Output prices will reflect input (especially labor) prices, as well as industry productivity. A high-income country could be quite price competitive in tourism if its tourism industries are productive relative to those of its low-income competitors. To some extent, high-income countries have been able to achieve high tourism price competitiveness because their industries are productive. However, the relative productivity performance of different countries' tourism industries is a relatively under-researched area.

Export booms and Dutch disease: Structural shifts can impact tourism competitiveness through changes in the exchange rate. A well-known effect is the Dutch disease, whereby an export boom in one industry pushes up the exchange rate and makes other export industries less competitive. This effect is very relevant for a country's tourism price competitiveness. Over the five years from mid 2003 to mid 2008, Australia experienced a minerals export boom, which pushed up its exchange rate. This made its tourism industry less competitive, and inbound tourism fell—well before the effects of the global financial crisis.

Tax levels and structures: Taxes, and especially indirect taxes, can influence the prices of the goods and services that tourists buy, and thus they can impact price competitiveness. If taxes result in price rises of a country's goods and services for export and home markets, they will tend to be counteracted by exchange rate depreciation, and the country's tourism price competitiveness will be relatively unchanged. However, often taxes impact different industries unevenly. Taxes such as the value-added tax (VAT) or goods and services tax

(GST) are typically levied on goods and services sold at home, but not on exports. When the rate of these taxes is increased, it will not affect most export industries—but tourism is the exception. The exchange rate will not alter much, but prices to tourists will rise and the country will lose competitiveness. Thus the ways taxes are levied will be a significant determinant of tourism competitiveness. Countries that rely heavily on taxes such as the VAT/GST will be less tourism competitive than other countries with similar per capita incomes and industry structures.

Infrastructure charges: Infrastructure charges can take many forms, such as road pricing, airport levies, and developer contributions to resort developments. These charges push up the prices charged to tourists. Since they are specific, they will not have any significant impact on exchange rates, and thus they will reduce a country's tourism competitiveness.

Fuel prices and taxation: Fuel is an important input into tourism goods and services, and fuel prices can have a significant impact on tourism price competitiveness. Fuel prices are dominated by the price of oil, which is much the same for all countries. However, countries differ considerably in the way they tax (or sometimes subsidize) fuels. Thus higher fuel taxes in European countries lessen their tourism competitiveness.

Environmental charges: Tourism industries are becoming increasingly subject to environmental charges. These may be either specific, such as a noise levy on an airport, or very general, such as higher costs due to the implementation of an emissions trading scheme (ETS). The impact on competitiveness will depend on how general the charge is, and how it affects other trading industries. If an ETS raises costs to all industries, it will make exports more expensive; this will tend to lead to exchange rate depreciation, which in turn will tend to cancel out the cost increase (though not exactly). However, if some export industries are exempted from the ETS, as is proposed in some countries, the impact on the exchange rate will be limited, and the competitiveness of industries that are not exempted, such as tourism, will suffer. Specific duties, such as the air passenger duties of the United Kingdom and the Netherlands (which may or may not be regarded as environmental levies) will not have any appreciable impact on the exchange rate, and thus they will reduce tourism competitiveness.

Tourism competitiveness, policy, and the macro environment

Destination competitiveness is sensitive to both government policy and the general macroeconomic environment. Here we provide a brief outline of how tourism competitiveness can be affected by these.

Government policy

Government policy can impact tourism competitiveness through both general and specific policies. General policies, such as the implementation of an ETS, can impact a country's tourism, as discussed in the previous section. In addition, some policies, such as an aviation tax, may be quite specific; these policies may have unintended impacts on tourism. Objectives for policies differ: sometimes the objective of a policy may be to increase the price competitiveness of tourism (for example, when improved infrastructure lowers the cost to tourism) and sometimes the intention is to achieve some other objective, which incidentally has some cost to tourism competitiveness (for example, when an aviation tax is levied to raise revenue or correct for an environmental external cost).

Policy can thus impact the determinants of tourism competitiveness in a number of ways. These are summarized in Table 4.

The exchange rate is a variable that governments can, and do, use to increase the competitiveness of their export industries. However, there are costs to using exchange rates in this way and most advanced countries now prefer floating exchange rates. Governments, through their monetary policies, can influence price levels, but this is not a very well targeted way of influencing tourism competitiveness, especially since low home prices tend to be associated with higher exchange rates. Governments have little influence over real wage rates, which reflect the country's stage of development. Governments can have some influence over the productivity of their industries, including the tourism industry. In the main this influence is indirect, through the implementation of policies, such as competition policy, which stimulate efficiency. Again, however, economy-wide productivity improvements will tend to result in exchange rate rises and no gain in export competitiveness.

Governments cannot really control export booms. These booms do, however, have an impact on the competitiveness of non-boom export industries, such as tourism. Where booms are sharp and temporary, governments can mitigate their effects on exchange rates, and thus on non-boom industries, through encouraging the saving of the temporary income gains (as Norway does with its booms in its oil revenues).

Tax policies can have a direct impact on tourism prices, and thus on competitiveness. But it is critical to distinguish between taxes that apply to all export industries and those that apply only to some. As noted, while VAT/GST taxes are general, they are not applied to most export industries. Since they are, however, applied to tourism exports, they reduce tourism price competitiveness in much the same way that specific taxes on tourism do. If a tax is a general one and it affects all trading industries in the same way (say, an increase in corporation tax), the impact on competitiveness of any industry, such as tourism, will be limited since it will set

Table 4: Government policy and the determinants of tourism competitiveness

Determinant	Open to policy?	Sensitivity to policy	Impact on tourism competitiveness	Comments
Exchange rate	Yes	High	Low/moderate	Often not recommended
Price level	Yes	Moderate	Low	Not easy to target tourism
Real wage levels	No	Low	Low	
Tourism industry productivity	Yes	Low	Low	Some scope to improve productivity in longer term
Export booms	No	n/a	Moderate	Governments can mitigate effects of sudden booms
General taxes	Yes	High	Low	Tax structure important
Specific taxes	Yes	High	High	Other objectives important
Infrastructure charges	Yes	High	High	Other objectives important
Fuel prices	Yes	High	Moderate/high	Fuel price differences mainly tax driven
General environmental policies	Yes	High	Low	Policy design critical
Specific environmental policies	Yes	High	High	Other objectives important

Source: Authors.

in train compensating movements in exchange rates. Infrastructure charges are like specific taxes—when they are increased, they lessen tourism competitiveness, and when they are reduced, they enhance competitiveness. Fuel prices, and especially those of oil-based fuels that are critical to tourism, are sensitive to government policy —countries differ considerably as to how they tax fuels.

Environmental policies can affect tourism competitiveness. Specific environmental measures, such as levies on aviation, will reduce tourism competitiveness. To the extent that general measures, such as the implementation of an ETS, apply to all trading industries, they will set in train compensating exchange rate shifts, which will at least partially cancel out the initial impact on competitiveness. Again, the exact design of the policy is important, because if exemptions are granted to some industries, the loss of competitiveness experienced by other industries will be greater.

The macroeconomic environment

Destination competitiveness is sensitive to the general macroeconomic environment. In normal times of macro stability, the effects are not great. However, in times of macroeconomic stress, such as in the current global situation or during the Asian Financial Crisis 10 years ago, macro conditions can have a considerable impact on patterns of tourism competitiveness.

One of the most obvious ways in which this can happen is through changes in exchange rates. Exchange rates have shifted, for some countries quite substantially, and they show considerable volatility. This is even the case for currencies of major countries. The results are shifts in, and volatility of, patterns of tourism competitiveness. This has been very evident, for example, in Australia. After a five-year period of real exchange rate appreciation, leading to a boom in outbound travel, the value of the Australian dollar has dropped sharply (see Table 2). This has led to outbound travel becoming much more expensive, and this travel has fallen sharply, even though real GDP in Australia has continued to grow.

Recession in several countries could impact the prices being paid for tourism inputs, especially labor. This reduction is likely to lead to reductions in product prices—hotels and airlines are cutting prices to win business. This in turn will lead to at least temporary changes in patterns of tourism competitiveness, with some high-cost countries (in North America and Europe) increasing their tourism price competitiveness vis-à-vis other countries, such as those of Asia. The financial crisis is having a large impact on oil prices. This should lower the prices of tourism across the board, though it will probably not have a large impact on the *relative* competitiveness of countries since they all pay much the same prices for their oil, and it not likely that fuel taxes—the main source of differences among countries—will change much.

Although so far there is not much evidence of governments altering their tax, infrastructure, and environmental policies in response to the crisis, such policy adjustment could happen. Governments might postpone the introduction of their ETS proposals, depending on their design; such a postponement could have some impact on patterns of tourism competitiveness. Governments of individual countries might choose to stimulate their economies through tax reductions; depending on how they do this, there could be impacts on tourism competitiveness. With tax reductions putting pressure on governments' budgets, governments may be looking around for "easy" sources of revenue—and taxes on tourism, paid by nonresidents, may be appealing. Already the UK government has announced sharp increases in aviation taxes, designed to reduce its fiscal deficit. These increases will make the United Kingdom less competitive in tourism.

Table 5: Properties of tourism competitiveness indicators: A summary

Indicator	Accuracy-reflectiveness of tourism	Data gathering	Cross-country comparisons	Comparisons over time	Overall indicator of competitiveness	Comments
Tourism Price Competitiveness Index (Dwyer et al. 2000a)	High	Extensive	Yes	Yes	Potential	Most detailed indicator available
Simple PPP	Moderate	Easy	Yes	Yes	Potential	Broad readily available indicator
Big Mac	Low	Moderate	Yes	Yes	No	Too specific—really a gimmick
Sectoral measures (e.g., hotel prices)	High	Extensive	Yes	Potential	No	Useful for specific purposes and in general indicators
Tourism price index/ exchange rate	High	Extensive	No	Yes	Potential	Not used extensively
CPI/exchange rate	Moderate	Easy	No	Yes	No	Broad measure of changes
Tourism Trade Weighted Index	Moderate	Moderate	No	Yes	Yes	Summary measure of competitiveness changes over time
Aviation Trade Weighted Index	Moderate	Moderate	No	Yes	Yes	Summary measure of competitiveness changes over time for specific tourism industry

Source: Derived by authors.

Horses for courses: Which competitiveness indicator?

In this chapter, we have outlined a range of different tourism price competitiveness indicators. Which one should be used, and in what context? As with many similar situations, it is a matter of horses for courses. Depending on the exact question at hand, different indicators are suitable for different purposes.

Some questions apposite to the choice of indicators are:

- How detailed and tourism-specific need the indicator be?
- What is the tradeoff between accuracy and timeliness and ease of access?
- Are cross-country comparisons of the level of tourism prices needed?
- Is specific sectoral information of interest?
- Are patterns of change over time in relative tourism competitiveness needed?
- Is it useful to have an overall measure of changes in a country's tourism competitiveness?

The performance of the different indicators in terms of these aspects is summed up in Table 5.

The Tourism Competitiveness Index is the most comprehensive indicator of tourism price competitiveness we are aware of.[23] It measures only prices that enter the tourism bundle, and thus is highly reflective of tourism. It enables cross-country comparisons at a point in time, and can be calculated over time to indicate trends. With appropriate weights, it can be used to develop an indicator of changes in a country's overall tourism competitiveness. It is, however, the most data-intensive of the measures. A simple PPP comparison is even more readily available, but it is a measure of prices for whole economies, and it does not take any specific account of the prices that tourists actually pay, though these are likely to be correlated with the PPP prices. The Big Mac Index of *The Economist* is a popular device for illustrating the PPP point, but it is not to be regarded as a reliable indicator of tourism competitiveness. Sectoral measures, such as hotel price surveys, can give a high degree of accuracy about a specific sector, though they do involve collection costs.

If cross-country comparisons are not needed, and all that is needed are changes in the patterns of price competitiveness over time, then it is possible to adjust changes in exchange rates by changes in prices. If tourism-specific information is not regarded as necessary, then estimates of real exchange rate changes derived using CPI changes will be sufficient. However, if it is felt that CPI changes may not accurately reflect tourism price changes, then exchange rate changes can be adjusted using a tourism price index.

Developing a tourism price index requires data on changes in individual tourism prices for each country, along with a weighting structure (and, as noted, given that the tourism product is hardly homogeneous, there is no single ideal set of weights). Such an index also requires expenditure data to develop a set of weights for the index.

Over time, a country's competitiveness will rise relative to some competitors and fall relative to others. If an overall indicator of how a country's competitiveness fits in comparison with other countries is required, it is necessary to develop some measure such as the widely used TWI. The TTWI is an index that reflects the importance of different countries for inbound and outbound tourism expenditure. It is thus more tourism-specific than the general TWI. The concept can be extended to a sectoral context. The ATWI takes account of the real exchange rate changes taking place in the countries whose airlines are competitors for the home country airline—it thus gives a more accurate measure of the competitive pressure an airline will be under from its competitors than a general TWI will provide.

In the light of this discussion, some comments on the TTCI are relevant. The intention of this Index is to provide a timely measure of tourism price competitiveness across countries. Four hard data price indicators are used. At the most general level, PPP price comparisons are used (indicator 10.02)—this is a measure of the cost of a general bundle of goods and services in US dollar terms for all the countries reported on. While this is a good measure of general price levels in different countries, it is not tourism-specific. To address this lack, relative price data for three key tourism related products are also provided—these are ticket taxes and airport charges (10.01), fuel price levels (10.04), and, finally, a hotel price index (10.05). By aggregating all these indicators, a more tourism-specific index of prices in different countries is obtained from readily available and up-to-date price indicators.

Notes

1 Crouch 1994a; Lim 2006.

2 Little 1980.

3 Edwards 1995.

4 Crouch 1995.

5 Crouch 1994a.

6 De Mello et al. 2002.

7 Rosensweig 1986.

8 Artus 1970; Crouch 1994b.

9 Lim 2006.

10 Lim 2006.

11 Song and Witt 2000.

12 Song and Turner 2006.

13 World Bank 1993, 2007.

14 See Dwyer et al. 1999, 2000a, 2000b, 2000c; Dwyer et al. 2001.

15 Dwyer et al. 2002.

16 Divisekera 2003.

17 Dwyer et al. 2000a.

18 Kulendran 1996; Kulendran and King 1997.

19 Dwyer et al. 2000c.

20 Dwyer et al. 2000b.

21 Forsyth and Dwyer 2008.

22 Forsyth and Dwyer 2008.

23 Dwyer et al. 2000a.

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CHAPTER 1.7

National Competitiveness Council: Setting Up the Egyptian Travel & Tourism Competitiveness Council

ASHRAF IBRAHIM, Clever Travel and Egyptian Travel & Tourism Competitiveness Council
HEBA ALI ZAYED, Egyptian National Competitiveness Council

Egyptian National Competitiveness Council

Led by a group of prominent businessmen, the Egyptian National Competitiveness Council (ENCC) was established as a private sector–led nongovernmental organization (NGO) in February 2004. Its objective is to shed light on the issue of competitiveness and enhance the competitiveness of Egypt on various levels. The ENCC started as an observatory for the developments taking place in the Egyptian economy and their implications for Egypt's competitiveness. Its role is currently being broadened to include several initiatives that will impact, complement, and—sometimes—coordinate among efforts to improve the competitiveness of Egypt.

For the last five years, the ENCC has successfully published the *Egyptian Competitiveness Report*. This report provides a thorough analysis of Egyptian competitiveness based on the main competitiveness methodology of the World Economic Forum. Each year, a specific issue or sector is discussed in more detail, generating lively debate and highlighting the challenges within that area. This important annual report has attracted the attention of the Egyptian government, academic professors, industry leaders, and international observers. Since its establishment, the ENCC has succeeded in bringing together senior government officials, private-sector leaders, professors, think tanks, and media professionals to raise awareness and generate debate on Egypt's competitiveness. It has demonstrated that much more can now be done to strengthen the private-public dialogue on economic reform. The ENCC has also fostered important debate in Egypt and influenced competitiveness dialogue both in Egypt and in the region through its participation in the World Economic Forum on the Middle East in recent years.

Egyptian National Competitiveness Council's fifth annual report: Realizing the great potential in the tourism sector

The Travel & Tourism (T&T) sector was the focus of the 2008 *Egyptian Competitiveness Report* mainly because of its potential for growth and its contribution to Egypt's overall competitiveness. The potential for development in the sector is immense by every standard, with a growth rate of over 15 percent a year between 2002 and 2006—more than three times the growth rate of international tourism during the same period. This performance accelerated to an impressive 20 percent increase in 2007, indicating that the T&T sector can sustain this double digit growth going forward and has yet to see its potential fully tapped.

Special thanks to the members of the Travel & Tourism Competitiveness Council and Mr. George Atalla and Mr. Tarek Nassar from Booz & Company.

The importance of the T&T sector and its prominence within the Egyptian economy is evidenced by the following figures:[1]

- Travel & Tourism contributes—directly and indirectly —an estimated 11.3 percent of GDP.
- It accounts for around 40 percent of exported services' receipts and generates approximately 19.3 percent of foreign exchange.
- The sector is a significant employer, contributing 12.6 percent of both direct and indirect job creation.
- Tourism accounts for some 4 percent of total investment with the private sector, providing 73 percent of the total.
- Tax revenue from foreign tourist spending is estimated at 6 billion Egyptian pounds, representing 5 percent of total direct and indirect tax revenue in 2006.
- Investment opportunities in tourism are promising; in 2006, investment in tourism exceeded US$4.1 billion, representing 2.7 percent of gross investment that year.

The Travel & Tourism Competitiveness Index (TTCI), published for the third year and discussed in Chapter 1.1 of this volume, places Egypt 64th out of 133 countries—up two places from last year but still not as high as the 58th position out of 124 countries in 2007, indicating a decline since the first year of the Index. Egypt is now just among the top half of countries in the overall ranking, and in 6th position among Arab countries.

According to the TTCI, one of Egypt's major strengths in tourism attraction is its price competitiveness—it ranks 1st out of all countries as a result of very low ticket taxes and airport charges. Additionally, Egypt has relatively low fuel price levels, ranked 3rd just after Saudi Arabia, and it comes 4th on the hotel price index, right after Bolivia. The country is perceived as relatively safe from HIV/Aids, ranking 1st on that indicator, as it has in the past two *Report*s. It also does relatively well with regard to the government's focus on the sustainability of the T&T sector, ranking 38th, although the general assessment of environmental sustainability in Egypt is less positive, ranked 103rd overall, with environmental legislation that is not sufficiently strong or enforced. Egypt has been improving over the years with regard to the country's affinity for Travel & Tourism, where it ranked 20th this year, with progress in tourism openness as reflected in tourism receipts and expenditure as a percentage of GDP and an improving attitude toward the value of tourism in the country.

It is clear that the most significant reason for the fall of Egypt's overall score between 2007 and 2009 is the drop in its rankings related to the T&T business environment and infrastructure pillar of the Index. The quality of air transport, ground transport, and ICT all showed a significant decline. Safety and security continue to be of concern; the country is ranked 67th overall in this indicator, just ahead of Benin and Ghana. The country also suffers from a lack of qualified human resources, ranked 83rd, attributable in part to the quality of the educational system. In addition, the TTCI finds the overall policy environment (ranked 55th) not to be sufficiently conducive to the development of the sector, because of a low prevalence of foreign ownership, a lack of transparency in government policies, and the high cost of starting a business in the country. The details of the most recent assessment of Egypt's competitiveness can be found in Section 2.1 of this *Report*.

The Egyptian Travel & Tourism Competitiveness Council

The importance of the sector, together with the previously mentioned growth potential for the Egyptian T&T sector, encouraged the Egyptian National Competitiveness Council to form a Travel &Tourism Competitiveness Council (T&TCC) with the objective of bringing together stakeholders from the T&T sector to review sector developments, discuss its challenges, and come up with means of enhancing its international competitiveness.

The idea for the Council came when the ENCC was preparing its *5th Egyptian Competitiveness Report*. The T&TCC is composed of a group of high-profile local T&T sector business leaders and international players, who coordinate and collaborate with other stakeholders (including government officials, professors, professional consultants, chambers of Travel & Tourism, the Egyptian Tourism Federation, other NGOs, donor programs, and international organizations). Their mission is to assess the factors impeding the enhanced competitiveness of the sector and suggest solutions for dealing with these impediments, including policy actions. This is done through spreading awareness (inside and outside the sector), advocacy, and mobilizing efforts in cooperation with other stakeholders.

To achieve its objectives, the T&TCC scope of work includes but is not limited to:

1. preparing briefings on sector performance that analyze and shed light on specific issues related to the local T&T sector as well as following up on local and international changing market conditions that may impact the sector's performance;

2. organizing discussion forums that bring together various stakeholders of the T&T sector to discuss challenges and suggest feasible solutions to be submitted for discussion with senior government officials; and

3. following up with policymaking bodies on the application of suggested solutions and monitoring the implementation of policy reforms.

Action plan for the Travel & Tourism Competitiveness Council

Analysis of the Egyptian T&T sector indicates that it faces a number of key challenges going forward. Over the upcoming year, the T&TCC will focus on three main initiatives identified as top priority:

1. human resource development,
2. institution and capacity building for industry advocacy, and
3. environmental sustainability.

Human resource development

Human resource development is a platform through which employees in the T&T sector can develop their personal and organizational skills, knowledge, and abilities. It includes such opportunities as employee training, employee career development, performance management and development, coaching, succession planning, key employee identification, tuition assistance, and organization development.

The focus here will be on aspects of human resource development aiming to develop a workforce that both matches the needs of the local T&T industry and enables it to compete with tourist destinations worldwide.

Short-term tasks will revolve around increasing institutional coordination and assessing the sector's human resources needs; long-term initiatives will focus on the industry enablers, sector research and metric measurement, curriculum design, and training provision.

Short-term initiatives

- Institutional coordination
  - —Coordinate between different organizations—for example, Technical and Vocational Education and Training (TVET), the United States Agency for International Development (USAID), the Ministry of Tourism, tourism federations, chambers, and the tourism human resource development and training units—to help these organizations establish a training business plan that can achieve the strategic, marketing, and continuity plans of tourism sector businesses.
  - —Encourage different organizations—such as the Ministry of Tourism, the Tourism Federation, tourism chambers, TVET, and area investors' associations—to coordinate and establish training centers in different touristic regions—such as the Red Sea, Sinai, Luxor, and Cairo—to have ongoing training courses.
- Human resources needs assessment
  - —Communicate with the private-sector training companies about the required training and development programs needed for the T&T industry.
  - —Work in collaboration with the Ministry of Tourism and the Tourism Federation to suggest different recommendations for developing enough qualified trainers who will efficiently execute the training business plan.
  - —Provide advice regarding the development of employee performance and staff trainings to upgrade the skills and knowledge required to successfully fulfill their job descriptions.
  - —Highlight the importance of the need for human resource training with regard to soft skills such as greeting guests, handling complaints, up-selling, communication skills, and so on.
  - —Encourage the design of a training plan for each subsector to help in achieving its goals and objectives, not just training for the sake of training.
  - —Highlight the importance of establishing a sustainable financial system targeted at upgrading the current level of human resources in the tourism industry through offering training and skills development programs.

Long-term initiatives

- Sector research and metric measurement
  - —Highlight the importance of the availability of updated information about employer requirements and market needs.
  - —Work with different stakeholder organizations on embedding a clear evaluation system to measure effectiveness in order to ensure continuous development and improvement with a focus on monitoring and feedback. Such a system would evaluate all existing tourism-related industries, thus going beyond the design and implementation of vocational training programs.
- Curriculum design and training provision platforms
  - —Foster the creation of sector education curriculums that are more demand driven and directed toward market needs and requirements. This can be achieved through initiatives such as the national vocational skills standards project.[2] The ENCC must advocate for increased ministerial cooperation to change the current educational system to one that is demand driven.

- — Highlight the importance of developing tourism-related vocational training and education to provide workers with the necessary skills and knowledge needed for each job, from line employees to managers. Developing and focusing on talented and skilled employees will achieve the competitive advantage needed to differentiate Egypt from other countries.
- — Recommend and advocate for the establishment of a series of hotel and tourism institutions for touristic areas, such as El Gouna Hotel School.[3]

Institution and capacity building for industry advocacy

To advance the T&T sector, greater awareness, information dissemination, and communication are required. Active forums, councils, workshops, and seminars allow stakeholders to stay connected and work together to identify and solve major problems facing the tourism sector in Egypt. Awareness-raising activities can ensure that industry representatives and policymakers are up to date with recent advancements in the field. These activities enable the private sector to communicate and identify potential areas of collaboration with the government to improve tourism services and overcome obstacles. To foster efforts in this area, the ENCC plans to enhance the institution and capacity building for industry advocacy.

- Institutional setup
  - — Highlight the importance of stimulating the Supreme Council of Tourism (SCT), which has been established to coordinate among ministries and the various bodies concerned with tourist activity. The Council is charged with finding ways to remove obstacles that hinder tourism, coordinating among different ministries to implement development plans and specifying the role of each ministry in tourist promotion. The SCT aims to facilitate the quick identification of problem areas and to promote efficient, feasible, multi-stakeholder solutions. Members include the ministers of irrigation, environment, local government, transportation, and planning as well as the heads of the Supreme Council of Antiquities, Egypt Air, the Cairo Airport Authority, the Egyptian Authority for Civil Aviation, the Egyptian Tourist Authority, the Immigration Authority, the Customs Authority, the Egyptian Federation of Tourist Chambers, the Hotels Chamber, and the Travel Agencies Chamber.
  - — Highlight the importance of creating the Travel & Tourism Modernization Center that will be in charge not only of training activities but also of developing the whole tourism sector.
- Capacity building
  - — Organize several workshops to create awareness about the importance of training and human resources development as well as other necessary topics that are relevant to the sector.

Environmental sustainability

The Egyptian tourism sector is at particular risk of facing the negative effects of hurried development because of its reliance on environmental resources. Water scarcity, coral bleaching, loss of beaches, and acid rain are all part of the price paid for Egypt's intense development. The T&TCC hopes to play an active role in spreading awareness of the importance of environmental sustainability—in particular, by fostering greater understanding of the effects of environmental degradation and what it could mean for individual businesses. The focus will be on two main issues: increasing awareness among sector businesses and promoting the creation of a fund promoting environmentally friendly business practices.

- Increasing awareness
  - — Coordinate workshops or seminars promoting environmental consciousness within the industry and further interest in sustainability. Beyond upper-level management, there is a significant need to train staff and employees to implement and adopt environmentally friendly practices. This training is distinct from human resource development training, but the two kinds of training are highly complementary. The objective is to create a pool of labor in the tourism industry that is aware of the effects of climate change and can embrace practices that help protect the natural environment as an essential part of their livelihoods.
- Creating an Egyptian fund for promoting environmentally friendly business practices within the T&T sector
  - — Promote the creation of a fund pooling resources from the government, the private sector, international donors, and investment banks with clients interested in conservation. The fund will offset the cost of implementing environmentally friendly business practices such as recycling, coral protection, water/energy conservation, and so on. One of the major obstacles of implementing better environmental management systems is the presence of high initial costs that threaten profitability. The fund will help reduce this obstacle and facilitate green financing in Egypt's tourism sector.
  - — Provide financial support, through the fund, for eco-tourism and businesses focused on eco-tourism that attempt to preserve the natural environment as an essential component of a thriving society and tourism industry.

Conclusions

The above review indicates the importance of the TTCI as an essential tool to track and monitor national progress within Egypt's T&T sector. In addition to highlighting relative strengths, its subindexes provide a closer look at specific deficiencies and obstacles that must be overcome to increase investments. The Egyptian T&TCC played an important role in disseminating this information and bringing key issues into the spotlight in its 2008 competitiveness report. The Council was able to examine policy implications and develop key recommendations for policymakers and other stakeholders. The Council based its action plan and suggested initiatives in the coming period based on its analysis of the Index. The proposed strategy focused on industry needs, in particular human resource development and institution and capacity building for industry advocacy and environmental sustainability.

Together the TTCI and the analysis based on it helped the T&TCC provide invaluable benchmarking and learning opportunities for Egyptian T&T stakeholders. Most importantly, the Egyptian experience is not unique: these efforts can be replicated across countries to improve the performance of T&T sectors and boost national prosperity and growth.

Notes

1 These figures are all from the ENCC's *5th Egyptian Competitiveness Report,* May 2008, Chapter 3 "The Tourism Sector in Egypt: Realizing the Great Potential."

2 This is a proposed certification scheme to ensure minimum standards for certain vocations and job descriptions throughout the T&T sector. Accordingly professionals must meet certain requirements including education and training before gaining certification. This ensures standardized job qualifications and increased staff competence.

3 The Egyptian–German Hotel School Paul Rahn El Gouna, a cooperative venture, provides three-year dual vocational training programs in several areas. The school opened in 2002. See http://cms.rahndittrich.de/Institution.1446.0.html.

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CHAPTER 1.8

Navigating Yet Another Perfect Storm: The Promise of Sustainable Travel & Tourism

THEA CHIESA, World Economic Forum

The 21st century will certainly be recorded as a century of many perfect storms for the Travel & Tourism industry. Since September 11, 2001, the industry has had to rethink the way it operates. Beyond the threat of terrorism, in the last decade alone the sector has faced a number of other challenges including pandemics and natural disasters and, in 2008, the volatility of fuel prices, which put an additional burden on this sector.[1] Yet, most importantly, 2008 was marked by the bust of the real estate market, the near collapse of stock markets, limited access to capital, the lowest consumer confidence experienced since the Great Depression, and the announcement by many governments that their respective economies had entered or were entering recessions.

The financial crisis and its impact on the Travel & Tourism sector

We have seen over the years that economic business cycles are almost perfectly correlated with tourism growth rates. When economies grow, personal incomes rise, allowing for discretionary income spending on Travel & Tourism. In recent years, according to the United Nations World Tourism Organization (UNWTO), while the world economy grew at approximately 4 percent annually, this was outpaced by growth in international tourist arrivals reaching about 6.5 percent per year.[2] On the other hand, with nations facing a global credit crisis, fluctuating stock markets, erratic fuel prices, and a global recession, people and businesses are beginning to reduce travel and businesses are scaling back their travel budgets. In an interview with Global Insight, Doug Shifflet notes that, while the slowdown in air travel will vary by traveler type and purpose, businesses in particular are likely to continue to reduce travel budgets in 2009.[3]

Against this background, the Travel & Tourism industry will certainly navigate yet another perfect storm in 2009.

Effects of a global recession

A global recession will impact the entire Travel & Tourism sector, despite the robustness that it has shown in past years. There are many reasons to expect that demand for all kinds of travel will decline in the coming years. The financial crisis and economic recession are bringing about tighter credit conditions, high consumer debt, decreased housing wealth, stagnant wages, and rising unemployment, all of which are leading to a contraction in travel demand, particularly business travel.[4]

According to IATA, in the first quarter of 2008, airlines—which tend to be very sensitive to the business downturn—experienced the largest contraction in business travel since 2003, with growth in economy-class travel slowing to less than 1 percent, down from 6 percent in 2007, significantly reducing airline operations' revenues. IATA estimates that, by the end of 2008, the total loss to the global air transport industry will have been in the order of US$5.2 billion.[5] By July 2008, passenger demand growth had fallen to 1.9 percent—the lowest in five years.[6] In parallel, passenger capacity increased by twice that amount—3.8 percent—which indicates that cuts in service did not keep up with decreasing demand. In September 2008, the six largest US airlines experienced a 9.5 percent drop on average in the quantity of domestic miles traveled by passengers compared with September 2007.[7] Compounding these difficulties, flight ticket fares are 15 to 25 percent higher on many routes than they were in 2007.[8]

The lower price of crude oil, which fell by late 2008 to more than two-thirds of its peak price of over $147 a barrel in July 2008, has not significantly lessened the financial difficulties for many airlines in the industry, as many of them hedged against the possibility of fuel prices rising to even higher levels.[9]

Therefore, if the US and global economies remain in recession for most of 2009, as many expect will be the case, it is reasonable to assume that both global leisure and business travel, measured in trips per person, will decline over the period.

Capacity contraction, industry consolidation, and possible bankruptcies

It is safe to say that, within the Travel & Tourism industry, airlines have been the hardest hit by the crisis, with serious negative consequences for the bottom line.[10] According to Felipe González Abad, Senior Advisor at Amadeus, airline bookings in October 2008 were down approximately 10 percent from the same month in 2007 (see Figures 1 and 2).[11] As a result of the present contraction in consumer demand, the T&T industry will probably face an increase in the number of airline industry bankruptcies. Strategies to eliminate excess capacity (e.g., grounding planes, slowing down the purchase of new planes) and increased mergers and acquisitions (market consolidation) will likely be adopted as a means of achieving greater financial stability.

One single GDS has lost 30 percent of it segments production in nine months.

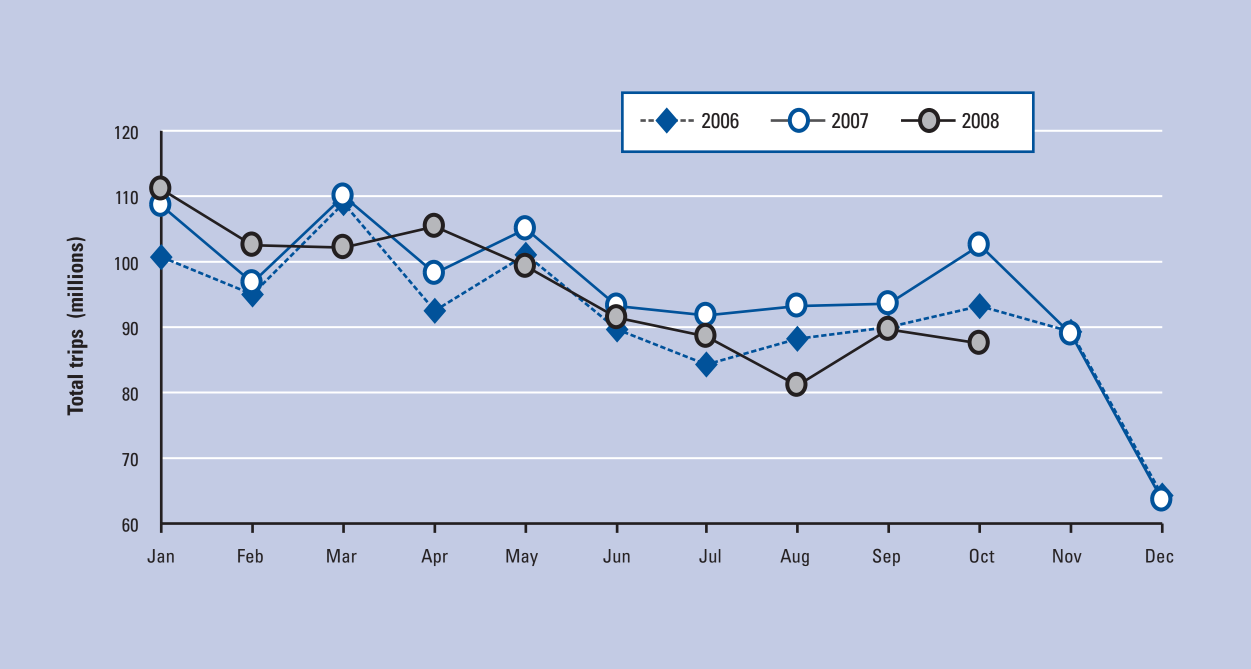
Since the beginning of 2008, more than 25 airlines have stopped or suspended operations. These include the bankruptcies of Russia's AiRUnion and Britain's XL Airways UK. Globally, many airlines have grounded aircraft to reduce supply in light of slumping domestic markets. For example, in late 2008, China Southern Airlines and China Eastern Airlines began to ground aircraft and cut flights because of concerns that the slumping domestic air travel market would not recover quickly.[12] Similarly, in October 2008, Singapore Airlines (SIA) addressed the problem of falling passenger numbers through an aggressive capacity-reduction program aimed at cutting back on some routes and entirely pulling out from others.[13]

According to the corporate travel agency Egencia, the contraction in both the supply and demand of air travel, together with the spillover effects of mergers and acquisitions, will result in lower average ticket prices for business travelers in most markets, despite higher fees for services such as meals and baggage.[14]

There is not all bad news, however. On the positive side, notwithstanding much skepticism within the industry, the current financial crisis could provide a positive effect by, for example, encouraging airlines to lobby governments for increased liberalization of the market through the adoption of global Open Skies agreements.[15] It could also lobby for the removal of all current ownership and control restrictions, which currently hinder the airlines' ability to consolidate on a truly global scale. Many agree that airline industry consolidation would be beneficial by allowing for economies of scale and increased functional synergies (e.g., shared sales services, frequent flyer programs, fuel hedging, fleet acquisition and maintenance, etc.).[16] This is along the lines of the logic employed by the US Justice Department in approving the merger of Delta and Northwest in October 2008: it was agreed that the merger was likely to benefit consumers through improved service, made possible by the consolidation of the airlines' activities.[17] Other mergers of present relevance are that of British Airways/Iberia/American Airlines, currently awaiting European Union (EU) antitrust approval; the Virgin-BMI acquisition; and the alliance between India's Jet Airways and Kingfisher, aimed at stabilizing the market in the greater public interest.

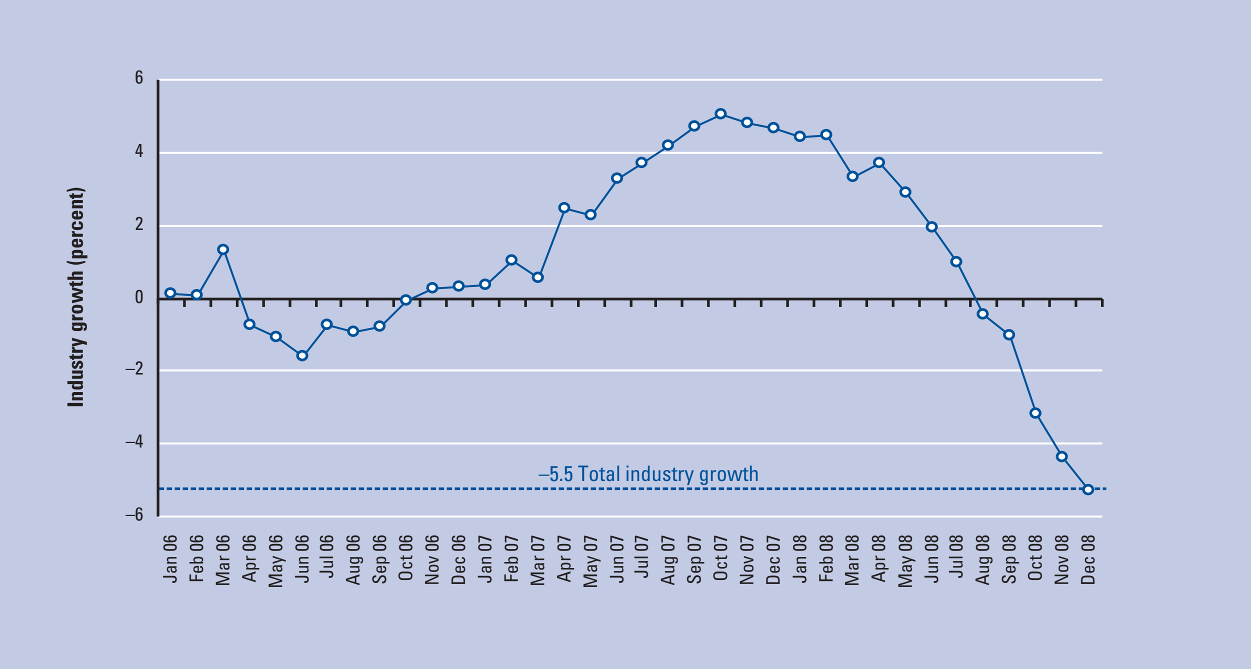
With respect to the hospitality industry, since mid-September—almost in parallel with the stock market turmoil—demand for high-end hotel rooms has sharply decreased because businesses, especially, are cutting back on travel expenses. The hospitality industry has been experiencing a drop-off in business from affluent international leisure and business travelers in particular, as economies around the globe slow and the value of the US dollar rises against many currencies. Patrick Ford, the president of the global authority for hotel real estate Lodging Econometrics, has said that in 2008 revenue rates on luxury hotel rooms "slowed in mid-September and really ratcheted downward during October.… Revenue per available room, the standard measure of performance, dropped 14 percent at upscale and luxury hotels in the week ending Oct. 18 over the comparable week last year.… For hotels in general, the decline was about 8 percent."[18]

Figure 1: Air booking evolution: Global Distribution System (GDS) world-wide



Source: González, 2008.
Note: From May 2008, the worldwide demand has been decreasing in comparison with 2007.

Figure 2: Monthly airline industry growth, 2006–08



Source: González, 2008.

A roundtable of two dozen hospitality industry professionals and Cornell faculty members that met on November 10, 2008, to discuss key trends facing the lodging industry in 2009 made the following prognosis:

- Lodging supply will continue to grow at between 2.5 and 3 percent per year through 2010, while demand for lodging will decline by approximately 0.5 percent in 2008 and 1 percent in 2009 before growing again in 2010.
- Hotel prices will decline by over 25 percent in the short term as a result of the increased cost of debt capital and slower industry growth.
- Most agree that future lending criteria will be more conservative, but, within these strictures, some deals will still be made.
- When an economic turnaround occurs, it will occur quickly.
- Owners and operators will likely increase their cooperation in order to get through what everyone knows will be a very difficult period.[19]

Ultimately, however, the lodging industry is also driven by trends in GDP growth (or contraction), the availability of airline seats to take people to destinations, the cost of oil, the increase in hotel room supply, and the demand for hotel rooms. Therefore, according to a recent PKF Hospitality Research study, the expected decline in airline travel will alone bring about a decline in hotel room demand on the order of 1 to 1.5 percent.[20]

With respect to market consolidation, the lodging industry has been driven by consolidation and takeovers over the past couple of years—notably Blackstone's Hilton, Starwood Capital's Crillion & Baccarat, and Wyndham Worldwide as a spin-off from Cendant. This trend is likely to continue as a means to rationalize supply, reduce overhead expenses and the cost of capital, and thereby mitigate the effects of the economic downturn.

How can the Travel &Tourism industry best navigate these turbulent times?

It is likely that the current global economic recession, coupled with factors such as fluctuating fuel prices, global warming, a crisis of governance, and the lack of consumer confidence, will act as a catalyst for structural change in the sector. To thrive, or even survive, in this period of uncertainty and change, both the T&T industry and destinations themselves will need to approach the challenges in a holistic and systemic manner, as shown in Figure 3. This would allow innovative ideas to emerge, new directions to be taken, new alliances to be forged, and profits to be reaped.

Sustainable tourism can create innovation and economic gains

Innovation is a promising response to the present period of crisis, transition, and change.

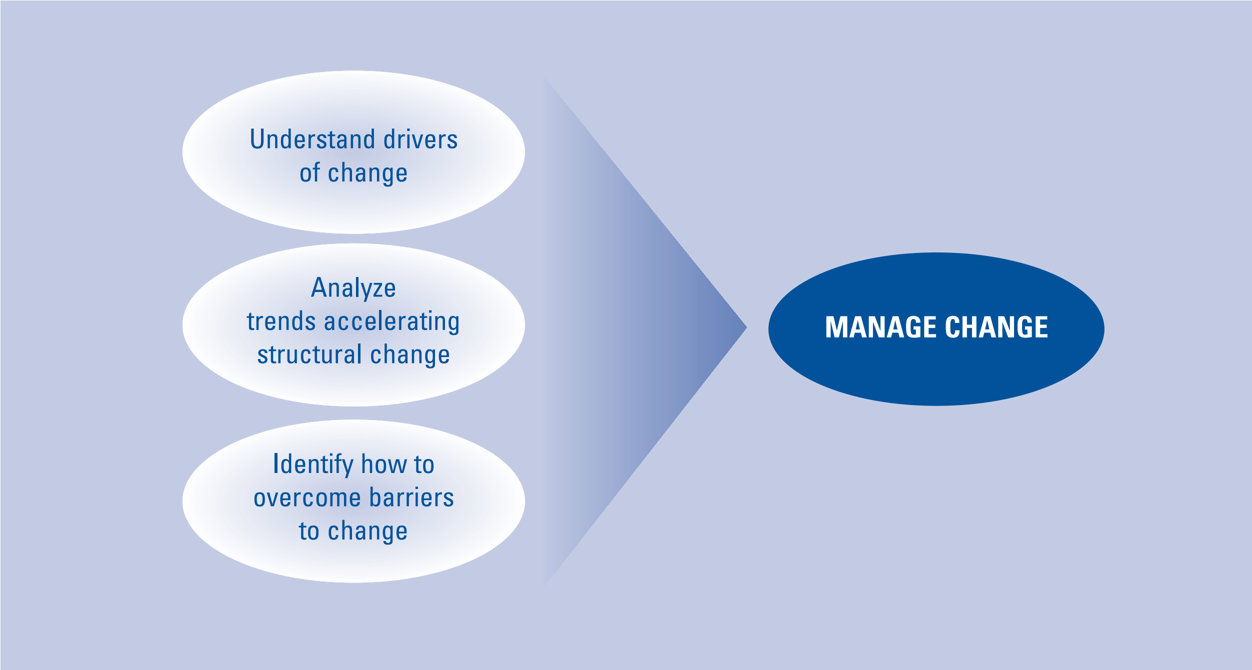
Current events are reshaping the financial and industrial world, and the role of institutions and government. Together with concurrently evolving consumer behaviors toward climate change, water consumption, and food production, these factors all provide ample opportunity for innovation. New and profitable partnerships—whether operator to supplier, operator to operator, or supplier to supplier—can help keep people traveling by creating interesting and marketable new products and services. In particular, as highlighted by the conclusions of the World Economic Forum's Travel & Tourism Industry Partnership project "Climate Change: The Route to Copenhagen," the Travel & Tourism industry can take advantage of this current period of uncertainty to increase collaboration among all actors of the T&T value chain as well as to initiate innovative partnership across different industries and create new ways of doing business (Figure 4).

For example, increased attention by consumers and governments to the issues of the environment and climate change could offer the T&T sector the opportunity to re-think the way it operates in terms of consumption levels, efficiency, and impact on the environment. Sustainable tourism, which has long been the object of a semantic debate about how to define it, has, over the course of the last couple of years, become synonymous with opportunity for growth and reduction of cost of sales (i.e., the ability to attain financial competitiveness). Sustainable tourism therefore could become a way through which to innovate, and therefore to create competitive advantage for those companies and destinations able to transform the concept into new modes of operations and of management.

It could be envisioned that the air transport industry could expand its scope of business to encompass the "movement of people and goods" regardless of the means of transportation. This would obviously require innovative alliances with other transportation companies to provide an end-to-end transportation service to customers. Such cooperative business partnerships are currently being formed between industries in the T&T sector in areas such as infrastructure (e.g., the collaboration between Air France and Veolia to service customers on short-haul destinations) and energy procurement (e.g., the partnership of the World Wildlife Fund (WWF), the Natural Resources Defense Council (NRDC), and nine major airlines to form the Sustainable Aviation Fuel Users Group).[21]

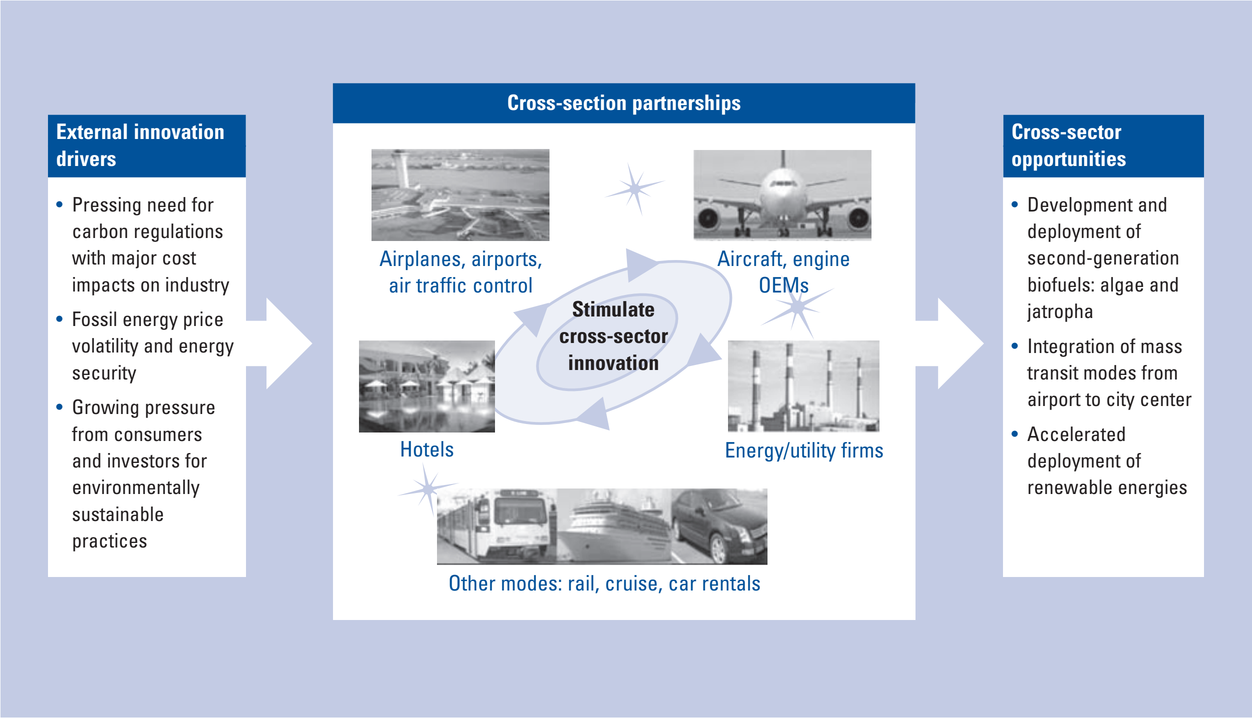
The year 2009 might therefore be a catalytic year for the emergence of new alliances for the provision of

Figure 3: Understanding the need for managing change



Source: Author.

Figure 4: Leverage cross-sector partnerships to stimulate innovation



External innovation drivers

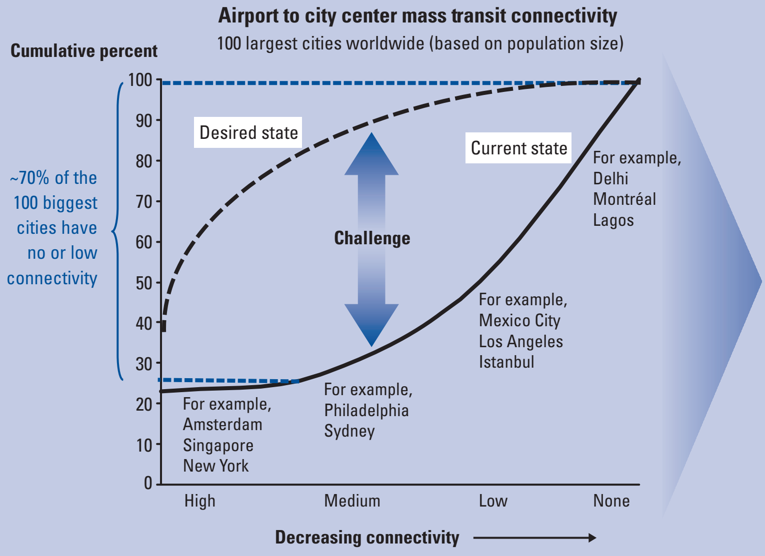
- Pressing need for carbon regulations with major cost impacts on industry
- Fossil energy price volatility and energy security
- Growing pressure from consumers and investors for environmentally sustainable practices

Cross-sector opportunities

- Development and deployment of second-generation biofuels: algae and jatropha
- Integration of mass transit modes from airport to city center
- Accelerated deployment of renewable energies

Source: World Economic Industry Partnership Project “Travel & Tourism Climate Change: The Route to Copenhagen”; analysis provided by Booz & Co.

Figure 5: Integration of mass transit modes, city to airport: Insights and challenges



MASS TRANSIT CONNECTIVITY

Level	Availability
High	Dedicated (train, bus, subway)
Medium	Non-dedicated (train, bus, subway)
Low	Limited (train, bus)
None	No mass transportation

IMPLICATIONS
Significant opportunity to reduce CO_2 emissions (needs to be further quantified)
Less road congestion and more employee productive hours
Higher travel convenience at a lower cost to the consumer

Source: World Economic Industry Partnership Project “Travel & Tourism Climate Change: The Route to Copenhagen”; analysis provided by Booz & Co.

integrated horizontal seamless transportation services. This type of new service provisioning would increase profitability of the service providers, enable the rationalization of investment spent in infrastructure and service delivery, and potentially reduce the carbon footprint of travelers. This new type of passenger service provision could provide an economic gain for industry and a competitive advantage to attract a new customer segment (see Figure 5 for a more detailed explanation).

The challenges for the development of this type of partnership include the need to create an appropriate regulatory framework to encourage modal shifts; large infrastructure investment cost upfront, with limited returns on the investment; and limited public funds, which have other competing agendas such as health and education.

Transforming “green tourism” from a niche to a mass phenomenon

Innovative cooperative partnerships could transform “green tourism” from a niche to a mass phenomenon, thereby creating a competitive advantage for those countries with policies that foster such cooperation. The current approach, of increasing awareness to pay for sustainable tourism, however, has not led to desired results. The percent of tourists who are actually aware that sustainable tourism options exist is unknown, but it is known that 6 percent of the total number of tourists actually pay extra for these options, and 34 percent would be willing to pay extra for them.[22]

The majority of current voluntary offsetting schemes have a low participation rate and low consumer involvement. This lack of participation is largely driven by three factors: a lack of insight into the spending of offsetting funds, the low availability of offsetting options, and the absence of recognized offsetting standards for the organizations offering these programs.

Three options exist to convert sustainability to a mass market phenomenon and therefore provide economic returns:

- Fit sustainability into existing consumer needs or preference schemes (e.g., low price):
  - — Provide multiple options for sustainable tourism to consumers.
  - — Make sustainable tourism financially attractive.
  - — Increase the convenience of booking sustainable tourism.
- Create a new consumer need or preference for sustainability:
  - — Make the effect of Travel & Tourism on the environment more tangible by showing its impact on specific destinations (e.g., the coral bleaching that results from increased ocean temperature due to global warming).
  - — Link tourist payments of offsets to tangible benefits on climate.

Figure 6: Types of green investment options for the T&T sector

EXAMPLES OF GREEN INVESTMENT FUND

- **New Ventures India** (NVI) is a joint initiative of the Confederation of Indian Industries and the World Resources Institute to invest in businesses in ecotourism, green building materials, recycling waste, and renewable energy.
- **UNWTO Earth Lung projects** include the reforestation of rainforests in Sri Lanka and the carbon-neutral Sharm el Sheik resort in Egypt.

INVESTMENT OPTIONS

Tourism destination

Developing countries with large dependence on the T&T sector

- Small island states (e.g., Malta, the Maldives)
- African nations (e.g., Morocco, Egypt)

Transport infrastructure

- Second-generation biofuels (e.g., algae or jatropha)
- Integration of mass transit modes from airport to city centers

Hospitality sector

- Collaborative sourcing of green electricity
- Improvements in building energy efficiency

Source: World Economic Industry Partnership Project "Travel & Tourism Climate Change: The Route to Copenhagen"; analysis provided by Booz & Co.

— Change mindset of tourists and the culture of tourism: make sustainability hot (e.g., make renting hybrid cars the most desirable of all possible vehicles).

- Create public-private collaboration for the development of green standards and labels in Travel & Tourism. As with the food industry, where today consumers have a choice of purchasing different labels such as fair trade, organic, locally produced, and, increasingly, foods labeled with their "carbon ratings," the T&T industry could encourage governments to create truly global, world-recognized "green labels" that would be not limited only to reporting carbon footprinting but also would include a measurement of sustainable practices that illuminates their impact on local communities and the environment as a whole.

Creating "tourism green funds": Destinations and industry working together

Presently, public and private money is being diverted to finance investments in emissions mitigation measures. For example:

- The Global Environment Facility (GEF) fund managed by the United Nations Framework Convention on Climate Change (UNFCCC) and the World Bank funds for climate change provide approximately US$2 billion, and bilateral funding initiatives provide approximately US$3 billion per year until 2012 for emissions mitigation—but no direct funding is available for projects directly linked to Travel & Tourism activities and that would directly impact the overall industry's carbon footprint.

- Global venture capital investment has grown from just 1.6 percent of total investment in 2003 to 11 percent in 2008 (approximately US$12 billion).

However, there are limited funds available for sustainable projects in the T&T sector. Moreover, no offsetting scheme today is directly linked to a tourism-related product. Thus a true opportunity exists for industry and destinations to work together to create innovative green funds that are linked directly to the T&T offering. Several promising investment options exist for investing in sustainable T&T projects (see Figure 6).

By creating green tourism investment funds, consumers can be proactively engaged in financing sustainable tourism initiatives by overcoming some of the structural short-comings of the offsetting funds. In particular, this would allow:

- higher transparency—for example, consumers see how money is being spent in a destination green project, and

- more consumer engagement—for example, ask for investments for specific causes, such as preventing the Maldives flooding.

However, the challenges in creating such funds are numerous and include the need to:

- Design the right regulatory framework to create incentives for the formation of and investment in green funds. This should include, among other items:
  - the development of a favorable tax regime (e.g., low capital gains tax) for investments in T&T sustainable projects, and
  - linking existing industry-specific offsetting schemes to T&T green investment funds.
- Engage the funding community to invest in sustainable projects specific to the T&T sector. This could be done by:
  - mobilizing industry to showcase T&T sustainable projects, and
  - incentivizing travelers to contribute to the investment fund.
- Define the governance and operating model of the green T&T investment fund in terms of:
  - the management and board of governors for the investment fund,
  - the identification of investment projects, and
  - an understanding of the economic requirements of investors in such funds.

Conclusions

The present economic crisis has highlighted the urgent need for industry, governments, and society to re-shape companies and institutions, to redefine values, and to collaborate in innovative ways. Only coming together to meet these urgent needs will ensure the effective and sustainable use of our planet's scarce resources. For the T&T industry, this translates into the need to fully embrace the concept of sustainability within day-to-day operations as well as in re-formulating new products and services. Success in this endeavor will ensure not only that the destinations will be able to reap the benefits of Travel & Tourism in the long run, but in the short run it will also better prepare companies to ride out the present economic turmoil.

There are plenty of opportunities for the sector to collaborate innovatively to address the challenges of climate change. Some of the most promising cross innovative partnership opportunities identified by the Forum's Aviation, Travel & Tourism community have been illustrated in this chapter, yet many more exist. The World Economic Forum, through its Industry Partnership Programme for the Aviation, Travel & Tourism industry, is engaging all key stakeholders in a collaborative dialogue to address the barriers to implementing some promising new cross-industry partnerships for carbon abatement that have been identified by the community. The Forum will continue this dialogue throughout the course of 2009–10.

Notes

1 Tarlow 2008.

2 Yeoman 2008.

3 Doug Shifflet, president and CEO of D.K. Shifflet & Associates, in an interview in Global Insight (2008).

4 Global Insight 2008.

5 MacInnis 2008.

6 IATA 2008.

7 The six largest US airlines are AMR, Continental, Delta/Northwest Airlines (Delta and Northwest are now one company), US Airways, United, SouthWest. See ChicagoTribune.com 2008.

8 Sharkey 2008a.

9 IATA Director-General, Giovanni Bisignani, noted that many of the big banks that previously extended plentiful credit to the industry have scaled back that activity. See MacInnis 2008.

10 WTM and Euromonitor International 2008.

11 González 2008.

12 ATW Online 2008.

13 Sreenivasan 2008.

14 BNET 2008.

15 *Open Skies* refers to a bilateral (and sometimes multilateral) Air Transport Agreement that liberalizes the rules for international aviation markets and minimizes government intervention—the provisions apply to passenger, all-cargo and combination air transportation and encompass both scheduled and charter services.

16 Spencer 2008.

17 Moylan 2008.

18 Sharkey 2008b.

19 hospitality-Net 2008.

20 ETN 2008.

21 The Sustainable Aviation Fuel Users Group, formed in September 2008, is an initiative to promote the development of biofuels for aviation. See http://www.boeing.com/commercial/environment/pdf/sustainable_aviation_fuel_users_group.pd.

22 TNS Global 2007.

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CHAPTER 1.9

Strengthening the Travel & Tourism Competitiveness Index

GEOFFREY LIPMAN

JOHN KESTER

United Nations World Travel Organization (UNWTO)

Once again we offer our views on the application of the Travel & Tourism Competitiveness Index (TTCI) in the spirit of collaboration that has prevailed since this work has been initiated. We congratulate our partners in the World Economic Forum for their commitment to this program. **We will step up our contribution to that partnership by not only providing data and analysis but acting to better incorporate the views of the sector itself.**

This time, moreover, the unprecedented economic conditions, market shifts, and evolving policy response are determining factors in which to consider the Index. This raises the central question of its relevance in a world of short-term stimulus actions and parallel, longer-term shift to a green economy, *coherent with global development and climate imperatives.* **Our comments are therefore focused only on actions needed to strengthen the use of the Index for the tourism & travel sector in this underlying context.**

- Summarizing our past views on the Index and the changes in this edition, we strongly welcome the initiatives to improve and broaden the base data and particularly to incorporate new environmental criteria and information.

- We also welcome the new emphasis on presentation of data by regions, which we have long argued is more relevant than a global listing with its massive unfair presentational differential between rich and poor. We continue to assert that presentation by gross domestic product (GDP) clusters and by region will be a more valid presentation because the competitive gap between rich and poor nations often reflects their place in the development cycle, their inherent infrastructure, and their resource differences as well as their capacity to allocate funds to change tourism competitiveness. Similarly mature markets have had the time to put in place the infrastructure and legal frameworks that are other key components of the TTCI. In fact, this disparity does make the Index a useful tool for development agencies looking to enhance the tourism competitiveness of poor and emerging markets.

- Looking at current global realities, we believe a major new factor in tourism competitiveness will be the way in which countries place tourism in their strategic economic repositioning.

    — Stimulation programs seek to create jobs and reignite growth. Tourism has more capacity for job creation and economic regeneration than virtually any other sector. Tourism and travel is one of the largest employment sectors in most countries and a fast entry vehicle into the workforce for young people and women.

Encouraging travel boosts consumer and business confidence, it strengthens two-way trade, and it promotes export income for the poorest countries with few similar alternatives. So countries mainstreaming tourism squarely in their stimulation priorities will be enhancing their socioeconomic competitiveness generally and in the sector specifically.

— In regard to the parallel shift to a green economy—on the one hand, tourism transformation can be of immense overall economic value in its own right, given that the sector produces some 5–8 percent of GDP directly and indirectly as well as one in every 12 to 15 jobs. On the other hand, given that tourism—business and leisure—accounts for some 5 percent of carbon emissions, we must play our part in the global response to climate change. In addition our role is highly significant, given the catalytic effect of the sector in other areas of the economy and our strong consumer communications activity.

— Moreover, the value of ecotourism has long been recognized as a beacon for environmental change, and it is one where poor countries have a comparative advantage because of their nature, culture, and very lack of intensive development. Similarly, with the exception of the newly emerging industrialized economies, the poorest play a negligible role in greenhouse gas emissions.

— But ecotourism, as well as green tourism generally, also offers massive potential for industrialized states competitiveness—particularly in regard to rural transformation and sustainable urban mobility. Better conservation strategies offer massive energy savings. Reduction in congestion in the air and on the ground, for example, is a major factor in intelligent energy use.

— At the same time, the next generation of green energy, climate-proofing of buildings and other infrastructure, retraining, and education are areas where all states can gain competitive enhancement in their tourism sector. The use of solar or wind power and clean biofuels are obvious strategic possibilities for hotels and transport companies.

While serious consideration of these elements suggests a major new thrust for the TTCI, we believe that it is actually in keeping with the evolution of the Index to reflect the realities of government, industry, and market shifts. In order to better ensure that the sector's views on these matters are better reflected in future issues of the Index UNWTO will hold an open global discussion forum on these matters in the second half of 2009.

Part 2

Country/Economy Profiles and Data Presentation

2.1

Country/Economy Profiles

How to Read the Country/Economy Profiles

This section presents two-page profiles for all the 133 economies included in the *Travel & Tourism Competitiveness Report 2009.*

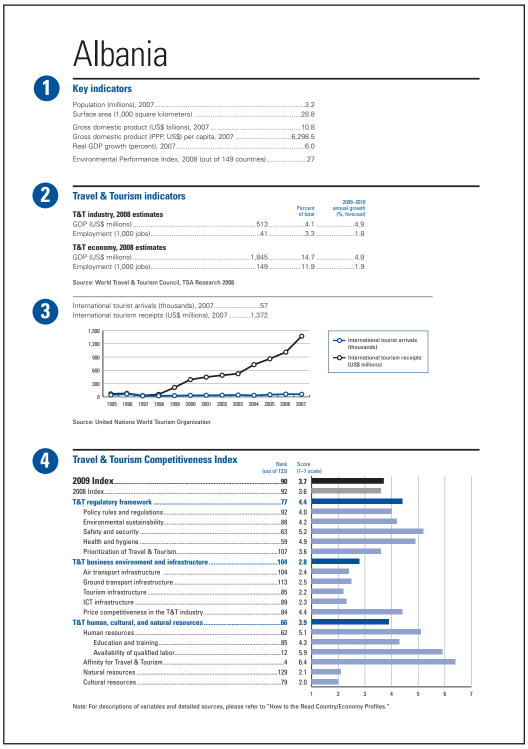
Left-hand page

❶ Key indicators

The first section presents several key indicators that give a sense of the size of the country and its economy. Population and surface area figures are from the World Bank's *World Development Indicators Online Database* (December 2008). GDP numbers are from the International Monetary Fund (IMF)'s *World Economic Outlook Database* (October 2008 edition). The Environmental Performance Index rankings are from YCELP, Yale University and CIESIN, Columbia University. National sources have been consulted where appropriate.

Travel & Tourism indicators

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



Albania

❶ **Key indicators**

Population (millions), 2007	3.2
Surface area (1,000 square kilometers)	28.8
Gross domestic product (US$ billions), 2007	10.8
Gross domestic product (PPP, US$) per capita, 2007	6,298.5
Real GDP growth (percent), 2007	6.0
Environmental Performance Index, 2008 (out of 149 countries)	27

❷ **Travel & Tourism indicators**

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	513	4.1	4.9
Employment (1,000 jobs)	41	3.3	1.8
T&T economy, 2008 estimates			
GDP (US$ millions)	1,845	14.7	4.9
Employment (1,000 jobs)	149	11.9	1.9

Source: World Travel & Tourism Council, TSA Research 2008

❸

International tourist arrivals (thousands), 2007	57
International tourism receipts (US$ millions), 2007	1,372

Source: United Nations World Tourism Organization

❹ **Travel & Tourism Competitiveness Index**

	Rank (out of 133)	Score (1–7 scale)
2009 Index	90	3.7
2008 Index	92	3.6
T&T regulatory framework	77	4.4
Policy rules and regulations	92	4.0
Environmental sustainability	88	4.2
Safety and security	63	5.2
Health and hygiene	59	4.9
Prioritization of Travel & Tourism	107	3.6
T&T business environment and infrastructure	104	2.8
Air transport infrastructure	104	2.4
Ground transport infrastructure	113	2.5
Tourism infrastructure	85	2.2
ICT infrastructure	89	2.3
Price competitiveness in the T&T industry	84	4.4
T&T human, cultural, and natural resources	66	3.9
Human resources	62	5.1
Education and training	85	4.3
Availability of qualified labor	12	5.9
Affinity for Travel & Tourism	4	6.4
Natural resources	129	2.1
Cultural resources	79	2.0

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

❷ The first part presents data from the Tourism Satellite Accounting Research carried out annually by the World Travel & Tourism Council (WTTC). Developed by the United Nations World Tourism Organization (UNWTO), the Organisation for Economic Co-operation and Development (OECD), and Eurostat, the Tourism Satellite Accounting (TSA) framework is a statistical tool—including concepts, definitions, aggregates, classifications, and tables—that is compatible with international national accounting guidelines and allows for valid international comparisons. The TSA also makes these estimates comparable with other internationally recognized macroeconomic aggregates and compilations. Using the TSA approach, WTTC estimates the current and projected future economic contribution of Travel & Tourism in terms of an economy's GDP and employment. WTTC defines the **T&T industry** as a narrow perspective of T&T activity that captures the production-side industry contribution (that is, direct impact only). The **T&T economy** is a broader perspective of Travel & Tourism that takes into consideration the direct as well as the indirect contributions by traditional travel service providers and industry suppliers within the resident economy.

This latter perspective is used when one wants to understand the total impact of Travel & Tourism on the resident economy. More information regarding WTTC's TSA Research, along with details on the methodology and data, are available at http://www.wttc.org/eng/Tourism_Research/.

❸ The second part of the T&T indicators presents data on international tourist arrivals and international tourism receipts over the period 1995 to 2007. In some cases data are missing for particular years. The graph shows all available data during this period for each economy. The data for these indicators were provided by the UNWTO.

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

International tourism receipts, expressed in millions of current US dollars, are the receipts earned by a destination country from inbound tourism and cover all tourism receipts resulting from expenditures made by visitors from abroad, on, for instance, lodging, food and drinks, fuel, transport in the country, entertainment, shopping, and so on. This measure includes receipts generated by overnight as well as by same-day trips. Receipts from same-day trips can be substantial, as in the case of countries where a lot of shopping for goods and services takes place by visitors from neighboring countries.

④ Travel & Tourism Competitiveness Index

The third section of the page presents the economy's performance on the Travel & Tourism Competitiveness Index (TTCI) and its various components. For further analysis, the Data Tables at the end of the *Report* provide detailed rankings and scores for each of the variables included in the TTCI.

Right-hand page

⑤ Travel & Tourism competitiveness index in detail

This page presents the rank achieved by a country on each of the indicators entering the composition of the TTCI. Indicators are organized by pillar. Please refer to Appendix A of Chapter 1.1 for the detailed structure of the TTCI.

Next to the rank, a colored square indicates whether the indicator constitutes an advantage (blue square) or a disadvantage (gray square) for the country. In order to identify variables as advantage or disadvantages, the following rules are applied:

- For the top 10 economies in the overall TTCI, any variables on which the economy is ranked 10th or higher are considered to be advantages. Any variables ranked below 10 are considered to be disadvantages. For example, Spain, ranked 6th overall, has the indicator "number of World Heritage cultural sites" (ranked 2nd) listed as an advantage, while the indicator "stringency of environmental regulation" (36th) is considered a disadvantage.

- For those economies ranked from 11th to 50th on the overall TTCI, any variables with a higher rank than the economy's overall rank are considered to be advantages. Any variables ranked equal to, or lower than, the economy's overall rank are disadvantages. For example, Slovenia ranks 35th overall. Thus, "hotel price index," on which the country ranks 24th, is an advantage, while the "attitude of population toward foreign visitors" (68th) and "number of operating airlines" (103rd) both constitute disadvantages.

Albania

⑤ The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ▨ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	111	▨
1.02	Property rights	126	▨
1.03	Business impact of rules on FDI	116	▨
1.04	Visa requirements*	83	▨
1.05	Openness of bilateral Air Service Agreements*	69	▨
1.06	Transparency of government policymaking	122	▨
1.07	Time required to start a business*	20	🟦
1.08	Cost to start a business*	90	▨
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	129	▨
2.02	Enforcement of environmental regulation	125	▨
2.03	Sustainability of T&T industry development	114	▨
2.04	Carbon dioxide emissions*	39	🟦
2.05	Particulate matter concentration*	84	▨
2.06	Threatened species*	35	🟦
2.07	Environmental treaty ratification*	81	▨
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	87	▨
3.02	Reliability of police services	81	▨
3.03	Business costs of crime and violence	77	▨
3.04	Road traffic accidents*	8	🟦
	4th pillar: Health and hygiene		
4.01	Physician density*	81	▨
4.02	Access to improved sanitation*	40	🟦
4.03	Access to improved drinking water*	53	▨
4.04	Hospital beds*	57	▨
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	89	▨
5.02	T&T government expenditure*	52	▨
5.03	Effectiveness of marketing and branding	116	▨
5.04	T&T fair attendance*	98	▨
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	76	▨
6.02	Available seat kilometers, domestic*	100	▨
6.03	Available seat kilometers, international*	114	▨
6.04	Departures per 1,000 population*	84	▨
6.05	Airport density*	102	▨
6.06	Number of operating airlines*	92	▨
6.07	International air transport network	83	▨
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	114	▨
7.02	Quality of railroad infrastructure	108	▨
7.03	Quality of port infrastructure	124	▨
7.04	Quality of ground transport network	123	▨
7.05	Road density*	46	🟦

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	95	▨
8.02	Presence of major car rental companies*	73	▨
8.03	ATMs accepting Visa cards*	82	▨
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	114	▨
9.02	Internet users*	81	▨
9.03	Telephone lines*	86	▨
9.04	Broadband Internet subscribers*	119	▨
9.05	Mobile telephone subscribers*	76	▨
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	116	▨
10.02	Purchasing power parity*	54	▨
10.03	Extent and effect of taxation	68	▨
10.04	Fuel price levels*	111	▨
10.05	Hotel price index*	48	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	65	▨
11.02	Secondary education enrollment*	88	▨
11.03	Quality of the educational system	80	▨
11.04	Local availability of research and training services	124	▨
11.05	Extent of staff training	71	▨
11.06	Hiring and firing practices	27	🟦
11.07	Ease of hiring foreign labor	2	🟦
11.08	HIV prevalence*	22	🟦
11.09	Business impact of HIV/AIDS	56	▨
11.10	Life expectancy*	76	▨
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	2	🟦
12.02	Attitude of population toward foreign visitors	55	▨
12.03	Extension of business trips recommended	42	🟦
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	▨
13.02	Protected areas*	80	▨
13.03	Quality of the natural environment	130	▨
13.04	Total known species*	98	▨
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	65	▨
14.02	Sports stadiums*	42	🟦
14.03	Number of international fairs and exhibitions*	107	▨
14.04	Creative industries exports*	93	▨

- For economies with an overall rank on the TTCI lower than 50, any variables for which the economy has a rank of 50 or higher are considered to be advantages. Any variables ranked below 50 are considered to be disadvantages. For example, ranked 68th overall, Oman has the variable "sustainability of T&T industry development" (22nd) listed as an advantage, while the variable "carbon dioxide emissions" (113th) is a disadvantage.

List of Countries/Economies

Albania

Key indicators

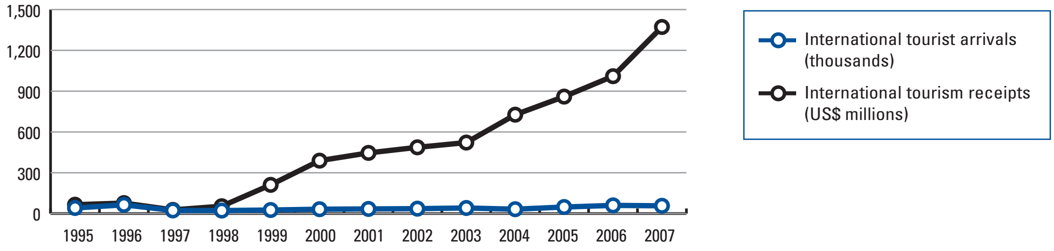
Population (millions), 2007	3.2
Surface area (1,000 square kilometers)	28.8
Gross domestic product (US$ billions), 2007	10.8
Gross domestic product (PPP, US$) per capita, 2007	6,298.5
Real GDP growth (percent), 2007	6.0
Environmental Performance Index, 2008 (out of 149 countries)	27

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	513	4.1	4.9
Employment (1,000 jobs)	41	3.3	1.8
T&T economy, 2008 estimates			
GDP (US$ millions)	1,845	14.7	4.9
Employment (1,000 jobs)	149	11.9	1.9

Source: World Travel & Tourism Council, TSA Research 2008

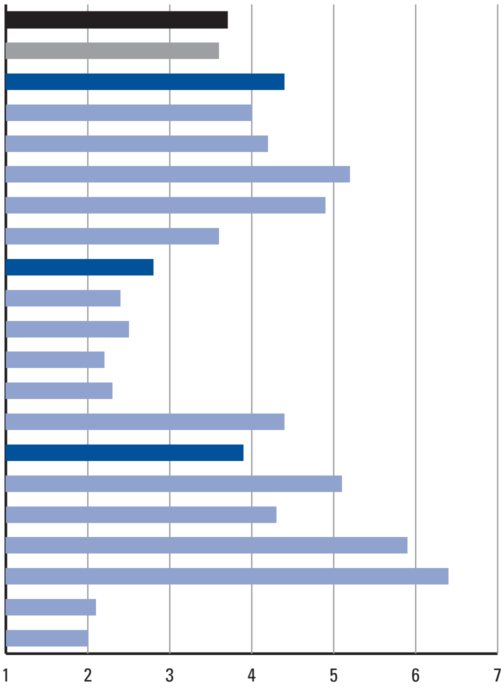
International tourist arrivals (thousands), 2007	57
International tourism receipts (US$ millions), 2007	1,372



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**90**	**3.7**
2008 Index	92	3.6
T&T regulatory framework	**77**	**4.4**
Policy rules and regulations	92	4.0
Environmental sustainability	88	4.2
Safety and security	63	5.2
Health and hygiene	59	4.9
Prioritization of Travel & Tourism	107	3.6
T&T business environment and infrastructure	**104**	**2.8**
Air transport infrastructure	104	2.4
Ground transport infrastructure	113	2.5
Tourism infrastructure	85	2.2
ICT infrastructure	89	2.3
Price competitiveness in the T&T industry	84	4.4
T&T human, cultural, and natural resources	**66**	**3.9**
Human resources	62	5.1
Education and training	85	4.3
Availability of qualified labor	12	5.9
Affinity for Travel & Tourism	4	6.4
Natural resources	129	2.1
Cultural resources	79	2.0



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Albania

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ▨ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	111	▨
1.02	Property rights	126	▨
1.03	Business impact of rules on FDI	116	▨
1.04	Visa requirements*	83	▨
1.05	Openness of bilateral Air Service Agreements*	69	▨
1.06	Transparency of government policymaking	122	▨
1.07	Time required to start a business*	20	🟦
1.08	Cost to start a business*	90	▨
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	129	▨
2.02	Enforcement of environmental regulation	125	▨
2.03	Sustainability of T&T industry development	114	▨
2.04	Carbon dioxide emissions*	39	🟦
2.05	Particulate matter concentration*	84	▨
2.06	Threatened species*	35	🟦
2.07	Environmental treaty ratification*	81	▨
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	87	▨
3.02	Reliability of police services	81	▨
3.03	Business costs of crime and violence	77	▨
3.04	Road traffic accidents*	8	🟦
	4th pillar: Health and hygiene		
4.01	Physician density*	81	▨
4.02	Access to improved sanitation*	40	🟦
4.03	Access to improved drinking water*	53	▨
4.04	Hospital beds*	57	▨
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	89	▨
5.02	T&T government expenditure*	52	▨
5.03	Effectiveness of marketing and branding	116	▨
5.04	T&T fair attendance*	98	▨
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	76	▨
6.02	Available seat kilometers, domestic*	100	▨
6.03	Available seat kilometers, international*	114	▨
6.04	Departures per 1,000 population*	84	▨
6.05	Airport density*	102	▨
6.06	Number of operating airlines*	92	▨
6.07	International air transport network	83	▨
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	114	▨
7.02	Quality of railroad infrastructure	108	▨
7.03	Quality of port infrastructure	124	▨
7.04	Quality of ground transport network	123	▨
7.05	Road density*	46	🟦

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	95	▨
8.02	Presence of major car rental companies*	73	▨
8.03	ATMs accepting Visa cards*	82	▨
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	114	▨
9.02	Internet users*	81	▨
9.03	Telephone lines*	86	▨
9.04	Broadband Internet subscribers*	119	▨
9.05	Mobile telephone subscribers*	76	▨
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	116	▨
10.02	Purchasing power parity*	54	▨
10.03	Extent and effect of taxation	68	▨
10.04	Fuel price levels*	111	▨
10.05	Hotel price index*	48	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	65	▨
11.02	Secondary education enrollment*	88	▨
11.03	Quality of the educational system	80	▨
11.04	Local availability of research and training services	124	▨
11.05	Extent of staff training	71	▨
11.06	Hiring and firing practices	27	🟦
11.07	Ease of hiring foreign labor	2	🟦
11.08	HIV prevalence*	22	🟦
11.09	Business impact of HIV/AIDS	56	▨
11.10	Life expectancy*	76	▨
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	2	🟦
12.02	Attitude of population toward foreign visitors	55	▨
12.03	Extension of business trips recommended	42	🟦
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	▨
13.02	Protected areas*	80	▨
13.03	Quality of the natural environment	130	▨
13.04	Total known species*	98	▨
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	65	▨
14.02	Sports stadiums*	42	🟦
14.03	Number of international fairs and exhibitions*	107	▨
14.04	Creative industries exports*	93	▨

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Algeria

Key indicators

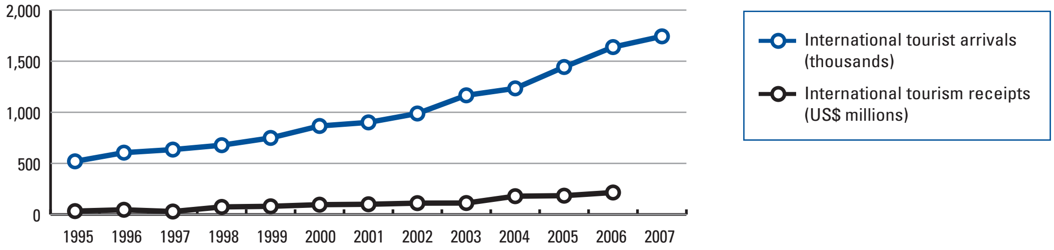
Population (millions), 2007	33.9
Surface area (1,000 square kilometers)	2,381.7
Gross domestic product (US$ billions), 2007	134.3
Gross domestic product (PPP, US$) per capita, 2007	6,538.7
Real GDP growth (percent), 2007	4.6
Environmental Performance Index, 2008 (out of 149 countries)	66

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	2,190	1.6	5.6
Employment (1,000 jobs)	138	1.5	3.5
T&T economy, 2008 estimates			
GDP (US$ millions)	8,733	6.4	4.8
Employment (1,000 jobs)	506	5.6	2.8

Source: World Travel & Tourism Council, TSA Research 2008

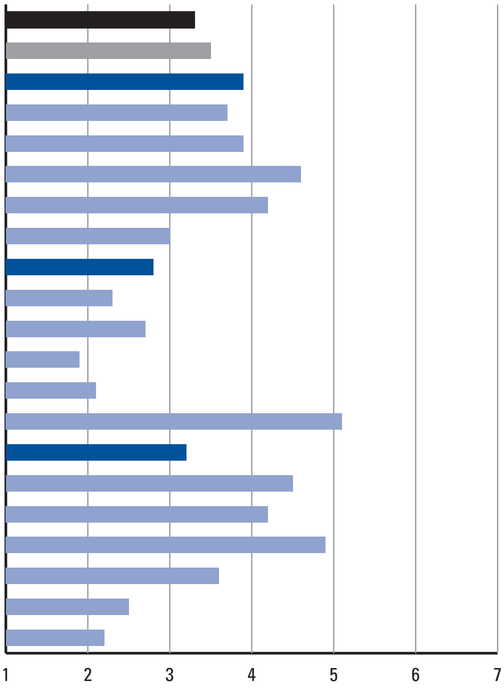
International tourist arrivals (thousands), 2007	1,743
International tourism receipts (US$ millions), 2006	215



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**115**	**3.3**
2008 Index	102	3.5
T&T regulatory framework	**108**	**3.9**
Policy rules and regulations	111	3.7
Environmental sustainability	116	3.9
Safety and security	97	4.6
Health and hygiene	81	4.2
Prioritization of Travel & Tourism	124	3.0
T&T business environment and infrastructure	**98**	**2.8**
Air transport infrastructure	110	2.3
Ground transport infrastructure	101	2.7
Tourism infrastructure	95	1.9
ICT infrastructure	97	2.1
Price competitiveness in the T&T industry	32	5.1
T&T human, cultural, and natural resources	**127**	**3.2**
Human resources	101	4.5
Education and training	98	4.2
Availability of qualified labor	113	4.9
Affinity for Travel & Tourism	132	3.6
Natural resources	105	2.5
Cultural resources	69	2.2



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Algeria

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ▨ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	129	▨
1.02	Property rights	115	▨
1.03	Business impact of rules on FDI	115	▨
1.04	Visa requirements*	120	▨
1.05	Openness of bilateral Air Service Agreements*	105	▨
1.06	Transparency of government policymaking	112	▨
1.07	Time required to start a business*	68	▨
1.08	Cost to start a business*	66	▨
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	114	▨
2.02	Enforcement of environmental regulation	100	▨
2.03	Sustainability of T&T industry development	100	▨
2.04	Carbon dioxide emissions*	84	▨
2.05	Particulate matter concentration*	102	▨
2.06	Threatened species*	91	▨
2.07	Environmental treaty ratification*	67	▨
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	123	▨
3.02	Reliability of police services	72	▨
3.03	Business costs of crime and violence	85	▨
3.04	Road traffic accidents*	94	▨
	4th pillar: Health and hygiene		
4.01	Physician density*	85	▨
4.02	Access to improved sanitation*	48	🟦
4.03	Access to improved drinking water*	91	▨
4.04	Hospital beds*	89	▨
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	123	▨
5.02	T&T government expenditure*	116	▨
5.03	Effectiveness of marketing and branding	120	▨
5.04	T&T fair attendance*	81	▨
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	106	▨
6.02	Available seat kilometers, domestic*	41	🟦
6.03	Available seat kilometers, international*	72	▨
6.04	Departures per 1,000 population*	85	▨
6.05	Airport density*	55	▨
6.06	Number of operating airlines*	84	▨
6.07	International air transport network	125	▨
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	77	▨
7.02	Quality of railroad infrastructure	63	▨
7.03	Quality of port infrastructure	103	▨
7.04	Quality of ground transport network	111	▨
7.05	Road density*	119	▨

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	94	▨
8.02	Presence of major car rental companies*	73	▨
8.03	ATMs accepting Visa cards*	124	▨
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	133	▨
9.02	Internet users*	92	▨
9.03	Telephone lines*	96	▨
9.04	Broadband Internet subscribers*	84	▨
9.05	Mobile telephone subscribers*	64	▨
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	60	▨
10.02	Purchasing power parity*	51	▨
10.03	Extent and effect of taxation	58	▨
10.04	Fuel price levels*	7	🟦
10.05	Hotel price index*	92	▨
	11th pillar: Human resources		
11.01	Primary education enrollment*	50	🟦
11.02	Secondary education enrollment*	78	▨
11.03	Quality of the educational system	122	▨
11.04	Local availability of research and training services	111	▨
11.05	Extent of staff training	127	▨
11.06	Hiring and firing practices	118	▨
11.07	Ease of hiring foreign labor	123	▨
11.08	HIV prevalence*	22	🟦
11.09	Business impact of HIV/AIDS	87	▨
11.10	Life expectancy*	76	▨
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	131	▨
12.02	Attitude of population toward foreign visitors	128	▨
12.03	Extension of business trips recommended	128	▨
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	40	🟦
13.02	Protected areas*	94	▨
13.03	Quality of the natural environment	111	▨
13.04	Total known species*	82	▨
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	22	🟦
14.02	Sports stadiums*	87	▨
14.03	Number of international fairs and exhibitions*	107	▨
14.04	Creative industries exports*	107	▨

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Argentina

Key indicators

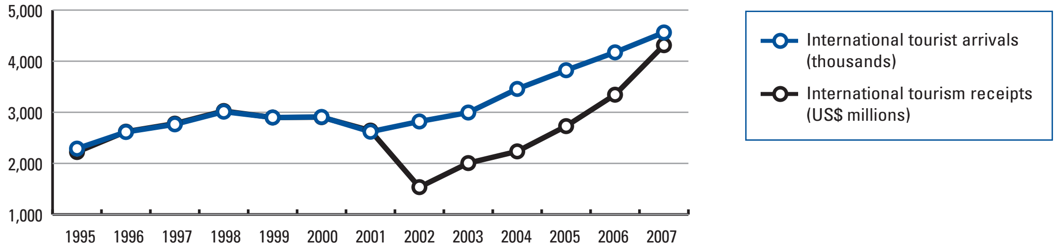
Population (millions), 2007	39.5
Surface area (1,000 square kilometers)	2,780.4
Gross domestic product (US$ billions), 2007	260.1
Gross domestic product (PPP, US$) per capita, 2007	13,317.8
Real GDP growth (percent), 2007	8.7
Environmental Performance Index, 2008 (out of 149 countries)	38

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	9,448	3.3	3.3
Employment (1,000 jobs)	783	4.6	1.6
T&T economy, 2008 estimates			
GDP (US$ millions)	25,427	8.8	3.6
Employment (1,000 jobs)	1,813	10.5	1.9

Source: World Travel & Tourism Council, TSA Research 2008

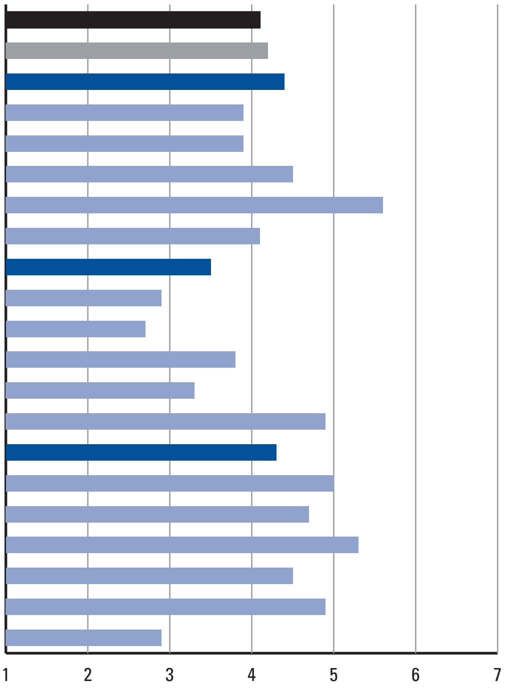
International tourist arrivals (thousands), 2007	4,562
International tourism receipts (US$ millions), 2007	4,313



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**65**	**4.1**
2008 Index	58	4.2
T&T regulatory framework	**74**	**4.4**
Policy rules and regulations	98	3.9
Environmental sustainability	119	3.9
Safety and security	102	4.5
Health and hygiene	43	5.6
Prioritization of Travel & Tourism	79	4.1
T&T business environment and infrastructure	**70**	**3.5**
Air transport infrastructure	72	2.9
Ground transport infrastructure	105	2.7
Tourism infrastructure	52	3.8
ICT infrastructure	53	3.3
Price competitiveness in the T&T industry	52	4.9
T&T human, cultural, and natural resources	**41**	**4.3**
Human resources	73	5.0
Education and training	67	4.7
Availability of qualified labor	83	5.3
Affinity for Travel & Tourism	94	4.5
Natural resources	13	4.9
Cultural resources	43	2.9



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Argentina

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	96	⬜
1.02	Property rights	127	⬜
1.03	Business impact of rules on FDI	125	⬜
1.04	Visa requirements*	26	🟦
1.05	Openness of bilateral Air Service Agreements*	79	⬜
1.06	Transparency of government policymaking	131	⬜
1.07	Time required to start a business*	89	⬜
1.08	Cost to start a business*	60	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	121	⬜
2.02	Enforcement of environmental regulation	123	⬜
2.03	Sustainability of T&T industry development	105	⬜
2.04	Carbon dioxide emissions*	63	⬜
2.05	Particulate matter concentration*	107	⬜
2.06	Threatened species*	99	⬜
2.07	Environmental treaty ratification*	52	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	38	🟦
3.02	Reliability of police services	129	⬜
3.03	Business costs of crime and violence	111	⬜
3.04	Road traffic accidents*	89	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	32	🟦
4.02	Access to improved sanitation*	59	⬜
4.03	Access to improved drinking water*	58	⬜
4.04	Hospital beds*	41	🟦
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	92	⬜
5.02	T&T government expenditure*	87	⬜
5.03	Effectiveness of marketing and branding	79	⬜
5.04	T&T fair attendance*	41	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	123	⬜
6.02	Available seat kilometers, domestic*	21	🟦
6.03	Available seat kilometers, international*	31	🟦
6.04	Departures per 1,000 population*	78	⬜
6.05	Airport density*	37	🟦
6.06	Number of operating airlines*	51	⬜
6.07	International air transport network	97	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	89	⬜
7.02	Quality of railroad infrastructure	76	⬜
7.03	Quality of port infrastructure	92	⬜
7.04	Quality of ground transport network	95	⬜
7.05	Road density*	110	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	52	⬜
8.02	Presence of major car rental companies*	23	🟦
8.03	ATMs accepting Visa cards*	58	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	71	⬜
9.02	Internet users*	62	⬜
9.03	Telephone lines*	57	⬜
9.04	Broadband Internet subscribers*	44	🟦
9.05	Mobile telephone subscribers*	39	🟦
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	62	⬜
10.02	Purchasing power parity*	45	🟦
10.03	Extent and effect of taxation	129	⬜
10.04	Fuel price levels*	21	🟦
10.05	Hotel price index*	50	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	14	🟦
11.02	Secondary education enrollment*	75	⬜
11.03	Quality of the educational system	105	⬜
11.04	Local availability of research and training services	60	⬜
11.05	Extent of staff training	86	⬜
11.06	Hiring and firing practices	119	⬜
11.07	Ease of hiring foreign labor	48	🟦
11.08	HIV prevalence*	78	⬜
11.09	Business impact of HIV/AIDS	66	⬜
11.10	Life expectancy*	42	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	97	⬜
12.02	Attitude of population toward foreign visitors	105	⬜
12.03	Extension of business trips recommended	59	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	10	🟦
13.02	Protected areas*	84	⬜
13.03	Quality of the natural environment	65	⬜
13.04	Total known species*	13	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	54	⬜
14.02	Sports stadiums*	37	🟦
14.03	Number of international fairs and exhibitions*	36	🟦
14.04	Creative industries exports*	48	🟦

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Armenia

Key indicators

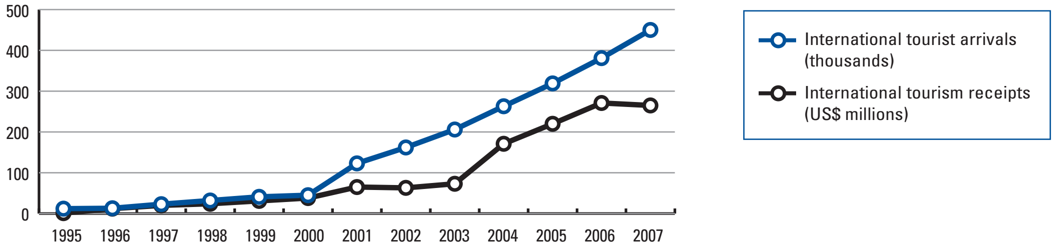
Population (millions), 2007	3.0
Surface area (1,000 square kilometers)	29.8
Gross domestic product (US$ billions), 2007	9.2
Gross domestic product (PPP, US$) per capita, 2007	4,945.9
Real GDP growth (percent), 2007	13.8
Environmental Performance Index, 2008 (out of 149 countries)	62

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	240	2.3	4.4
Employment (1,000 jobs)	20	1.8	–0.8
T&T economy, 2008 estimates			
GDP (US$ millions)	1,079	10.2	4.7
Employment (1,000 jobs)	91	8.3	–0.5

Source: World Travel & Tourism Council, TSA Research 2008

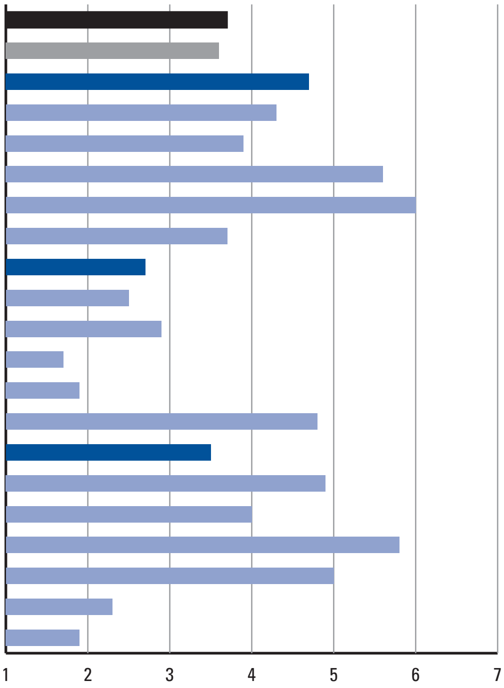
International tourist arrivals (thousands), 2007	450
International tourism receipts (US$ millions), 2007	265



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**91**	**3.7**
2008 Index	89	3.6
T&T regulatory framework	**58**	**4.7**
Policy rules and regulations	77	4.3
Environmental sustainability	113	3.9
Safety and security	45	5.6
Health and hygiene	30	6.0
Prioritization of Travel & Tourism	104	3.7
T&T business environment and infrastructure	**105**	**2.7**
Air transport infrastructure	96	2.5
Ground transport infrastructure	95	2.9
Tourism infrastructure	106	1.7
ICT infrastructure	107	1.9
Price competitiveness in the T&T industry	63	4.8
T&T human, cultural, and natural resources	**102**	**3.5**
Human resources	81	4.9
Education and training	100	4.0
Availability of qualified labor	18	5.8
Affinity for Travel & Tourism	46	5.0
Natural resources	118	2.3
Cultural resources	82	1.9



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Armenia

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133
	1st pillar: Policy rules and regulations	
1.01	Prevalence of foreign ownership	84 ⬜
1.02	Property rights	69 ⬜
1.03	Business impact of rules on FDI	87 ⬜
1.04	Visa requirements*	117 ⬜
1.05	Openness of bilateral Air Service Agreements*	89 ⬜
1.06	Transparency of government policymaking	103 ⬜
1.07	Time required to start a business*	54 ⬜
1.08	Cost to start a business*	30 🟦
	2nd pillar: Environmental sustainability	
2.01	Stringency of environmental regulation	118 ⬜
2.02	Enforcement of environmental regulation	128 ⬜
2.03	Sustainability of T&T industry development	96 ⬜
2.04	Carbon dioxide emissions*	41 🟦
2.05	Particulate matter concentration*	99 ⬜
2.06	Threatened species*	78 ⬜
2.07	Environmental treaty ratification*	104 ⬜
	3rd pillar: Safety and security	
3.01	Business costs of terrorism	33 🟦
3.02	Reliability of police services	95 ⬜
3.03	Business costs of crime and violence	32 🟦
3.04	Road traffic accidents*	24 🟦
	4th pillar: Health and hygiene	
4.01	Physician density*	12 🟦
4.02	Access to improved sanitation*	59 ⬜
4.03	Access to improved drinking water*	47 🟦
4.04	Hospital beds*	39 🟦
	5th pillar: Prioritization of Travel & Tourism	
5.01	Government prioritization of the T&T industry	85 ⬜
5.02	T&T government expenditure*	55 ⬜
5.03	Effectiveness of marketing and branding	109 ⬜
5.04	T&T fair attendance*	98 ⬜
	6th pillar: Air transport infrastructure	
6.01	Quality of air transport infrastructure	85 ⬜
6.02	Available seat kilometers, domestic*	100 ⬜
6.03	Available seat kilometers, international*	96 ⬜
6.04	Departures per 1,000 population*	74 ⬜
6.05	Airport density*	71 ⬜
6.06	Number of operating airlines*	64 ⬜
6.07	International air transport network	109 ⬜
	7th pillar: Ground transport infrastructure	
7.01	Quality of roads	79 ⬜
7.02	Quality of railroad infrastructure	83 ⬜
7.03	Quality of port infrastructure	115 ⬜
7.04	Quality of ground transport network	60 ⬜
7.05	Road density*	70 ⬜

	INDICATOR	RANK/133
	8th pillar: Tourism infrastructure	
8.01	Hotel rooms*	101 ⬜
8.02	Presence of major car rental companies*	95 ⬜
8.03	ATMs accepting Visa cards*	87 ⬜
	9th pillar: ICT infrastructure	
9.01	Extent of business Internet use	116 ⬜
9.02	Internet users*	105 ⬜
9.03	Telephone lines*	66 ⬜
9.04	Broadband Internet subscribers*	103 ⬜
9.05	Mobile telephone subscribers*	126 ⬜
	10th pillar: Price competitiveness in the T&T industry	
10.01	Ticket taxes and airport charges*	65 ⬜
10.02	Purchasing power parity*	57 ⬜
10.03	Extent and effect of taxation	83 ⬜
10.04	Fuel price levels*	54 ⬜
10.05	Hotel price index*	64 ⬜
	11th pillar: Human resources	
11.01	Primary education enrollment*	109 ⬜
11.02	Secondary education enrollment*	57 ⬜
11.03	Quality of the educational system	98 ⬜
11.04	Local availability of research and training services	125 ⬜
11.05	Extent of staff training	116 ⬜
11.06	Hiring and firing practices	16 🟦
11.07	Ease of hiring foreign labor	8 🟦
11.08	HIV prevalence*	22 🟦
11.09	Business impact of HIV/AIDS	49 🟦
11.10	Life expectancy*	87 ⬜
	12th pillar: Affinity for Travel & Tourism	
12.01	Tourism openness*	46 🟦
12.02	Attitude of population toward foreign visitors	81 ⬜
12.03	Extension of business trips recommended	31 🟦
	13th pillar: Natural resources	
13.01	Number of World Heritage natural sites*	74 ⬜
13.02	Protected areas*	73 ⬜
13.03	Quality of the natural environment	126 ⬜
13.04	Total known species*	100 ⬜
	14th pillar: Cultural resources	
14.01	Number of World Heritage cultural sites*	54 ⬜
14.02	Sports stadiums*	58 ⬜
14.03	Number of international fairs and exhibitions*	101 ⬜
14.04	Creative industries exports*	78 ⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Australia

Key indicators

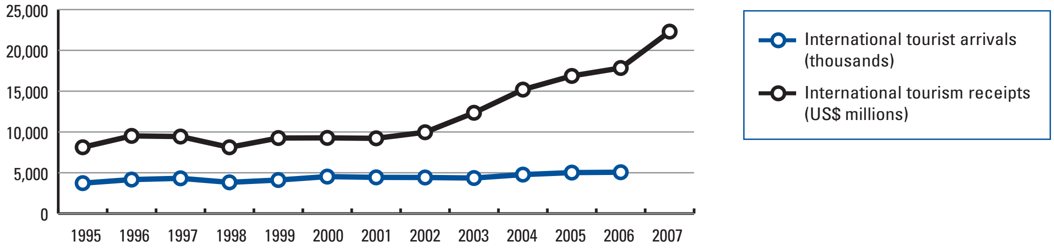
Population (millions), 2007	20.6
Surface area (1,000 square kilometers)	7,741.2
Gross domestic product (US$ billions), 2007	909.0
Gross domestic product (PPP, US$) per capita, 2007	36,225.6
Real GDP growth (percent), 2007	4.2
Environmental Performance Index, 2008 (out of 149 countries)	46

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	46,299	4.5	4.1
Employment (1,000 jobs)	484	4.5	1.9
T&T economy, 2008 estimates			
GDP (US$ millions)	112,879	11.0	4.3
Employment (1,000 jobs)	1,140	10.7	1.6

Source: World Travel & Tourism Council, TSA Research 2008

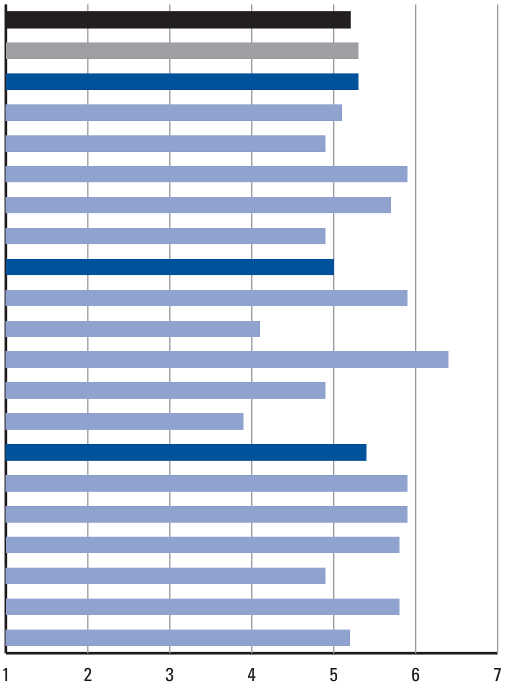
International tourist arrivals (thousands), 2006	5,064
International tourism receipts (US$ millions), 2007	22,298



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**9**	**5.2**
2008 Index	4	5.3
T&T regulatory framework	**27**	**5.3**
Policy rules and regulations	27	5.1
Environmental sustainability	40	4.9
Safety and security	25	5.9
Health and hygiene	41	5.7
Prioritization of Travel & Tourism	37	4.9
T&T business environment and infrastructure	**15**	**5.0**
Air transport infrastructure	3	5.9
Ground transport infrastructure	47	4.1
Tourism infrastructure	9	6.4
ICT infrastructure	20	4.9
Price competitiveness in the T&T industry	117	3.9
T&T human, cultural, and natural resources	**3**	**5.4**
Human resources	10	5.9
Education and training	14	5.9
Availability of qualified labor	13	5.8
Affinity for Travel & Tourism	52	4.9
Natural resources	4	5.8
Cultural resources	19	5.2



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Australia

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	37	⬜
1.02	Property rights	13	⬜
1.03	Business impact of rules on FDI	59	⬜
1.04	Visa requirements*	111	⬜
1.05	Openness of bilateral Air Service Agreements*	76	⬜
1.06	Transparency of government policymaking	9	🟦
1.07	Time required to start a business*	2	🟦
1.08	Cost to start a business*	10	🟦
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	16	⬜
2.02	Enforcement of environmental regulation	12	⬜
2.03	Sustainability of T&T industry development	17	⬜
2.04	Carbon dioxide emissions*	119	⬜
2.05	Particulate matter concentration*	10	🟦
2.06	Threatened species*	121	⬜
2.07	Environmental treaty ratification*	2	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	74	⬜
3.02	Reliability of police services	14	⬜
3.03	Business costs of crime and violence	38	⬜
3.04	Road traffic accidents*	65	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	41	⬜
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	43	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	19	⬜
5.02	T&T government expenditure*	56	⬜
5.03	Effectiveness of marketing and branding	18	⬜
5.04	T&T fair attendance*	41	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	19	⬜
6.02	Available seat kilometers, domestic*	5	🟦
6.03	Available seat kilometers, international*	12	⬜
6.04	Departures per 1,000 population*	22	⬜
6.05	Airport density*	4	🟦
6.06	Number of operating airlines*	26	⬜
6.07	International air transport network	23	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	31	⬜
7.02	Quality of railroad infrastructure	26	⬜
7.03	Quality of port infrastructure	41	⬜
7.04	Quality of ground transport network	39	⬜
7.05	Road density*	104	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	19	⬜
8.02	Presence of major car rental companies*	1	🟦
8.03	ATMs accepting Visa cards*	10	🟦
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	21	⬜
9.02	Internet users*	25	⬜
9.03	Telephone lines*	19	⬜
9.04	Broadband Internet subscribers*	16	⬜
9.05	Mobile telephone subscribers*	38	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	119	⬜
10.02	Purchasing power parity*	114	⬜
10.03	Extent and effect of taxation	62	⬜
10.04	Fuel price levels*	75	⬜
10.05	Hotel price index*	71	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	39	⬜
11.02	Secondary education enrollment*	1	🟦
11.03	Quality of the educational system	9	🟦
11.04	Local availability of research and training services	15	⬜
11.05	Extent of staff training	17	⬜
11.06	Hiring and firing practices	46	⬜
11.07	Ease of hiring foreign labor	86	⬜
11.08	HIV prevalence*	49	⬜
11.09	Business impact of HIV/AIDS	35	⬜
11.10	Life expectancy*	2	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	81	⬜
12.02	Attitude of population toward foreign visitors	12	⬜
12.03	Extension of business trips recommended	36	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	1	🟦
13.02	Protected areas*	31	⬜
13.03	Quality of the natural environment	14	⬜
13.04	Total known species*	19	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	33	⬜
14.02	Sports stadiums*	8	🟦
14.03	Number of international fairs and exhibitions*	12	⬜
14.04	Creative industries exports*	38	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Austria

Key indicators

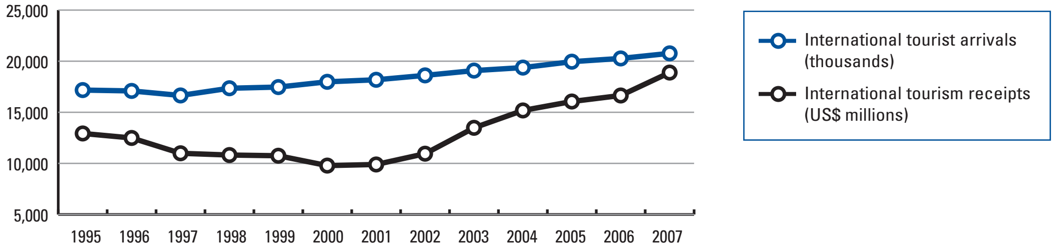
Population (millions), 2007	8.2
Surface area (1,000 square kilometers)	83.9
Gross domestic product (US$ billions), 2007	371.2
Gross domestic product (PPP, US$) per capita, 2007	38,181.0
Real GDP growth (percent), 2007	3.1
Environmental Performance Index, 2008 (out of 149 countries)	6

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	20,049	4.9	4.3
Employment (1,000 jobs)	248	5.9	3.4
T&T economy, 2008 estimates			
GDP (US$ millions)	59,733	14.5	4.0
Employment (1,000 jobs)	707	16.8	3.1

Source: World Travel & Tourism Council, TSA Research 2008

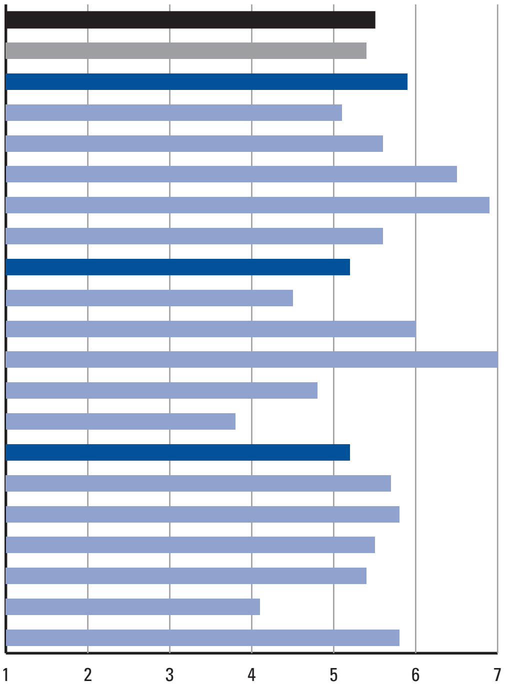
International tourist arrivals (thousands), 2007	20,766
International tourism receipts (US$ millions), 2007	18,887



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**2**	**5.5**
2008 Index	2	5.4
T&T regulatory framework	**4**	**5.9**
Policy rules and regulations	28	5.1
Environmental sustainability	9	5.6
Safety and security	6	6.5
Health and hygiene	5	6.9
Prioritization of Travel & Tourism	14	5.6
T&T business environment and infrastructure	**6**	**5.2**
Air transport infrastructure	26	4.5
Ground transport infrastructure	10	6.0
Tourism infrastructure	1	7.0
ICT infrastructure	23	4.8
Price competitiveness in the T&T industry	118	3.8
T&T human, cultural, and natural resources	**7**	**5.2**
Human resources	18	5.7
Education and training	16	5.8
Availability of qualified labor	52	5.5
Affinity for Travel & Tourism	23	5.4
Natural resources	40	4.1
Cultural resources	11	5.8



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Austria

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	18	⬜
1.02	Property rights	3	🟦
1.03	Business impact of rules on FDI	31	⬜
1.04	Visa requirements*	40	⬜
1.05	Openness of bilateral Air Service Agreements*	54	⬜
1.06	Transparency of government policymaking	25	⬜
1.07	Time required to start a business*	79	⬜
1.08	Cost to start a business*	41	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	13	⬜
2.02	Enforcement of environmental regulation	5	🟦
2.03	Sustainability of T&T industry development	5	🟦
2.04	Carbon dioxide emissions*	97	⬜
2.05	Particulate matter concentration*	57	⬜
2.06	Threatened species*	42	⬜
2.07	Environmental treaty ratification*	21	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	8	🟦
3.02	Reliability of police services	13	⬜
3.03	Business costs of crime and violence	11	⬜
3.04	Road traffic accidents*	49	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	15	⬜
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	11	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	15	⬜
5.02	T&T government expenditure*	39	⬜
5.03	Effectiveness of marketing and branding	4	🟦
5.04	T&T fair attendance*	20	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	13	⬜
6.02	Available seat kilometers, domestic*	53	⬜
6.03	Available seat kilometers, international*	36	⬜
6.04	Departures per 1,000 population*	20	⬜
6.05	Airport density*	63	⬜
6.06	Number of operating airlines*	15	⬜
6.07	International air transport network	15	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	6	🟦
7.02	Quality of railroad infrastructure	12	⬜
7.03	Quality of port infrastructure	34	⬜
7.04	Quality of ground transport network	9	🟦
7.05	Road density*	21	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	3	🟦
8.02	Presence of major car rental companies*	1	🟦
8.03	ATMs accepting Visa cards*	4	🟦
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	13	⬜
9.02	Internet users*	29	⬜
9.03	Telephone lines*	30	⬜
9.04	Broadband Internet subscribers*	25	⬜
9.05	Mobile telephone subscribers*	17	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	81	⬜
10.02	Purchasing power parity*	118	⬜
10.03	Extent and effect of taxation	67	⬜
10.04	Fuel price levels*	106	⬜
10.05	Hotel price index*	69	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	27	⬜
11.02	Secondary education enrollment*	20	⬜
11.03	Quality of the educational system	14	⬜
11.04	Local availability of research and training services	16	⬜
11.05	Extent of staff training	18	⬜
11.06	Hiring and firing practices	86	⬜
11.07	Ease of hiring foreign labor	121	⬜
11.08	HIV prevalence*	49	⬜
11.09	Business impact of HIV/AIDS	7	🟦
11.10	Life expectancy*	12	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	35	⬜
12.02	Attitude of population toward foreign visitors	18	⬜
12.03	Extension of business trips recommended	5	🟦
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	17	⬜
13.03	Quality of the natural environment	6	🟦
13.04	Total known species*	87	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	22	⬜
14.02	Sports stadiums*	26	⬜
14.03	Number of international fairs and exhibitions*	9	🟦
14.04	Creative industries exports*	14	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Azerbaijan

Key indicators

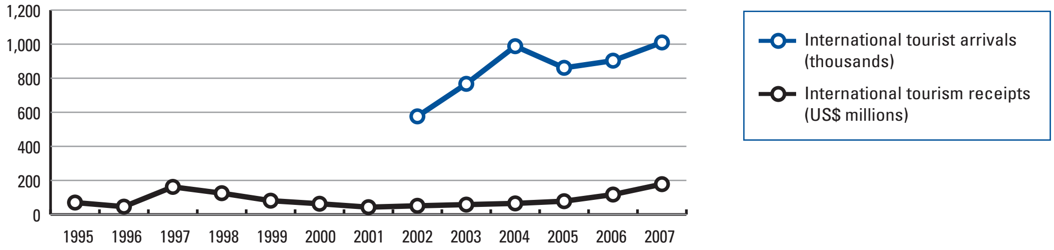
Population (millions), 2007	8.5
Surface area (1,000 square kilometers)	86.6
Gross domestic product (US$ billions), 2007	31.2
Gross domestic product (PPP, US$) per capita, 2007	7,618.1
Real GDP growth (percent), 2007	23.4
Environmental Performance Index, 2008 (out of 149 countries)	80

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	509	1.2	8.8
Employment (1,000 jobs)	39	0.9	3.0
T&T economy, 2008 estimates			
GDP (US$ millions)	3,925	9.0	6.5
Employment (1,000 jobs)	305	7.4	0.8

Source: World Travel & Tourism Council, TSA Research 2008

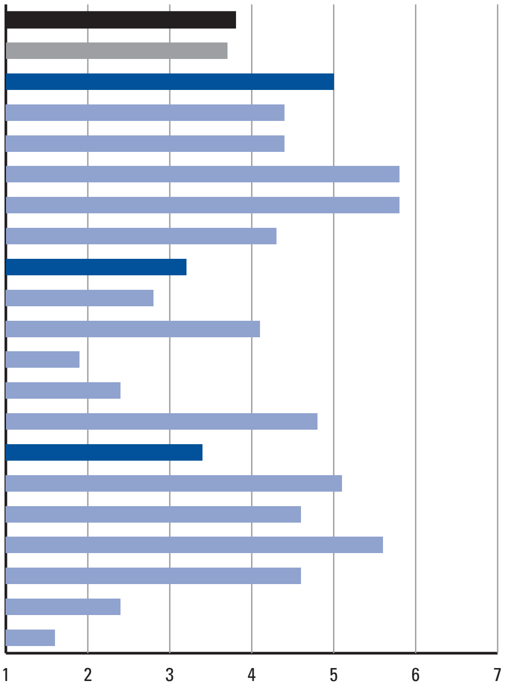
International tourist arrivals (thousands), 2007	1,010
International tourism receipts (US$ millions), 2007	178



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**76**	**3.8**
2008 Index	79	3.7
T&T regulatory framework	**47**	**5.0**
Policy rules and regulations	65	4.4
Environmental sustainability	72	4.4
Safety and security	37	5.8
Health and hygiene	39	5.8
Prioritization of Travel & Tourism	66	4.3
T&T business environment and infrastructure	**84**	**3.2**
Air transport infrastructure	78	2.8
Ground transport infrastructure	45	4.1
Tourism infrastructure	99	1.9
ICT infrastructure	87	2.4
Price competitiveness in the T&T industry	62	4.8
T&T human, cultural, and natural resources	**111**	**3.4**
Human resources	67	5.1
Education and training	71	4.6
Availability of qualified labor	43	5.6
Affinity for Travel & Tourism	89	4.6
Natural resources	113	2.4
Cultural resources	104	1.6



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Azerbaijan

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	51	⬜
1.02	Property rights	80	⬜
1.03	Business impact of rules on FDI	78	⬜
1.04	Visa requirements*	119	⬜
1.05	Openness of bilateral Air Service Agreements*	49	🟦
1.06	Transparency of government policymaking	83	⬜
1.07	Time required to start a business*	45	🟦
1.08	Cost to start a business*	28	🟦
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	63	⬜
2.02	Enforcement of environmental regulation	49	🟦
2.03	Sustainability of T&T industry development	71	⬜
2.04	Carbon dioxide emissions*	65	⬜
2.05	Particulate matter concentration*	90	⬜
2.06	Threatened species*	70	⬜
2.07	Environmental treaty ratification*	104	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	43	🟦
3.02	Reliability of police services	59	⬜
3.03	Business costs of crime and violence	24	🟦
3.04	Road traffic accidents*	35	🟦
	4th pillar: Health and hygiene		
4.01	Physician density*	18	🟦
4.02	Access to improved sanitation*	77	⬜
4.03	Access to improved drinking water*	104	⬜
4.04	Hospital beds*	7	🟦
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	63	⬜
5.02	T&T government expenditure*	71	⬜
5.03	Effectiveness of marketing and branding	90	⬜
5.04	T&T fair attendance*	41	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	48	🟦
6.02	Available seat kilometers, domestic*	98	⬜
6.03	Available seat kilometers, international*	94	⬜
6.04	Departures per 1,000 population*	83	⬜
6.05	Airport density*	96	⬜
6.06	Number of operating airlines*	66	⬜
6.07	International air transport network	64	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	59	⬜
7.02	Quality of railroad infrastructure	33	🟦
7.03	Quality of port infrastructure	58	⬜
7.04	Quality of ground transport network	34	🟦
7.05	Road density*	41	🟦

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	87	⬜
8.02	Presence of major car rental companies*	95	⬜
8.03	ATMs accepting Visa cards*	73	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	68	⬜
9.02	Internet users*	85	⬜
9.03	Telephone lines*	77	⬜
9.04	Broadband Internet subscribers*	112	⬜
9.05	Mobile telephone subscribers*	88	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	115	⬜
10.02	Purchasing power parity*	42	🟦
10.03	Extent and effect of taxation	38	🟦
10.04	Fuel price levels*	15	🟦
10.05	Hotel price index*	96	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	105	⬜
11.02	Secondary education enrollment*	80	⬜
11.03	Quality of the educational system	78	⬜
11.04	Local availability of research and training services	67	⬜
11.05	Extent of staff training	39	🟦
11.06	Hiring and firing practices	9	🟦
11.07	Ease of hiring foreign labor	41	🟦
11.08	HIV prevalence*	49	🟦
11.09	Business impact of HIV/AIDS	64	⬜
11.10	Life expectancy*	100	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	124	⬜
12.02	Attitude of population toward foreign visitors	79	⬜
12.03	Extension of business trips recommended	25	🟦
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	84	⬜
13.03	Quality of the natural environment	100	⬜
13.04	Total known species*	75	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	65	⬜
14.02	Sports stadiums*	88	⬜
14.03	Number of international fairs and exhibitions*	96	⬜
14.04	Creative industries exports*	110	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Bahrain

Key indicators

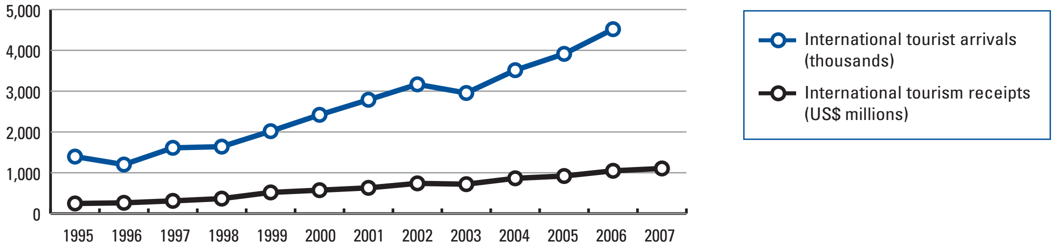
Population (millions), 2007	0.8
Surface area (1,000 square kilometers)	0.7
Gross domestic product (US$ billions), 2007	17.4
Gross domestic product (PPP, US$) per capita, 2007	31,898.8
Real GDP growth (percent), 2007	6.0
Environmental Performance Index, 2008 (out of 149 countries)	n/a

Travel & Tourism indicators

T&T industry, 2008 estimates		Percent of total	2009–2018 annual growth (%, forecast)
GDP (US$ millions)	1,183	5.8	6.9
Employment (1,000 jobs)	28	7.7	5.3
T&T economy, 2008 estimates			
GDP (US$ millions)	3,027	14.8	5.9
Employment (1,000 jobs)	64	17.2	4.6

Source: World Travel & Tourism Council, TSA Research 2008

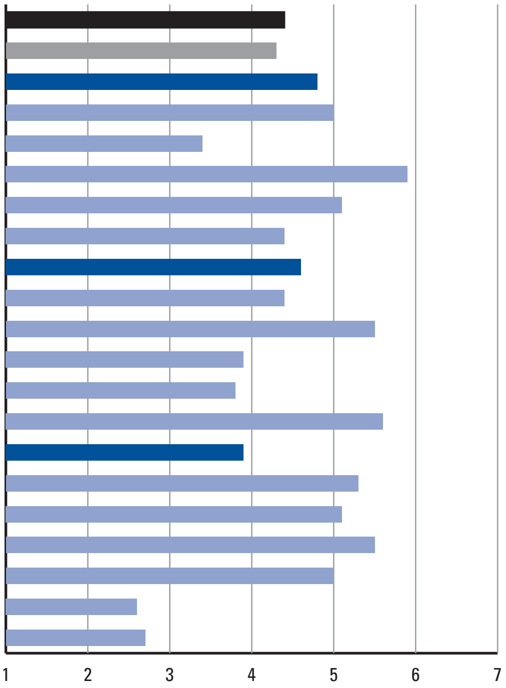
International tourist arrivals (thousands), 2006	4,519
International tourism receipts (US$ millions), 2007	1,105



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**41**	**4.4**
2008 Index	48	4.3
T&T regulatory framework	**55**	**4.8**
Policy rules and regulations	32	5.0
Environmental sustainability	129	3.4
Safety and security	30	5.9
Health and hygiene	55	5.1
Prioritization of Travel & Tourism	63	4.4
T&T business environment and infrastructure	**28**	**4.6**
Air transport infrastructure	28	4.4
Ground transport infrastructure	16	5.5
Tourism infrastructure	47	3.9
ICT infrastructure	44	3.8
Price competitiveness in the T&T industry	6	5.6
T&T human, cultural, and natural resources	**67**	**3.9**
Human resources	39	5.3
Education and training	38	5.1
Availability of qualified labor	47	5.5
Affinity for Travel & Tourism	45	5.0
Natural resources	104	2.6
Cultural resources	55	2.7



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Bahrain

The Travel & Tourism Competitiveness Index in detail

■ Competitive **Advantage** ▨ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	14	■
1.02	Property rights	37	■
1.03	Business impact of rules on FDI	6	■
1.04	Visa requirements*	105	▨
1.05	Openness of bilateral Air Service Agreements*	58	▨
1.06	Transparency of government policymaking	31	■
1.07	Time required to start a business*	23	■
1.08	Cost to start a business*	6	■
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	49	▨
2.02	Enforcement of environmental regulation	54	▨
2.03	Sustainability of T&T industry development	74	▨
2.04	Carbon dioxide emissions*	123	▨
2.05	Particulate matter concentration*	111	▨
2.06	Threatened species*	40	■
2.07	Environmental treaty ratification*	121	▨
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	75	▨
3.02	Reliability of police services	33	■
3.03	Business costs of crime and violence	28	■
3.04	Road traffic accidents*	10	■
	4th pillar: Health and hygiene		
4.01	Physician density*	35	■
4.02	Access to improved sanitation*	1	■
4.03	Access to improved drinking water*	n/a	
4.04	Hospital beds*	68	▨
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	61	▨
5.02	T&T government expenditure*	49	▨
5.03	Effectiveness of marketing and branding	75	▨
5.04	T&T fair attendance*	62	▨
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	21	■
6.02	Available seat kilometers, domestic*	100	▨
6.03	Available seat kilometers, international*	50	▨
6.04	Departures per 1,000 population*	6	■
6.05	Airport density*	36	■
6.06	Number of operating airlines*	61	▨
6.07	International air transport network	16	■
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	26	■
7.02	Quality of railroad infrastructure	n/a	
7.03	Quality of port infrastructure	22	■
7.04	Quality of ground transport network	73	▨
7.05	Road density*	3	■

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	28	■
8.02	Presence of major car rental companies*	56	▨
8.03	ATMs accepting Visa cards*	54	▨
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	60	▨
9.02	Internet users*	48	▨
9.03	Telephone lines*	53	▨
9.04	Broadband Internet subscribers*	47	▨
9.05	Mobile telephone subscribers*	4	■
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	7	■
10.02	Purchasing power parity*	94	▨
10.03	Extent and effect of taxation	2	■
10.04	Fuel price levels*	4	■
10.05	Hotel price index*	95	▨
	11th pillar: Human resources		
11.01	Primary education enrollment*	18	■
11.02	Secondary education enrollment*	19	■
11.03	Quality of the educational system	56	▨
11.04	Local availability of research and training services	72	▨
11.05	Extent of staff training	60	▨
11.06	Hiring and firing practices	72	▨
11.07	Ease of hiring foreign labor	75	▨
11.08	HIV prevalence*	49	▨
11.09	Business impact of HIV/AIDS	44	▨
11.10	Life expectancy*	42	▨
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	33	■
12.02	Attitude of population toward foreign visitors	51	▨
12.03	Extension of business trips recommended	95	▨
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	▨
13.02	Protected areas*	59	▨
13.03	Quality of the natural environment	64	▨
13.04	Total known species*	129	▨
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	97	▨
14.02	Sports stadiums*	3	■
14.03	Number of international fairs and exhibitions*	95	▨
14.04	Creative industries exports*	85	▨

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Bangladesh

Key indicators

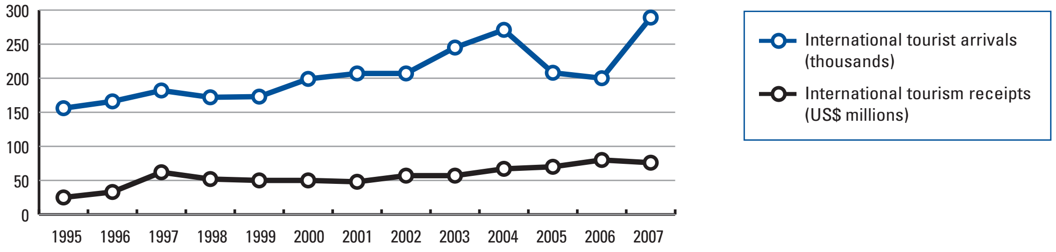
Population (millions), 2007	147.1
Surface area (1,000 square kilometers)	144.0
Gross domestic product (US$ billions), 2007	73.7
Gross domestic product (PPP, US$) per capita, 2007	1,311.0
Real GDP growth (percent), 2007	6.3
Environmental Performance Index, 2008 (out of 149 countries)	125

Travel & Tourism indicators

T&T industry, 2008 estimates		Percent of total	2009–2018 annual growth (%, forecast)
GDP (US$ millions)	1,185	1.6	5.1
Employment (1,000 jobs)	801	1.2	2.6
T&T economy, 2008 estimates			
GDP (US$ millions)	2,964	3.9	5.5
Employment (1,000 jobs)	2,065	3.1	3.1

Source: World Travel & Tourism Council, TSA Research 2008

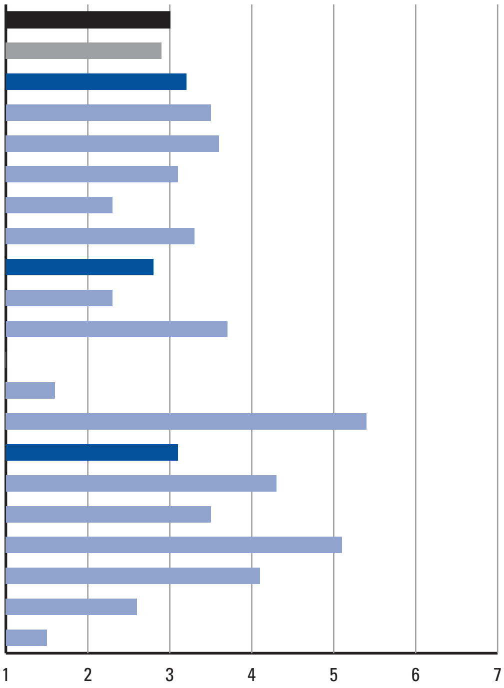
International tourist arrivals (thousands), 2007	289
International tourism receipts (US$ millions), 2007	76



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**129**	**3.0**
2008 Index	127	2.9
T&T regulatory framework	**130**	**3.2**
Policy rules and regulations	117	3.5
Environmental sustainability	125	3.6
Safety and security	131	3.1
Health and hygiene	115	2.3
Prioritization of Travel & Tourism	117	3.3
T&T business environment and infrastructure	**103**	**2.8**
Air transport infrastructure	111	2.3
Ground transport infrastructure	60	3.7
Tourism infrastructure	132	1.0
ICT infrastructure	125	1.6
Price competitiveness in the T&T industry	18	5.4
T&T human, cultural, and natural resources	**130**	**3.1**
Human resources	110	4.3
Education and training	116	3.5
Availability of qualified labor	99	5.1
Affinity for Travel & Tourism	126	4.1
Natural resources	102	2.6
Cultural resources	110	1.5



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Bangladesh

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	93	⬜
1.02	Property rights	114	⬜
1.03	Business impact of rules on FDI	56	⬜
1.04	Visa requirements*	101	⬜
1.05	Openness of bilateral Air Service Agreements*	109	⬜
1.06	Transparency of government policymaking	108	⬜
1.07	Time required to start a business*	120	⬜
1.08	Cost to start a business*	88	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	125	⬜
2.02	Enforcement of environmental regulation	111	⬜
2.03	Sustainability of T&T industry development	126	⬜
2.04	Carbon dioxide emissions*	16	🟦
2.05	Particulate matter concentration*	128	⬜
2.06	Threatened species*	106	⬜
2.07	Environmental treaty ratification*	52	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	114	⬜
3.02	Reliability of police services	121	⬜
3.03	Business costs of crime and violence	104	⬜
3.04	Road traffic accidents*	121	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	106	⬜
4.02	Access to improved sanitation*	108	⬜
4.03	Access to improved drinking water*	100	⬜
4.04	Hospital beds*	125	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	124	⬜
5.02	T&T government expenditure*	95	⬜
5.03	Effectiveness of marketing and branding	124	⬜
5.04	T&T fair attendance*	62	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	118	⬜
6.02	Available seat kilometers, domestic*	58	⬜
6.03	Available seat kilometers, international*	61	⬜
6.04	Departures per 1,000 population*	123	⬜
6.05	Airport density*	132	⬜
6.06	Number of operating airlines*	69	⬜
6.07	International air transport network	84	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	93	⬜
7.02	Quality of railroad infrastructure	67	⬜
7.03	Quality of port infrastructure	121	⬜
7.04	Quality of ground transport network	100	⬜
7.05	Road density*	17	🟦

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	125	⬜
8.02	Presence of major car rental companies*	122	⬜
8.03	ATMs accepting Visa cards*	120	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	122	⬜
9.02	Internet users*	132	⬜
9.03	Telephone lines*	123	⬜
9.04	Broadband Internet subscribers*	127	⬜
9.05	Mobile telephone subscribers*	116	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	87	⬜
10.02	Purchasing power parity*	12	🟦
10.03	Extent and effect of taxation	50	🟦
10.04	Fuel price levels*	17	🟦
10.05	Hotel price index*	28	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	93	⬜
11.02	Secondary education enrollment*	111	⬜
11.03	Quality of the educational system	107	⬜
11.04	Local availability of research and training services	130	⬜
11.05	Extent of staff training	132	⬜
11.06	Hiring and firing practices	29	🟦
11.07	Ease of hiring foreign labor	124	⬜
11.08	HIV prevalence*	1	🟦
11.09	Business impact of HIV/AIDS	73	⬜
11.10	Life expectancy*	104	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	132	⬜
12.02	Attitude of population toward foreign visitors	77	⬜
12.03	Extension of business trips recommended	116	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	40	🟦
13.02	Protected areas*	116	⬜
13.03	Quality of the natural environment	128	⬜
13.04	Total known species*	44	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	65	⬜
14.02	Sports stadiums*	129	⬜
14.03	Number of international fairs and exhibitions*	101	⬜
14.04	Creative industries exports*	64	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Barbados

Key indicators

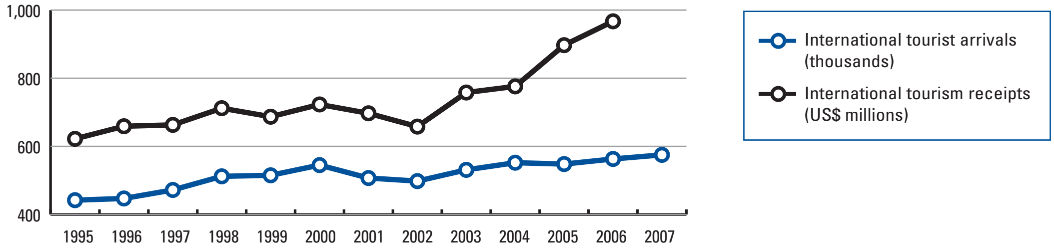
Population (millions), 2007	0.3
Surface area (1,000 square kilometers)	0.4
Gross domestic product (US$ billions), 2007	3.4
Gross domestic product (PPP, US$) per capita, 2007	18,558.6
Real GDP growth (percent), 2007	3.3
Environmental Performance Index, 2008 (out of 149 countries)	n/a

Travel & Tourism indicators

T&T industry, 2008 estimates		Percent of total	2009–2018 annual growth (%, forecast)
GDP (US$ millions)	509	12.6	4.1
Employment (1,000 jobs)	22	15.9	2.1
T&T economy, 2008 estimates			
GDP (US$ millions)	1,645	40.7	3.6
Employment (1,000 jobs)	63	45.8	1.8

Source: World Travel & Tourism Council, TSA Research 2008

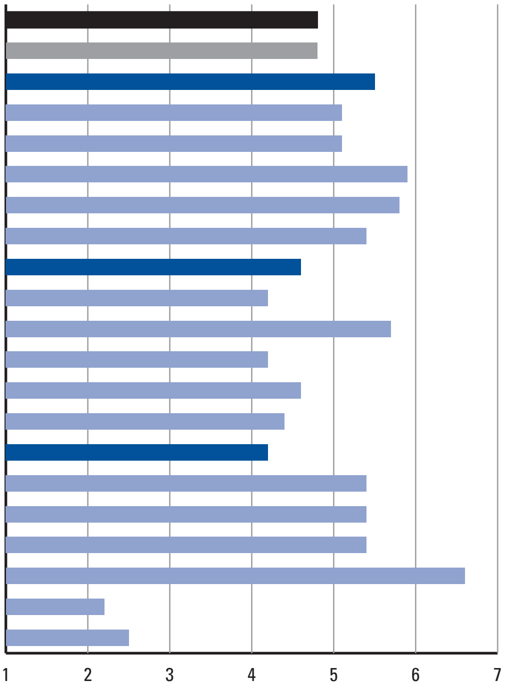
International tourist arrivals (thousands), 2007	575
International tourism receipts (US$ millions), 2006	967



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**30**	**4.8**
2008 Index	29	4.8
T&T regulatory framework	**19**	**5.5**
Policy rules and regulations	24	5.1
Environmental sustainability	29	5.1
Safety and security	26	5.9
Health and hygiene	40	5.8
Prioritization of Travel & Tourism	19	5.4
T&T business environment and infrastructure	**29**	**4.6**
Air transport infrastructure	33	4.2
Ground transport infrastructure	12	5.7
Tourism infrastructure	42	4.2
ICT infrastructure	26	4.6
Price competitiveness in the T&T industry	83	4.4
T&T human, cultural, and natural resources	**45**	**4.2**
Human resources	32	5.4
Education and training	25	5.4
Availability of qualified labor	69	5.4
Affinity for Travel & Tourism	2	6.6
Natural resources	121	2.2
Cultural resources	59	2.5



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Barbados

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	48	⬜
1.02	Property rights	24	🟦
1.03	Business impact of rules on FDI	28	🟦
1.04	Visa requirements*	5	🟦
1.05	Openness of bilateral Air Service Agreements*	23	🟦
1.06	Transparency of government policymaking	10	🟦
1.07	Time required to start a business*	n/a	
1.08	Cost to start a business*	n/a	
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	55	⬜
2.02	Enforcement of environmental regulation	55	⬜
2.03	Sustainability of T&T industry development	6	🟦
2.04	Carbon dioxide emissions*	74	⬜
2.05	Particulate matter concentration*	55	⬜
2.06	Threatened species*	11	🟦
2.07	Environmental treaty ratification*	81	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	44	⬜
3.02	Reliability of police services	21	🟦
3.03	Business costs of crime and violence	68	⬜
3.04	Road traffic accidents*	2	🟦
	4th pillar: Health and hygiene		
4.01	Physician density*	79	⬜
4.02	Access to improved sanitation*	34	⬜
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	18	🟦
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	2	🟦
5.02	T&T government expenditure*	4	🟦
5.03	Effectiveness of marketing and branding	6	🟦
5.04	T&T fair attendance*	115	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	16	🟦
6.02	Available seat kilometers, domestic*	100	⬜
6.03	Available seat kilometers, international*	74	⬜
6.04	Departures per 1,000 population*	n/a	
6.05	Airport density*	13	🟦
6.06	Number of operating airlines*	95	⬜
6.07	International air transport network	25	🟦
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	33	⬜
7.02	Quality of railroad infrastructure	n/a	
7.03	Quality of port infrastructure	19	🟦
7.04	Quality of ground transport network	30	⬜
7.05	Road density*	5	🟦

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	6	🟦
8.02	Presence of major car rental companies*	95	⬜
8.03	ATMs accepting Visa cards*	47	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	55	⬜
9.02	Internet users*	19	🟦
9.03	Telephone lines*	15	🟦
9.04	Broadband Internet subscribers*	23	🟦
9.05	Mobile telephone subscribers*	54	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	41	⬜
10.02	Purchasing power parity*	83	⬜
10.03	Extent and effect of taxation	33	⬜
10.04	Fuel price levels*	59	⬜
10.05	Hotel price index*	109	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	43	⬜
11.02	Secondary education enrollment*	18	🟦
11.03	Quality of the educational system	15	🟦
11.04	Local availability of research and training services	54	⬜
11.05	Extent of staff training	41	⬜
11.06	Hiring and firing practices	70	⬜
11.07	Ease of hiring foreign labor	119	⬜
11.08	HIV prevalence*	104	⬜
11.09	Business impact of HIV/AIDS	115	⬜
11.10	Life expectancy*	42	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	1	🟦
12.02	Attitude of population toward foreign visitors	1	🟦
12.03	Extension of business trips recommended	22	🟦
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	132	⬜
13.03	Quality of the natural environment	25	🟦
13.04	Total known species*	128	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	116	⬜
14.02	Sports stadiums*	5	🟦
14.03	Number of international fairs and exhibitions*	83	⬜
14.04	Creative industries exports*	84	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Belgium

Key indicators

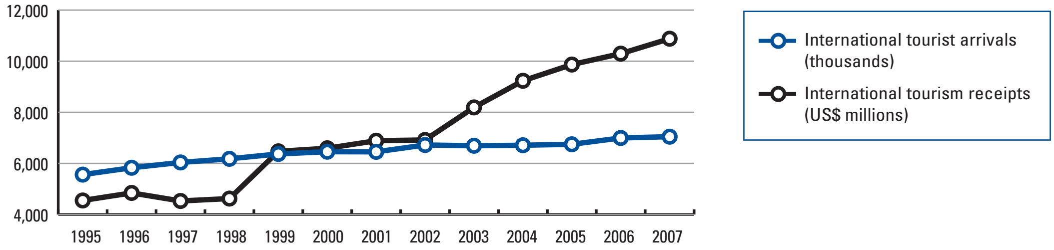
Population (millions), 2007	10.5
Surface area (1,000 square kilometers)	30.5
Gross domestic product (US$ billions), 2007	454.3
Gross domestic product (PPP, US$) per capita, 2007	35,387.6
Real GDP growth (percent), 2007	2.8
Environmental Performance Index, 2008 (out of 149 countries)	57

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	13,057	2.6	4.3
Employment (1,000 jobs)	122	2.8	2.7
T&T economy, 2008 estimates			
GDP (US$ millions)	44,831	8.9	3.7
Employment (1,000 jobs)	405	9.2	2.2

Source: World Travel & Tourism Council, TSA Research 2008

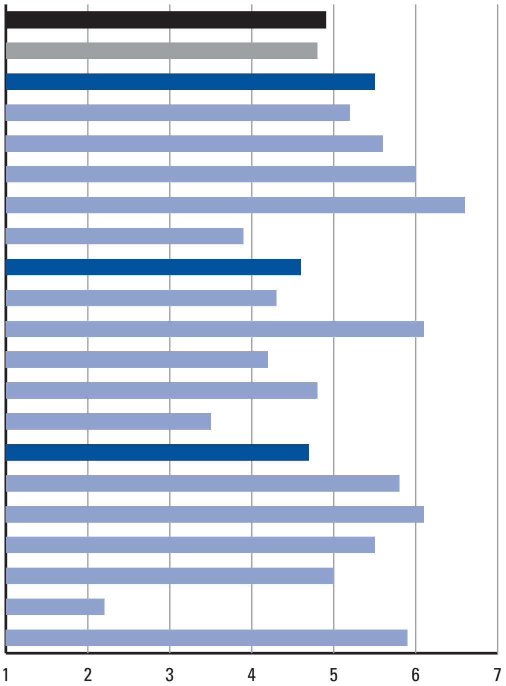
International tourist arrivals (thousands), 2007	7,045
International tourism receipts (US$ millions), 2007	10,880



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**22**	**4.9**
2008 Index	27	4.8
T&T regulatory framework	**21**	**5.5**
Policy rules and regulations	20	5.2
Environmental sustainability	8	5.6
Safety and security	21	6.0
Health and hygiene	16	6.6
Prioritization of Travel & Tourism	92	3.9
T&T business environment and infrastructure	**32**	**4.6**
Air transport infrastructure	31	4.3
Ground transport infrastructure	7	6.1
Tourism infrastructure	41	4.2
ICT infrastructure	22	4.8
Price competitiveness in the T&T industry	126	3.5
T&T human, cultural, and natural resources	**20**	**4.7**
Human resources	13	5.8
Education and training	4	6.1
Availability of qualified labor	55	5.5
Affinity for Travel & Tourism	42	5.0
Natural resources	120	2.2
Cultural resources	8	5.9



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Belgium

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ▨ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	12	🟦
1.02	Property rights	19	🟦
1.03	Business impact of rules on FDI	21	🟦
1.04	Visa requirements*	40	▨
1.05	Openness of bilateral Air Service Agreements*	33	▨
1.06	Transparency of government policymaking	57	▨
1.07	Time required to start a business*	4	🟦
1.08	Cost to start a business*	42	▨
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	9	🟦
2.02	Enforcement of environmental regulation	13	🟦
2.03	Sustainability of T&T industry development	60	▨
2.04	Carbon dioxide emissions*	102	▨
2.05	Particulate matter concentration*	35	▨
2.06	Threatened species*	7	🟦
2.07	Environmental treaty ratification*	10	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	47	▨
3.02	Reliability of police services	28	▨
3.03	Business costs of crime and violence	27	▨
3.04	Road traffic accidents*	58	▨
	4th pillar: Health and hygiene		
4.01	Physician density*	4	🟦
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	32	▨
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	81	▨
5.02	T&T government expenditure*	67	▨
5.03	Effectiveness of marketing and branding	64	▨
5.04	T&T fair attendance*	98	▨
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	15	🟦
6.02	Available seat kilometers, domestic*	96	▨
6.03	Available seat kilometers, international*	30	▨
6.04	Departures per 1,000 population*	25	▨
6.05	Airport density*	84	▨
6.06	Number of operating airlines*	16	🟦
6.07	International air transport network	29	▨
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	11	🟦
7.02	Quality of railroad infrastructure	8	🟦
7.03	Quality of port infrastructure	7	🟦
7.04	Quality of ground transport network	17	🟦
7.05	Road density*	2	🟦

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	44	▨
8.02	Presence of major car rental companies*	23	▨
8.03	ATMs accepting Visa cards*	44	▨
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	24	▨
9.02	Internet users*	30	▨
9.03	Telephone lines*	23	▨
9.04	Broadband Internet subscribers*	11	🟦
9.05	Mobile telephone subscribers*	41	▨
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	57	▨
10.02	Purchasing power parity*	121	▨
10.03	Extent and effect of taxation	131	▨
10.04	Fuel price levels*	118	▨
10.05	Hotel price index*	78	▨
	11th pillar: Human resources		
11.01	Primary education enrollment*	28	▨
11.02	Secondary education enrollment*	12	🟦
11.03	Quality of the educational system	4	🟦
11.04	Local availability of research and training services	11	🟦
11.05	Extent of staff training	13	🟦
11.06	Hiring and firing practices	116	▨
11.07	Ease of hiring foreign labor	78	▨
11.08	HIV prevalence*	49	▨
11.09	Business impact of HIV/AIDS	27	▨
11.10	Life expectancy*	22	▨
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	47	▨
12.02	Attitude of population toward foreign visitors	19	🟦
12.03	Extension of business trips recommended	57	▨
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	▨
13.02	Protected areas*	105	▨
13.03	Quality of the natural environment	84	▨
13.04	Total known species*	109	▨
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	17	🟦
14.02	Sports stadiums*	28	▨
14.03	Number of international fairs and exhibitions*	19	🟦
14.04	Creative industries exports*	12	🟦

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Benin

Key indicators

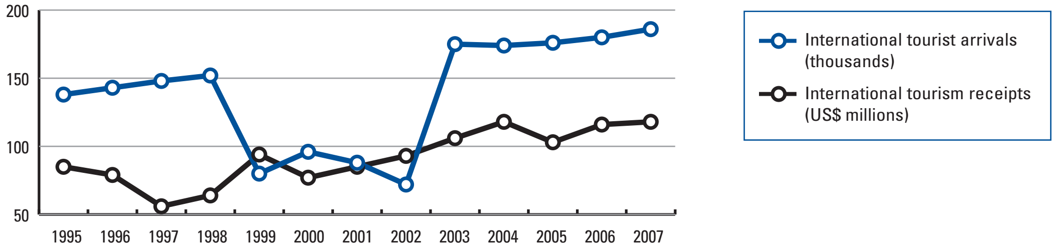
Population (millions), 2007	9.0
Surface area (1,000 square kilometers)	112.6
Gross domestic product (US$ billions), 2007	5.6
Gross domestic product (PPP, US$) per capita, 2007	1,547.8
Real GDP growth (percent), 2007	4.6
Environmental Performance Index, 2008 (out of 149 countries)	127

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	170	2.7	6.0
Employment (1,000 jobs)	40	2.1	4.6
T&T economy, 2008 estimates			
GDP (US$ millions)	358	5.6	5.5
Employment (1,000 jobs)	85	4.6	4.1

Source: World Travel & Tourism Council, TSA Research 2008

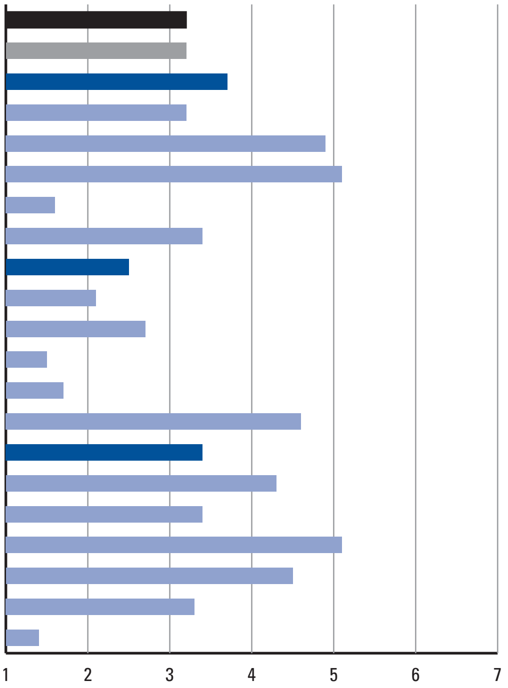
International tourist arrivals (thousands), 2007	186
International tourism receipts (US$ millions), 2007	118



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**120**	**3.2**
2008 Index	120	3.2
T&T regulatory framework	**117**	**3.7**
Policy rules and regulations	124	3.2
Environmental sustainability	38	4.9
Safety and security	68	5.1
Health and hygiene	125	1.6
Prioritization of Travel & Tourism	115	3.4
T&T business environment and infrastructure	**121**	**2.5**
Air transport infrastructure	121	2.1
Ground transport infrastructure	104	2.7
Tourism infrastructure	116	1.5
ICT infrastructure	118	1.7
Price competitiveness in the T&T industry	74	4.6
T&T human, cultural, and natural resources	**116**	**3.4**
Human resources	111	4.3
Education and training	117	3.4
Availability of qualified labor	102	5.1
Affinity for Travel & Tourism	98	4.5
Natural resources	60	3.3
Cultural resources	118	1.4



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Benin

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	90	⬜
1.02	Property rights	110	⬜
1.03	Business impact of rules on FDI	105	⬜
1.04	Visa requirements*	108	⬜
1.05	Openness of bilateral Air Service Agreements*	122	⬜
1.06	Transparency of government policymaking	75	⬜
1.07	Time required to start a business*	85	⬜
1.08	Cost to start a business*	126	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	94	⬜
2.02	Enforcement of environmental regulation	85	⬜
2.03	Sustainability of T&T industry development	83	⬜
2.04	Carbon dioxide emissions*	18	🟦
2.05	Particulate matter concentration*	75	⬜
2.06	Threatened species*	17	🟦
2.07	Environmental treaty ratification*	52	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	95	⬜
3.02	Reliability of police services	44	🟦
3.03	Business costs of crime and violence	96	⬜
3.04	Road traffic accidents*	71	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	126	⬜
4.02	Access to improved sanitation*	114	⬜
4.03	Access to improved drinking water*	115	⬜
4.04	Hospital beds*	120	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	91	⬜
5.02	T&T government expenditure*	72	⬜
5.03	Effectiveness of marketing and branding	80	⬜
5.04	T&T fair attendance*	126	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	100	⬜
6.02	Available seat kilometers, domestic*	100	⬜
6.03	Available seat kilometers, international*	119	⬜
6.04	Departures per 1,000 population*	118	⬜
6.05	Airport density*	126	⬜
6.06	Number of operating airlines*	108	⬜
6.07	International air transport network	102	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	97	⬜
7.02	Quality of railroad infrastructure	87	⬜
7.03	Quality of port infrastructure	96	⬜
7.04	Quality of ground transport network	86	⬜
7.05	Road density*	83	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	97	⬜
8.02	Presence of major car rental companies*	95	⬜
8.03	ATMs accepting Visa cards*	117	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	99	⬜
9.02	Internet users*	118	⬜
9.03	Telephone lines*	117	⬜
9.04	Broadband Internet subscribers*	114	⬜
9.05	Mobile telephone subscribers*	117	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	112	⬜
10.02	Purchasing power parity*	34	🟦
10.03	Extent and effect of taxation	119	⬜
10.04	Fuel price levels*	61	⬜
10.05	Hotel price index*	n/a	
	11th pillar: Human resources		
11.01	Primary education enrollment*	110	⬜
11.02	Secondary education enrollment*	116	⬜
11.03	Quality of the educational system	89	⬜
11.04	Local availability of research and training services	85	⬜
11.05	Extent of staff training	121	⬜
11.06	Hiring and firing practices	57	⬜
11.07	Ease of hiring foreign labor	28	🟦
11.08	HIV prevalence*	104	⬜
11.09	Business impact of HIV/AIDS	113	⬜
11.10	Life expectancy*	116	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	99	⬜
12.02	Attitude of population toward foreign visitors	73	⬜
12.03	Extension of business trips recommended	82	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	22	🟦
13.03	Quality of the natural environment	119	⬜
13.04	Total known species*	52	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	82	⬜
14.02	Sports stadiums*	100	⬜
14.03	Number of international fairs and exhibitions*	107	⬜
14.04	Creative industries exports*	114	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Bolivia

Key indicators

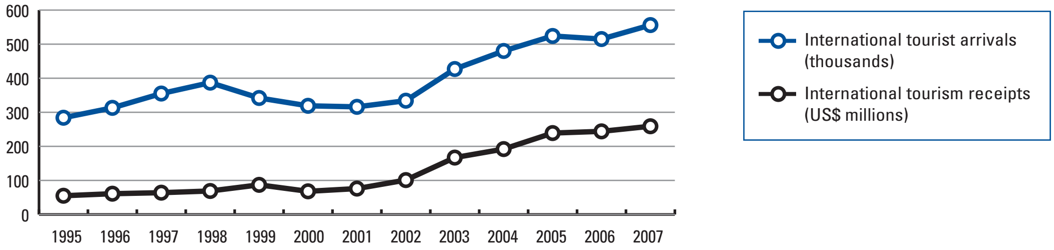
Population (millions), 2007	9.5
Surface area (1,000 square kilometers)	1,098.6
Gross domestic product (US$ billions), 2007	13.3
Gross domestic product (PPP, US$) per capita, 2007	4,084.5
Real GDP growth (percent), 2007	4.6
Environmental Performance Index, 2008 (out of 149 countries)	110

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	308	2.1	3.7
Employment (1,000 jobs)	72	1.7	2.4
T&T economy, 2008 estimates			
GDP (US$ millions)	894	6.1	3.5
Employment (1,000 jobs)	209	5.0	2.2

Source: World Travel & Tourism Council, TSA Research 2008

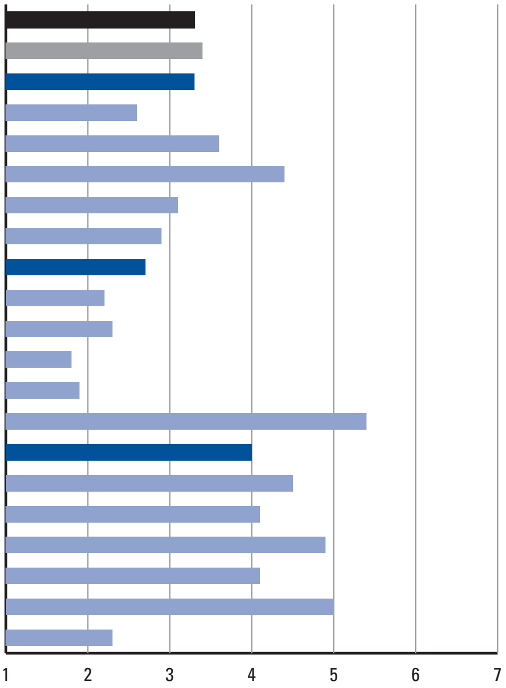
International tourist arrivals (thousands), 2007	556
International tourism receipts (US$ millions), 2007	259



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**114**	**3.3**
2008 Index	106	3.4
T&T regulatory framework	**127**	**3.3**
Policy rules and regulations	131	2.6
Environmental sustainability	126	3.6
Safety and security	104	4.4
Health and hygiene	104	3.1
Prioritization of Travel & Tourism	128	2.9
T&T business environment and infrastructure	**110**	**2.7**
Air transport infrastructure	114	2.2
Ground transport infrastructure	124	2.3
Tourism infrastructure	104	1.8
ICT infrastructure	109	1.9
Price competitiveness in the T&T industry	13	5.4
T&T human, cultural, and natural resources	**58**	**4.0**
Human resources	103	4.5
Education and training	99	4.1
Availability of qualified labor	112	4.9
Affinity for Travel & Tourism	125	4.1
Natural resources	12	5.0
Cultural resources	66	2.3



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Bolivia

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	124	⬜
1.02	Property rights	131	⬜
1.03	Business impact of rules on FDI	131	⬜
1.04	Visa requirements*	80	⬜
1.05	Openness of bilateral Air Service Agreements*	67	⬜
1.06	Transparency of government policymaking	132	⬜
1.07	Time required to start a business*	112	⬜
1.08	Cost to start a business*	117	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	120	⬜
2.02	Enforcement of environmental regulation	131	⬜
2.03	Sustainability of T&T industry development	133	⬜
2.04	Carbon dioxide emissions*	27	🟦
2.05	Particulate matter concentration*	118	⬜
2.06	Threatened species*	63	⬜
2.07	Environmental treaty ratification*	67	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	94	⬜
3.02	Reliability of police services	131	⬜
3.03	Business costs of crime and violence	101	⬜
3.04	Road traffic accidents*	62	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	78	⬜
4.02	Access to improved sanitation*	105	⬜
4.03	Access to improved drinking water*	89	⬜
4.04	Hospital beds*	101	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	129	⬜
5.02	T&T government expenditure*	70	⬜
5.03	Effectiveness of marketing and branding	133	⬜
5.04	T&T fair attendance*	81	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	122	⬜
6.02	Available seat kilometers, domestic*	45	🟦
6.03	Available seat kilometers, international*	97	⬜
6.04	Departures per 1,000 population*	69	⬜
6.05	Airport density*	34	🟦
6.06	Number of operating airlines*	106	⬜
6.07	International air transport network	129	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	128	⬜
7.02	Quality of railroad infrastructure	95	⬜
7.03	Quality of port infrastructure	98	⬜
7.04	Quality of ground transport network	119	⬜
7.05	Road density*	115	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	77	⬜
8.02	Presence of major car rental companies*	95	⬜
8.03	ATMs accepting Visa cards*	95	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	128	⬜
9.02	Internet users*	91	⬜
9.03	Telephone lines*	101	⬜
9.04	Broadband Internet subscribers*	90	⬜
9.05	Mobile telephone subscribers*	103	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	93	⬜
10.02	Purchasing power parity*	6	🟦
10.03	Extent and effect of taxation	108	⬜
10.04	Fuel price levels*	20	🟦
10.05	Hotel price index*	3	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	53	⬜
11.02	Secondary education enrollment*	82	⬜
11.03	Quality of the educational system	131	⬜
11.04	Local availability of research and training services	118	⬜
11.05	Extent of staff training	123	⬜
11.06	Hiring and firing practices	126	⬜
11.07	Ease of hiring foreign labor	72	⬜
11.08	HIV prevalence*	49	🟦
11.09	Business impact of HIV/AIDS	86	⬜
11.10	Life expectancy*	96	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	85	⬜
12.02	Attitude of population toward foreign visitors	122	⬜
12.03	Extension of business trips recommended	126	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	40	🟦
13.02	Protected areas*	24	🟦
13.03	Quality of the natural environment	22	🟦
13.04	Total known species*	8	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	26	🟦
14.02	Sports stadiums*	71	⬜
14.03	Number of international fairs and exhibitions*	71	⬜
14.04	Creative industries exports*	68	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Bosnia and Herzegovina

Key indicators

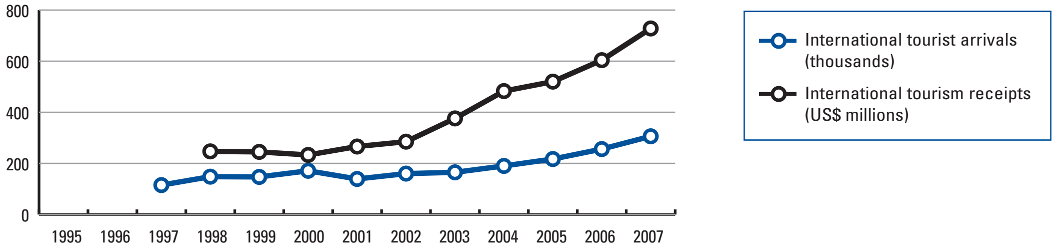
Population (millions), 2007	4.0
Surface area (1,000 square kilometers)	51.2
Gross domestic product (US$ billions), 2007	15.2
Gross domestic product (PPP, US$) per capita, 2007	7,074.2
Real GDP growth (percent), 2007	6.8
Environmental Performance Index, 2008 (out of 149 countries)	48

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	461	2.9	3.6
Employment (1,000 jobs)	26	2.3	–1.3
T&T economy, 2008 estimates			
GDP (US$ millions)	1,637	10.3	4.3
Employment (1,000 jobs)	95	8.3	–0.5

Source: World Travel & Tourism Council, TSA Research 2008

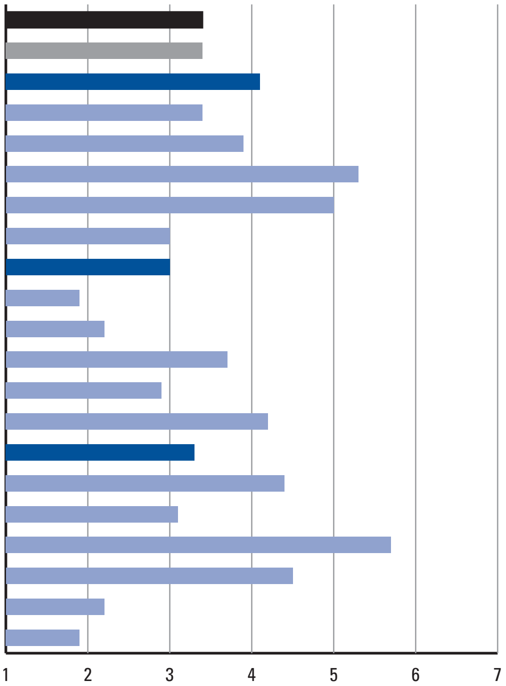
International tourist arrivals (thousands), 2007	306
International tourism receipts (US$ millions), 2007	728



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**107**	**3.4**
2008 Index	105	3.4
T&T regulatory framework	**96**	**4.1**
Policy rules and regulations	119	3.4
Environmental sustainability	115	3.9
Safety and security	57	5.3
Health and hygiene	56	5.0
Prioritization of Travel & Tourism	126	3.0
T&T business environment and infrastructure	**93**	**3.0**
Air transport infrastructure	130	1.9
Ground transport infrastructure	126	2.2
Tourism infrastructure	57	3.7
ICT infrastructure	66	2.9
Price competitiveness in the T&T industry	100	4.2
T&T human, cultural, and natural resources	**124**	**3.3**
Human resources	109	4.4
Education and training	124	3.1
Availability of qualified labor	30	5.7
Affinity for Travel & Tourism	92	4.5
Natural resources	123	2.2
Cultural resources	81	1.9



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Bosnia and Herzegovina

The Travel & Tourism Competitiveness Index in detail

■ Competitive **Advantage** □ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	100	□
1.02	Property rights	121	□
1.03	Business impact of rules on FDI	127	□
1.04	Visa requirements*	78	□
1.05	Openness of bilateral Air Service Agreements*	73	□
1.06	Transparency of government policymaking	129	□
1.07	Time required to start a business*	115	□
1.08	Cost to start a business*	96	□
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	130	□
2.02	Enforcement of environmental regulation	127	□
2.03	Sustainability of T&T industry development	129	□
2.04	Carbon dioxide emissions*	70	□
2.05	Particulate matter concentration*	20	■
2.06	Threatened species*	39	■
2.07	Environmental treaty ratification*	127	□
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	23	■
3.02	Reliability of police services	110	□
3.03	Business costs of crime and violence	70	□
3.04	Road traffic accidents*	15	■
	4th pillar: Health and hygiene		
4.01	Physician density*	70	□
4.02	Access to improved sanitation*	46	■
4.03	Access to improved drinking water*	38	■
4.04	Hospital beds*	57	□
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	111	□
5.02	T&T government expenditure*	117	□
5.03	Effectiveness of marketing and branding	125	□
5.04	T&T fair attendance*	98	□
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	131	□
6.02	Available seat kilometers, domestic*	100	□
6.03	Available seat kilometers, international*	129	□
6.04	Departures per 1,000 population*	87	□
6.05	Airport density*	59	□
6.06	Number of operating airlines*	113	□
6.07	International air transport network	130	□
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	130	□
7.02	Quality of railroad infrastructure	103	□
7.03	Quality of port infrastructure	133	□
7.04	Quality of ground transport network	96	□
7.05	Road density*	55	□

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	70	□
8.02	Presence of major car rental companies*	1	■
8.03	ATMs accepting Visa cards*	74	□
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	91	□
9.02	Internet users*	55	□
9.03	Telephone lines*	52	□
9.04	Broadband Internet subscribers*	67	□
9.05	Mobile telephone subscribers*	83	□
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	110	□
10.02	Purchasing power parity*	59	□
10.03	Extent and effect of taxation	111	□
10.04	Fuel price levels*	104	□
10.05	Hotel price index*	n/a	
	11th pillar: Human resources		
11.01	Primary education enrollment*	n/a	
11.02	Secondary education enrollment*	109	□
11.03	Quality of the educational system	92	□
11.04	Local availability of research and training services	126	□
11.05	Extent of staff training	125	□
11.06	Hiring and firing practices	20	■
11.07	Ease of hiring foreign labor	76	□
11.08	HIV prevalence*	1	■
11.09	Business impact of HIV/AIDS	26	■
11.10	Life expectancy*	42	■
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	48	■
12.02	Attitude of population toward foreign visitors	98	□
12.03	Extension of business trips recommended	117	□
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	□
13.02	Protected areas*	124	□
13.03	Quality of the natural environment	71	□
13.04	Total known species*	104	□
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	82	□
14.02	Sports stadiums*	36	■
14.03	Number of international fairs and exhibitions*	83	□
14.04	Creative industries exports*	86	□

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Botswana

Key indicators

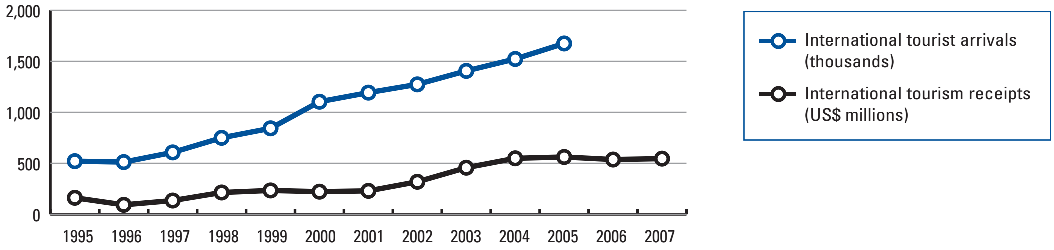
Population (millions), 2007	1.8
Surface area (1,000 square kilometers)	581.7
Gross domestic product (US$ billions), 2007	12.4
Gross domestic product (PPP, US$) per capita, 2007	16,516.1
Real GDP growth (percent), 2007	5.7
Environmental Performance Index, 2008 (out of 149 countries)	98

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	503	4.3	6.6
Employment (1,000 jobs)	25	4.4	2.5
T&T economy, 2008 estimates			
GDP (US$ millions)	1,110	9.4	6.3
Employment (1,000 jobs)	60	10.7	3.0

Source: World Travel & Tourism Council, TSA Research 2008

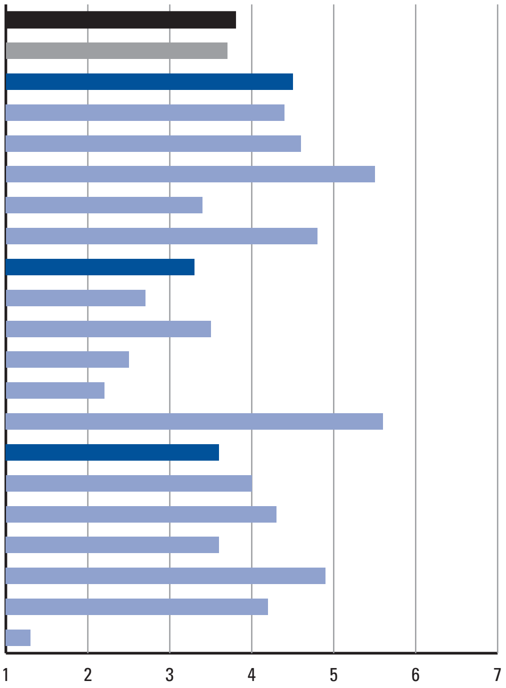
International tourist arrivals (thousands), 2005	1,675
International tourism receipts (US$ millions), 2007	546



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**79**	**3.8**
2008 Index	87	3.7
T&T regulatory framework	**66**	**4.5**
Policy rules and regulations	70	4.4
Environmental sustainability	62	4.6
Safety and security	49	5.5
Health and hygiene	97	3.4
Prioritization of Travel & Tourism	43	4.8
T&T business environment and infrastructure	**76**	**3.3**
Air transport infrastructure	83	2.7
Ground transport infrastructure	66	3.5
Tourism infrastructure	79	2.5
ICT infrastructure	93	2.2
Price competitiveness in the T&T industry	9	5.6
T&T human, cultural, and natural resources	**95**	**3.6**
Human resources	120	4.0
Education and training	88	4.3
Availability of qualified labor	130	3.6
Affinity for Travel & Tourism	49	4.9
Natural resources	34	4.2
Cultural resources	126	1.3



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Botswana

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	38	🟦
1.02	Property rights	48	🟦
1.03	Business impact of rules on FDI	33	🟦
1.04	Visa requirements*	26	🟦
1.05	Openness of bilateral Air Service Agreements*	103	⬜
1.06	Transparency of government policymaking	39	🟦
1.07	Time required to start a business*	123	⬜
1.08	Cost to start a business*	22	🟦
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	59	⬜
2.02	Enforcement of environmental regulation	68	⬜
2.03	Sustainability of T&T industry development	14	🟦
2.04	Carbon dioxide emissions*	57	⬜
2.05	Particulate matter concentration*	100	⬜
2.06	Threatened species*	13	🟦
2.07	Environmental treaty ratification*	104	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	46	🟦
3.02	Reliability of police services	48	🟦
3.03	Business costs of crime and violence	88	⬜
3.04	Road traffic accidents*	22	🟦
	4th pillar: Health and hygiene		
4.01	Physician density*	103	⬜
4.02	Access to improved sanitation*	102	⬜
4.03	Access to improved drinking water*	58	⬜
4.04	Hospital beds*	74	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	26	🟦
5.02	T&T government expenditure*	23	🟦
5.03	Effectiveness of marketing and branding	34	🟦
5.04	T&T fair attendance*	81	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	97	⬜
6.02	Available seat kilometers, domestic*	79	⬜
6.03	Available seat kilometers, international*	131	⬜
6.04	Departures per 1,000 population*	56	⬜
6.05	Airport density*	23	🟦
6.06	Number of operating airlines*	132	⬜
6.07	International air transport network	95	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	44	🟦
7.02	Quality of railroad infrastructure	36	🟦
7.03	Quality of port infrastructure	60	⬜
7.04	Quality of ground transport network	94	⬜
7.05	Road density*	120	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	72	⬜
8.02	Presence of major car rental companies*	73	⬜
8.03	ATMs accepting Visa cards*	70	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	103	⬜
9.02	Internet users*	111	⬜
9.03	Telephone lines*	100	⬜
9.04	Broadband Internet subscribers*	97	⬜
9.05	Mobile telephone subscribers*	70	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	15	🟦
10.02	Purchasing power parity*	37	🟦
10.03	Extent and effect of taxation	19	🟦
10.04	Fuel price levels*	49	🟦
10.05	Hotel price index*	n/a	
	11th pillar: Human resources		
11.01	Primary education enrollment*	107	⬜
11.02	Secondary education enrollment*	89	⬜
11.03	Quality of the educational system	50	🟦
11.04	Local availability of research and training services	104	⬜
11.05	Extent of staff training	69	⬜
11.06	Hiring and firing practices	85	⬜
11.07	Ease of hiring foreign labor	92	⬜
11.08	HIV prevalence*	133	⬜
11.09	Business impact of HIV/AIDS	127	⬜
11.10	Life expectancy*	119	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	42	🟦
12.02	Attitude of population toward foreign visitors	94	⬜
12.03	Extension of business trips recommended	45	🟦
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	13	🟦
13.03	Quality of the natural environment	24	🟦
13.04	Total known species*	47	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	97	⬜
14.02	Sports stadiums*	98	⬜
14.03	Number of international fairs and exhibitions*	122	⬜
14.04	Creative industries exports*	98	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Brazil

Key indicators

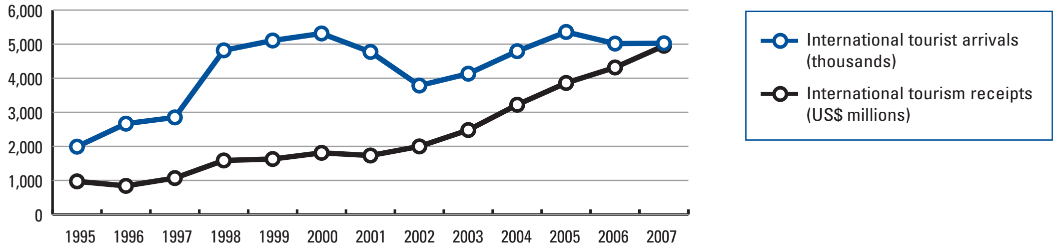
Population (millions), 2007	191.3
Surface area (1,000 square kilometers)	8,514.9
Gross domestic product (US$ billions), 2007	1,313.6
Gross domestic product (PPP, US$) per capita, 2007	9,703.2
Real GDP growth (percent), 2007	5.4
Environmental Performance Index, 2008 (out of 149 countries)	35

Travel & Tourism indicators

T&T industry, 2008 estimates		Percent of total	2009–2018 annual growth (%, forecast)
GDP (US$ millions)	36,077	2.5	4.2
Employment (1,000 jobs)	2,279	2.5	3.0
T&T economy, 2008 estimates			
GDP (US$ millions)	88,261	6.2	4.7
Employment (1,000 jobs)	5,500	5.9	3.3

Source: World Travel & Tourism Council, TSA Research 2008

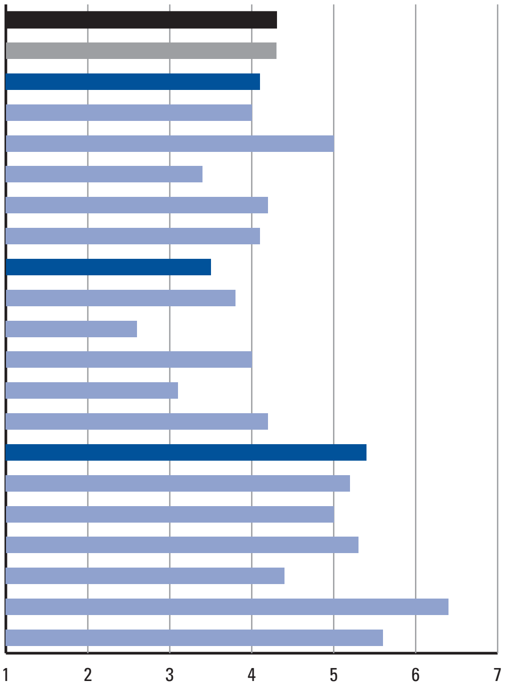
International tourist arrivals (thousands), 2007	5,026
International tourism receipts (US$ millions), 2007	4,953



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**45**	**4.3**
2008 Index	49	4.3
T&T regulatory framework	**95**	**4.1**
Policy rules and regulations	94	4.0
Environmental sustainability	33	5.0
Safety and security	130	3.4
Health and hygiene	80	4.2
Prioritization of Travel & Tourism	84	4.1
T&T business environment and infrastructure	**69**	**3.5**
Air transport infrastructure	46	3.8
Ground transport infrastructure	110	2.6
Tourism infrastructure	45	4.0
ICT infrastructure	60	3.1
Price competitiveness in the T&T industry	91	4.2
T&T human, cultural, and natural resources	**4**	**5.4**
Human resources	55	5.2
Education and training	40	5.0
Availability of qualified labor	87	5.3
Affinity for Travel & Tourism	108	4.4
Natural resources	2	6.4
Cultural resources	14	5.6



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Brazil

The Travel & Tourism Competitiveness Index in detail

■ Competitive **Advantage** □ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	80	□
1.02	Property rights	70	□
1.03	Business impact of rules on FDI	82	□
1.04	Visa requirements*	67	□
1.05	Openness of bilateral Air Service Agreements*	37	■
1.06	Transparency of government policymaking	101	□
1.07	Time required to start a business*	128	□
1.08	Cost to start a business*	56	□
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	40	■
2.02	Enforcement of environmental regulation	51	□
2.03	Sustainability of T&T industry development	104	□
2.04	Carbon dioxide emissions*	50	□
2.05	Particulate matter concentration*	41	■
2.06	Threatened species*	100	□
2.07	Environmental treaty ratification*	21	■
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	12	■
3.02	Reliability of police services	116	□
3.03	Business costs of crime and violence	122	□
3.04	Road traffic accidents*	123	□
	4th pillar: Health and hygiene		
4.01	Physician density*	81	□
4.02	Access to improved sanitation*	83	□
4.03	Access to improved drinking water*	78	□
4.04	Hospital beds*	70	□
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	113	□
5.02	T&T government expenditure*	77	□
5.03	Effectiveness of marketing and branding	95	□
5.04	T&T fair attendance*	25	■
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	101	□
6.02	Available seat kilometers, domestic*	6	■
6.03	Available seat kilometers, international*	18	■
6.04	Departures per 1,000 population*	62	□
6.05	Airport density*	78	□
6.06	Number of operating airlines*	32	■
6.07	International air transport network	68	□
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	110	□
7.02	Quality of railroad infrastructure	86	□
7.03	Quality of port infrastructure	123	□
7.04	Quality of ground transport network	69	□
7.05	Road density*	77	□

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	n/a	
8.02	Presence of major car rental companies*	23	■
8.03	ATMs accepting Visa cards*	68	□
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	28	■
9.02	Internet users*	57	□
9.03	Telephone lines*	63	□
9.04	Broadband Internet subscribers*	55	□
9.05	Mobile telephone subscribers*	82	□
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	88	□
10.02	Purchasing power parity*	97	□
10.03	Extent and effect of taxation	133	□
10.04	Fuel price levels*	62	□
10.05	Hotel price index*	49	□
	11th pillar: Human resources		
11.01	Primary education enrollment*	58	□
11.02	Secondary education enrollment*	14	■
11.03	Quality of the educational system	117	□
11.04	Local availability of research and training services	26	■
11.05	Extent of staff training	46	□
11.06	Hiring and firing practices	111	□
11.07	Ease of hiring foreign labor	61	□
11.08	HIV prevalence*	85	□
11.09	Business impact of HIV/AIDS	71	□
11.10	Life expectancy*	66	□
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	128	□
12.02	Attitude of population toward foreign visitors	75	□
12.03	Extension of business trips recommended	56	□
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	6	■
13.02	Protected areas*	15	■
13.03	Quality of the natural environment	58	□
13.04	Total known species*	1	■
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	14	■
14.02	Sports stadiums*	54	□
14.03	Number of international fairs and exhibitions*	11	■
14.04	Creative industries exports*	23	■

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Brunei Darussalam

Key indicators

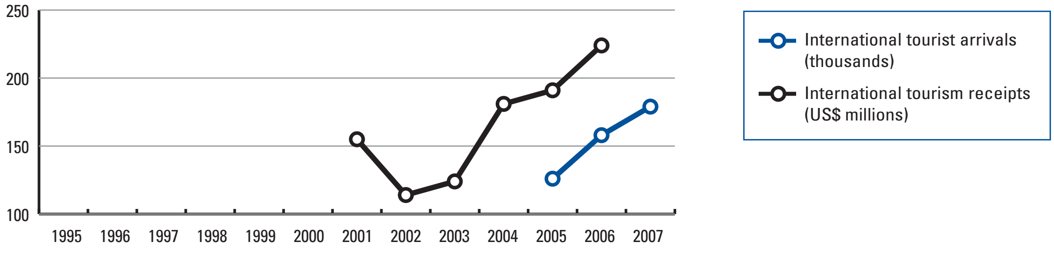
Population (millions), 2007	0.4
Surface area (1,000 square kilometers)	5.8
Gross domestic product (US$ billions), 2007	12.3
Gross domestic product (PPP, US$) per capita, 2007	50,790.4
Real GDP growth (percent), 2007	0.6
Environmental Performance Index, 2008 (out of 149 countries)	n/a

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	261	1.9	6.3
Employment (1,000 jobs)	5	3.1	5.0
T&T economy, 2008 estimates			
GDP (US$ millions)	1,615	11.6	4.5
Employment (1,000 jobs)	24	13.8	4.2

Source: World Travel & Tourism Council, TSA Research 2008

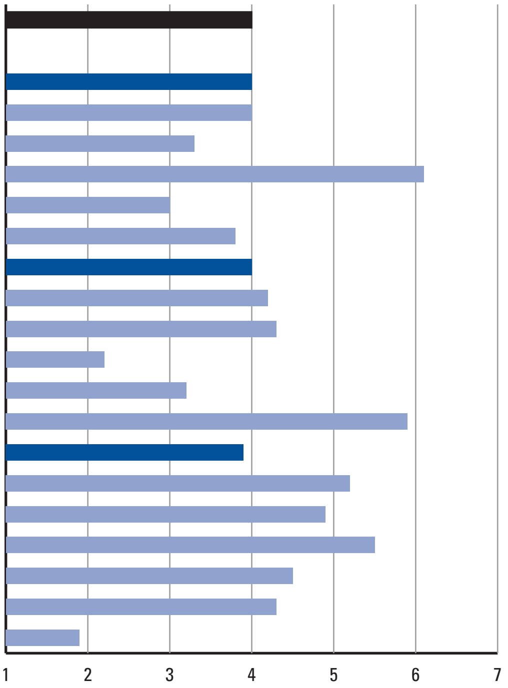
International tourist arrivals (thousands), 2007	179
International tourism receipts (US$ millions), 2006	224



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**69**	**4.0**
2008 Index	n/a	n/a
T&T regulatory framework	**99**	**4.0**
Policy rules and regulations	88	4.0
Environmental sustainability	131	3.3
Safety and security	19	6.1
Health and hygiene	105	3.0
Prioritization of Travel & Tourism	99	3.8
T&T business environment and infrastructure	**47**	**4.0**
Air transport infrastructure	32	4.2
Ground transport infrastructure	35	4.3
Tourism infrastructure	86	2.2
ICT infrastructure	55	3.2
Price competitiveness in the T&T industry	2	5.9
T&T human, cultural, and natural resources	**60**	**3.9**
Human resources	52	5.2
Education and training	56	4.9
Availability of qualified labor	65	5.5
Affinity for Travel & Tourism	100	4.5
Natural resources	31	4.3
Cultural resources	86	1.9



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Brunei Darussalam

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	120	⬜
1.02	Property rights	62	⬜
1.03	Business impact of rules on FDI	81	⬜
1.04	Visa requirements*	79	⬜
1.05	Openness of bilateral Air Service Agreements*	14	🟦
1.06	Transparency of government policymaking	36	🟦
1.07	Time required to start a business*	126	⬜
1.08	Cost to start a business*	62	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	46	🟦
2.02	Enforcement of environmental regulation	45	🟦
2.03	Sustainability of T&T industry development	54	⬜
2.04	Carbon dioxide emissions*	124	⬜
2.05	Particulate matter concentration*	81	⬜
2.06	Threatened species*	114	⬜
2.07	Environmental treaty ratification*	129	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	22	🟦
3.02	Reliability of police services	42	🟦
3.03	Business costs of crime and violence	15	🟦
3.04	Road traffic accidents*	5	🟦
	4th pillar: Health and hygiene		
4.01	Physician density*	84	⬜
4.02	Access to improved sanitation*	n/a	
4.03	Access to improved drinking water*	n/a	
4.04	Hospital beds*	57	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	76	⬜
5.02	T&T government expenditure*	123	⬜
5.03	Effectiveness of marketing and branding	82	⬜
5.04	T&T fair attendance*	62	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	38	🟦
6.02	Available seat kilometers, domestic*	100	⬜
6.03	Available seat kilometers, international*	85	⬜
6.04	Departures per 1,000 population*	11	🟦
6.05	Airport density*	17	🟦
6.06	Number of operating airlines*	121	⬜
6.07	International air transport network	43	🟦
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	28	🟦
7.02	Quality of railroad infrastructure	n/a	
7.03	Quality of port infrastructure	35	🟦
7.04	Quality of ground transport network	107	⬜
7.05	Road density*	45	🟦

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	42	🟦
8.02	Presence of major car rental companies*	122	⬜
8.03	ATMs accepting Visa cards*	n/a	
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	51	⬜
9.02	Internet users*	41	🟦
9.03	Telephone lines*	61	⬜
9.04	Broadband Internet subscribers*	61	⬜
9.05	Mobile telephone subscribers*	67	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	3	🟦
10.02	Purchasing power parity*	76	⬜
10.03	Extent and effect of taxation	10	🟦
10.04	Fuel price levels*	n/a	
10.05	Hotel price index*	n/a	
	11th pillar: Human resources		
11.01	Primary education enrollment*	64	⬜
11.02	Secondary education enrollment*	33	🟦
11.03	Quality of the educational system	48	🟦
11.04	Local availability of research and training services	105	⬜
11.05	Extent of staff training	61	⬜
11.06	Hiring and firing practices	79	⬜
11.07	Ease of hiring foreign labor	99	⬜
11.08	HIV prevalence*	1	🟦
11.09	Business impact of HIV/AIDS	69	⬜
11.10	Life expectancy*	37	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	59	⬜
12.02	Attitude of population toward foreign visitors	93	⬜
12.03	Extension of business trips recommended	115	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	8	🟦
13.03	Quality of the natural environment	10	🟦
13.04	Total known species*	57	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	116	⬜
14.02	Sports stadiums*	27	🟦
14.03	Number of international fairs and exhibitions*	83	⬜
14.04	Creative industries exports*	118	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Bulgaria

Key indicators

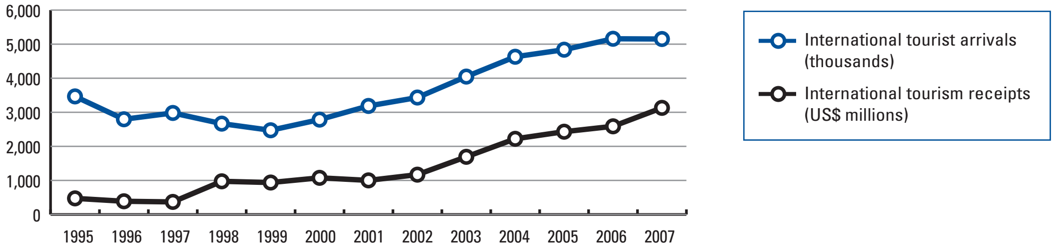
Population (millions), 2007	7.6
Surface area (1,000 square kilometers)	111.0
Gross domestic product (US$ billions), 2007	39.6
Gross domestic product (PPP, US$) per capita, 2007	11,310.9
Real GDP growth (percent), 2007	6.2
Environmental Performance Index, 2008 (out of 149 countries)	56

Travel & Tourism indicators

T&T industry, 2008 estimates		Percent of total	2009–2018 annual growth (%, forecast)
GDP (US$ millions)	1,483.22	3.1	3.3
Employment (1,000 jobs)	84	2.7	–2.7
T&T economy, 2008 estimates			
GDP (US$ millions)	5,757	12.0	4.4
Employment (1,000 jobs)	324	10.2	–1.7

Source: World Travel & Tourism Council, TSA Research 2008

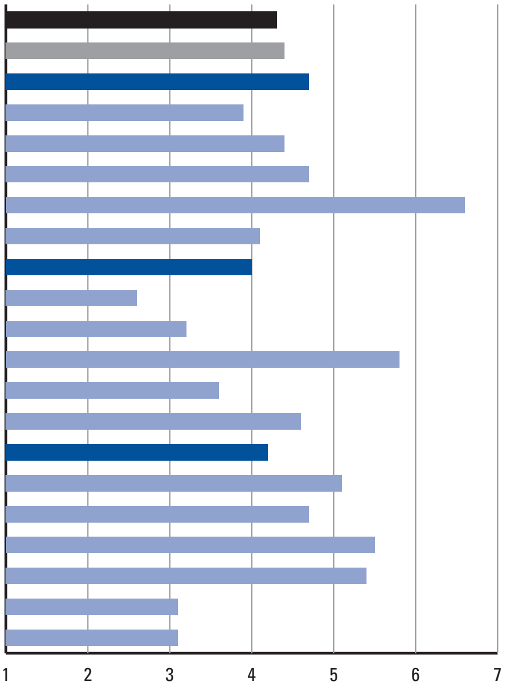
International tourist arrivals (thousands), 2007	5,151
International tourism receipts (US$ millions), 2007	3,130



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**50**	**4.3**
2008 Index	43	4.4
T&T regulatory framework	**56**	**4.7**
Policy rules and regulations	95	3.9
Environmental sustainability	76	4.4
Safety and security	87	4.7
Health and hygiene	15	6.6
Prioritization of Travel & Tourism	78	4.1
T&T business environment and infrastructure	**48**	**4.0**
Air transport infrastructure	90	2.6
Ground transport infrastructure	75	3.2
Tourism infrastructure	18	5.8
ICT infrastructure	47	3.6
Price competitiveness in the T&T industry	73	4.6
T&T human, cultural, and natural resources	**46**	**4.2**
Human resources	65	5.1
Education and training	69	4.7
Availability of qualified labor	57	5.5
Affinity for Travel & Tourism	18	5.4
Natural resources	68	3.1
Cultural resources	36	3.1



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Bulgaria

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ▨ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	102	▨
1.02	Property rights	97	▨
1.03	Business impact of rules on FDI	118	▨
1.04	Visa requirements*	40	🟦
1.05	Openness of bilateral Air Service Agreements*	100	▨
1.06	Transparency of government policymaking	113	▨
1.07	Time required to start a business*	110	▨
1.08	Cost to start a business*	18	🟦
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	107	▨
2.02	Enforcement of environmental regulation	92	▨
2.03	Sustainability of T&T industry development	103	▨
2.04	Carbon dioxide emissions*	78	▨
2.05	Particulate matter concentration*	91	▨
2.06	Threatened species*	59	▨
2.07	Environmental treaty ratification*	21	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	104	▨
3.02	Reliability of police services	111	▨
3.03	Business costs of crime and violence	99	▨
3.04	Road traffic accidents*	52	▨
	4th pillar: Health and hygiene		
4.01	Physician density*	15	🟦
4.02	Access to improved sanitation*	34	🟦
4.03	Access to improved drinking water*	38	🟦
4.04	Hospital beds*	23	🟦
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	101	▨
5.02	T&T government expenditure*	66	▨
5.03	Effectiveness of marketing and branding	88	▨
5.04	T&T fair attendance*	41	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	104	▨
6.02	Available seat kilometers, domestic*	74	▨
6.03	Available seat kilometers, international*	77	▨
6.04	Departures per 1,000 population*	81	▨
6.05	Airport density*	93	▨
6.06	Number of operating airlines*	44	🟦
6.07	International air transport network	88	▨
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	117	▨
7.02	Quality of railroad infrastructure	55	▨
7.03	Quality of port infrastructure	79	▨
7.04	Quality of ground transport network	50	▨
7.05	Road density*	56	▨

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	9	🟦
8.02	Presence of major car rental companies*	23	🟦
8.03	ATMs accepting Visa cards*	28	🟦
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	81	▨
9.02	Internet users*	61	▨
9.03	Telephone lines*	42	🟦
9.04	Broadband Internet subscribers*	42	🟦
9.05	Mobile telephone subscribers*	8	🟦
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	49	🟦
10.02	Purchasing power parity*	33	🟦
10.03	Extent and effect of taxation	78	▨
10.04	Fuel price levels*	87	▨
10.05	Hotel price index*	82	▨
	11th pillar: Human resources		
11.01	Primary education enrollment*	70	▨
11.02	Secondary education enrollment*	13	🟦
11.03	Quality of the educational system	81	▨
11.04	Local availability of research and training services	70	▨
11.05	Extent of staff training	117	▨
11.06	Hiring and firing practices	35	🟦
11.07	Ease of hiring foreign labor	93	▨
11.08	HIV prevalence*	1	🟦
11.09	Business impact of HIV/AIDS	62	▨
11.10	Life expectancy*	55	▨
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	17	🟦
12.02	Attitude of population toward foreign visitors	96	▨
12.03	Extension of business trips recommended	47	🟦
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	23	🟦
13.02	Protected areas*	64	▨
13.03	Quality of the natural environment	108	▨
13.04	Total known species*	79	▨
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	22	🟦
14.02	Sports stadiums*	24	🟦
14.03	Number of international fairs and exhibitions*	57	▨
14.04	Creative industries exports*	62	▨

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Burkina Faso

Key indicators

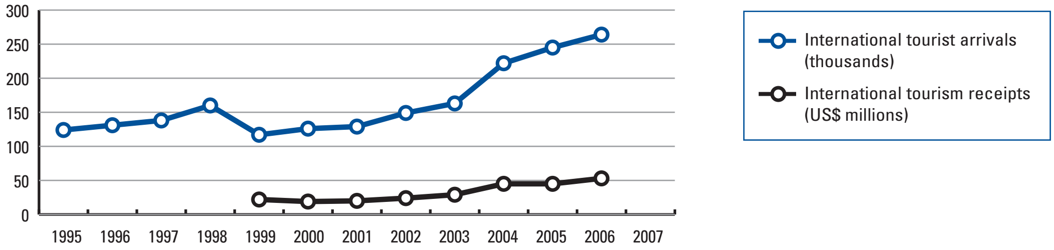
Population (millions), 2007	14.0
Surface area (1,000 square kilometers)	274.0
Gross domestic product (US$ billions), 2007	6.8
Gross domestic product (PPP, US$) per capita, 2007	1,206.5
Real GDP growth (percent), 2007	3.6
Environmental Performance Index, 2008 (out of 149 countries)	144

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	25	0.3	0.5
Employment (1,000 jobs)	10	0.2	–2.2
T&T economy, 2008 estimates			
GDP (US$ millions)	116	1.5	3.3
Employment (1,000 jobs)	48	1.2	0.6

Source: World Travel & Tourism Council, TSA Research 2008

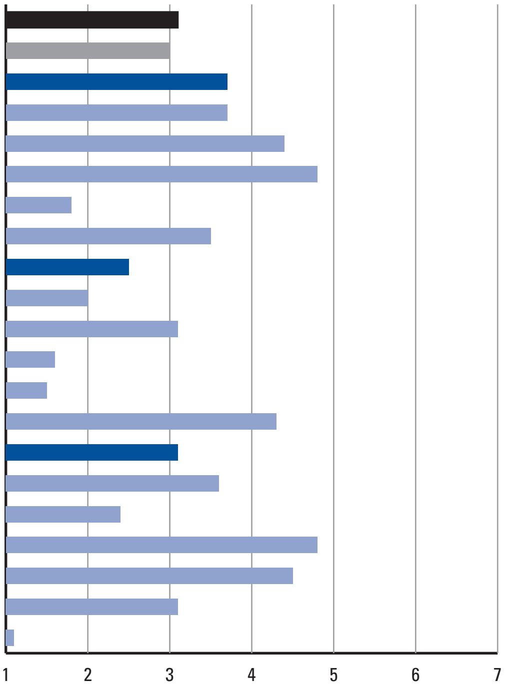
International tourist arrivals (thousands), 2006	264
International tourism receipts (US$ millions), 2006	53



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**126**	**3.1**
2008 Index	124	3.0
T&T regulatory framework	**118**	**3.7**
Policy rules and regulations	110	3.7
Environmental sustainability	71	4.4
Safety and security	83	4.8
Health and hygiene	122	1.8
Prioritization of Travel & Tourism	110	3.5
T&T business environment and infrastructure	**122**	**2.5**
Air transport infrastructure	124	2.0
Ground transport infrastructure	82	3.1
Tourism infrastructure	110	1.6
ICT infrastructure	128	1.5
Price competitiveness in the T&T industry	87	4.3
T&T human, cultural, and natural resources	**131**	**3.1**
Human resources	129	3.6
Education and training	132	2.4
Availability of qualified labor	117	4.8
Affinity for Travel & Tourism	101	4.5
Natural resources	71	3.1
Cultural resources	131	1.1



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Burkina Faso

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ▨ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	94	▨
1.02	Property rights	72	▨
1.03	Business impact of rules on FDI	93	▨
1.04	Visa requirements*	114	▨
1.05	Openness of bilateral Air Service Agreements*	127	▨
1.06	Transparency of government policymaking	34	🟦
1.07	Time required to start a business*	45	🟦
1.08	Cost to start a business*	109	▨
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	81	▨
2.02	Enforcement of environmental regulation	71	▨
2.03	Sustainability of T&T industry development	42	🟦
2.04	Carbon dioxide emissions*	7	🟦
2.05	Particulate matter concentration*	113	▨
2.06	Threatened species*	19	🟦
2.07	Environmental treaty ratification*	81	▨
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	86	▨
3.02	Reliability of police services	51	▨
3.03	Business costs of crime and violence	107	▨
3.04	Road traffic accidents*	91	▨
	4th pillar: Health and hygiene		
4.01	Physician density*	124	▨
4.02	Access to improved sanitation*	122	▨
4.03	Access to improved drinking water*	109	▨
4.04	Hospital beds*	107	▨
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	66	▨
5.02	T&T government expenditure*	102	▨
5.03	Effectiveness of marketing and branding	38	🟦
5.04	T&T fair attendance*	126	▨
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	107	▨
6.02	Available seat kilometers, domestic*	94	▨
6.03	Available seat kilometers, international*	122	▨
6.04	Departures per 1,000 population*	117	▨
6.05	Airport density*	122	▨
6.06	Number of operating airlines*	118	▨
6.07	International air transport network	106	▨
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	98	▨
7.02	Quality of railroad infrastructure	75	▨
7.03	Quality of port infrastructure	66	▨
7.04	Quality of ground transport network	48	🟦
7.05	Road density*	59	▨

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	n/a	
8.02	Presence of major car rental companies*	95	▨
8.03	ATMs accepting Visa cards*	114	▨
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	120	▨
9.02	Internet users*	128	▨
9.03	Telephone lines*	125	▨
9.04	Broadband Internet subscribers*	116	▨
9.05	Mobile telephone subscribers*	125	▨
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	125	▨
10.02	Purchasing power parity*	20	🟦
10.03	Extent and effect of taxation	81	▨
10.04	Fuel price levels*	93	▨
10.05	Hotel price index*	n/a	
	11th pillar: Human resources		
11.01	Primary education enrollment*	129	▨
11.02	Secondary education enrollment*	131	▨
11.03	Quality of the educational system	113	▨
11.04	Local availability of research and training services	80	▨
11.05	Extent of staff training	124	▨
11.06	Hiring and firing practices	55	▨
11.07	Ease of hiring foreign labor	36	🟦
11.08	HIV prevalence*	110	▨
11.09	Business impact of HIV/AIDS	103	▨
11.10	Life expectancy*	128	▨
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	119	▨
12.02	Attitude of population toward foreign visitors	65	▨
12.03	Extension of business trips recommended	72	▨
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	▨
13.02	Protected areas*	46	🟦
13.03	Quality of the natural environment	80	▨
13.04	Total known species*	59	▨
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	116	▨
14.02	Sports stadiums*	108	▨
14.03	Number of international fairs and exhibitions*	101	▨
14.04	Creative industries exports*	111	▨

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Burundi

Key indicators

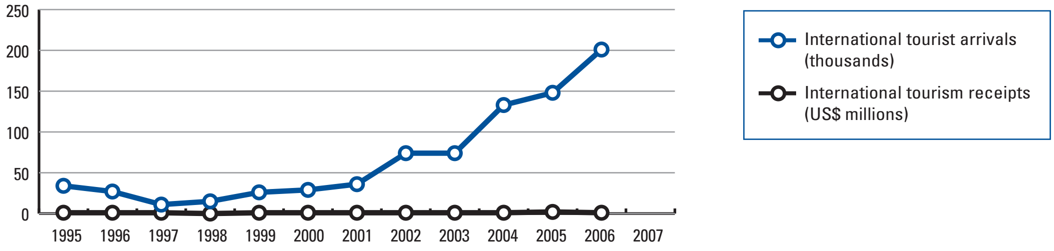
Population (millions), 2007	8.1
Surface area (1,000 square kilometers)	27.8
Gross domestic product (US$ billions), 2007	1.0
Gross domestic product (PPP, US$) per capita, 2007	371.7
Real GDP growth (percent), 2007	3.6
Environmental Performance Index, 2008 (out of 149 countries)	132

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	13	1.3	4.3
Employment (1,000 jobs)	16	1.0	–0.1
T&T economy, 2008 estimates			
GDP (US$ millions)	31	3.0	4.9
Employment (1,000 jobs)	41	2.4	0.5

Source: World Travel & Tourism Council, TSA Research 2008

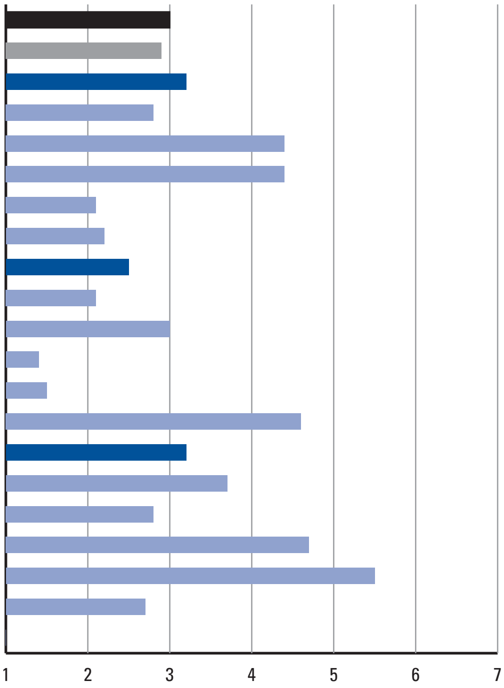
International tourist arrivals (thousands), 2006	201
International tourism receipts (US$ millions), 2006	1



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**131**	**3.0**
2008 Index	128	2.9
T&T regulatory framework	**129**	**3.2**
Policy rules and regulations	128	2.8
Environmental sustainability	75	4.4
Safety and security	106	4.4
Health and hygiene	118	2.1
Prioritization of Travel & Tourism	133	2.2
T&T business environment and infrastructure	**119**	**2.5**
Air transport infrastructure	120	2.1
Ground transport infrastructure	86	3.0
Tourism infrastructure	123	1.4
ICT infrastructure	131	1.5
Price competitiveness in the T&T industry	71	4.6
T&T human, cultural, and natural resources	**126**	**3.2**
Human resources	127	3.7
Education and training	131	2.8
Availability of qualified labor	120	4.7
Affinity for Travel & Tourism	16	5.5
Natural resources	97	2.7
Cultural resources	133	1.0



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Burundi

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	119	⬜
1.02	Property rights	128	⬜
1.03	Business impact of rules on FDI	111	⬜
1.04	Visa requirements*	128	⬜
1.05	Openness of bilateral Air Service Agreements*	113	⬜
1.06	Transparency of government policymaking	110	⬜
1.07	Time required to start a business*	106	⬜
1.08	Cost to start a business*	127	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	116	⬜
2.02	Enforcement of environmental regulation	108	⬜
2.03	Sustainability of T&T industry development	125	⬜
2.04	Carbon dioxide emissions*	2	🟦
2.05	Particulate matter concentration*	48	🟦
2.06	Threatened species*	43	🟦
2.07	Environmental treaty ratification*	115	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	127	⬜
3.02	Reliability of police services	107	⬜
3.03	Business costs of crime and violence	106	⬜
3.04	Road traffic accidents*	67	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	128	⬜
4.02	Access to improved sanitation*	107	⬜
4.03	Access to improved drinking water*	111	⬜
4.04	Hospital beds*	116	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	128	⬜
5.02	T&T government expenditure*	122	⬜
5.03	Effectiveness of marketing and branding	128	⬜
5.04	T&T fair attendance*	126	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	110	⬜
6.02	Available seat kilometers, domestic*	100	⬜
6.03	Available seat kilometers, international*	130	⬜
6.04	Departures per 1,000 population*	n/a	
6.05	Airport density*	124	⬜
6.06	Number of operating airlines*	124	⬜
6.07	International air transport network	119	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	123	⬜
7.02	Quality of railroad infrastructure	n/a	
7.03	Quality of port infrastructure	99	⬜
7.04	Quality of ground transport network	80	⬜
7.05	Road density*	53	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	126	⬜
8.02	Presence of major car rental companies*	95	⬜
8.03	ATMs accepting Visa cards*	124	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	115	⬜
9.02	Internet users*	126	⬜
9.03	Telephone lines*	130	⬜
9.04	Broadband Internet subscribers*	127	⬜
9.05	Mobile telephone subscribers*	132	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	50	🟦
10.02	Purchasing power parity*	9	🟦
10.03	Extent and effect of taxation	114	⬜
10.04	Fuel price levels*	100	⬜
10.05	Hotel price index*	n/a	
	11th pillar: Human resources		
11.01	Primary education enrollment*	117	⬜
11.02	Secondary education enrollment*	132	⬜
11.03	Quality of the educational system	123	⬜
11.04	Local availability of research and training services	113	⬜
11.05	Extent of staff training	130	⬜
11.06	Hiring and firing practices	77	⬜
11.07	Ease of hiring foreign labor	60	⬜
11.08	HIV prevalence*	115	⬜
11.09	Business impact of HIV/AIDS	108	⬜
11.10	Life expectancy*	126	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	14	🟦
12.02	Attitude of population toward foreign visitors	74	⬜
12.03	Extension of business trips recommended	86	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	92	⬜
13.03	Quality of the natural environment	91	⬜
13.04	Total known species*	46	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	116	⬜
14.02	Sports stadiums*	123	⬜
14.03	Number of international fairs and exhibitions*	122	⬜
14.04	Creative industries exports*	117	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Cambodia

Key indicators

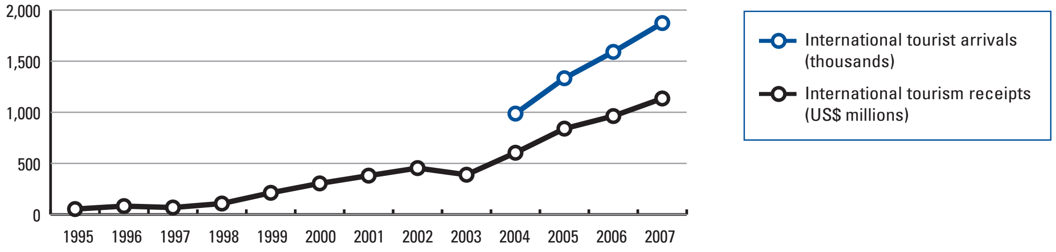
Population (millions), 2007	14.6
Surface area (1,000 square kilometers)	181.0
Gross domestic product (US$ billions), 2007	8.7
Gross domestic product (PPP, US$) per capita, 2007	1,817.7
Real GDP growth (percent), 2007	10.2
Environmental Performance Index, 2008 (out of 149 countries)	136

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	821	9.0	5.2
Employment (1,000 jobs)	492	6.9	–0.1
T&T economy, 2008 estimates			
GDP (US$ millions)	1,801	19.7	5.5
Employment (1,000 jobs)	1,102	15.4	0.2

Source: World Travel & Tourism Council, TSA Research 2008

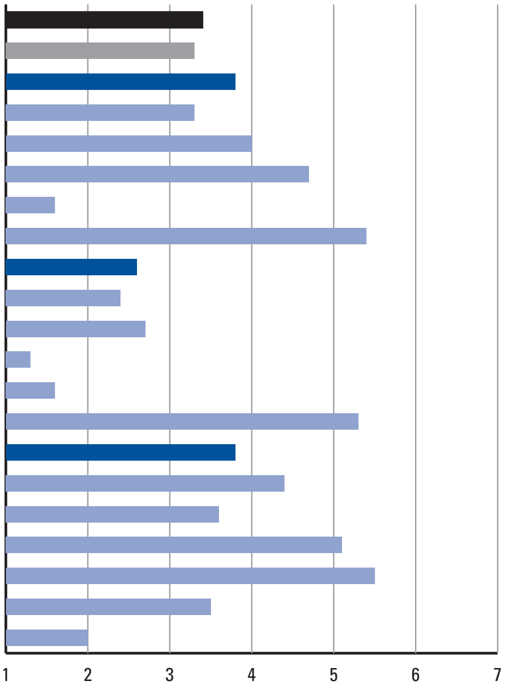
International tourist arrivals (thousands), 2007	1,873
International tourism receipts (US$ millions), 2007	1,135



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**108**	**3.4**
2008 Index	112	3.3
T&T regulatory framework	**111**	**3.8**
Policy rules and regulations	122	3.3
Environmental sustainability	107	4.0
Safety and security	88	4.7
Health and hygiene	126	1.6
Prioritization of Travel & Tourism	18	5.4
T&T business environment and infrastructure	**113**	**2.6**
Air transport infrastructure	106	2.4
Ground transport infrastructure	107	2.7
Tourism infrastructure	125	1.3
ICT infrastructure	122	1.6
Price competitiveness in the T&T industry	21	5.3
T&T human, cultural, and natural resources	**74**	**3.8**
Human resources	108	4.4
Education and training	113	3.6
Availability of qualified labor	100	5.1
Affinity for Travel & Tourism	15	5.5
Natural resources	58	3.5
Cultural resources	77	2.0



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Cambodia

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ▨ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	75	▨
1.02	Property rights	118	▨
1.03	Business impact of rules on FDI	70	▨
1.04	Visa requirements*	10	🟦
1.05	Openness of bilateral Air Service Agreements*	86	▨
1.06	Transparency of government policymaking	76	▨
1.07	Time required to start a business*	124	▨
1.08	Cost to start a business*	124	▨
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	104	▨
2.02	Enforcement of environmental regulation	115	▨
2.03	Sustainability of T&T industry development	68	▨
2.04	Carbon dioxide emissions*	3	🟦
2.05	Particulate matter concentration*	94	▨
2.06	Threatened species*	113	▨
2.07	Environmental treaty ratification*	104	▨
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	98	▨
3.02	Reliability of police services	114	▨
3.03	Business costs of crime and violence	79	▨
3.04	Road traffic accidents*	79	▨
	4th pillar: Health and hygiene		
4.01	Physician density*	112	▨
4.02	Access to improved sanitation*	116	▨
4.03	Access to improved drinking water*	115	▨
4.04	Hospital beds*	130	▨
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	86	▨
5.02	T&T government expenditure*	10	🟦
5.03	Effectiveness of marketing and branding	69	▨
5.04	T&T fair attendance*	25	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	87	▨
6.02	Available seat kilometers, domestic*	73	▨
6.03	Available seat kilometers, international*	88	▨
6.04	Departures per 1,000 population*	113	▨
6.05	Airport density*	111	▨
6.06	Number of operating airlines*	75	▨
6.07	International air transport network	86	▨
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	80	▨
7.02	Quality of railroad infrastructure	96	▨
7.03	Quality of port infrastructure	91	▨
7.04	Quality of ground transport network	116	▨
7.05	Road density*	75	▨

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	79	▨
8.02	Presence of major car rental companies*	122	▨
8.03	ATMs accepting Visa cards*	112	▨
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	108	▨
9.02	Internet users*	130	▨
9.03	Telephone lines*	132	▨
9.04	Broadband Internet subscribers*	105	▨
9.05	Mobile telephone subscribers*	121	▨
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	68	▨
10.02	Purchasing power parity*	8	🟦
10.03	Extent and effect of taxation	44	🟦
10.04	Fuel price levels*	56	▨
10.05	Hotel price index*	19	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	87	▨
11.02	Secondary education enrollment*	114	▨
11.03	Quality of the educational system	112	▨
11.04	Local availability of research and training services	115	▨
11.05	Extent of staff training	107	▨
11.06	Hiring and firing practices	47	🟦
11.07	Ease of hiring foreign labor	77	▨
11.08	HIV prevalence*	94	▨
11.09	Business impact of HIV/AIDS	109	▨
11.10	Life expectancy*	107	▨
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	11	🟦
12.02	Attitude of population toward foreign visitors	103	▨
12.03	Extension of business trips recommended	78	▨
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	▨
13.02	Protected areas*	23	🟦
13.03	Quality of the natural environment	103	▨
13.04	Total known species*	49	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	54	▨
14.02	Sports stadiums*	122	▨
14.03	Number of international fairs and exhibitions*	107	▨
14.04	Creative industries exports*	35	🟦

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Cameroon

Key indicators

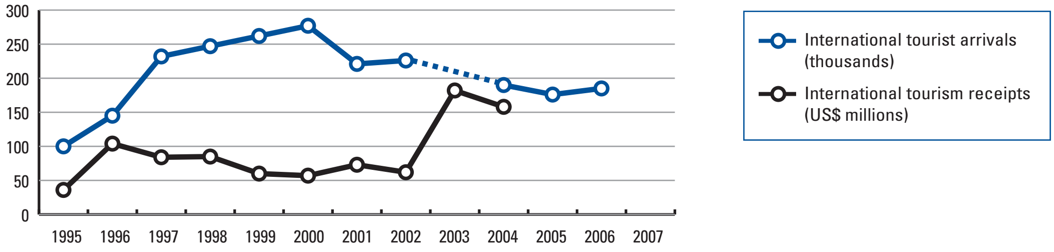
Population (millions), 2007	16.9
Surface area (1,000 square kilometers)	475.4
Gross domestic product (US$ billions), 2007	20.7
Gross domestic product (PPP, US$) per capita, 2007	2,093.6
Real GDP growth (percent), 2007	3.5
Environmental Performance Index, 2008 (out of 149 countries)	114

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	362	1.5	4.5
Employment (1,000 jobs)	48	1.3	2.1
T&T economy, 2008 estimates			
GDP (US$ millions)	1,000	4.2	4.8
Employment (1,000 jobs)	132	3.5	2.4

Source: World Travel & Tourism Council, TSA Research 2008

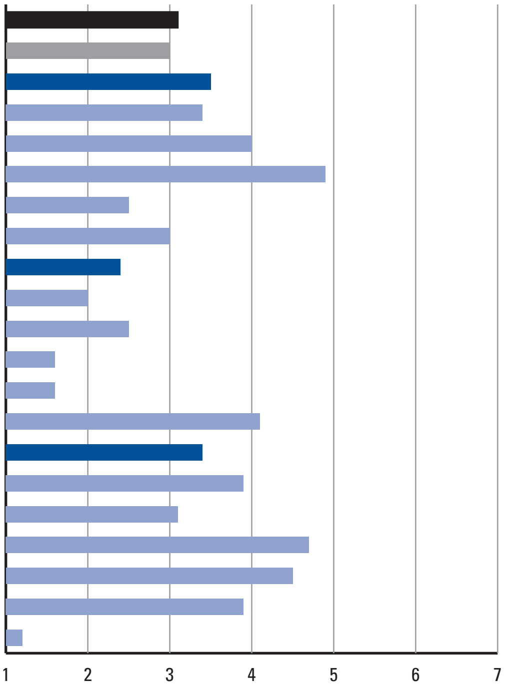
International tourist arrivals (thousands), 2006	185
International tourism receipts (US$ millions), 2004	158



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**125**	**3.1**
2008 Index	126	3.0
T&T regulatory framework	**126**	**3.5**
Policy rules and regulations	120	3.4
Environmental sustainability	110	4.0
Safety and security	80	4.9
Health and hygiene	112	2.5
Prioritization of Travel & Tourism	125	3.0
T&T business environment and infrastructure	**132**	**2.4**
Air transport infrastructure	126	2.0
Ground transport infrastructure	114	2.5
Tourism infrastructure	114	1.6
ICT infrastructure	124	1.6
Price competitiveness in the T&T industry	104	4.1
T&T human, cultural, and natural resources	**115**	**3.4**
Human resources	123	3.9
Education and training	125	3.1
Availability of qualified labor	121	4.7
Affinity for Travel & Tourism	97	4.5
Natural resources	42	3.9
Cultural resources	129	1.2



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Cameroon

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

1st pillar: Policy rules and regulations

	INDICATOR	RANK/133	
1.01	Prevalence of foreign ownership	59	⬜
1.02	Property rights	105	⬜
1.03	Business impact of rules on FDI	104	⬜
1.04	Visa requirements*	126	⬜
1.05	Openness of bilateral Air Service Agreements*	62	⬜
1.06	Transparency of government policymaking	53	⬜
1.07	Time required to start a business*	96	⬜
1.08	Cost to start a business*	123	⬜

2nd pillar: Environmental sustainability

	INDICATOR	RANK/133	
2.01	Stringency of environmental regulation	115	⬜
2.02	Enforcement of environmental regulation	112	⬜
2.03	Sustainability of T&T industry development	108	⬜
2.04	Carbon dioxide emissions*	15	🟦
2.05	Particulate matter concentration*	98	⬜
2.06	Threatened species*	105	⬜
2.07	Environmental treaty ratification*	81	⬜

3rd pillar: Safety and security

	INDICATOR	RANK/133	
3.01	Business costs of terrorism	63	⬜
3.02	Reliability of police services	68	⬜
3.03	Business costs of crime and violence	98	⬜
3.04	Road traffic accidents*	93	⬜

4th pillar: Health and hygiene

	INDICATOR	RANK/133	
4.01	Physician density*	111	⬜
4.02	Access to improved sanitation*	99	⬜
4.03	Access to improved drinking water*	113	⬜
4.04	Hospital beds*	92	⬜

5th pillar: Prioritization of Travel & Tourism

	INDICATOR	RANK/133	
5.01	Government prioritization of the T&T industry	122	⬜
5.02	T&T government expenditure*	103	⬜
5.03	Effectiveness of marketing and branding	118	⬜
5.04	T&T fair attendance*	98	⬜

6th pillar: Air transport infrastructure

	INDICATOR	RANK/133	
6.01	Quality of air transport infrastructure	125	⬜
6.02	Available seat kilometers, domestic*	89	⬜
6.03	Available seat kilometers, international*	99	⬜
6.04	Departures per 1,000 population*	101	⬜
6.05	Airport density*	115	⬜
6.06	Number of operating airlines*	99	⬜
6.07	International air transport network	114	⬜

7th pillar: Ground transport infrastructure

	INDICATOR	RANK/133	
7.01	Quality of roads	113	⬜
7.02	Quality of railroad infrastructure	71	⬜
7.03	Quality of port infrastructure	114	⬜
7.04	Quality of ground transport network	97	⬜
7.05	Road density*	103	⬜

8th pillar: Tourism infrastructure

	INDICATOR	RANK/133	
8.01	Hotel rooms*	88	⬜
8.02	Presence of major car rental companies*	95	⬜
8.03	ATMs accepting Visa cards*	121	⬜

9th pillar: ICT infrastructure

	INDICATOR	RANK/133	
9.01	Extent of business Internet use	130	⬜
9.02	Internet users*	117	⬜
9.03	Telephone lines*	121	⬜
9.04	Broadband Internet subscribers*	122	⬜
9.05	Mobile telephone subscribers*	113	⬜

10th pillar: Price competitiveness in the T&T industry

	INDICATOR	RANK/133	
10.01	Ticket taxes and airport charges*	124	⬜
10.02	Purchasing power parity*	55	⬜
10.03	Extent and effect of taxation	115	⬜
10.04	Fuel price levels*	86	⬜
10.05	Hotel price index*	65	⬜

11th pillar: Human resources

	INDICATOR	RANK/133	
11.01	Primary education enrollment*	n/a	
11.02	Secondary education enrollment*	127	⬜
11.03	Quality of the educational system	85	⬜
11.04	Local availability of research and training services	94	⬜
11.05	Extent of staff training	104	⬜
11.06	Hiring and firing practices	56	⬜
11.07	Ease of hiring foreign labor	45	🟦
11.08	HIV prevalence*	122	⬜
11.09	Business impact of HIV/AIDS	114	⬜
11.10	Life expectancy*	120	⬜

12th pillar: Affinity for Travel & Tourism

	INDICATOR	RANK/133	
12.01	Tourism openness*	72	⬜
12.02	Attitude of population toward foreign visitors	110	⬜
12.03	Extension of business trips recommended	96	⬜

13th pillar: Natural resources

	INDICATOR	RANK/133	
13.01	Number of World Heritage natural sites*	40	🟦
13.02	Protected areas*	61	⬜
13.03	Quality of the natural environment	95	⬜
13.04	Total known species*	15	🟦

14th pillar: Cultural resources

	INDICATOR	RANK/133	
14.01	Number of World Heritage cultural sites*	116	⬜
14.02	Sports stadiums*	93	⬜
14.03	Number of international fairs and exhibitions*	83	⬜
14.04	Creative industries exports*	96	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Canada

Key indicators

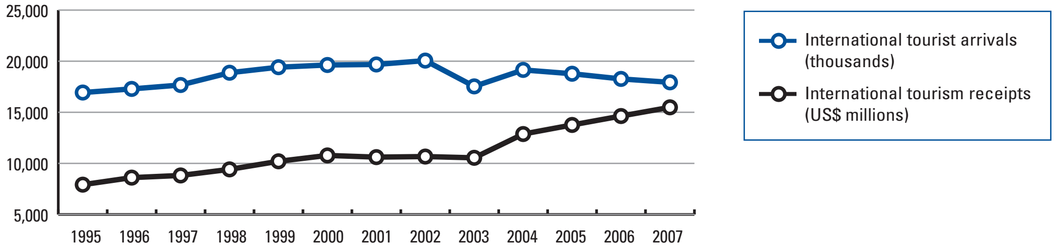
Population (millions), 2007	32.9
Surface area (1,000 square kilometers)	9,984.7
Gross domestic product (US$ billions), 2007	1,436.1
Gross domestic product (PPP, US$) per capita, 2007	38,613.6
Real GDP growth (percent), 2007	2.7
Environmental Performance Index, 2008 (out of 149 countries)	12

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	45,780	2.9	2.1
Employment (1,000 jobs)	582	3.4	0.0
T&T economy, 2008 estimates			
GDP (US$ millions)	154,631	9.7	3.1
Employment (1,000 jobs)	1,747	10.2	0.5

Source: World Travel & Tourism Council, TSA Research 2008

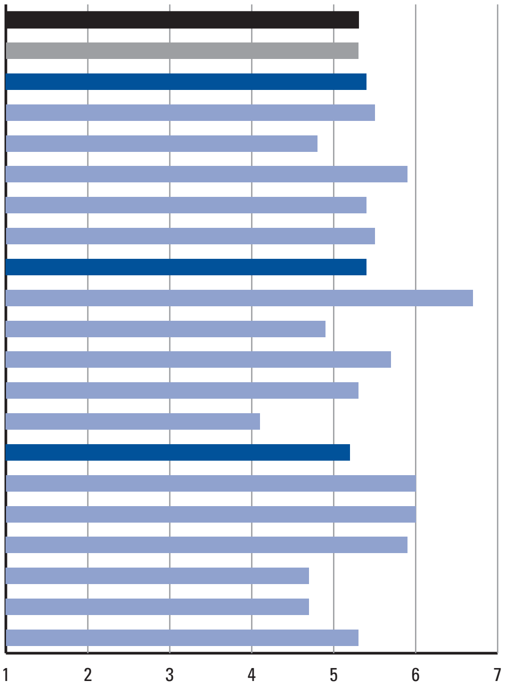
International tourist arrivals (thousands), 2007	17,931
International tourism receipts (US$ millions), 2007	15,486



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**5**	**5.3**
2008 Index	9	5.3
T&T regulatory framework	**23**	**5.4**
Policy rules and regulations	5	5.5
Environmental sustainability	46	4.8
Safety and security	29	5.9
Health and hygiene	51	5.4
Prioritization of Travel & Tourism	17	5.5
T&T business environment and infrastructure	**4**	**5.4**
Air transport infrastructure	1	6.7
Ground transport infrastructure	24	4.9
Tourism infrastructure	20	5.7
ICT infrastructure	13	5.3
Price competitiveness in the T&T industry	106	4.1
T&T human, cultural, and natural resources	**10**	**5.2**
Human resources	6	6.0
Education and training	7	6.0
Availability of qualified labor	11	5.9
Affinity for Travel & Tourism	67	4.7
Natural resources	17	4.7
Cultural resources	18	5.3



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Canada

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	34	⬜
1.02	Property rights	8	🟦
1.03	Business impact of rules on FDI	45	⬜
1.04	Visa requirements*	72	⬜
1.05	Openness of bilateral Air Service Agreements*	10	🟦
1.06	Transparency of government policymaking	16	⬜
1.07	Time required to start a business*	6	🟦
1.08	Cost to start a business*	5	🟦
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	20	⬜
2.02	Enforcement of environmental regulation	17	⬜
2.03	Sustainability of T&T industry development	31	⬜
2.04	Carbon dioxide emissions*	121	⬜
2.05	Particulate matter concentration*	18	⬜
2.06	Threatened species*	50	⬜
2.07	Environmental treaty ratification*	52	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	73	⬜
3.02	Reliability of police services	9	🟦
3.03	Business costs of crime and violence	41	⬜
3.04	Road traffic accidents*	78	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	59	⬜
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	51	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	37	⬜
5.02	T&T government expenditure*	47	⬜
5.03	Effectiveness of marketing and branding	30	⬜
5.04	T&T fair attendance*	3	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	17	⬜
6.02	Available seat kilometers, domestic*	7	🟦
6.03	Available seat kilometers, international*	13	⬜
6.04	Departures per 1,000 population*	12	⬜
6.05	Airport density*	3	🟦
6.06	Number of operating airlines*	7	🟦
6.07	International air transport network	8	🟦
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	10	🟦
7.02	Quality of railroad infrastructure	15	⬜
7.03	Quality of port infrastructure	14	⬜
7.04	Quality of ground transport network	12	⬜
7.05	Road density*	88	⬜
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	18	⬜
8.02	Presence of major car rental companies*	23	⬜
8.03	ATMs accepting Visa cards*	17	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	8	🟦
9.02	Internet users*	4	🟦
9.03	Telephone lines*	8	🟦
9.04	Broadband Internet subscribers*	9	🟦
9.05	Mobile telephone subscribers*	84	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	98	⬜
10.02	Purchasing power parity*	115	⬜
10.03	Extent and effect of taxation	87	⬜
10.04	Fuel price levels*	56	⬜
10.05	Hotel price index*	60	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	6	🟦
11.02	Secondary education enrollment*	6	🟦
11.03	Quality of the educational system	8	🟦
11.04	Local availability of research and training services	10	🟦
11.05	Extent of staff training	19	⬜
11.06	Hiring and firing practices	30	⬜
11.07	Ease of hiring foreign labor	82	⬜
11.08	HIV prevalence*	73	⬜
11.09	Business impact of HIV/AIDS	38	⬜
11.10	Life expectancy*	5	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	100	⬜
12.02	Attitude of population toward foreign visitors	14	⬜
12.03	Extension of business trips recommended	46	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	4	🟦
13.02	Protected areas*	81	⬜
13.03	Quality of the natural environment	15	⬜
13.04	Total known species*	43	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	33	⬜
14.02	Sports stadiums*	39	⬜
14.03	Number of international fairs and exhibitions*	13	⬜
14.04	Creative industries exports*	8	🟦

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Chad

Key indicators

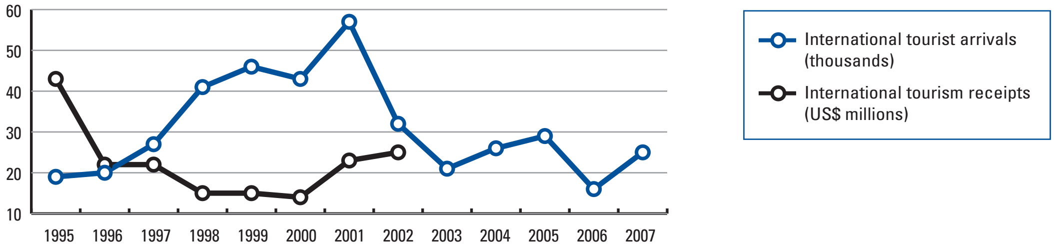
Population (millions), 2007	10.3
Surface area (1,000 square kilometers)	1,284.0
Gross domestic product (US$ billions), 2007	7.0
Gross domestic product (PPP, US$) per capita, 2007	1,668.7
Real GDP growth (percent), 2007	0.2
Environmental Performance Index, 2008 (out of 149 countries)	143

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	88	1.0	5.3
Employment (1,000 jobs)	14	0.8	2.2
T&T economy, 2008 estimates			
GDP (US$ millions)	644	7.6	5.7
Employment (1,000 jobs)	109	6.2	2.6

Source: World Travel & Tourism Council, TSA Research 2008

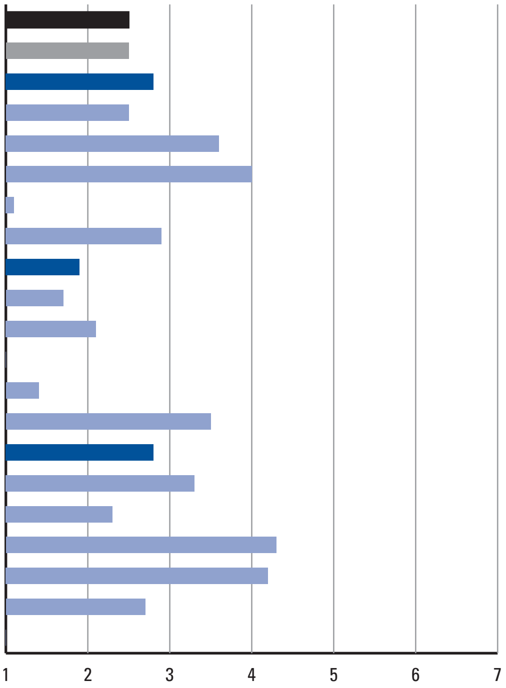
International tourist arrivals (thousands), 2007	25
International tourism receipts (US$ millions), 2002	25



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**133**	**2.5**
2008 Index	130	2.5
T&T regulatory framework	**133**	**2.8**
Policy rules and regulations	132	2.5
Environmental sustainability	128	3.6
Safety and security	115	4.0
Health and hygiene	132	1.1
Prioritization of Travel & Tourism	127	2.9
T&T business environment and infrastructure	**133**	**1.9**
Air transport infrastructure	131	1.7
Ground transport infrastructure	131	2.1
Tourism infrastructure	131	1.0
ICT infrastructure	133	1.4
Price competitiveness in the T&T industry	125	3.5
T&T human, cultural, and natural resources	**132**	**2.8**
Human resources	132	3.3
Education and training	133	2.3
Availability of qualified labor	124	4.3
Affinity for Travel & Tourism	120	4.2
Natural resources	99	2.7
Cultural resources	132	1.0



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Chad

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ◻ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	118	◻
1.02	Property rights	130	◻
1.03	Business impact of rules on FDI	124	◻
1.04	Visa requirements*	115	◻
1.05	Openness of bilateral Air Service Agreements*	70	◻
1.06	Transparency of government policymaking	116	◻
1.07	Time required to start a business*	121	◻
1.08	Cost to start a business*	125	◻
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	133	◻
2.02	Enforcement of environmental regulation	129	◻
2.03	Sustainability of T&T industry development	107	◻
2.04	Carbon dioxide emissions*	1	🟦
2.05	Particulate matter concentration*	124	◻
2.06	Threatened species*	38	🟦
2.07	Environmental treaty ratification*	115	◻
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	122	◻
3.02	Reliability of police services	126	◻
3.03	Business costs of crime and violence	119	◻
3.04	Road traffic accidents*	81	◻
	4th pillar: Health and hygiene		
4.01	Physician density*	126	◻
4.02	Access to improved sanitation*	126	◻
4.03	Access to improved drinking water*	123	◻
4.04	Hospital beds*	122	◻
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	120	◻
5.02	T&T government expenditure*	51	◻
5.03	Effectiveness of marketing and branding	123	◻
5.04	T&T fair attendance*	126	◻
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	129	◻
6.02	Available seat kilometers, domestic*	100	◻
6.03	Available seat kilometers, international*	125	◻
6.04	Departures per 1,000 population*	120	◻
6.05	Airport density*	128	◻
6.06	Number of operating airlines*	130	◻
6.07	International air transport network	128	◻
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	131	◻
7.02	Quality of railroad infrastructure	n/a	
7.03	Quality of port infrastructure	117	◻
7.04	Quality of ground transport network	128	◻
7.05	Road density*	128	◻

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	122	◻
8.02	Presence of major car rental companies*	122	◻
8.03	ATMs accepting Visa cards*	124	◻
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	132	◻
9.02	Internet users*	127	◻
9.03	Telephone lines*	133	◻
9.04	Broadband Internet subscribers*	127	◻
9.05	Mobile telephone subscribers*	128	◻
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	131	◻
10.02	Purchasing power parity*	25	🟦
10.03	Extent and effect of taxation	117	◻
10.04	Fuel price levels*	97	◻
10.05	Hotel price index*	58	◻
	11th pillar: Human resources		
11.01	Primary education enrollment*	127	◻
11.02	Secondary education enrollment*	130	◻
11.03	Quality of the educational system	127	◻
11.04	Local availability of research and training services	127	◻
11.05	Extent of staff training	133	◻
11.06	Hiring and firing practices	88	◻
11.07	Ease of hiring foreign labor	97	◻
11.08	HIV prevalence*	120	◻
11.09	Business impact of HIV/AIDS	125	◻
11.10	Life expectancy*	129	◻
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	64	◻
12.02	Attitude of population toward foreign visitors	118	◻
12.03	Extension of business trips recommended	129	◻
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	◻
13.02	Protected areas*	66	◻
13.03	Quality of the natural environment	115	◻
13.04	Total known species*	53	◻
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	116	◻
14.02	Sports stadiums*	127	◻
14.03	Number of international fairs and exhibitions*	n/a	
14.04	Creative industries exports*	n/a	

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Chile

Key indicators

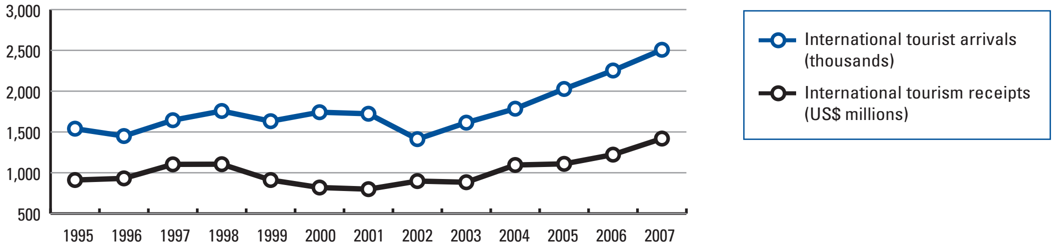
Population (millions), 2007	16.6
Surface area (1,000 square kilometers)	756.6
Gross domestic product (US$ billions), 2007	163.9
Gross domestic product (PPP, US$) per capita, 2007	13,921.2
Real GDP growth (percent), 2007	5.1
Environmental Performance Index, 2008 (out of 149 countries)	29

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	3,079	1.7	4.9
Employment (1,000 jobs)	128	2.0	2.2
T&T economy, 2008 estimates			
GDP (US$ millions)	8,206	4.5	4.5
Employment (1,000 jobs)	307	4.7	1.9

Source: World Travel & Tourism Council, TSA Research 2008

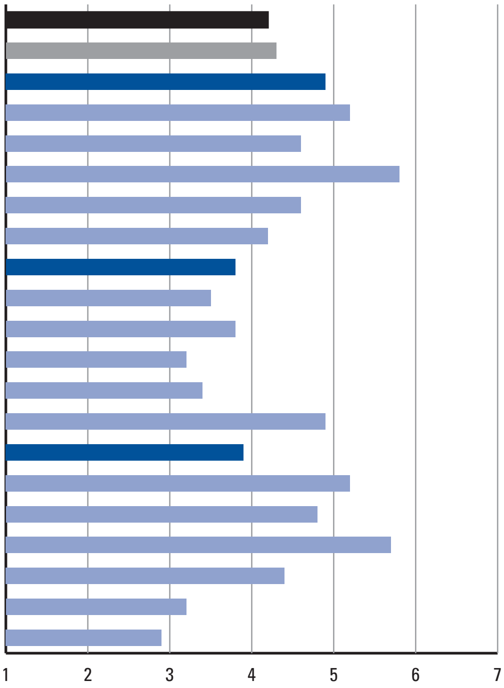
International tourist arrivals (thousands), 2007	2,507
International tourism receipts (US$ millions), 2007	1,419



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**57**	**4.2**
2008 Index	51	4.3
T&T regulatory framework	**49**	**4.9**
Policy rules and regulations	19	5.2
Environmental sustainability	64	4.6
Safety and security	38	5.8
Health and hygiene	66	4.6
Prioritization of Travel & Tourism	77	4.2
T&T business environment and infrastructure	**58**	**3.8**
Air transport infrastructure	51	3.5
Ground transport infrastructure	57	3.8
Tourism infrastructure	69	3.2
ICT infrastructure	49	3.4
Price competitiveness in the T&T industry	53	4.9
T&T human, cultural, and natural resources	**64**	**3.9**
Human resources	47	5.2
Education and training	63	4.8
Availability of qualified labor	25	5.7
Affinity for Travel & Tourism	111	4.4
Natural resources	63	3.2
Cultural resources	48	2.9



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Chile

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	11	🟦
1.02	Property rights	40	🟦
1.03	Business impact of rules on FDI	19	🟦
1.04	Visa requirements*	20	🟦
1.05	Openness of bilateral Air Service Agreements*	12	🟦
1.06	Transparency of government policymaking	26	🟦
1.07	Time required to start a business*	76	⬜
1.08	Cost to start a business*	51	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	39	🟦
2.02	Enforcement of environmental regulation	24	🟦
2.03	Sustainability of T&T industry development	95	⬜
2.04	Carbon dioxide emissions*	67	⬜
2.05	Particulate matter concentration*	88	⬜
2.06	Threatened species*	117	⬜
2.07	Environmental treaty ratification*	21	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	27	🟦
3.02	Reliability of police services	16	🟦
3.03	Business costs of crime and violence	84	⬜
3.04	Road traffic accidents*	75	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	87	⬜
4.02	Access to improved sanitation*	48	🟦
4.03	Access to improved drinking water*	62	⬜
4.04	Hospital beds*	75	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	109	⬜
5.02	T&T government expenditure*	46	🟦
5.03	Effectiveness of marketing and branding	98	⬜
5.04	T&T fair attendance*	41	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	24	🟦
6.02	Available seat kilometers, domestic*	25	🟦
6.03	Available seat kilometers, international*	42	🟦
6.04	Departures per 1,000 population*	46	🟦
6.05	Airport density*	42	🟦
6.06	Number of operating airlines*	70	⬜
6.07	International air transport network	20	🟦
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	22	🟦
7.02	Quality of railroad infrastructure	73	⬜
7.03	Quality of port infrastructure	37	🟦
7.04	Quality of ground transport network	35	🟦
7.05	Road density*	102	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	58	⬜
8.02	Presence of major car rental companies*	56	⬜
8.03	ATMs accepting Visa cards*	62	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	27	🟦
9.02	Internet users*	46	🟦
9.03	Telephone lines*	64	⬜
9.04	Broadband Internet subscribers*	43	🟦
9.05	Mobile telephone subscribers*	59	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	48	🟦
10.02	Purchasing power parity*	95	⬜
10.03	Extent and effect of taxation	45	🟦
10.04	Fuel price levels*	66	⬜
10.05	Hotel price index*	26	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	99	⬜
11.02	Secondary education enrollment*	54	⬜
11.03	Quality of the educational system	86	⬜
11.04	Local availability of research and training services	46	🟦
11.05	Extent of staff training	48	🟦
11.06	Hiring and firing practices	74	⬜
11.07	Ease of hiring foreign labor	43	🟦
11.08	HIV prevalence*	67	⬜
11.09	Business impact of HIV/AIDS	43	🟦
11.10	Life expectancy*	29	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	115	⬜
12.02	Attitude of population toward foreign visitors	82	⬜
12.03	Extension of business trips recommended	84	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	51	⬜
13.03	Quality of the natural environment	52	⬜
13.04	Total known species*	55	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	45	🟦
14.02	Sports stadiums*	44	🟦
14.03	Number of international fairs and exhibitions*	37	🟦
14.04	Creative industries exports*	55	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

China

Key indicators

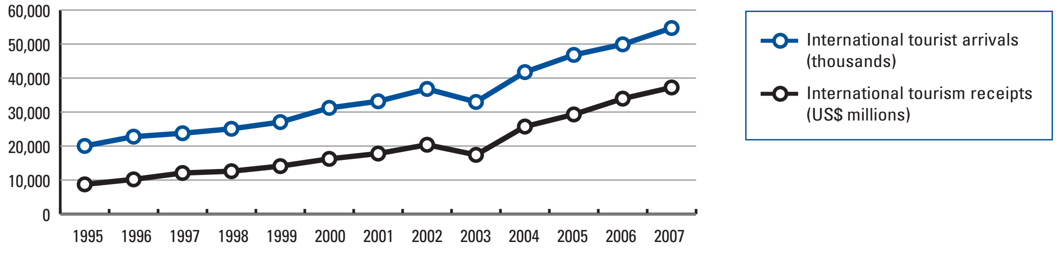
Population (millions), 2007	1,331.4
Surface area (1,000 square kilometers)	9,598.1
Gross domestic product (US$ billions), 2007	3,280.2
Gross domestic product (PPP, US$) per capita, 2007	5,325.2
Real GDP growth (percent), 2007	11.9
Environmental Performance Index, 2008 (out of 149 countries)	105

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	109,000	2.6	7.6
Employment (1,000 jobs)	19,138	2.5	2.5
T&T economy, 2008 estimates			
GDP (US$ millions)	508,589	12.2	8.8
Employment (1,000 jobs)	74,498	9.6	2.9

Source: World Travel & Tourism Council, TSA Research 2008

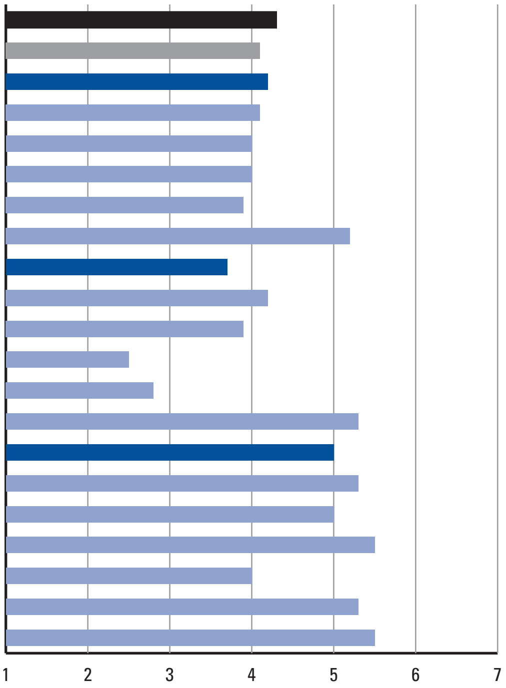
International tourist arrivals (thousands), 2007	54,720
International tourism receipts (US$ millions), 2007	37,233



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**47**	**4.3**
2008 Index	62	4.1
T&T regulatory framework	**88**	**4.2**
Policy rules and regulations	87	4.1
Environmental sustainability	105	4.0
Safety and security	116	4.0
Health and hygiene	91	3.9
Prioritization of Travel & Tourism	28	5.2
T&T business environment and infrastructure	**59**	**3.7**
Air transport infrastructure	34	4.2
Ground transport infrastructure	55	3.9
Tourism infrastructure	80	2.5
ICT infrastructure	68	2.8
Price competitiveness in the T&T industry	20	5.3
T&T human, cultural, and natural resources	**12**	**5.0**
Human resources	43	5.3
Education and training	46	5.0
Availability of qualified labor	62	5.5
Affinity for Travel & Tourism	127	4.0
Natural resources	7	5.3
Cultural resources	15	5.5



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

China

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	105	⬜
1.02	Property rights	54	⬜
1.03	Business impact of rules on FDI	55	⬜
1.04	Visa requirements*	128	⬜
1.05	Openness of bilateral Air Service Agreements*	112	⬜
1.06	Transparency of government policymaking	46	🟦
1.07	Time required to start a business*	100	⬜
1.08	Cost to start a business*	57	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	71	⬜
2.02	Enforcement of environmental regulation	63	⬜
2.03	Sustainability of T&T industry development	59	⬜
2.04	Carbon dioxide emissions*	66	⬜
2.05	Particulate matter concentration*	104	⬜
2.06	Threatened species*	119	⬜
2.07	Environmental treaty ratification*	52	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	89	⬜
3.02	Reliability of police services	50	⬜
3.03	Business costs of crime and violence	56	⬜
3.04	Road traffic accidents*	128	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	70	⬜
4.02	Access to improved sanitation*	91	⬜
4.03	Access to improved drinking water*	87	⬜
4.04	Hospital beds*	78	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	74	⬜
5.02	T&T government expenditure*	50	⬜
5.03	Effectiveness of marketing and branding	60	⬜
5.04	T&T fair attendance*	3	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	74	⬜
6.02	Available seat kilometers, domestic*	2	🟦
6.03	Available seat kilometers, international*	7	🟦
6.04	Departures per 1,000 population*	88	⬜
6.05	Airport density*	125	⬜
6.06	Number of operating airlines*	10	🟦
6.07	International air transport network	74	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	51	⬜
7.02	Quality of railroad infrastructure	28	🟦
7.03	Quality of port infrastructure	54	⬜
7.04	Quality of ground transport network	33	🟦
7.05	Road density*	78	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	98	⬜
8.02	Presence of major car rental companies*	56	⬜
8.03	ATMs accepting Visa cards*	90	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	54	⬜
9.02	Internet users*	78	⬜
9.03	Telephone lines*	50	⬜
9.04	Broadband Internet subscribers*	50	⬜
9.05	Mobile telephone subscribers*	94	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	21	🟦
10.02	Purchasing power parity*	36	🟦
10.03	Extent and effect of taxation	36	🟦
10.04	Fuel price levels*	32	🟦
10.05	Hotel price index*	41	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	5	🟦
11.02	Secondary education enrollment*	92	⬜
11.03	Quality of the educational system	55	⬜
11.04	Local availability of research and training services	39	🟦
11.05	Extent of staff training	42	🟦
11.06	Hiring and firing practices	53	⬜
11.07	Ease of hiring foreign labor	44	🟦
11.08	HIV prevalence*	22	🟦
11.09	Business impact of HIV/AIDS	48	⬜
11.10	Life expectancy*	55	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	113	⬜
12.02	Attitude of population toward foreign visitors	121	⬜
12.03	Extension of business trips recommended	122	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	3	🟦
13.02	Protected areas*	48	⬜
13.03	Quality of the natural environment	127	⬜
13.04	Total known species*	6	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	3	🟦
14.02	Sports stadiums*	126	⬜
14.03	Number of international fairs and exhibitions*	10	🟦
14.04	Creative industries exports*	1	🟦

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Colombia

Key indicators

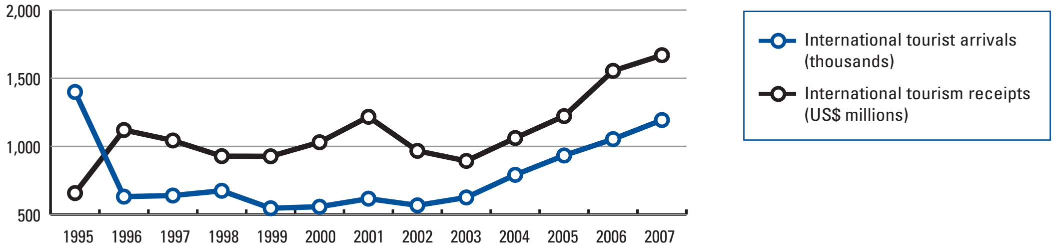
Population (millions), 2007	47.0
Surface area (1,000 square kilometers)	1,141.8
Gross domestic product (US$ billions), 2007	202.6
Gross domestic product (PPP, US$) per capita, 2007	7,968.2
Real GDP growth (percent), 2007	7.7
Environmental Performance Index, 2008 (out of 149 countries)	9

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	3,524	1.9	3.5
Employment (1,000 jobs)	386	1.8	2.1
T&T economy, 2008 estimates			
GDP (US$ millions)	10,753	5.9	4.0
Employment (1,000 jobs)	1,121	5.3	2.6

Source: World Travel & Tourism Council, TSA Research 2008

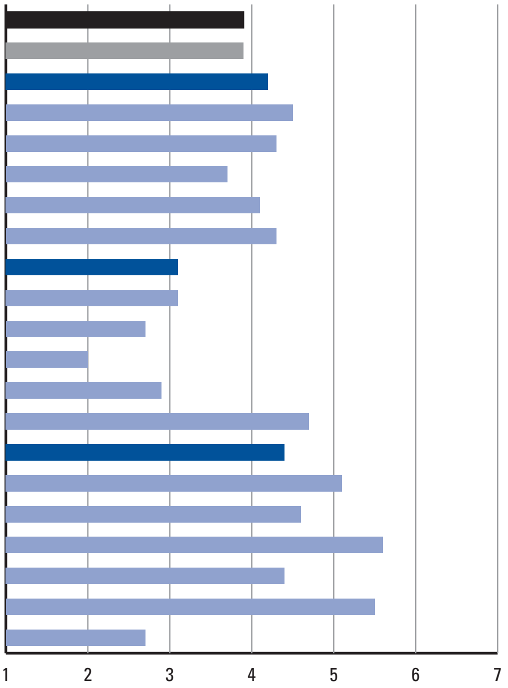
International tourist arrivals (thousands), 2007	1,193
International tourism receipts (US$ millions), 2007	1,669



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**72**	**3.9**
2008 Index	71	3.9
T&T regulatory framework	**91**	**4.2**
Policy rules and regulations	60	4.5
Environmental sustainability	84	4.3
Safety and security	125	3.7
Health and hygiene	86	4.1
Prioritization of Travel & Tourism	67	4.3
T&T business environment and infrastructure	**88**	**3.1**
Air transport infrastructure	65	3.1
Ground transport infrastructure	108	2.7
Tourism infrastructure	93	2.0
ICT infrastructure	65	2.9
Price competitiveness in the T&T industry	66	4.7
T&T human, cultural, and natural resources	**34**	**4.4**
Human resources	64	5.1
Education and training	72	4.6
Availability of qualified labor	37	5.6
Affinity for Travel & Tourism	104	4.4
Natural resources	5	5.5
Cultural resources	56	2.7



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Colombia

The Travel & Tourism Competitiveness Index in detail

■ Competitive **Advantage** □ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	86	□
1.02	Property rights	73	□
1.03	Business impact of rules on FDI	80	□
1.04	Visa requirements*	14	■
1.05	Openness of bilateral Air Service Agreements*	41	■
1.06	Transparency of government policymaking	48	■
1.07	Time required to start a business*	95	□
1.08	Cost to start a business*	72	□
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	66	□
2.02	Enforcement of environmental regulation	76	□
2.03	Sustainability of T&T industry development	53	□
2.04	Carbon dioxide emissions*	42	■
2.05	Particulate matter concentration*	32	■
2.06	Threatened species*	120	□
2.07	Environmental treaty ratification*	121	□
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	133	□
3.02	Reliability of police services	77	□
3.03	Business costs of crime and violence	118	□
3.04	Road traffic accidents*	109	□
	4th pillar: Health and hygiene		
4.01	Physician density*	73	□
4.02	Access to improved sanitation*	80	□
4.03	Access to improved drinking water*	68	□
4.04	Hospital beds*	99	□
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	67	□
5.02	T&T government expenditure*	99	□
5.03	Effectiveness of marketing and branding	54	□
5.04	T&T fair attendance*	41	■
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	64	□
6.02	Available seat kilometers, domestic*	27	■
6.03	Available seat kilometers, international*	51	□
6.04	Departures per 1,000 population*	55	□
6.05	Airport density*	41	■
6.06	Number of operating airlines*	68	□
6.07	International air transport network	72	□
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	91	□
7.02	Quality of railroad infrastructure	99	□
7.03	Quality of port infrastructure	108	□
7.04	Quality of ground transport network	62	□
7.05	Road density*	86	□

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	83	□
8.02	Presence of major car rental companies*	95	□
8.03	ATMs accepting Visa cards*	65	□
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	61	□
9.02	Internet users*	56	□
9.03	Telephone lines*	72	□
9.04	Broadband Internet subscribers*	63	□
9.05	Mobile telephone subscribers*	74	□
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	117	□
10.02	Purchasing power parity*	58	□
10.03	Extent and effect of taxation	103	□
10.04	Fuel price levels*	28	■
10.05	Hotel price index*	33	■
	11th pillar: Human resources		
11.01	Primary education enrollment*	95	□
11.02	Secondary education enrollment*	83	□
11.03	Quality of the educational system	61	□
11.04	Local availability of research and training services	61	□
11.05	Extent of staff training	91	□
11.06	Hiring and firing practices	73	□
11.07	Ease of hiring foreign labor	33	■
11.08	HIV prevalence*	85	□
11.09	Business impact of HIV/AIDS	93	□
11.10	Life expectancy*	50	■
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	117	□
12.02	Attitude of population toward foreign visitors	57	□
12.03	Extension of business trips recommended	85	□
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	23	■
13.02	Protected areas*	12	■
13.03	Quality of the natural environment	61	□
13.04	Total known species*	2	■
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	33	■
14.02	Sports stadiums*	78	□
14.03	Number of international fairs and exhibitions*	42	■
14.04	Creative industries exports*	40	■

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Costa Rica

Key indicators

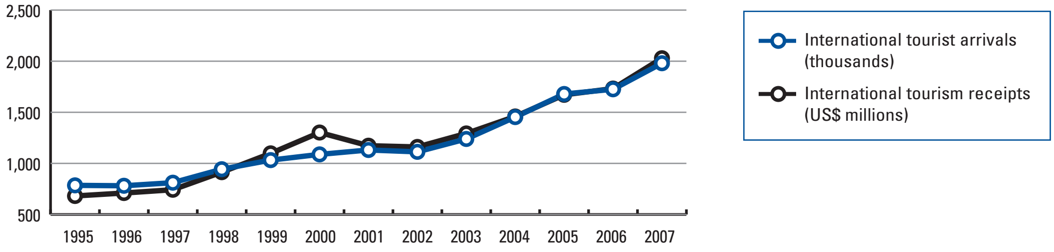
Population (millions), 2007	4.5
Surface area (1,000 square kilometers)	51.1
Gross domestic product (US$ billions), 2007	26.2
Gross domestic product (PPP, US$) per capita, 2007	10,357.9
Real GDP growth (percent), 2007	7.3
Environmental Performance Index, 2008 (out of 149 countries)	5

Travel & Tourism indicators

T&T industry, 2008 estimates		Percent of total	2009–2018 annual growth (%, forecast)
GDP (US$ millions)	1,466	5.3	4.7
Employment (1,000 jobs)	107	5.4	3.4
T&T economy, 2008 estimates			
GDP (US$ millions)	3,769	13.5	4.7
Employment (1,000 jobs)	258	13.1	3.4

Source: World Travel & Tourism Council, TSA Research 2008

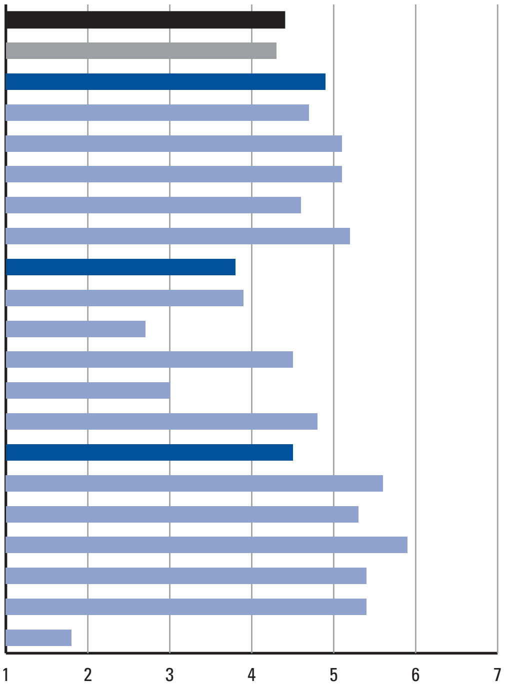
International tourist arrivals (thousands), 2007	1,980
International tourism receipts (US$ millions), 2007	2,029



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**42**	**4.4**
2008 Index	44	4.3
T&T regulatory framework	**48**	**4.9**
Policy rules and regulations	48	4.7
Environmental sustainability	27	5.1
Safety and security	72	5.1
Health and hygiene	65	4.6
Prioritization of Travel & Tourism	29	5.2
T&T business environment and infrastructure	**55**	**3.8**
Air transport infrastructure	42	3.9
Ground transport infrastructure	103	2.7
Tourism infrastructure	33	4.5
ICT infrastructure	61	3.0
Price competitiveness in the T&T industry	57	4.8
T&T human, cultural, and natural resources	**31**	**4.5**
Human resources	24	5.6
Education and training	31	5.3
Availability of qualified labor	10	5.9
Affinity for Travel & Tourism	27	5.4
Natural resources	6	5.4
Cultural resources	89	1.8



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Costa Rica

The Travel & Tourism Competitiveness Index in detail

■ Competitive **Advantage** □ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	10	■
1.02	Property rights	71	□
1.03	Business impact of rules on FDI	17	■
1.04	Visa requirements*	12	■
1.05	Openness of bilateral Air Service Agreements*	9	■
1.06	Transparency of government policymaking	52	□
1.07	Time required to start a business*	115	□
1.08	Cost to start a business*	85	□
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	32	■
2.02	Enforcement of environmental regulation	34	■
2.03	Sustainability of T&T industry development	24	■
2.04	Carbon dioxide emissions*	46	□
2.05	Particulate matter concentration*	68	□
2.06	Threatened species*	93	□
2.07	Environmental treaty ratification*	52	□
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	59	□
3.02	Reliability of police services	84	□
3.03	Business costs of crime and violence	108	□
3.04	Road traffic accidents*	47	□
	4th pillar: Health and hygiene		
4.01	Physician density*	75	□
4.02	Access to improved sanitation*	44	□
4.03	Access to improved drinking water*	47	□
4.04	Hospital beds*	95	□
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	10	■
5.02	T&T government expenditure*	22	■
5.03	Effectiveness of marketing and branding	19	■
5.04	T&T fair attendance*	62	□
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	58	□
6.02	Available seat kilometers, domestic*	69	□
6.03	Available seat kilometers, international*	67	□
6.04	Departures per 1,000 population*	39	■
6.05	Airport density*	12	■
6.06	Number of operating airlines*	75	□
6.07	International air transport network	45	□
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	118	□
7.02	Quality of railroad infrastructure	113	□
7.03	Quality of port infrastructure	128	□
7.04	Quality of ground transport network	79	□
7.05	Road density*	40	■

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	29	■
8.02	Presence of major car rental companies*	23	■
8.03	ATMs accepting Visa cards*	46	□
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	72	□
9.02	Internet users*	45	□
9.03	Telephone lines*	38	■
9.04	Broadband Internet subscribers*	60	□
9.05	Mobile telephone subscribers*	104	□
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	59	□
10.02	Purchasing power parity*	56	□
10.03	Extent and effect of taxation	46	□
10.04	Fuel price levels*	42	□
10.05	Hotel price index*	89	□
	11th pillar: Human resources		
11.01	Primary education enrollment*	11	■
11.02	Secondary education enrollment*	71	□
11.03	Quality of the educational system	32	■
11.04	Local availability of research and training services	40	■
11.05	Extent of staff training	25	■
11.06	Hiring and firing practices	15	■
11.07	Ease of hiring foreign labor	52	□
11.08	HIV prevalence*	73	□
11.09	Business impact of HIV/AIDS	58	□
11.10	Life expectancy*	29	■
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	24	■
12.02	Attitude of population toward foreign visitors	31	■
12.03	Extension of business trips recommended	53	□
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	16	■
13.02	Protected areas*	21	■
13.03	Quality of the natural environment	19	■
13.04	Total known species*	19	■
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	97	□
14.02	Sports stadiums*	48	□
14.03	Number of international fairs and exhibitions*	66	□
14.04	Creative industries exports*	72	□

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Côte d'Ivoire

Key indicators

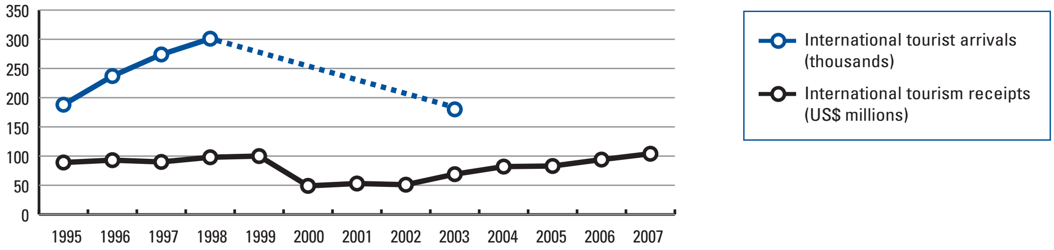
Population (millions), 2007	18.8
Surface area (1,000 square kilometers)	322.5
Gross domestic product (US$ billions), 2007	19.8
Gross domestic product (PPP, US$) per capita, 2007	1,736.8
Real GDP growth (percent), 2007	1.6
Environmental Performance Index, 2008 (out of 149 countries)	103

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	338	1.5	3.5
Employment (1,000 jobs)	55	1.3	1.5
T&T economy, 2008 estimates			
GDP (US$ millions)	983	4.4	4.2
Employment (1,000 jobs)	159	3.6	2.3

Source: World Travel & Tourism Council, TSA Research 2008

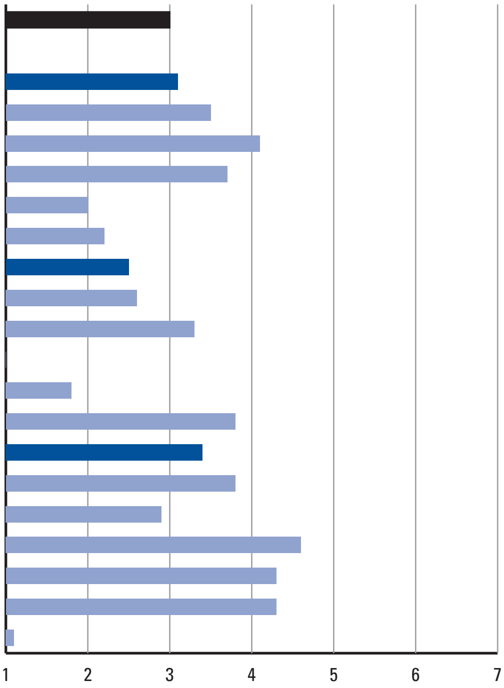
International tourist arrivals (thousands), 2003	180
International tourism receipts (US$ millions), 2007	104



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**130**	**3.0**
2008 Index	n/a	n/a
T&T regulatory framework	**131**	**3.1**
Policy rules and regulations	115	3.5
Environmental sustainability	102	4.1
Safety and security	124	3.7
Health and hygiene	119	2.0
Prioritization of Travel & Tourism	132	2.2
T&T business environment and infrastructure	**123**	**2.5**
Air transport infrastructure	88	2.6
Ground transport infrastructure	71	3.3
Tourism infrastructure	133	1.0
ICT infrastructure	113	1.8
Price competitiveness in the T&T industry	120	3.8
T&T human, cultural, and natural resources	**118**	**3.4**
Human resources	126	3.8
Education and training	129	2.9
Availability of qualified labor	122	4.6
Affinity for Travel & Tourism	116	4.3
Natural resources	32	4.3
Cultural resources	130	1.1



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Côte d’Ivoire

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	21	🟦
1.02	Property rights	113	⬜
1.03	Business impact of rules on FDI	39	🟦
1.04	Visa requirements*	105	⬜
1.05	Openness of bilateral Air Service Agreements*	98	⬜
1.06	Transparency of government policymaking	66	⬜
1.07	Time required to start a business*	100	⬜
1.08	Cost to start a business*	122	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	132	⬜
2.02	Enforcement of environmental regulation	132	⬜
2.03	Sustainability of T&T industry development	130	⬜
2.04	Carbon dioxide emissions*	17	🟦
2.05	Particulate matter concentration*	83	⬜
2.06	Threatened species*	74	⬜
2.07	Environmental treaty ratification*	34	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	111	⬜
3.02	Reliability of police services	120	⬜
3.03	Business costs of crime and violence	128	⬜
3.04	Road traffic accidents*	99	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	117	⬜
4.02	Access to improved sanitation*	120	⬜
4.03	Access to improved drinking water*	98	⬜
4.04	Hospital beds*	122	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	131	⬜
5.02	T&T government expenditure*	108	⬜
5.03	Effectiveness of marketing and branding	130	⬜
5.04	T&T fair attendance*	126	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	82	⬜
6.02	Available seat kilometers, domestic*	100	⬜
6.03	Available seat kilometers, international*	102	⬜
6.04	Departures per 1,000 population*	n/a	
6.05	Airport density*	131	⬜
6.06	Number of operating airlines*	86	⬜
6.07	International air transport network	67	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	58	⬜
7.02	Quality of railroad infrastructure	80	⬜
7.03	Quality of port infrastructure	40	🟦
7.04	Quality of ground transport network	76	⬜
7.05	Road density*	72	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	n/a	
8.02	Presence of major car rental companies*	122	⬜
8.03	ATMs accepting Visa cards*	n/a	
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	104	⬜
9.02	Internet users*	119	⬜
9.03	Telephone lines*	115	⬜
9.04	Broadband Internet subscribers*	107	⬜
9.05	Mobile telephone subscribers*	101	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	129	⬜
10.02	Purchasing power parity*	71	⬜
10.03	Extent and effect of taxation	84	⬜
10.04	Fuel price levels*	83	⬜
10.05	Hotel price index*	n/a	
	11th pillar: Human resources		
11.01	Primary education enrollment*	128	⬜
11.02	Secondary education enrollment*	124	⬜
11.03	Quality of the educational system	106	⬜
11.04	Local availability of research and training services	84	⬜
11.05	Extent of staff training	68	⬜
11.06	Hiring and firing practices	69	⬜
11.07	Ease of hiring foreign labor	95	⬜
11.08	HIV prevalence*	121	⬜
11.09	Business impact of HIV/AIDS	121	⬜
11.10	Life expectancy*	117	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	107	⬜
12.02	Attitude of population toward foreign visitors	101	⬜
12.03	Extension of business trips recommended	110	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	16	🟦
13.02	Protected areas*	26	🟦
13.03	Quality of the natural environment	133	⬜
13.04	Total known species*	31	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	116	⬜
14.02	Sports stadiums*	115	⬜
14.03	Number of international fairs and exhibitions*	117	⬜
14.04	Creative industries exports*	71	⬜

* Hard data

Note: For further details and explanation, please refer to the section “How to Read the Country/Economy Profiles” at the beginning of this chapter.

Croatia

Key indicators

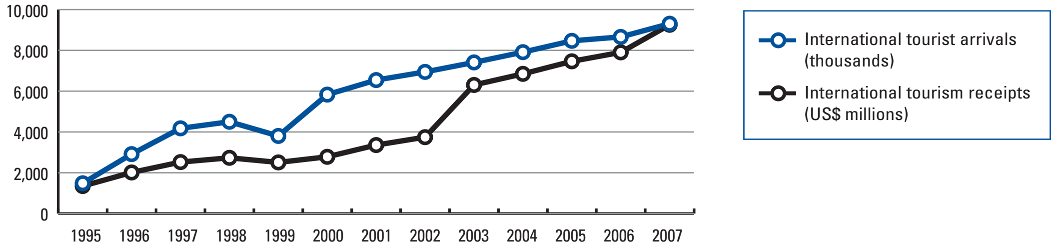
Population (millions), 2007	4.6
Surface area (1,000 square kilometers)	56.5
Gross domestic product (US$ billions), 2007	51.3
Gross domestic product (PPP, US$) per capita, 2007	15,532.2
Real GDP growth (percent), 2007	5.6
Environmental Performance Index, 2008 (out of 149 countries)	20

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	6,904	12.1	6.6
Employment (1,000 jobs)	159	13.6	2.5
T&T economy, 2008 estimates			
GDP (US$ millions)	14,557	25.5	7.1
Employment (1,000 jobs)	336	28.7	3.0

Source: World Travel & Tourism Council, TSA Research 2008

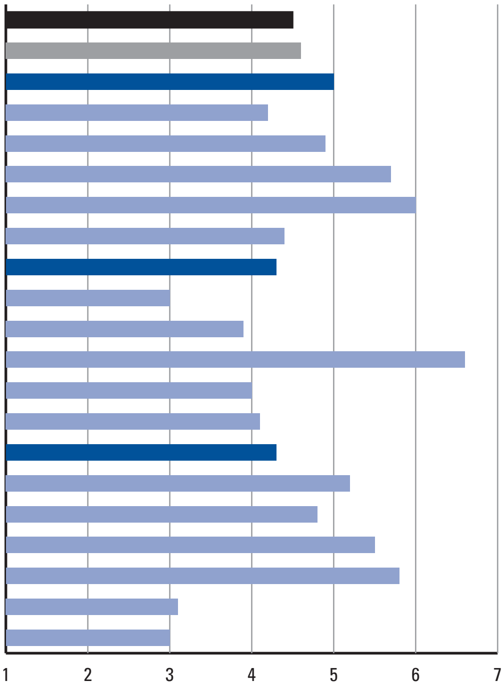
International tourist arrivals (thousands), 2007	9,307
International tourism receipts (US$ millions), 2007	9,254



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**34**	**4.5**
2008 Index	34	4.6
T&T regulatory framework	**43**	**5.0**
Policy rules and regulations	80	4.2
Environmental sustainability	39	4.9
Safety and security	42	5.7
Health and hygiene	33	6.0
Prioritization of Travel & Tourism	64	4.4
T&T business environment and infrastructure	**37**	**4.3**
Air transport infrastructure	69	3.0
Ground transport infrastructure	54	3.9
Tourism infrastructure	6	6.6
ICT infrastructure	38	4.0
Price competitiveness in the T&T industry	103	4.1
T&T human, cultural, and natural resources	**43**	**4.3**
Human resources	53	5.2
Education and training	58	4.8
Availability of qualified labor	60	5.5
Affinity for Travel & Tourism	9	5.8
Natural resources	69	3.1
Cultural resources	41	3.0



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Croatia

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	82	⬜
1.02	Property rights	84	⬜
1.03	Business impact of rules on FDI	117	⬜
1.04	Visa requirements*	36	⬜
1.05	Openness of bilateral Air Service Agreements*	46	⬜
1.06	Transparency of government policymaking	90	⬜
1.07	Time required to start a business*	100	⬜
1.08	Cost to start a business*	68	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	53	⬜
2.02	Enforcement of environmental regulation	61	⬜
2.03	Sustainability of T&T industry development	82	⬜
2.04	Carbon dioxide emissions*	77	⬜
2.05	Particulate matter concentration*	50	⬜
2.06	Threatened species*	69	⬜
2.07	Environmental treaty ratification*	34	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	39	⬜
3.02	Reliability of police services	53	⬜
3.03	Business costs of crime and violence	49	⬜
3.04	Road traffic accidents*	42	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	41	⬜
4.02	Access to improved sanitation*	34	⬜
4.03	Access to improved drinking water*	38	⬜
4.04	Hospital beds*	30	🟦
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	44	⬜
5.02	T&T government expenditure*	110	⬜
5.03	Effectiveness of marketing and branding	73	⬜
5.04	T&T fair attendance*	25	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	81	⬜
6.02	Available seat kilometers, domestic*	57	⬜
6.03	Available seat kilometers, international*	91	⬜
6.04	Departures per 1,000 population*	51	⬜
6.05	Airport density*	26	🟦
6.06	Number of operating airlines*	55	⬜
6.07	International air transport network	99	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	34	⬜
7.02	Quality of railroad infrastructure	45	⬜
7.03	Quality of port infrastructure	90	⬜
7.04	Quality of ground transport network	44	⬜
7.05	Road density*	51	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	11	🟦
8.02	Presence of major car rental companies*	1	🟦
8.03	ATMs accepting Visa cards*	19	🟦
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	66	⬜
9.02	Internet users*	35	⬜
9.03	Telephone lines*	31	🟦
9.04	Broadband Internet subscribers*	38	⬜
9.05	Mobile telephone subscribers*	27	🟦
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	75	⬜
10.02	Purchasing power parity*	99	⬜
10.03	Extent and effect of taxation	96	⬜
10.04	Fuel price levels*	100	⬜
10.05	Hotel price index*	75	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	82	⬜
11.02	Secondary education enrollment*	55	⬜
11.03	Quality of the educational system	66	⬜
11.04	Local availability of research and training services	47	⬜
11.05	Extent of staff training	64	⬜
11.06	Hiring and firing practices	68	⬜
11.07	Ease of hiring foreign labor	105	⬜
11.08	HIV prevalence*	1	🟦
11.09	Business impact of HIV/AIDS	6	🟦
11.10	Life expectancy*	40	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	6	🟦
12.02	Attitude of population toward foreign visitors	59	⬜
12.03	Extension of business trips recommended	123	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	40	⬜
13.02	Protected areas*	83	⬜
13.03	Quality of the natural environment	16	🟦
13.04	Total known species*	84	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	33	🟦
14.02	Sports stadiums*	32	🟦
14.03	Number of international fairs and exhibitions*	44	⬜
14.04	Creative industries exports*	45	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Cyprus

Key indicators

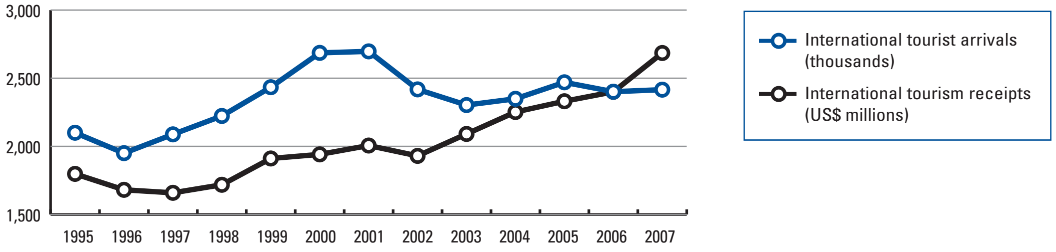
Population (millions), 2007	0.8
Surface area (1,000 square kilometers)	9.3
Gross domestic product (US$ billions), 2007	21.3
Gross domestic product (PPP, US$) per capita, 2007	27,170.7
Real GDP growth (percent), 2007	4.4
Environmental Performance Index, 2008 (out of 149 countries)	52

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	2,280	9.6	4.7
Employment (1,000 jobs)	55	13.5	1.3
T&T economy, 2008 estimates			
GDP (US$ millions)	5,077	21.4	4.5
Employment (1,000 jobs)	110	27.2	1.2

Source: World Travel & Tourism Council, TSA Research 2008

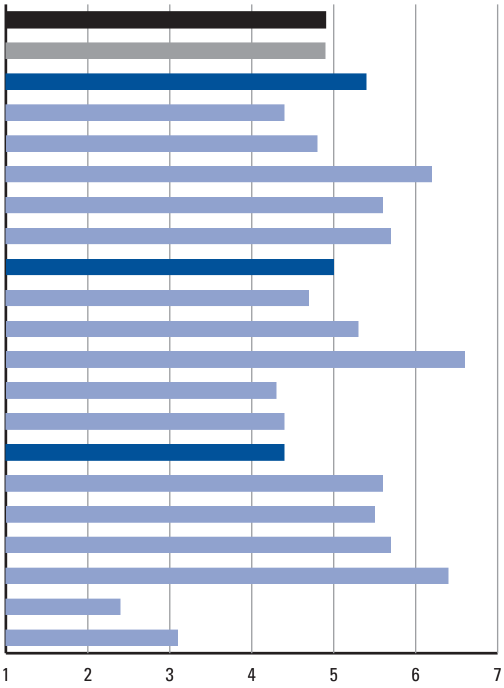
International tourist arrivals (thousands), 2007	2,416
International tourism receipts (US$ millions), 2007	2,685



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**21**	**4.9**
2008 Index	24	4.9
T&T regulatory framework	**25**	**5.4**
Policy rules and regulations	69	4.4
Environmental sustainability	43	4.8
Safety and security	12	6.2
Health and hygiene	45	5.6
Prioritization of Travel & Tourism	11	5.7
T&T business environment and infrastructure	**13**	**5.0**
Air transport infrastructure	21	4.7
Ground transport infrastructure	19	5.3
Tourism infrastructure	8	6.6
ICT infrastructure	32	4.3
Price competitiveness in the T&T industry	82	4.4
T&T human, cultural, and natural resources	**37**	**4.4**
Human resources	27	5.6
Education and training	22	5.5
Availability of qualified labor	28	5.7
Affinity for Travel & Tourism	5	6.4
Natural resources	111	2.4
Cultural resources	38	3.1



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Cyprus

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ▨ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	66	▨
1.02	Property rights	29	▨
1.03	Business impact of rules on FDI	32	▨
1.04	Visa requirements*	40	▨
1.05	Openness of bilateral Air Service Agreements*	118	▨
1.06	Transparency of government policymaking	32	▨
1.07	Time required to start a business*	n/a	
1.08	Cost to start a business*	n/a	
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	48	▨
2.02	Enforcement of environmental regulation	44	▨
2.03	Sustainability of T&T industry development	45	▨
2.04	Carbon dioxide emissions*	100	▨
2.05	Particulate matter concentration*	82	▨
2.06	Threatened species*	44	▨
2.07	Environmental treaty ratification*	21	▨
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	26	▨
3.02	Reliability of police services	30	▨
3.03	Business costs of crime and violence	12	🟦
3.04	Road traffic accidents*	18	🟦
	4th pillar: Health and hygiene		
4.01	Physician density*	47	▨
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	46	▨
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	22	▨
5.02	T&T government expenditure*	11	🟦
5.03	Effectiveness of marketing and branding	28	▨
5.04	T&T fair attendance*	41	▨
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	44	▨
6.02	Available seat kilometers, domestic*	90	▨
6.03	Available seat kilometers, international*	60	▨
6.04	Departures per 1,000 population*	14	🟦
6.05	Airport density*	11	🟦
6.06	Number of operating airlines*	36	▨
6.07	International air transport network	53	▨
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	15	🟦
7.02	Quality of railroad infrastructure	n/a	
7.03	Quality of port infrastructure	26	▨
7.04	Quality of ground transport network	83	▨
7.05	Road density*	27	▨

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	1	🟦
8.02	Presence of major car rental companies*	23	▨
8.03	ATMs accepting Visa cards*	14	🟦
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	42	▨
9.02	Internet users*	34	▨
9.03	Telephone lines*	21	▨
9.04	Broadband Internet subscribers*	35	▨
9.05	Mobile telephone subscribers*	18	🟦
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	55	▨
10.02	Purchasing power parity*	108	▨
10.03	Extent and effect of taxation	14	🟦
10.04	Fuel price levels*	97	▨
10.05	Hotel price index*	67	▨
	11th pillar: Human resources		
11.01	Primary education enrollment*	10	🟦
11.02	Secondary education enrollment*	37	▨
11.03	Quality of the educational system	10	🟦
11.04	Local availability of research and training services	49	▨
11.05	Extent of staff training	56	▨
11.06	Hiring and firing practices	82	▨
11.07	Ease of hiring foreign labor	88	▨
11.08	HIV prevalence*	49	▨
11.09	Business impact of HIV/AIDS	12	🟦
11.10	Life expectancy*	12	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	7	🟦
12.02	Attitude of population toward foreign visitors	21	▨
12.03	Extension of business trips recommended	14	🟦
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	▨
13.02	Protected areas*	96	▨
13.03	Quality of the natural environment	33	▨
13.04	Total known species*	121	▨
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	65	▨
14.02	Sports stadiums*	6	🟦
14.03	Number of international fairs and exhibitions*	51	▨
14.04	Creative industries exports*	89	▨

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Czech Republic

Key indicators

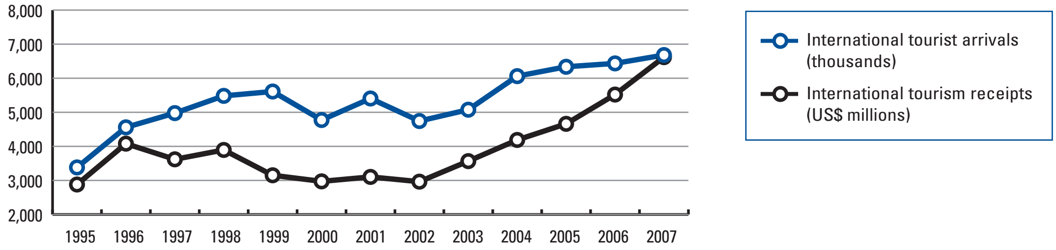
Population (millions), 2007	10.2
Surface area (1,000 square kilometers)	78.9
Gross domestic product (US$ billions), 2007	175.0
Gross domestic product (PPP, US$) per capita, 2007	24,229.2
Real GDP growth (percent), 2007	6.6
Environmental Performance Index, 2008 (out of 149 countries)	68

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	3,474	1.6	4.0
Employment (1,000 jobs)	86	1.7	–0.6
T&T economy, 2008 estimates			
GDP (US$ millions)	22,019	10.4	6.0
Employment (1,000 jobs)	478	9.6	1.1

Source: World Travel & Tourism Council, TSA Research 2008

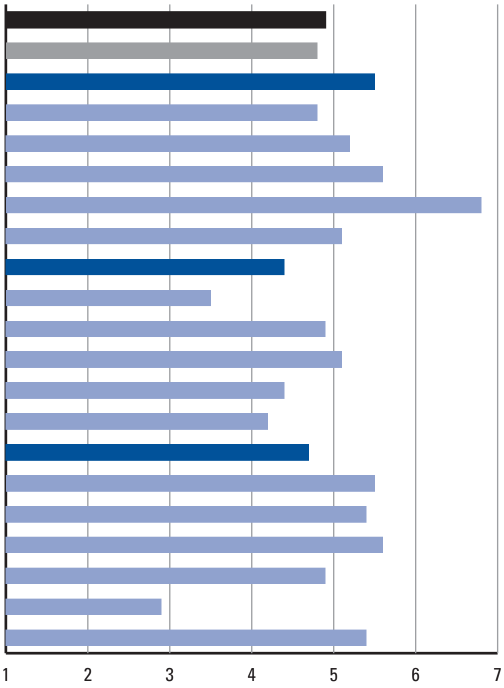
International tourist arrivals (thousands), 2007	6,680
International tourism receipts (US$ millions), 2007	6,618



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**26**	**4.9**
2008 Index	30	4.8
T&T regulatory framework	**16**	**5.5**
Policy rules and regulations	46	4.8
Environmental sustainability	23	5.2
Safety and security	44	5.6
Health and hygiene	6	6.8
Prioritization of Travel & Tourism	32	5.1
T&T business environment and infrastructure	**36**	**4.4**
Air transport infrastructure	50	3.5
Ground transport infrastructure	25	4.9
Tourism infrastructure	24	5.1
ICT infrastructure	29	4.4
Price competitiveness in the T&T industry	97	4.2
T&T human, cultural, and natural resources	**24**	**4.7**
Human resources	28	5.5
Education and training	28	5.4
Availability of qualified labor	39	5.6
Affinity for Travel & Tourism	59	4.9
Natural resources	84	2.9
Cultural resources	17	5.4



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Czech Republic

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

1st pillar: Policy rules and regulations

	INDICATOR	RANK/133	
1.01	Prevalence of foreign ownership	52	⬜
1.02	Property rights	63	⬜
1.03	Business impact of rules on FDI	25	🟦
1.04	Visa requirements*	40	⬜
1.05	Openness of bilateral Air Service Agreements*	32	⬜
1.06	Transparency of government policymaking	104	⬜
1.07	Time required to start a business*	41	⬜
1.08	Cost to start a business*	63	⬜

2nd pillar: Environmental sustainability

	INDICATOR	RANK/133	
2.01	Stringency of environmental regulation	15	🟦
2.02	Enforcement of environmental regulation	28	⬜
2.03	Sustainability of T&T industry development	81	⬜
2.04	Carbon dioxide emissions*	112	⬜
2.05	Particulate matter concentration*	31	⬜
2.06	Threatened species*	16	🟦
2.07	Environmental treaty ratification*	34	⬜

3rd pillar: Safety and security

	INDICATOR	RANK/133	
3.01	Business costs of terrorism	13	🟦
3.02	Reliability of police services	91	⬜
3.03	Business costs of crime and violence	36	⬜
3.04	Road traffic accidents*	54	⬜

4th pillar: Health and hygiene

	INDICATOR	RANK/133	
4.01	Physician density*	20	🟦
4.02	Access to improved sanitation*	34	⬜
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	5	🟦

5th pillar: Prioritization of Travel & Tourism

	INDICATOR	RANK/133	
5.01	Government prioritization of the T&T industry	75	⬜
5.02	T&T government expenditure*	58	⬜
5.03	Effectiveness of marketing and branding	72	⬜
5.04	T&T fair attendance*	3	🟦

6th pillar: Air transport infrastructure

	INDICATOR	RANK/133	
6.01	Quality of air transport infrastructure	45	⬜
6.02	Available seat kilometers, domestic*	75	⬜
6.03	Available seat kilometers, international*	55	⬜
6.04	Departures per 1,000 population*	43	⬜
6.05	Airport density*	77	⬜
6.06	Number of operating airlines*	29	⬜
6.07	International air transport network	35	⬜

7th pillar: Ground transport infrastructure

	INDICATOR	RANK/133	
7.01	Quality of roads	81	⬜
7.02	Quality of railroad infrastructure	23	🟦
7.03	Quality of port infrastructure	61	⬜
7.04	Quality of ground transport network	16	🟦
7.05	Road density*	19	🟦

8th pillar: Tourism infrastructure

	INDICATOR	RANK/133	
8.01	Hotel rooms*	24	🟦
8.02	Presence of major car rental companies*	1	🟦
8.03	ATMs accepting Visa cards*	42	⬜

9th pillar: ICT infrastructure

	INDICATOR	RANK/133	
9.01	Extent of business Internet use	19	🟦
9.02	Internet users*	37	⬜
9.03	Telephone lines*	47	⬜
9.04	Broadband Internet subscribers*	30	⬜
9.05	Mobile telephone subscribers*	11	🟦

10th pillar: Price competitiveness in the T&T industry

	INDICATOR	RANK/133	
10.01	Ticket taxes and airport charges*	80	⬜
10.02	Purchasing power parity*	91	⬜
10.03	Extent and effect of taxation	61	⬜
10.04	Fuel price levels*	111	⬜
10.05	Hotel price index*	84	⬜

11th pillar: Human resources

	INDICATOR	RANK/133	
11.01	Primary education enrollment*	69	⬜
11.02	Secondary education enrollment*	41	⬜
11.03	Quality of the educational system	26	⬜
11.04	Local availability of research and training services	23	🟦
11.05	Extent of staff training	28	⬜
11.06	Hiring and firing practices	99	⬜
11.07	Ease of hiring foreign labor	34	⬜
11.08	HIV prevalence*	22	🟦
11.09	Business impact of HIV/AIDS	53	⬜
11.10	Life expectancy*	37	⬜

12th pillar: Affinity for Travel & Tourism

	INDICATOR	RANK/133	
12.01	Tourism openness*	52	⬜
12.02	Attitude of population toward foreign visitors	72	⬜
12.03	Extension of business trips recommended	66	⬜

13th pillar: Natural resources

	INDICATOR	RANK/133	
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	35	⬜
13.03	Quality of the natural environment	82	⬜
13.04	Total known species*	101	⬜

14th pillar: Cultural resources

	INDICATOR	RANK/133	
14.01	Number of World Heritage cultural sites*	12	🟦
14.02	Sports stadiums*	29	⬜
14.03	Number of international fairs and exhibitions*	24	🟦
14.04	Creative industries exports*	24	🟦

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Denmark

Key indicators

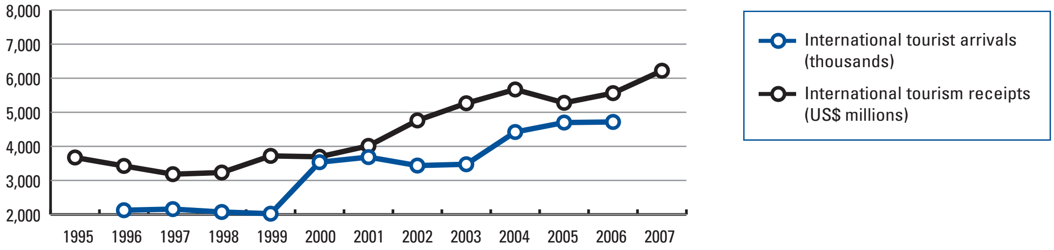
Population (millions), 2007	5.5
Surface area (1,000 square kilometers)	43.1
Gross domestic product (US$ billions), 2007	312.0
Gross domestic product (PPP, US$) per capita, 2007	37,265.0
Real GDP growth (percent), 2007	1.7
Environmental Performance Index, 2008 (out of 149 countries)	25

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	10,987	3.2	3.2
Employment (1,000 jobs)	89	3.2	0.7
T&T economy, 2008 estimates			
GDP (US$ millions)	29,273	8.5	2.9
Employment (1,000 jobs)	238	8.5	0.3

Source: World Travel & Tourism Council, TSA Research 2008

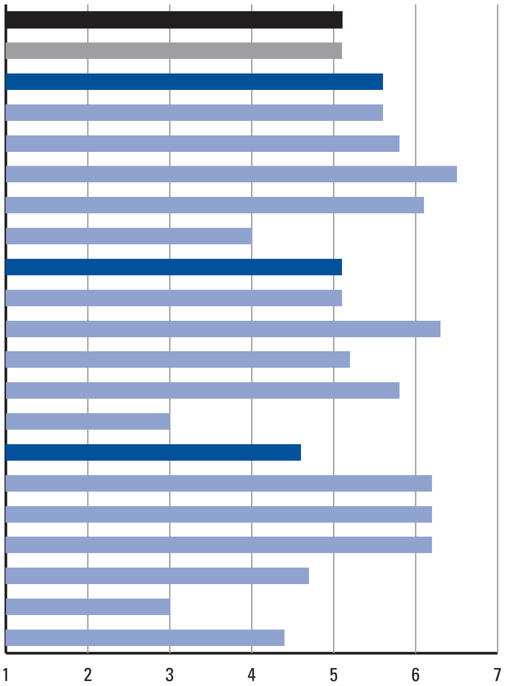
International tourist arrivals (thousands), 2006	4,716
International tourism receipts (US$ millions), 2007	6,220



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**14**	**5.1**
2008 Index	13	5.1
T&T regulatory framework	**10**	**5.6**
Policy rules and regulations	4	5.6
Environmental sustainability	3	5.8
Safety and security	4	6.5
Health and hygiene	28	6.1
Prioritization of Travel & Tourism	91	4.0
T&T business environment and infrastructure	**10**	**5.1**
Air transport infrastructure	12	5.1
Ground transport infrastructure	6	6.3
Tourism infrastructure	23	5.2
ICT infrastructure	4	5.8
Price competitiveness in the T&T industry	131	3.0
T&T human, cultural, and natural resources	**28**	**4.6**
Human resources	2	6.2
Education and training	2	6.2
Availability of qualified labor	5	6.2
Affinity for Travel & Tourism	72	4.7
Natural resources	77	3.0
Cultural resources	26	4.4



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Denmark

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	17	⬜
1.02	Property rights	2	🟦
1.03	Business impact of rules on FDI	24	⬜
1.04	Visa requirements*	40	⬜
1.05	Openness of bilateral Air Service Agreements*	18	⬜
1.06	Transparency of government policymaking	4	🟦
1.07	Time required to start a business*	9	🟦
1.08	Cost to start a business*	1	🟦
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	2	🟦
2.02	Enforcement of environmental regulation	3	🟦
2.03	Sustainability of T&T industry development	33	⬜
2.04	Carbon dioxide emissions*	105	⬜
2.05	Particulate matter concentration*	19	⬜
2.06	Threatened species*	4	🟦
2.07	Environmental treaty ratification*	10	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	41	⬜
3.02	Reliability of police services	2	🟦
3.03	Business costs of crime and violence	8	🟦
3.04	Road traffic accidents*	37	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	19	⬜
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	46	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	62	⬜
5.02	T&T government expenditure*	89	⬜
5.03	Effectiveness of marketing and branding	36	⬜
5.04	T&T fair attendance*	98	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	7	🟦
6.02	Available seat kilometers, domestic*	44	⬜
6.03	Available seat kilometers, international*	39	⬜
6.04	Departures per 1,000 population*	13	🟦
6.05	Airport density*	25	⬜
6.06	Number of operating airlines*	21	⬜
6.07	International air transport network	10	🟦
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	7	🟦
7.02	Quality of railroad infrastructure	14	⬜
7.03	Quality of port infrastructure	5	🟦
7.04	Quality of ground transport network	7	🟦
7.05	Road density*	16	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	36	⬜
8.02	Presence of major car rental companies*	23	⬜
8.03	ATMs accepting Visa cards*	21	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	5	🟦
9.02	Internet users*	16	⬜
9.03	Telephone lines*	14	⬜
9.04	Broadband Internet subscribers*	1	🟦
9.05	Mobile telephone subscribers*	23	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	96	⬜
10.02	Purchasing power parity*	131	⬜
10.03	Extent and effect of taxation	123	⬜
10.04	Fuel price levels*	125	⬜
10.05	Hotel price index*	79	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	47	⬜
11.02	Secondary education enrollment*	3	🟦
11.03	Quality of the educational system	6	🟦
11.04	Local availability of research and training services	6	🟦
11.05	Extent of staff training	1	🟦
11.06	Hiring and firing practices	1	🟦
11.07	Ease of hiring foreign labor	38	⬜
11.08	HIV prevalence*	49	⬜
11.09	Business impact of HIV/AIDS	9	🟦
11.10	Life expectancy*	22	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	69	⬜
12.02	Attitude of population toward foreign visitors	56	⬜
12.03	Extension of business trips recommended	90	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	40	⬜
13.02	Protected areas*	98	⬜
13.03	Quality of the natural environment	11	🟦
13.04	Total known species*	107	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	65	⬜
14.02	Sports stadiums*	21	⬜
14.03	Number of international fairs and exhibitions*	23	⬜
14.04	Creative industries exports*	26	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Dominican Republic

Key indicators

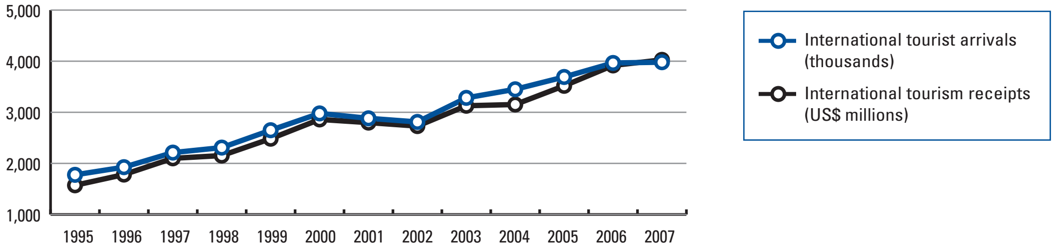
Population (millions), 2007	9.1
Surface area (1,000 square kilometers)	48.7
Gross domestic product (US$ billions), 2007	41.0
Gross domestic product (PPP, US$) per capita, 2007	8,116.5
Real GDP growth (percent), 2007	8.5
Environmental Performance Index, 2008 (out of 149 countries)	33

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	2,325	5.3	3.7
Employment (1,000 jobs)	178	4.7	3.1
T&T economy, 2008 estimates			
GDP (US$ millions)	7,325	16.6	3.7
Employment (1,000 jobs)	550	14.4	3.1

Source: World Travel & Tourism Council, TSA Research 2008

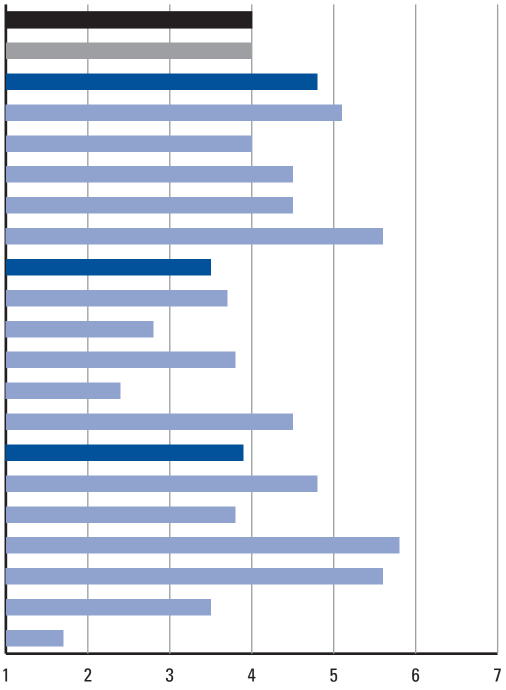
International tourist arrivals (thousands), 2007	3,980
International tourism receipts (US$ millions), 2007	4,026



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**67**	**4.0**
2008 Index	63	4.0
T&T regulatory framework	**54**	**4.8**
Policy rules and regulations	26	5.1
Environmental sustainability	108	4.0
Safety and security	101	4.5
Health and hygiene	68	4.5
Prioritization of Travel & Tourism	13	5.6
T&T business environment and infrastructure	**71**	**3.5**
Air transport infrastructure	47	3.7
Ground transport infrastructure	99	2.8
Tourism infrastructure	51	3.8
ICT infrastructure	83	2.4
Price competitiveness in the T&T industry	81	4.5
T&T human, cultural, and natural resources	**68**	**3.9**
Human resources	92	4.8
Education and training	108	3.8
Availability of qualified labor	19	5.8
Affinity for Travel & Tourism	14	5.6
Natural resources	55	3.5
Cultural resources	95	1.7



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Dominican Republic

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	36	🟦
1.02	Property rights	90	⬜
1.03	Business impact of rules on FDI	67	⬜
1.04	Visa requirements*	7	🟦
1.05	Openness of bilateral Air Service Agreements*	4	🟦
1.06	Transparency of government policymaking	80	⬜
1.07	Time required to start a business*	57	⬜
1.08	Cost to start a business*	83	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	110	⬜
2.02	Enforcement of environmental regulation	121	⬜
2.03	Sustainability of T&T industry development	56	⬜
2.04	Carbon dioxide emissions*	53	⬜
2.05	Particulate matter concentration*	34	🟦
2.06	Threatened species*	127	⬜
2.07	Environmental treaty ratification*	94	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	49	🟦
3.02	Reliability of police services	128	⬜
3.03	Business costs of crime and violence	116	⬜
3.04	Road traffic accidents*	72	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	60	⬜
4.02	Access to improved sanitation*	78	⬜
4.03	Access to improved drinking water*	62	⬜
4.04	Hospital beds*	82	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	28	🟦
5.02	T&T government expenditure*	1	🟦
5.03	Effectiveness of marketing and branding	25	🟦
5.04	T&T fair attendance*	62	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	37	🟦
6.02	Available seat kilometers, domestic*	88	⬜
6.03	Available seat kilometers, international*	46	🟦
6.04	Departures per 1,000 population*	n/a	
6.05	Airport density*	64	⬜
6.06	Number of operating airlines*	39	🟦
6.07	International air transport network	32	🟦
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	64	⬜
7.02	Quality of railroad infrastructure	109	⬜
7.03	Quality of port infrastructure	74	⬜
7.04	Quality of ground transport network	114	⬜
7.05	Road density*	69	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	40	🟦
8.02	Presence of major car rental companies*	23	🟦
8.03	ATMs accepting Visa cards*	67	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	76	⬜
9.02	Internet users*	76	⬜
9.03	Telephone lines*	94	⬜
9.04	Broadband Internet subscribers*	71	⬜
9.05	Mobile telephone subscribers*	86	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	122	⬜
10.02	Purchasing power parity*	64	⬜
10.03	Extent and effect of taxation	124	⬜
10.04	Fuel price levels*	51	⬜
10.05	Hotel price index*	21	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	113	⬜
11.02	Secondary education enrollment*	96	⬜
11.03	Quality of the educational system	130	⬜
11.04	Local availability of research and training services	89	⬜
11.05	Extent of staff training	78	⬜
11.06	Hiring and firing practices	37	🟦
11.07	Ease of hiring foreign labor	7	🟦
11.08	HIV prevalence*	102	⬜
11.09	Business impact of HIV/AIDS	112	⬜
11.10	Life expectancy*	83	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	18	🟦
12.02	Attitude of population toward foreign visitors	28	🟦
12.03	Extension of business trips recommended	44	🟦
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	7	🟦
13.03	Quality of the natural environment	85	⬜
13.04	Total known species*	113	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	65	⬜
14.02	Sports stadiums*	91	⬜
14.03	Number of international fairs and exhibitions*	62	⬜
14.04	Creative industries exports*	118	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Ecuador

Key indicators

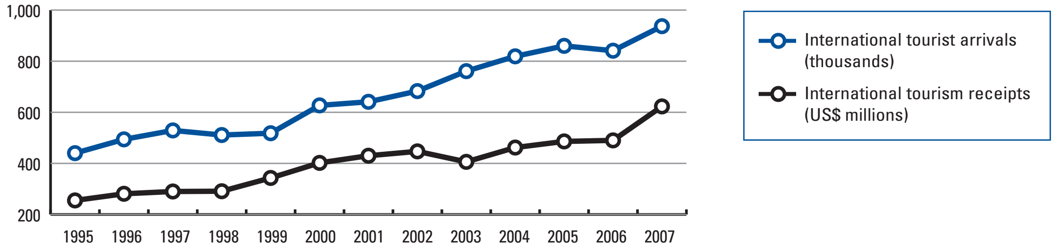
Population (millions), 2007	13.6
Surface area (1,000 square kilometers)	283.6
Gross domestic product (US$ billions), 2007	45.8
Gross domestic product (PPP, US$) per capita, 2007	7,242.1
Real GDP growth (percent), 2007	2.5
Environmental Performance Index, 2008 (out of 149 countries)	22

Travel & Tourism indicators

T&T industry, 2008 estimates		Percent of total	2009–2018 annual growth (%, forecast)
GDP (US$ millions)	824	1.7	4.2
Employment (1,000 jobs)	96	1.5	3.4
T&T economy, 2008 estimates			
GDP (US$ millions)	3,839	8.1	3.3
Employment (1,000 jobs)	429	6.9	2.5

Source: World Travel & Tourism Council, TSA Research 2008

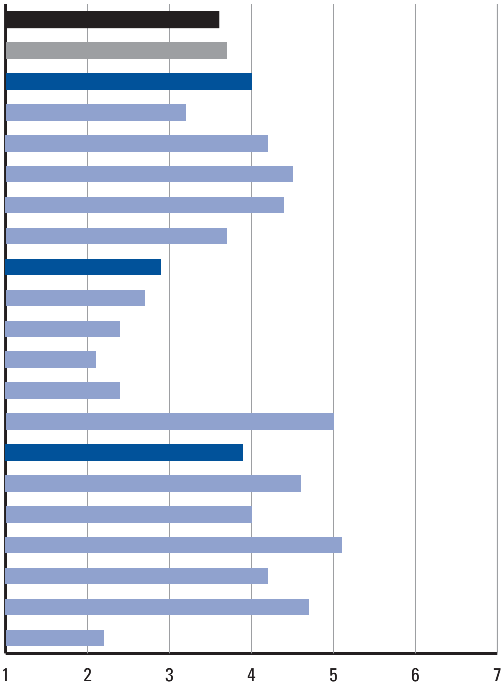
International tourist arrivals (thousands), 2007	937
International tourism receipts (US$ millions), 2007	623



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**96**	**3.6**
2008 Index	86	3.7
T&T regulatory framework	**103**	**4.0**
Policy rules and regulations	126	3.2
Environmental sustainability	86	4.2
Safety and security	99	4.5
Health and hygiene	73	4.4
Prioritization of Travel & Tourism	106	3.7
T&T business environment and infrastructure	**97**	**2.9**
Air transport infrastructure	86	2.7
Ground transport infrastructure	119	2.4
Tourism infrastructure	89	2.1
ICT infrastructure	85	2.4
Price competitiveness in the T&T industry	40	5.0
T&T human, cultural, and natural resources	**62**	**3.9**
Human resources	98	4.6
Education and training	101	4.0
Availability of qualified labor	97	5.1
Affinity for Travel & Tourism	117	4.2
Natural resources	19	4.7
Cultural resources	71	2.2



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Ecuador

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	121	⬜
1.02	Property rights	125	⬜
1.03	Business impact of rules on FDI	130	⬜
1.04	Visa requirements*	70	⬜
1.05	Openness of bilateral Air Service Agreements*	34	🟦
1.06	Transparency of government policymaking	130	⬜
1.07	Time required to start a business*	117	⬜
1.08	Cost to start a business*	100	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	109	⬜
2.02	Enforcement of environmental regulation	109	⬜
2.03	Sustainability of T&T industry development	110	⬜
2.04	Carbon dioxide emissions*	55	⬜
2.05	Particulate matter concentration*	40	🟦
2.06	Threatened species*	118	⬜
2.07	Environmental treaty ratification*	34	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	68	⬜
3.02	Reliability of police services	125	⬜
3.03	Business costs of crime and violence	112	⬜
3.04	Road traffic accidents*	68	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	69	⬜
4.02	Access to improved sanitation*	70	⬜
4.03	Access to improved drinking water*	62	⬜
4.04	Hospital beds*	89	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	118	⬜
5.02	T&T government expenditure*	53	⬜
5.03	Effectiveness of marketing and branding	106	⬜
5.04	T&T fair attendance*	81	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	77	⬜
6.02	Available seat kilometers, domestic*	37	🟦
6.03	Available seat kilometers, international*	71	⬜
6.04	Departures per 1,000 population*	70	⬜
6.05	Airport density*	44	🟦
6.06	Number of operating airlines*	81	⬜
6.07	International air transport network	93	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	100	⬜
7.02	Quality of railroad infrastructure	116	⬜
7.03	Quality of port infrastructure	109	⬜
7.04	Quality of ground transport network	109	⬜
7.05	Road density*	85	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	59	⬜
8.02	Presence of major car rental companies*	95	⬜
8.03	ATMs accepting Visa cards*	79	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	118	⬜
9.02	Internet users*	87	⬜
9.03	Telephone lines*	82	⬜
9.04	Broadband Internet subscribers*	66	⬜
9.05	Mobile telephone subscribers*	71	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	123	⬜
10.02	Purchasing power parity*	27	🟦
10.03	Extent and effect of taxation	91	⬜
10.04	Fuel price levels*	12	🟦
10.05	Hotel price index*	13	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	36	🟦
11.02	Secondary education enrollment*	97	⬜
11.03	Quality of the educational system	125	⬜
11.04	Local availability of research and training services	110	⬜
11.05	Extent of staff training	119	⬜
11.06	Hiring and firing practices	122	⬜
11.07	Ease of hiring foreign labor	90	⬜
11.08	HIV prevalence*	67	⬜
11.09	Business impact of HIV/AIDS	72	⬜
11.10	Life expectancy*	55	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	109	⬜
12.02	Attitude of population toward foreign visitors	107	⬜
12.03	Extension of business trips recommended	109	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	23	🟦
13.02	Protected areas*	43	🟦
13.03	Quality of the natural environment	74	⬜
13.04	Total known species*	5	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	65	⬜
14.02	Sports stadiums*	38	🟦
14.03	Number of international fairs and exhibitions*	59	⬜
14.04	Creative industries exports*	79	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Egypt

Key indicators

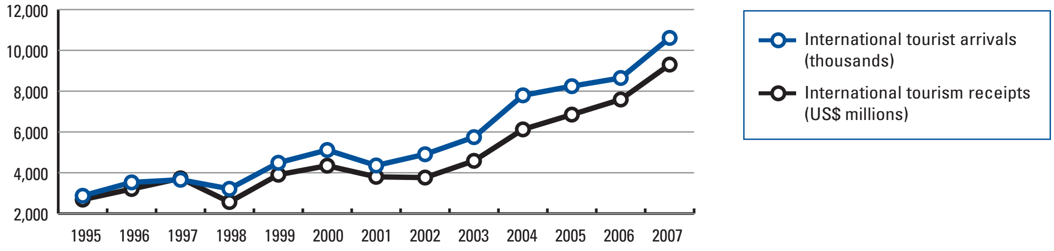
Population (millions), 2007	76.9
Surface area (1,000 square kilometers)	1,001.5
Gross domestic product (US$ billions), 2007	128.0
Gross domestic product (PPP, US$) per capita, 2007	5,495.1
Real GDP growth (percent), 2007	7.1
Environmental Performance Index, 2008 (out of 149 countries)	71

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	11,630	8.3	4.2
Employment (1,000 jobs)	1,467	7.0	1.6
T&T economy, 2008 estimates			
GDP (US$ millions)	22,594	16.1	5.8
Employment (1,000 jobs)	2,833	13.5	3.2

Source: World Travel & Tourism Council, TSA Research 2008

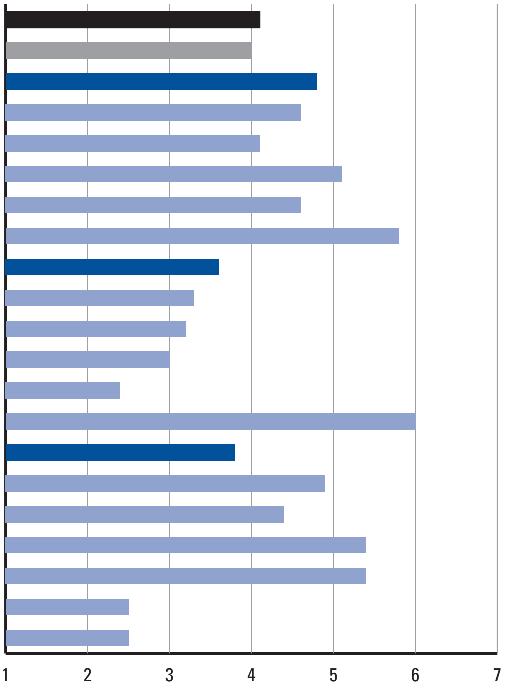
International tourist arrivals (thousands), 2007	10,610
International tourism receipts (US$ millions), 2007	9,303



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**64**	**4.1**
2008 Index	66	4.0
T&T regulatory framework	**52**	**4.8**
Policy rules and regulations	55	4.6
Environmental sustainability	103	4.1
Safety and security	67	5.1
Health and hygiene	64	4.6
Prioritization of Travel & Tourism	9	5.8
T&T business environment and infrastructure	**65**	**3.6**
Air transport infrastructure	58	3.3
Ground transport infrastructure	79	3.2
Tourism infrastructure	74	3.0
ICT infrastructure	84	2.4
Price competitiveness in the T&T industry	1	6.0
T&T human, cultural, and natural resources	**73**	**3.8**
Human resources	83	4.9
Education and training	83	4.4
Availability of qualified labor	75	5.4
Affinity for Travel & Tourism	20	5.4
Natural resources	109	2.5
Cultural resources	60	2.5



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Egypt

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	78	⬜
1.02	Property rights	67	⬜
1.03	Business impact of rules on FDI	83	⬜
1.04	Visa requirements*	38	🟦
1.05	Openness of bilateral Air Service Agreements*	67	⬜
1.06	Transparency of government policymaking	67	⬜
1.07	Time required to start a business*	15	🟦
1.08	Cost to start a business*	80	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	103	⬜
2.02	Enforcement of environmental regulation	120	⬜
2.03	Sustainability of T&T industry development	38	🟦
2.04	Carbon dioxide emissions*	54	⬜
2.05	Particulate matter concentration*	125	⬜
2.06	Threatened species*	80	⬜
2.07	Environmental treaty ratification*	34	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	72	⬜
3.02	Reliability of police services	52	⬜
3.03	Business costs of crime and violence	23	🟦
3.04	Road traffic accidents*	111	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	43	🟦
4.02	Access to improved sanitation*	89	⬜
4.03	Access to improved drinking water*	47	🟦
4.04	Hospital beds*	78	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	33	🟦
5.02	T&T government expenditure*	20	🟦
5.03	Effectiveness of marketing and branding	49	🟦
5.04	T&T fair attendance*	3	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	52	⬜
6.02	Available seat kilometers, domestic*	40	🟦
6.03	Available seat kilometers, international*	26	🟦
6.04	Departures per 1,000 population*	99	⬜
6.05	Airport density*	117	⬜
6.06	Number of operating airlines*	20	🟦
6.07	International air transport network	73	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	74	⬜
7.02	Quality of railroad infrastructure	54	⬜
7.03	Quality of port infrastructure	69	⬜
7.04	Quality of ground transport network	67	⬜
7.05	Road density*	106	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	74	⬜
8.02	Presence of major car rental companies*	23	🟦
8.03	ATMs accepting Visa cards*	96	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	36	🟦
9.02	Internet users*	88	⬜
9.03	Telephone lines*	76	⬜
9.04	Broadband Internet subscribers*	89	⬜
9.05	Mobile telephone subscribers*	96	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	34	🟦
10.02	Purchasing power parity*	4	🟦
10.03	Extent and effect of taxation	34	🟦
10.04	Fuel price levels*	3	🟦
10.05	Hotel price index*	4	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	63	⬜
11.02	Secondary education enrollment*	65	⬜
11.03	Quality of the educational system	126	⬜
11.04	Local availability of research and training services	92	⬜
11.05	Extent of staff training	96	⬜
11.06	Hiring and firing practices	91	⬜
11.07	Ease of hiring foreign labor	39	🟦
11.08	HIV prevalence*	1	🟦
11.09	Business impact of HIV/AIDS	32	🟦
11.10	Life expectancy*	89	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	27	🟦
12.02	Attitude of population toward foreign visitors	54	⬜
12.03	Extension of business trips recommended	6	🟦
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	40	🟦
13.02	Protected areas*	75	⬜
13.03	Quality of the natural environment	131	⬜
13.04	Total known species*	70	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	26	🟦
14.02	Sports stadiums*	109	⬜
14.03	Number of international fairs and exhibitions*	51	⬜
14.04	Creative industries exports*	n/a	

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

El Salvador

Key indicators

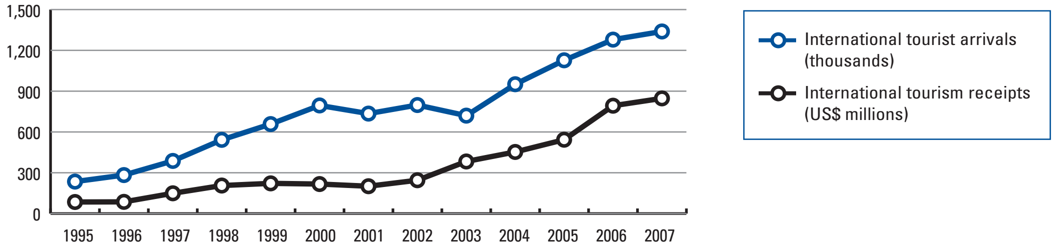
Population (millions), 2007	7.1
Surface area (1,000 square kilometers)	21.0
Gross domestic product (US$ billions), 2007	20.4
Gross domestic product (PPP, US$) per capita, 2007	5,846.8
Real GDP growth (percent), 2007	4.7
Environmental Performance Index, 2008 (out of 149 countries)	65

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	841	3.9	1.9
Employment (1,000 jobs)	97	3.4	1.4
T&T economy, 2008 estimates			
GDP (US$ millions)	1,954	9.1	2.0
Employment (1,000 jobs)	221	7.9	1.5

Source: World Travel & Tourism Council, TSA Research 2008

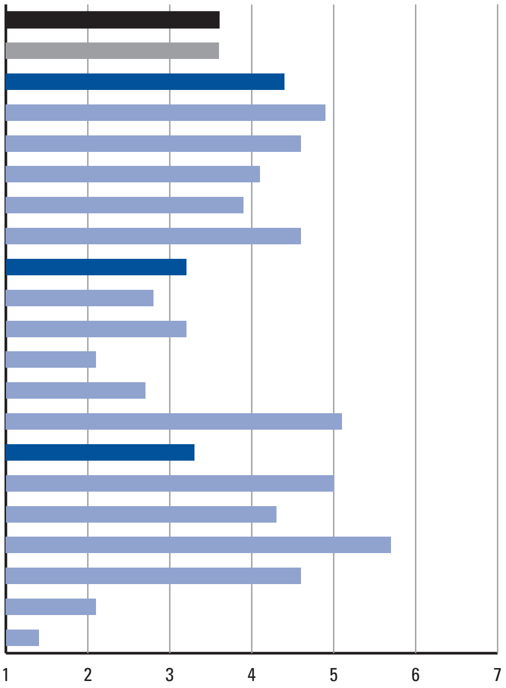
International tourist arrivals (thousands), 2007	1,339
International tourism receipts (US$ millions), 2007	847



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**94**	**3.6**
2008 Index	97	3.6
T&T regulatory framework	**73**	**4.4**
Policy rules and regulations	40	4.9
Environmental sustainability	58	4.6
Safety and security	112	4.1
Health and hygiene	92	3.9
Prioritization of Travel & Tourism	56	4.6
T&T business environment and infrastructure	**83**	**3.2**
Air transport infrastructure	74	2.8
Ground transport infrastructure	78	3.2
Tourism infrastructure	87	2.1
ICT infrastructure	74	2.7
Price competitiveness in the T&T industry	31	5.1
T&T human, cultural, and natural resources	**123**	**3.3**
Human resources	75	5.0
Education and training	87	4.3
Availability of qualified labor	27	5.7
Affinity for Travel & Tourism	84	4.6
Natural resources	127	2.1
Cultural resources	117	1.4



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

El Salvador

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ▨ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	50	🟦
1.02	Property rights	82	▨
1.03	Business impact of rules on FDI	43	🟦
1.04	Visa requirements*	23	🟦
1.05	Openness of bilateral Air Service Agreements*	1	🟦
1.06	Transparency of government policymaking	72	▨
1.07	Time required to start a business*	50	🟦
1.08	Cost to start a business*	104	▨
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	98	▨
2.02	Enforcement of environmental regulation	106	▨
2.03	Sustainability of T&T industry development	67	▨
2.04	Carbon dioxide emissions*	33	🟦
2.05	Particulate matter concentration*	60	▨
2.06	Threatened species*	31	🟦
2.07	Environmental treaty ratification*	104	▨
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	116	▨
3.02	Reliability of police services	96	▨
3.03	Business costs of crime and violence	132	▨
3.04	Road traffic accidents*	69	▨
	4th pillar: Health and hygiene		
4.01	Physician density*	77	▨
4.02	Access to improved sanitation*	66	▨
4.03	Access to improved drinking water*	92	▨
4.04	Hospital beds*	107	▨
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	32	🟦
5.02	T&T government expenditure*	85	▨
5.03	Effectiveness of marketing and branding	35	🟦
5.04	T&T fair attendance*	41	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	33	🟦
6.02	Available seat kilometers, domestic*	100	▨
6.03	Available seat kilometers, international*	79	▨
6.04	Departures per 1,000 population*	57	▨
6.05	Airport density*	121	▨
6.06	Number of operating airlines*	115	▨
6.07	International air transport network	36	🟦
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	36	🟦
7.02	Quality of railroad infrastructure	112	▨
7.03	Quality of port infrastructure	81	▨
7.04	Quality of ground transport network	118	▨
7.05	Road density*	52	▨

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	102	▨
8.02	Presence of major car rental companies*	73	▨
8.03	ATMs accepting Visa cards*	83	▨
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	77	▨
9.02	Internet users*	89	▨
9.03	Telephone lines*	75	▨
9.04	Broadband Internet subscribers*	76	▨
9.05	Mobile telephone subscribers*	52	▨
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	107	▨
10.02	Purchasing power parity*	47	🟦
10.03	Extent and effect of taxation	32	🟦
10.04	Fuel price levels*	60	▨
10.05	Hotel price index*	8	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	62	▨
11.02	Secondary education enrollment*	101	▨
11.03	Quality of the educational system	102	▨
11.04	Local availability of research and training services	81	▨
11.05	Extent of staff training	66	▨
11.06	Hiring and firing practices	26	🟦
11.07	Ease of hiring foreign labor	16	🟦
11.08	HIV prevalence*	94	▨
11.09	Business impact of HIV/AIDS	104	▨
11.10	Life expectancy*	76	▨
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	40	🟦
12.02	Attitude of population toward foreign visitors	100	▨
12.03	Extension of business trips recommended	121	▨
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	▨
13.02	Protected areas*	123	▨
13.03	Quality of the natural environment	129	▨
13.04	Total known species*	51	▨
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	97	▨
14.02	Sports stadiums*	82	▨
14.03	Number of international fairs and exhibitions*	79	▨
14.04	Creative industries exports*	81	▨

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Estonia

Key indicators

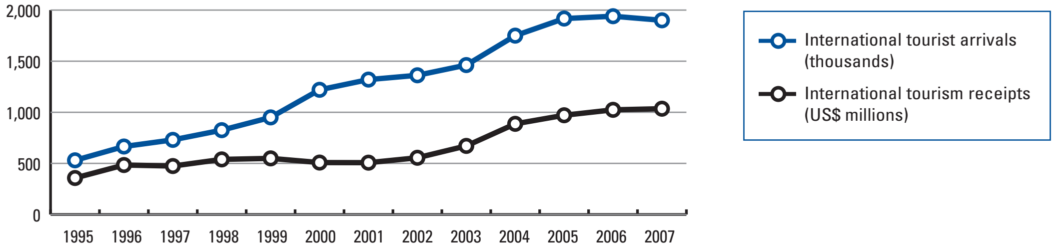
Population (millions), 2007	1.3
Surface area (1,000 square kilometers)	45.2
Gross domestic product (US$ billions), 2007	20.9
Gross domestic product (PPP, US$) per capita, 2007	20,584.3
Real GDP growth (percent), 2007	6.3
Environmental Performance Index, 2008 (out of 149 countries)	19

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	750	3.1	5.0
Employment (1,000 jobs)	19	2.8	–0.5
T&T economy, 2008 estimates			
GDP (US$ millions)	4,887	20.4	3.6
Employment (1,000 jobs)	115	17.5	–1.7

Source: World Travel & Tourism Council, TSA Research 2008

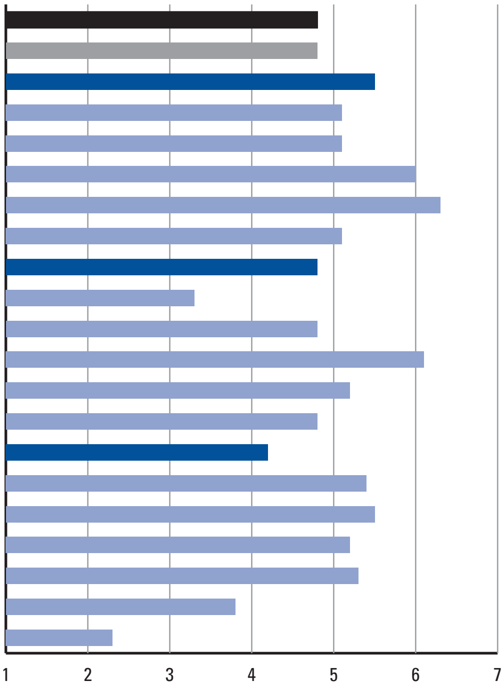
International tourist arrivals (thousands), 2007	1,900
International tourism receipts (US$ millions), 2007	1,035



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**27**	**4.8**
2008 Index	26	4.8
T&T regulatory framework	**17**	**5.5**
Policy rules and regulations	31	5.1
Environmental sustainability	30	5.1
Safety and security	20	6.0
Health and hygiene	23	6.3
Prioritization of Travel & Tourism	34	5.1
T&T business environment and infrastructure	**21**	**4.8**
Air transport infrastructure	59	3.3
Ground transport infrastructure	29	4.8
Tourism infrastructure	15	6.1
ICT infrastructure	16	5.2
Price competitiveness in the T&T industry	64	4.8
T&T human, cultural, and natural resources	**47**	**4.2**
Human resources	38	5.4
Education and training	23	5.5
Availability of qualified labor	91	5.2
Affinity for Travel & Tourism	31	5.3
Natural resources	45	3.8
Cultural resources	67	2.3



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Estonia

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ▨ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	35	▨
1.02	Property rights	28	▨
1.03	Business impact of rules on FDI	11	🟦
1.04	Visa requirements*	40	▨
1.05	Openness of bilateral Air Service Agreements*	124	▨
1.06	Transparency of government policymaking	27	▨
1.07	Time required to start a business*	15	🟦
1.08	Cost to start a business*	17	🟦
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	26	🟦
2.02	Enforcement of environmental regulation	29	▨
2.03	Sustainability of T&T industry development	57	▨
2.04	Carbon dioxide emissions*	118	▨
2.05	Particulate matter concentration*	4	🟦
2.06	Threatened species*	5	🟦
2.07	Environmental treaty ratification*	67	▨
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	19	🟦
3.02	Reliability of police services	35	▨
3.03	Business costs of crime and violence	37	▨
3.04	Road traffic accidents*	17	🟦
	4th pillar: Health and hygiene		
4.01	Physician density*	24	🟦
4.02	Access to improved sanitation*	46	▨
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	28	▨
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	70	▨
5.02	T&T government expenditure*	14	🟦
5.03	Effectiveness of marketing and branding	55	▨
5.04	T&T fair attendance*	62	▨
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	51	▨
6.02	Available seat kilometers, domestic*	93	▨
6.03	Available seat kilometers, international*	110	▨
6.04	Departures per 1,000 population*	45	▨
6.05	Airport density*	21	🟦
6.06	Number of operating airlines*	92	▨
6.07	International air transport network	60	▨
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	53	▨
7.02	Quality of railroad infrastructure	39	▨
7.03	Quality of port infrastructure	20	🟦
7.04	Quality of ground transport network	29	▨
7.05	Road density*	28	▨

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	16	🟦
8.02	Presence of major car rental companies*	23	🟦
8.03	ATMs accepting Visa cards*	16	🟦
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	4	🟦
9.02	Internet users*	20	🟦
9.03	Telephone lines*	34	▨
9.04	Broadband Internet subscribers*	22	🟦
9.05	Mobile telephone subscribers*	3	🟦
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	38	▨
10.02	Purchasing power parity*	100	▨
10.03	Extent and effect of taxation	13	🟦
10.04	Fuel price levels*	100	▨
10.05	Hotel price index*	55	▨
	11th pillar: Human resources		
11.01	Primary education enrollment*	60	▨
11.02	Secondary education enrollment*	27	▨
11.03	Quality of the educational system	30	▨
11.04	Local availability of research and training services	21	🟦
11.05	Extent of staff training	35	▨
11.06	Hiring and firing practices	76	▨
11.07	Ease of hiring foreign labor	125	▨
11.08	HIV prevalence*	106	▨
11.09	Business impact of HIV/AIDS	82	▨
11.10	Life expectancy*	55	▨
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	34	▨
12.02	Attitude of population toward foreign visitors	52	▨
12.03	Extension of business trips recommended	13	🟦
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	▨
13.02	Protected areas*	9	🟦
13.03	Quality of the natural environment	21	🟦
13.04	Total known species*	117	▨
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	54	▨
14.02	Sports stadiums*	56	▨
14.03	Number of international fairs and exhibitions*	48	▨
14.04	Creative industries exports*	56	▨

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Ethiopia

Key indicators

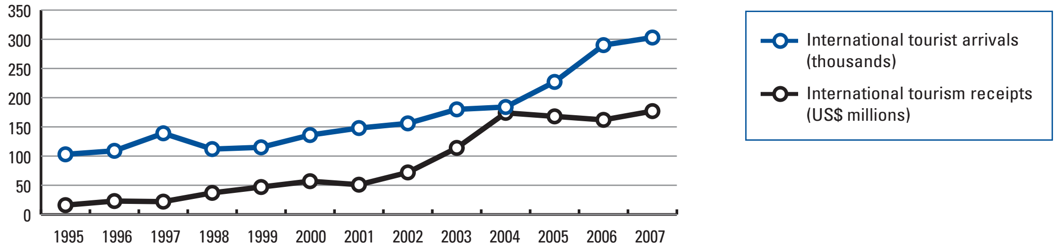
Population (millions), 2007	81.2
Surface area (1,000 square kilometers)	1,104.3
Gross domestic product (US$ billions), 2007	19.4
Gross domestic product (PPP, US$) per capita, 2007	806.6
Real GDP growth (percent), 2007	11.4
Environmental Performance Index, 2008 (out of 149 countries)	123

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	813	4.1	4.3
Employment (1,000 jobs)	627	3.1	1.5
T&T economy, 2008 estimates			
GDP (US$ millions)	1,694	8.6	4.0
Employment (1,000 jobs)	1,333	6.7	1.2

Source: World Travel & Tourism Council, TSA Research 2008

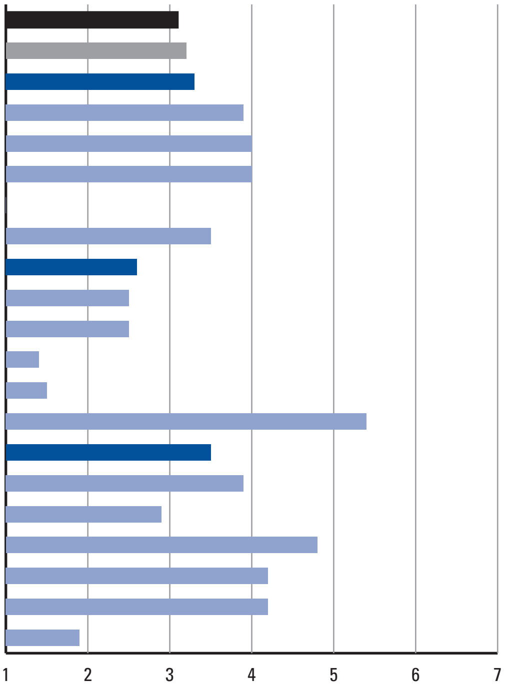
International tourist arrivals (thousands), 2007	303
International tourism receipts (US$ millions), 2007	177



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**123**	**3.1**
2008 Index	121	3.2
T&T regulatory framework	**128**	**3.3**
Policy rules and regulations	100	3.9
Environmental sustainability	109	4.0
Safety and security	117	4.0
Health and hygiene	133	1.0
Prioritization of Travel & Tourism	111	3.5
T&T business environment and infrastructure	**112**	**2.6**
Air transport infrastructure	97	2.5
Ground transport infrastructure	117	2.5
Tourism infrastructure	122	1.4
ICT infrastructure	132	1.5
Price competitiveness in the T&T industry	15	5.4
T&T human, cultural, and natural resources	**101**	**3.5**
Human resources	124	3.9
Education and training	127	2.9
Availability of qualified labor	118	4.8
Affinity for Travel & Tourism	121	4.2
Natural resources	36	4.2
Cultural resources	83	1.9



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Ethiopia

The Travel & Tourism Competitiveness Index in detail

■ Competitive **Advantage** ▨ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	123	▨
1.02	Property rights	78	▨
1.03	Business impact of rules on FDI	98	▨
1.04	Visa requirements*	128	▨
1.05	Openness of bilateral Air Service Agreements*	56	▨
1.06	Transparency of government policymaking	92	▨
1.07	Time required to start a business*	45	■
1.08	Cost to start a business*	94	▨
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	93	▨
2.02	Enforcement of environmental regulation	91	▨
2.03	Sustainability of T&T industry development	91	▨
2.04	Carbon dioxide emissions*	9	■
2.05	Particulate matter concentration*	103	▨
2.06	Threatened species*	79	▨
2.07	Environmental treaty ratification*	121	▨
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	91	▨
3.02	Reliability of police services	82	▨
3.03	Business costs of crime and violence	54	▨
3.04	Road traffic accidents*	119	▨
	4th pillar: Health and hygiene		
4.01	Physician density*	128	▨
4.02	Access to improved sanitation*	124	▨
4.03	Access to improved drinking water*	126	▨
4.04	Hospital beds*	128	▨
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	98	▨
5.02	T&T government expenditure*	90	▨
5.03	Effectiveness of marketing and branding	91	▨
5.04	T&T fair attendance*	98	▨
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	60	▨
6.02	Available seat kilometers, domestic*	59	▨
6.03	Available seat kilometers, international*	70	▨
6.04	Departures per 1,000 population*	108	▨
6.05	Airport density*	107	▨
6.06	Number of operating airlines*	108	▨
6.07	International air transport network	69	▨
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	92	▨
7.02	Quality of railroad infrastructure	98	▨
7.03	Quality of port infrastructure	80	▨
7.04	Quality of ground transport network	122	▨
7.05	Road density*	123	▨

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	120	▨
8.02	Presence of major car rental companies*	95	▨
8.03	ATMs accepting Visa cards*	123	▨
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	117	▨
9.02	Internet users*	131	▨
9.03	Telephone lines*	120	▨
9.04	Broadband Internet subscribers*	126	▨
9.05	Mobile telephone subscribers*	133	▨
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	25	■
10.02	Purchasing power parity*	3	■
10.03	Extent and effect of taxation	54	▨
10.04	Fuel price levels*	34	■
10.05	Hotel price index*	37	■
	11th pillar: Human resources		
11.01	Primary education enrollment*	122	▨
11.02	Secondary education enrollment*	118	▨
11.03	Quality of the educational system	88	▨
11.04	Local availability of research and training services	114	▨
11.05	Extent of staff training	126	▨
11.06	Hiring and firing practices	62	▨
11.07	Ease of hiring foreign labor	103	▨
11.08	HIV prevalence*	116	▨
11.09	Business impact of HIV/AIDS	123	▨
11.10	Life expectancy*	115	▨
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	123	▨
12.02	Attitude of population toward foreign visitors	108	▨
12.03	Extension of business trips recommended	107	▨
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	40	■
13.02	Protected areas*	29	■
13.03	Quality of the natural environment	68	▨
13.04	Total known species*	26	■
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	26	■
14.02	Sports stadiums*	128	▨
14.03	Number of international fairs and exhibitions*	83	▨
14.04	Creative industries exports*	103	▨

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Finland

Key indicators

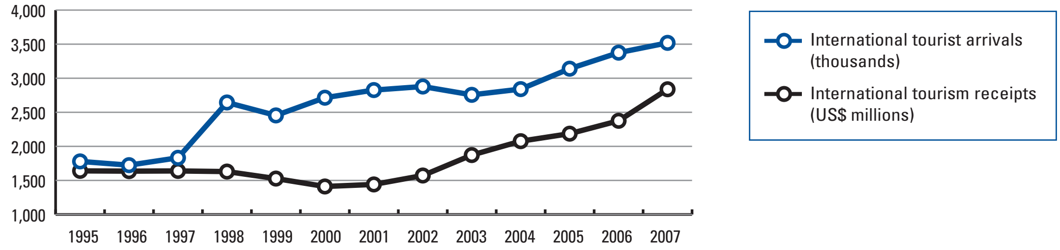
Population (millions), 2007	5.3
Surface area (1,000 square kilometers)	338.2
Gross domestic product (US$ billions), 2007	246.4
Gross domestic product (PPP, US$) per capita, 2007	35,349.4
Real GDP growth (percent), 2007	4.5
Environmental Performance Index, 2008 (out of 149 countries)	4

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	8,014	3.0	2.0
Employment (1,000 jobs)	76	3.0	0.0
T&T economy, 2008 estimates			
GDP (US$ millions)	24,131	8.9	3.4
Employment (1,000 jobs)	234	9.4	1.3

Source: World Travel & Tourism Council, TSA Research 2008

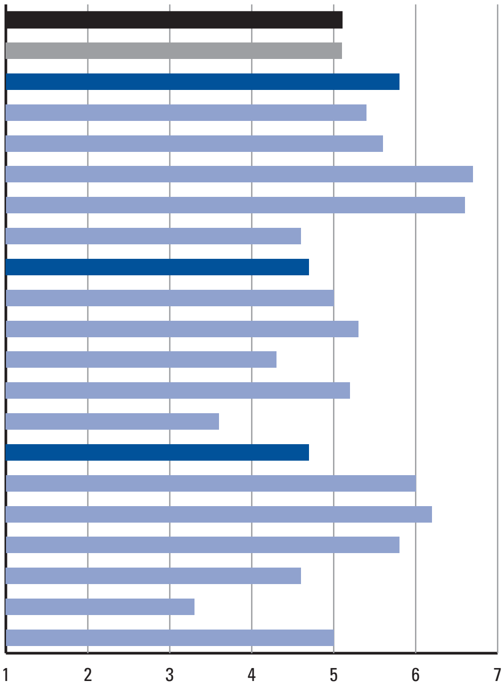
International tourist arrivals (thousands), 2007	3,519
International tourism receipts (US$ millions), 2007	2,838



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**15**	**5.1**
2008 Index	12	5.1
T&T regulatory framework	**5**	**5.8**
Policy rules and regulations	6	5.4
Environmental sustainability	7	5.6
Safety and security	1	6.7
Health and hygiene	12	6.6
Prioritization of Travel & Tourism	54	4.6
T&T business environment and infrastructure	**25**	**4.7**
Air transport infrastructure	14	5.0
Ground transport infrastructure	21	5.3
Tourism infrastructure	38	4.3
ICT infrastructure	14	5.2
Price competitiveness in the T&T industry	121	3.6
T&T human, cultural, and natural resources	**21**	**4.7**
Human resources	5	6.0
Education and training	1	6.2
Availability of qualified labor	16	5.8
Affinity for Travel & Tourism	88	4.6
Natural resources	61	3.3
Cultural resources	22	5.0



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Finland

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	8	🟦
1.02	Property rights	5	🟦
1.03	Business impact of rules on FDI	14	🟦
1.04	Visa requirements*	40	⬜
1.05	Openness of bilateral Air Service Agreements*	35	⬜
1.06	Transparency of government policymaking	5	🟦
1.07	Time required to start a business*	38	⬜
1.08	Cost to start a business*	14	🟦
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	4	🟦
2.02	Enforcement of environmental regulation	6	🟦
2.03	Sustainability of T&T industry development	49	⬜
2.04	Carbon dioxide emissions*	115	⬜
2.05	Particulate matter concentration*	17	⬜
2.06	Threatened species*	9	🟦
2.07	Environmental treaty ratification*	10	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	1	🟦
3.02	Reliability of police services	1	🟦
3.03	Business costs of crime and violence	3	🟦
3.04	Road traffic accidents*	34	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	25	⬜
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	16	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	90	⬜
5.02	T&T government expenditure*	76	⬜
5.03	Effectiveness of marketing and branding	67	⬜
5.04	T&T fair attendance*	20	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	8	🟦
6.02	Available seat kilometers, domestic*	38	⬜
6.03	Available seat kilometers, international*	41	⬜
6.04	Departures per 1,000 population*	16	⬜
6.05	Airport density*	10	🟦
6.06	Number of operating airlines*	50	⬜
6.07	International air transport network	11	🟦
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	12	🟦
7.02	Quality of railroad infrastructure	6	🟦
7.03	Quality of port infrastructure	6	🟦
7.04	Quality of ground transport network	6	🟦
7.05	Road density*	74	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	25	⬜
8.02	Presence of major car rental companies*	56	⬜
8.03	ATMs accepting Visa cards*	40	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	10	🟦
9.02	Internet users*	11	🟦
9.03	Telephone lines*	35	⬜
9.04	Broadband Internet subscribers*	6	🟦
9.05	Mobile telephone subscribers*	20	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	44	⬜
10.02	Purchasing power parity*	127	⬜
10.03	Extent and effect of taxation	113	⬜
10.04	Fuel price levels*	106	⬜
10.05	Hotel price index*	66	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	35	⬜
11.02	Secondary education enrollment*	9	🟦
11.03	Quality of the educational system	1	🟦
11.04	Local availability of research and training services	4	🟦
11.05	Extent of staff training	11	🟦
11.06	Hiring and firing practices	89	⬜
11.07	Ease of hiring foreign labor	23	⬜
11.08	HIV prevalence*	22	⬜
11.09	Business impact of HIV/AIDS	8	🟦
11.10	Life expectancy*	22	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	102	⬜
12.02	Attitude of population toward foreign visitors	23	⬜
12.03	Extension of business trips recommended	91	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	40	⬜
13.02	Protected areas*	71	⬜
13.03	Quality of the natural environment	4	🟦
13.04	Total known species*	115	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	33	⬜
14.02	Sports stadiums*	13	🟦
14.03	Number of international fairs and exhibitions*	21	⬜
14.04	Creative industries exports*	32	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

France

Key indicators

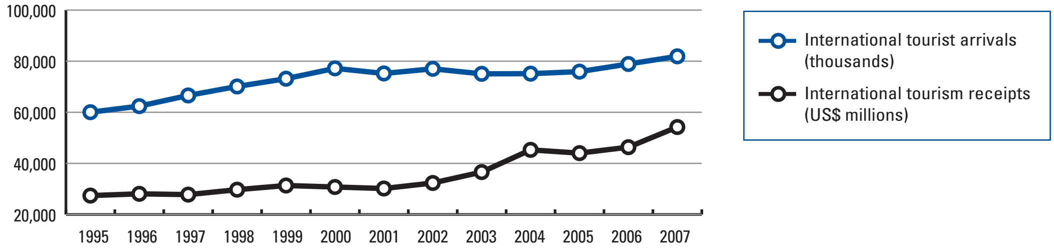
Population (millions), 2007	60.9
Surface area (1,000 square kilometers)	551.5
Gross domestic product (US$ billions), 2007	2,593.8
Gross domestic product (PPP, US$) per capita, 2007	33,508.6
Real GDP growth (percent), 2007	2.2
Environmental Performance Index, 2008 (out of 149 countries)	10

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	115,681	4.1	2.4
Employment (1,000 jobs)	1,349	5.2	1.1
T&T economy, 2008 estimates			
GDP (US$ millions)	306,992	10.9	2.7
Employment (1,000 jobs)	3,365	13.1	1.4

Source: World Travel & Tourism Council, TSA Research 2008

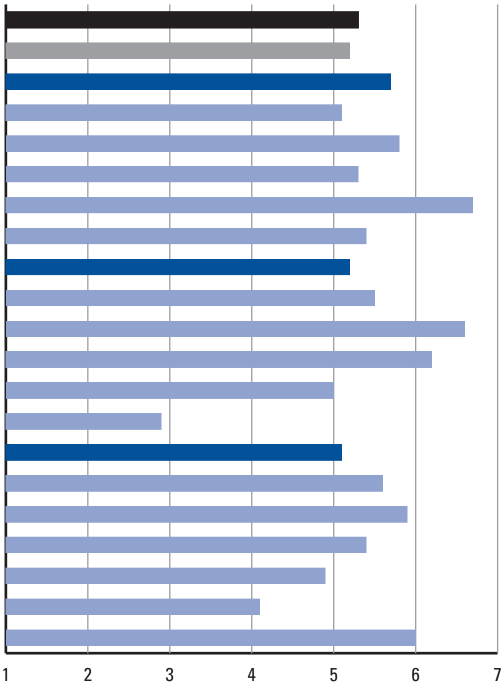
International tourist arrivals (thousands), 2007	81,900
International tourism receipts (US$ millions), 2007	54,228



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**4**	**5.3**
2008 Index	10	5.2
T&T regulatory framework	**8**	**5.7**
Policy rules and regulations	25	5.1
Environmental sustainability	4	5.8
Safety and security	55	5.3
Health and hygiene	9	6.7
Prioritization of Travel & Tourism	21	5.4
T&T business environment and infrastructure	**7**	**5.2**
Air transport infrastructure	5	5.5
Ground transport infrastructure	3	6.6
Tourism infrastructure	14	6.2
ICT infrastructure	19	5.0
Price competitiveness in the T&T industry	132	2.9
T&T human, cultural, and natural resources	**11**	**5.1**
Human resources	23	5.6
Education and training	13	5.9
Availability of qualified labor	77	5.4
Affinity for Travel & Tourism	55	4.9
Natural resources	39	4.1
Cultural resources	7	6.0



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

France

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	46	⬜
1.02	Property rights	18	⬜
1.03	Business impact of rules on FDI	65	⬜
1.04	Visa requirements*	40	⬜
1.05	Openness of bilateral Air Service Agreements*	72	⬜
1.06	Transparency of government policymaking	33	⬜
1.07	Time required to start a business*	15	⬜
1.08	Cost to start a business*	14	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	14	⬜
2.02	Enforcement of environmental regulation	19	⬜
2.03	Sustainability of T&T industry development	19	⬜
2.04	Carbon dioxide emissions*	86	⬜
2.05	Particulate matter concentration*	5	🟦
2.06	Threatened species*	46	⬜
2.07	Environmental treaty ratification*	2	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	69	⬜
3.02	Reliability of police services	19	⬜
3.03	Business costs of crime and violence	52	⬜
3.04	Road traffic accidents*	110	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	23	⬜
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	15	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	31	⬜
5.02	T&T government expenditure*	75	⬜
5.03	Effectiveness of marketing and branding	20	⬜
5.04	T&T fair attendance*	3	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	5	🟦
6.02	Available seat kilometers, domestic*	13	⬜
6.03	Available seat kilometers, international*	4	🟦
6.04	Departures per 1,000 population*	28	⬜
6.05	Airport density*	49	⬜
6.06	Number of operating airlines*	3	🟦
6.07	International air transport network	6	🟦
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	1	🟦
7.02	Quality of railroad infrastructure	2	🟦
7.03	Quality of port infrastructure	10	🟦
7.04	Quality of ground transport network	5	🟦
7.05	Road density*	14	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	27	⬜
8.02	Presence of major car rental companies*	1	🟦
8.03	ATMs accepting Visa cards*	9	🟦
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	23	⬜
9.02	Internet users*	31	⬜
9.03	Telephone lines*	7	🟦
9.04	Broadband Internet subscribers*	13	⬜
9.05	Mobile telephone subscribers*	51	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	114	⬜
10.02	Purchasing power parity*	123	⬜
10.03	Extent and effect of taxation	98	⬜
10.04	Fuel price levels*	116	⬜
10.05	Hotel price index*	113	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	13	⬜
11.02	Secondary education enrollment*	7	🟦
11.03	Quality of the educational system	20	⬜
11.04	Local availability of research and training services	8	🟦
11.05	Extent of staff training	24	⬜
11.06	Hiring and firing practices	125	⬜
11.07	Ease of hiring foreign labor	96	⬜
11.08	HIV prevalence*	73	⬜
11.09	Business impact of HIV/AIDS	40	⬜
11.10	Life expectancy*	5	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	91	⬜
12.02	Attitude of population toward foreign visitors	71	⬜
12.03	Extension of business trips recommended	9	🟦
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	16	⬜
13.02	Protected areas*	51	⬜
13.03	Quality of the natural environment	32	⬜
13.04	Total known species*	66	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	4	🟦
14.02	Sports stadiums*	49	⬜
14.03	Number of international fairs and exhibitions*	5	🟦
14.04	Creative industries exports*	7	🟦

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Gambia, The

Key indicators

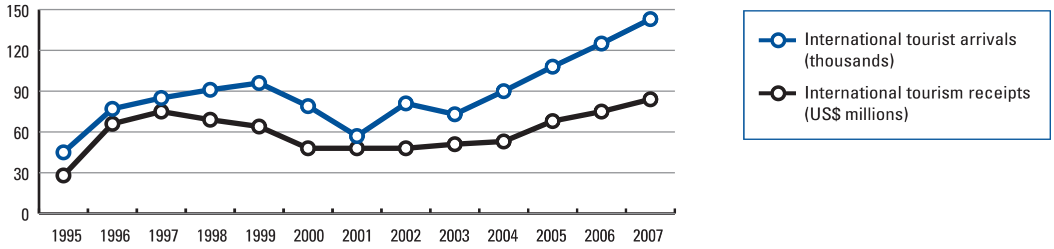
Population (millions), 2007	1.6
Surface area (1,000 square kilometers)	11.3
Gross domestic product (US$ billions), 2007	0.6
Gross domestic product (PPP, US$) per capita, 2007	1,317.7
Real GDP growth (percent), 2007	6.3
Environmental Performance Index, 2008 (out of 149 countries)	n/a

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	58	8.0	3.7
Employment (1,000 jobs)	39	6.4	2.6
T&T economy, 2008 estimates			
GDP (US$ millions)	129	17.9	3.7
Employment (1,000 jobs)	89	14.4	2.7

Source: World Travel & Tourism Council, TSA Research 2008

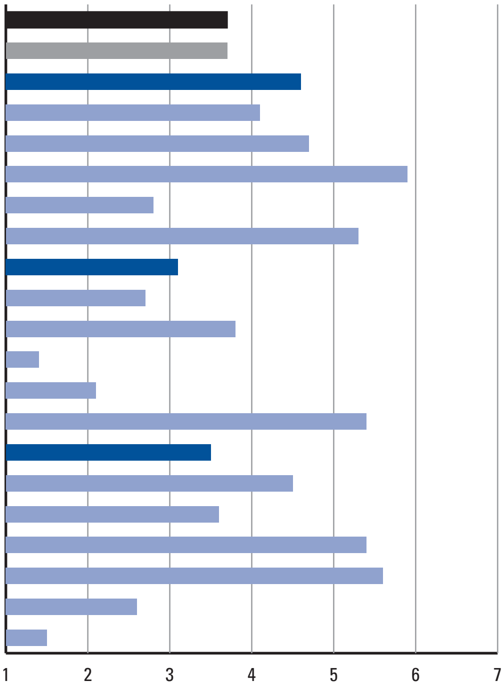
International tourist arrivals (thousands), 2007	143
International tourism receipts (US$ millions), 2007	84



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**87**	**3.7**
2008 Index	84	3.7
T&T regulatory framework	**65**	**4.6**
Policy rules and regulations	85	4.1
Environmental sustainability	52	4.7
Safety and security	27	5.9
Health and hygiene	107	2.8
Prioritization of Travel & Tourism	25	5.3
T&T business environment and infrastructure	**90**	**3.1**
Air transport infrastructure	85	2.7
Ground transport infrastructure	58	3.8
Tourism infrastructure	124	1.4
ICT infrastructure	100	2.1
Price competitiveness in the T&T industry	14	5.4
T&T human, cultural, and natural resources	**98**	**3.5**
Human resources	102	4.5
Education and training	112	3.6
Availability of qualified labor	76	5.4
Affinity for Travel & Tourism	13	5.6
Natural resources	101	2.6
Cultural resources	107	1.5



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Gambia, The

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	15	🟦
1.02	Property rights	56	⬜
1.03	Business impact of rules on FDI	13	🟦
1.04	Visa requirements*	88	⬜
1.05	Openness of bilateral Air Service Agreements*	76	⬜
1.06	Transparency of government policymaking	24	🟦
1.07	Time required to start a business*	76	⬜
1.08	Cost to start a business*	128	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	45	🟦
2.02	Enforcement of environmental regulation	43	🟦
2.03	Sustainability of T&T industry development	3	🟦
2.04	Carbon dioxide emissions*	13	🟦
2.05	Particulate matter concentration*	116	⬜
2.06	Threatened species*	23	🟦
2.07	Environmental treaty ratification*	81	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	42	🟦
3.02	Reliability of police services	38	🟦
3.03	Business costs of crime and violence	33	🟦
3.04	Road traffic accidents*	30	🟦
	4th pillar: Health and hygiene		
4.01	Physician density*	119	⬜
4.02	Access to improved sanitation*	96	⬜
4.03	Access to improved drinking water*	89	⬜
4.04	Hospital beds*	114	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	11	🟦
5.02	T&T government expenditure*	9	🟦
5.03	Effectiveness of marketing and branding	11	🟦
5.04	T&T fair attendance*	115	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	71	⬜
6.02	Available seat kilometers, domestic*	100	⬜
6.03	Available seat kilometers, international*	128	⬜
6.04	Departures per 1,000 population*	n/a	
6.05	Airport density*	76	⬜
6.06	Number of operating airlines*	121	⬜
6.07	International air transport network	80	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	56	⬜
7.02	Quality of railroad infrastructure	n/a	
7.03	Quality of port infrastructure	62	⬜
7.04	Quality of ground transport network	38	🟦
7.05	Road density*	60	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	69	⬜
8.02	Presence of major car rental companies*	122	⬜
8.03	ATMs accepting Visa cards*	124	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	78	⬜
9.02	Internet users*	104	⬜
9.03	Telephone lines*	104	⬜
9.04	Broadband Internet subscribers*	121	⬜
9.05	Mobile telephone subscribers*	91	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	100	⬜
10.02	Purchasing power parity*	1	🟦
10.03	Extent and effect of taxation	35	🟦
10.04	Fuel price levels*	80	⬜
10.05	Hotel price index*	1	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	125	⬜
11.02	Secondary education enrollment*	110	⬜
11.03	Quality of the educational system	34	🟦
11.04	Local availability of research and training services	93	⬜
11.05	Extent of staff training	53	⬜
11.06	Hiring and firing practices	22	🟦
11.07	Ease of hiring foreign labor	26	🟦
11.08	HIV prevalence*	99	⬜
11.09	Business impact of HIV/AIDS	92	⬜
11.10	Life expectancy*	110	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	13	🟦
12.02	Attitude of population toward foreign visitors	39	🟦
12.03	Extension of business trips recommended	87	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	115	⬜
13.03	Quality of the natural environment	36	🟦
13.04	Total known species*	58	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	65	⬜
14.02	Sports stadiums*	106	⬜
14.03	Number of international fairs and exhibitions*	96	⬜
14.04	Creative industries exports*	116	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Georgia

Key indicators

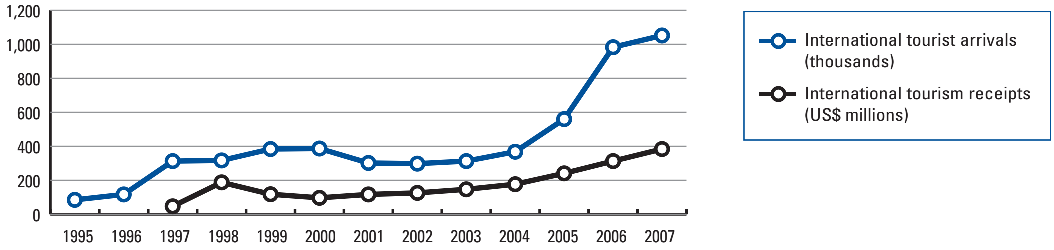
Population (millions), 2007	4.4
Surface area (1,000 square kilometers)	69.7
Gross domestic product (US$ billions), 2007	10.2
Gross domestic product (PPP, US$) per capita, 2007	4,694.1
Real GDP growth (percent), 2007	12.4
Environmental Performance Index, 2008 (out of 149 countries)	37

Travel & Tourism indicators

T&T industry, 2008 estimates		Percent of total	2009–2018 annual growth (%, forecast)
GDP (US$ millions)	n/a	n/a	n/a
Employment (1,000 jobs)	n/a	n/a	n/a
T&T economy, 2008 estimates			
GDP (US$ millions)	n/a	n/a	n/a
Employment (1,000 jobs)	n/a	n/a	n/a

Source: World Travel & Tourism Council, TSA Research 2008

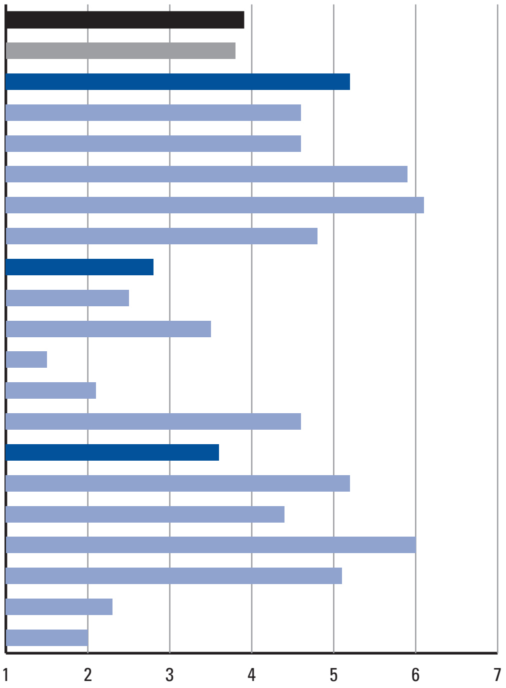
International tourist arrivals (thousands), 2007	1,052
International tourism receipts (US$ millions), 2007	384



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**73**	**3.9**
2008 Index	72	3.8
T&T regulatory framework	**33**	**5.2**
Policy rules and regulations	56	4.6
Environmental sustainability	56	4.6
Safety and security	32	5.9
Health and hygiene	29	6.1
Prioritization of Travel & Tourism	40	4.8
T&T business environment and infrastructure	**99**	**2.8**
Air transport infrastructure	100	2.5
Ground transport infrastructure	67	3.5
Tourism infrastructure	115	1.5
ICT infrastructure	96	2.1
Price competitiveness in the T&T industry	72	4.6
T&T human, cultural, and natural resources	**92**	**3.6**
Human resources	51	5.2
Education and training	84	4.4
Availability of qualified labor	8	6.0
Affinity for Travel & Tourism	37	5.1
Natural resources	115	2.3
Cultural resources	76	2.0



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Georgia

The Travel & Tourism Competitiveness Index in detail

■ Competitive **Advantage** □ Competitive **Disadvantage**

	INDICATOR	RANK/133	

1st pillar: Policy rules and regulations

1.01	Prevalence of foreign ownership	53	□
1.02	Property rights	109	□
1.03	Business impact of rules on FDI	60	□
1.04	Visa requirements*	72	□
1.05	Openness of bilateral Air Service Agreements*	117	□
1.06	Transparency of government policymaking	86	□
1.07	Time required to start a business*	3	■
1.08	Cost to start a business*	34	■

2nd pillar: Environmental sustainability

2.01	Stringency of environmental regulation	70	□
2.02	Enforcement of environmental regulation	66	□
2.03	Sustainability of T&T industry development	79	□
2.04	Carbon dioxide emissions*	31	■
2.05	Particulate matter concentration*	85	□
2.06	Threatened species*	77	□
2.07	Environmental treaty ratification*	67	□

3rd pillar: Safety and security

3.01	Business costs of terrorism	50	■
3.02	Reliability of police services	39	■
3.03	Business costs of crime and violence	39	■
3.04	Road traffic accidents*	23	■

4th pillar: Health and hygiene

4.01	Physician density*	2	■
4.02	Access to improved sanitation*	52	□
4.03	Access to improved drinking water*	38	■
4.04	Hospital beds*	48	■

5th pillar: Prioritization of Travel & Tourism

5.01	Government prioritization of the T&T industry	34	■
5.02	T&T government expenditure*	n/a	
5.03	Effectiveness of marketing and branding	74	□
5.04	T&T fair attendance*	62	□

6th pillar: Air transport infrastructure

6.01	Quality of air transport infrastructure	86	□
6.02	Available seat kilometers, domestic*	100	□
6.03	Available seat kilometers, international*	108	□
6.04	Departures per 1,000 population*	91	□
6.05	Airport density*	68	□
6.06	Number of operating airlines*	83	□
6.07	International air transport network	85	□

7th pillar: Ground transport infrastructure

7.01	Quality of roads	68	□
7.02	Quality of railroad infrastructure	38	■
7.03	Quality of port infrastructure	67	□
7.04	Quality of ground transport network	71	□
7.05	Road density*	66	□

	INDICATOR	RANK/133	

8th pillar: Tourism infrastructure

8.01	Hotel rooms*	81	□
8.02	Presence of major car rental companies*	122	□
8.03	ATMs accepting Visa cards*	76	□

9th pillar: ICT infrastructure

9.01	Extent of business Internet use	98	□
9.02	Internet users*	96	□
9.03	Telephone lines*	84	□
9.04	Broadband Internet subscribers*	81	□
9.05	Mobile telephone subscribers*	98	□

10th pillar: Price competitiveness in the T&T industry

10.01	Ticket taxes and airport charges*	95	□
10.02	Purchasing power parity*	43	■
10.03	Extent and effect of taxation	24	■
10.04	Fuel price levels*	73	□
10.05	Hotel price index*	106	□

11th pillar: Human resources

11.01	Primary education enrollment*	91	□
11.02	Secondary education enrollment*	73	□
11.03	Quality of the educational system	83	□
11.04	Local availability of research and training services	117	□
11.05	Extent of staff training	73	□
11.06	Hiring and firing practices	5	■
11.07	Ease of hiring foreign labor	6	■
11.08	HIV prevalence*	22	■
11.09	Business impact of HIV/AIDS	42	■
11.10	Life expectancy*	83	□

12th pillar: Affinity for Travel & Tourism

12.01	Tourism openness*	60	□
12.02	Attitude of population toward foreign visitors	48	■
12.03	Extension of business trips recommended	12	■

13th pillar: Natural resources

13.01	Number of World Heritage natural sites*	74	□
13.02	Protected areas*	101	□
13.03	Quality of the natural environment	77	□
13.04	Total known species*	96	□

14th pillar: Cultural resources

14.01	Number of World Heritage cultural sites*	54	□
14.02	Sports stadiums*	47	■
14.03	Number of international fairs and exhibitions*	117	□
14.04	Creative industries exports*	105	□

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Germany

Key indicators

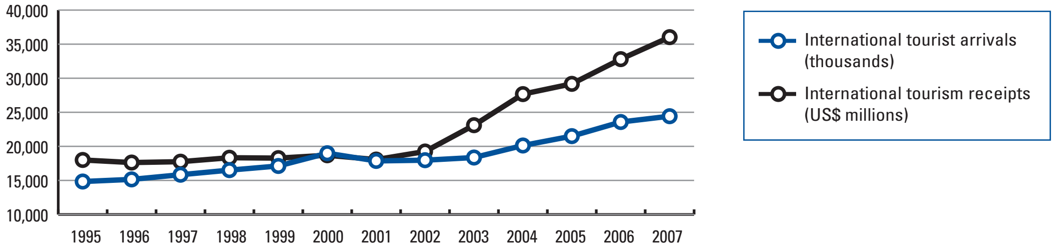
Population (millions), 2007	82.7
Surface area (1,000 square kilometers)	357.1
Gross domestic product (US$ billions), 2007	3,320.9
Gross domestic product (PPP, US$) per capita, 2007	34,212.4
Real GDP growth (percent), 2007	2.5
Environmental Performance Index, 2008 (out of 149 countries)	13

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	88,712	2.4	0.8
Employment (1,000 jobs)	1,062	2.6	–1.0
T&T economy, 2008 estimates			
GDP (US$ millions)	316,217	8.6	1.9
Employment (1,000 jobs)	3,616	9.0	0.2

Source: World Travel & Tourism Council, TSA Research 2008

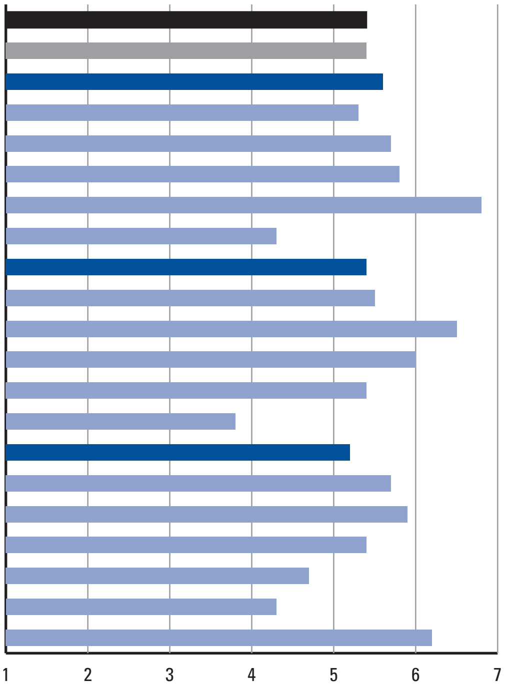
International tourist arrivals (thousands), 2007	24,425
International tourism receipts (US$ millions), 2007	36,029



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**3**	**5.4**
2008 Index	3	5.4
T&T regulatory framework	**13**	**5.6**
Policy rules and regulations	17	5.3
Environmental sustainability	6	5.7
Safety and security	39	5.8
Health and hygiene	7	6.8
Prioritization of Travel & Tourism	65	4.3
T&T business environment and infrastructure	**3**	**5.4**
Air transport infrastructure	7	5.5
Ground transport infrastructure	5	6.5
Tourism infrastructure	17	6.0
ICT infrastructure	11	5.4
Price competitiveness in the T&T industry	119	3.8
T&T human, cultural, and natural resources	**9**	**5.2**
Human resources	21	5.7
Education and training	11	5.9
Availability of qualified labor	81	5.4
Affinity for Travel & Tourism	68	4.7
Natural resources	29	4.3
Cultural resources	4	6.2



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Germany

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	31	⬜
1.02	Property rights	6	🟦
1.03	Business impact of rules on FDI	46	⬜
1.04	Visa requirements*	40	⬜
1.05	Openness of bilateral Air Service Agreements*	16	⬜
1.06	Transparency of government policymaking	22	⬜
1.07	Time required to start a business*	54	⬜
1.08	Cost to start a business*	45	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	5	🟦
2.02	Enforcement of environmental regulation	1	🟦
2.03	Sustainability of T&T industry development	73	⬜
2.04	Carbon dioxide emissions*	104	⬜
2.05	Particulate matter concentration*	22	⬜
2.06	Threatened species*	33	⬜
2.07	Environmental treaty ratification*	10	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	62	⬜
3.02	Reliability of police services	4	🟦
3.03	Business costs of crime and violence	19	⬜
3.04	Road traffic accidents*	106	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	21	⬜
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	6	🟦
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	106	⬜
5.02	T&T government expenditure*	100	⬜
5.03	Effectiveness of marketing and branding	77	⬜
5.04	T&T fair attendance*	20	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	3	🟦
6.02	Available seat kilometers, domestic*	15	⬜
6.03	Available seat kilometers, international*	3	🟦
6.04	Departures per 1,000 population*	27	⬜
6.05	Airport density*	87	⬜
6.06	Number of operating airlines*	4	🟦
6.07	International air transport network	1	🟦
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	4	🟦
7.02	Quality of railroad infrastructure	4	🟦
7.03	Quality of port infrastructure	4	🟦
7.04	Quality of ground transport network	2	🟦
7.05	Road density*	n/a	

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	23	⬜
8.02	Presence of major car rental companies*	1	🟦
8.03	ATMs accepting Visa cards*	18	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	6	🟦
9.02	Internet users*	28	⬜
9.03	Telephone lines*	2	🟦
9.04	Broadband Internet subscribers*	15	⬜
9.05	Mobile telephone subscribers*	16	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	27	⬜
10.02	Purchasing power parity*	119	⬜
10.03	Extent and effect of taxation	104	⬜
10.04	Fuel price levels*	122	⬜
10.05	Hotel price index*	54	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	17	⬜
11.02	Secondary education enrollment*	25	⬜
11.03	Quality of the educational system	23	⬜
11.04	Local availability of research and training services	5	🟦
11.05	Extent of staff training	12	⬜
11.06	Hiring and firing practices	129	⬜
11.07	Ease of hiring foreign labor	83	⬜
11.08	HIV prevalence*	22	⬜
11.09	Business impact of HIV/AIDS	16	⬜
11.10	Life expectancy*	12	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	90	⬜
12.02	Attitude of population toward foreign visitors	67	⬜
12.03	Extension of business trips recommended	43	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	40	⬜
13.02	Protected areas*	2	🟦
13.03	Quality of the natural environment	18	⬜
13.04	Total known species*	81	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	4	🟦
14.02	Sports stadiums*	33	⬜
14.03	Number of international fairs and exhibitions*	2	🟦
14.04	Creative industries exports*	5	🟦

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Ghana

Key indicators

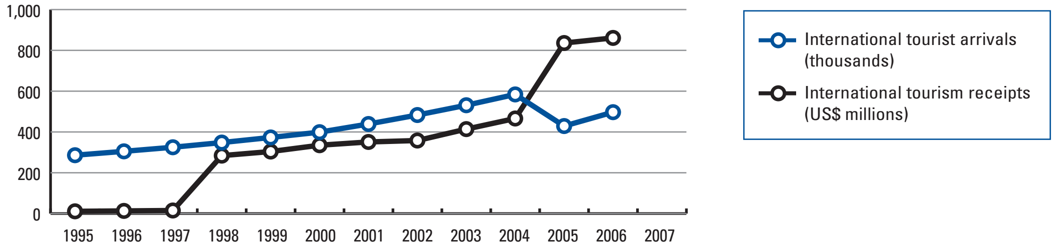
Population (millions), 2007	23.0
Surface area (1,000 square kilometers)	238.5
Gross domestic product (US$ billions), 2007	15.2
Gross domestic product (PPP, US$) per capita, 2007	1,426.0
Real GDP growth (percent), 2007	6.3
Environmental Performance Index, 2008 (out of 149 countries)	86

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	726	4.3	5.0
Employment (1,000 jobs)	175	3.5	2.6
T&T economy, 2008 estimates			
GDP (US$ millions)	1,611	9.6	5.0
Employment (1,000 jobs)	393	7.8	2.5

Source: World Travel & Tourism Council, TSA Research 2008

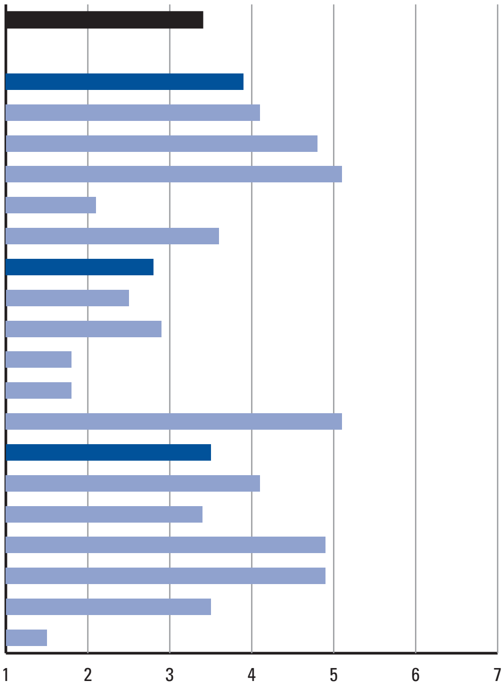
International tourist arrivals (thousands), 2006	497
International tourism receipts (US$ millions), 2006	861



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**110**	**3.4**
2008 Index	n/a	n/a
T&T regulatory framework	**105**	**3.9**
Policy rules and regulations	84	4.1
Environmental sustainability	48	4.8
Safety and security	69	5.1
Health and hygiene	117	2.1
Prioritization of Travel & Tourism	108	3.6
T&T business environment and infrastructure	**102**	**2.8**
Air transport infrastructure	101	2.5
Ground transport infrastructure	96	2.9
Tourism infrastructure	105	1.8
ICT infrastructure	114	1.8
Price competitiveness in the T&T industry	36	5.1
T&T human, cultural, and natural resources	**104**	**3.5**
Human resources	114	4.1
Education and training	120	3.4
Availability of qualified labor	111	4.9
Affinity for Travel & Tourism	56	4.9
Natural resources	57	3.5
Cultural resources	105	1.5



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Ghana

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ▨ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	29	🟦
1.02	Property rights	74	▨
1.03	Business impact of rules on FDI	35	🟦
1.04	Visa requirements*	108	▨
1.05	Openness of bilateral Air Service Agreements*	62	▨
1.06	Transparency of government policymaking	84	▨
1.07	Time required to start a business*	91	▨
1.08	Cost to start a business*	97	▨
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	97	▨
2.02	Enforcement of environmental regulation	101	▨
2.03	Sustainability of T&T industry development	88	▨
2.04	Carbon dioxide emissions*	20	🟦
2.05	Particulate matter concentration*	58	▨
2.06	Threatened species*	47	🟦
2.07	Environmental treaty ratification*	67	▨
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	18	🟦
3.02	Reliability of police services	89	▨
3.03	Business costs of crime and violence	63	▨
3.04	Road traffic accidents*	95	▨
	4th pillar: Health and hygiene		
4.01	Physician density*	114	▨
4.02	Access to improved sanitation*	125	▨
4.03	Access to improved drinking water*	100	▨
4.04	Hospital beds*	107	▨
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	60	▨
5.02	T&T government expenditure*	65	▨
5.03	Effectiveness of marketing and branding	104	▨
5.04	T&T fair attendance*	115	▨
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	91	▨
6.02	Available seat kilometers, domestic*	92	▨
6.03	Available seat kilometers, international*	80	▨
6.04	Departures per 1,000 population*	122	▨
6.05	Airport density*	118	▨
6.06	Number of operating airlines*	70	▨
6.07	International air transport network	58	▨
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	73	▨
7.02	Quality of railroad infrastructure	110	▨
7.03	Quality of port infrastructure	86	▨
7.04	Quality of ground transport network	81	▨
7.05	Road density*	73	▨

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	103	▨
8.02	Presence of major car rental companies*	95	▨
8.03	ATMs accepting Visa cards*	n/a	
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	100	▨
9.02	Internet users*	115	▨
9.03	Telephone lines*	114	▨
9.04	Broadband Internet subscribers*	104	▨
9.05	Mobile telephone subscribers*	107	▨
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	101	▨
10.02	Purchasing power parity*	41	🟦
10.03	Extent and effect of taxation	51	▨
10.04	Fuel price levels*	62	▨
10.05	Hotel price index*	9	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	123	▨
11.02	Secondary education enrollment*	108	▨
11.03	Quality of the educational system	75	▨
11.04	Local availability of research and training services	101	▨
11.05	Extent of staff training	103	▨
11.06	Hiring and firing practices	92	▨
11.07	Ease of hiring foreign labor	66	▨
11.08	HIV prevalence*	114	▨
11.09	Business impact of HIV/AIDS	111	▨
11.10	Life expectancy*	114	▨
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	26	🟦
12.02	Attitude of population toward foreign visitors	44	🟦
12.03	Extension of business trips recommended	125	▨
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	▨
13.02	Protected areas*	35	🟦
13.03	Quality of the natural environment	99	▨
13.04	Total known species*	33	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	82	▨
14.02	Sports stadiums*	97	▨
14.03	Number of international fairs and exhibitions*	78	▨
14.04	Creative industries exports*	66	▨

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Greece

Key indicators

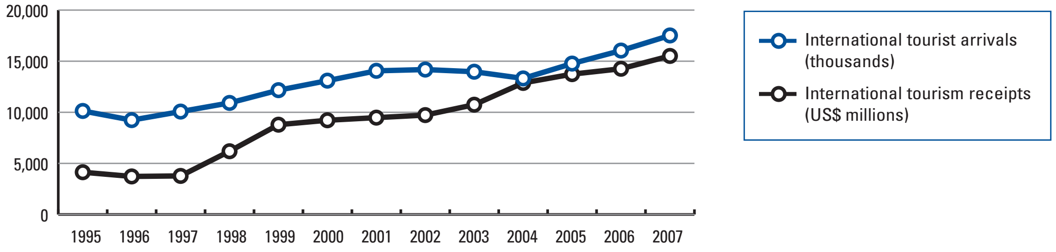
Population (millions), 2007	11.2
Surface area (1,000 square kilometers)	132.0
Gross domestic product (US$ billions), 2007	313.8
Gross domestic product (PPP, US$) per capita, 2007	29,146.3
Real GDP growth (percent), 2007	4.0
Environmental Performance Index, 2008 (out of 149 countries)	44

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	21,394	7.8	3.9
Employment (1,000 jobs)	496	10.8	3.0
T&T economy, 2008 estimates			
GDP (US$ millions)	47,420	17.2	3.9
Employment (1,000 jobs)	963	20.9	3.4

Source: World Travel & Tourism Council, TSA Research 2008

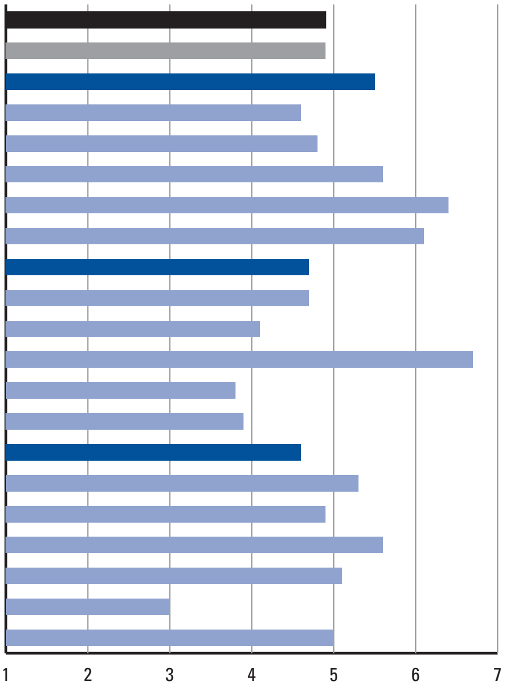
International tourist arrivals (thousands), 2007	17,518
International tourism receipts (US$ millions), 2007	15,513



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**24**	**4.9**
2008 Index	22	4.9
T&T regulatory framework	**18**	**5.5**
Policy rules and regulations	57	4.6
Environmental sustainability	47	4.8
Safety and security	47	5.6
Health and hygiene	19	6.4
Prioritization of Travel & Tourism	3	6.1
T&T business environment and infrastructure	**27**	**4.7**
Air transport infrastructure	19	4.7
Ground transport infrastructure	43	4.1
Tourism infrastructure	5	6.7
ICT infrastructure	40	3.8
Price competitiveness in the T&T industry	114	3.9
T&T human, cultural, and natural resources	**27**	**4.6**
Human resources	44	5.3
Education and training	53	4.9
Availability of qualified labor	41	5.6
Affinity for Travel & Tourism	35	5.1
Natural resources	74	3.0
Cultural resources	23	5.0



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Greece

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	64	⬜
1.02	Property rights	51	⬜
1.03	Business impact of rules on FDI	107	⬜
1.04	Visa requirements*	40	⬜
1.05	Openness of bilateral Air Service Agreements*	51	⬜
1.06	Transparency of government policymaking	99	⬜
1.07	Time required to start a business*	57	⬜
1.08	Cost to start a business*	64	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	67	⬜
2.02	Enforcement of environmental regulation	74	⬜
2.03	Sustainability of T&T industry development	69	⬜
2.04	Carbon dioxide emissions*	99	⬜
2.05	Particulate matter concentration*	66	⬜
2.06	Threatened species*	81	⬜
2.07	Environmental treaty ratification*	2	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	56	⬜
3.02	Reliability of police services	63	⬜
3.03	Business costs of crime and violence	31	⬜
3.04	Road traffic accidents*	73	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	1	🟦
4.02	Access to improved sanitation*	39	⬜
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	37	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	20	🟦
5.02	T&T government expenditure*	13	🟦
5.03	Effectiveness of marketing and branding	39	⬜
5.04	T&T fair attendance*	3	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	40	⬜
6.02	Available seat kilometers, domestic*	34	⬜
6.03	Available seat kilometers, international*	32	⬜
6.04	Departures per 1,000 population*	31	⬜
6.05	Airport density*	14	🟦
6.06	Number of operating airlines*	19	🟦
6.07	International air transport network	44	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	47	⬜
7.02	Quality of railroad infrastructure	50	⬜
7.03	Quality of port infrastructure	57	⬜
7.04	Quality of ground transport network	41	⬜
7.05	Road density*	35	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	4	🟦
8.02	Presence of major car rental companies*	1	🟦
8.03	ATMs accepting Visa cards*	20	🟦
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	97	⬜
9.02	Internet users*	63	⬜
9.03	Telephone lines*	10	🟦
9.04	Broadband Internet subscribers*	37	⬜
9.05	Mobile telephone subscribers*	29	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	99	⬜
10.02	Purchasing power parity*	107	⬜
10.03	Extent and effect of taxation	72	⬜
10.04	Fuel price levels*	96	⬜
10.05	Hotel price index*	83	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	7	🟦
11.02	Secondary education enrollment*	17	🟦
11.03	Quality of the educational system	82	⬜
11.04	Local availability of research and training services	87	⬜
11.05	Extent of staff training	81	⬜
11.06	Hiring and firing practices	113	⬜
11.07	Ease of hiring foreign labor	73	⬜
11.08	HIV prevalence*	49	⬜
11.09	Business impact of HIV/AIDS	29	⬜
11.10	Life expectancy*	12	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	50	⬜
12.02	Attitude of population toward foreign visitors	16	🟦
12.03	Extension of business trips recommended	28	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	23	🟦
13.02	Protected areas*	108	⬜
13.03	Quality of the natural environment	62	⬜
13.04	Total known species*	73	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	9	🟦
14.02	Sports stadiums*	34	⬜
14.03	Number of international fairs and exhibitions*	19	🟦
14.04	Creative industries exports*	34	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Guatemala

Key indicators

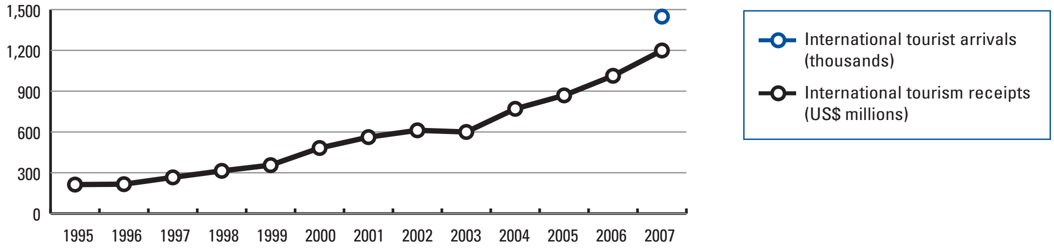
Population (millions), 2007	13.2
Surface area (1,000 square kilometers)	108.9
Gross domestic product (US$ billions), 2007	33.7
Gross domestic product (PPP, US$) per capita, 2007	4,702.5
Real GDP growth (percent), 2007	5.7
Environmental Performance Index, 2008 (out of 149 countries)	69

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	1,257	3.0	3.7
Employment (1,000 jobs)	110	2.6	2.7
T&T economy, 2008 estimates			
GDP (US$ millions)	2,864	6.8	3.9
Employment (1,000 jobs)	248	5.9	3.0

Source: World Travel & Tourism Council, TSA Research 2008

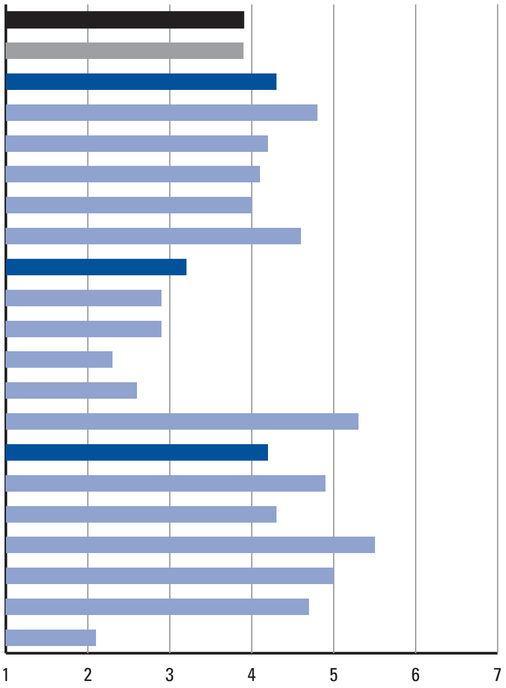
International tourist arrivals (thousands), 2007	1,448
International tourism receipts (US$ millions), 2007	1,199



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**70**	**3.9**
2008 Index	68	3.9
T&T regulatory framework	**81**	**4.3**
Policy rules and regulations	45	4.8
Environmental sustainability	95	4.2
Safety and security	114	4.1
Health and hygiene	88	4.0
Prioritization of Travel & Tourism	55	4.6
T&T business environment and infrastructure	**81**	**3.2**
Air transport infrastructure	71	2.9
Ground transport infrastructure	92	2.9
Tourism infrastructure	82	2.3
ICT infrastructure	78	2.6
Price competitiveness in the T&T industry	23	5.3
T&T human, cultural, and natural resources	**48**	**4.2**
Human resources	85	4.9
Education and training	92	4.3
Availability of qualified labor	54	5.5
Affinity for Travel & Tourism	40	5.0
Natural resources	20	4.7
Cultural resources	74	2.1



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Guatemala

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

1st pillar: Policy rules and regulations

	INDICATOR	RANK/133	
1.01	Prevalence of foreign ownership	41	🟦
1.02	Property rights	87	⬜
1.03	Business impact of rules on FDI	73	⬜
1.04	Visa requirements*	17	🟦
1.05	Openness of bilateral Air Service Agreements*	3	🟦
1.06	Transparency of government policymaking	61	⬜
1.07	Time required to start a business*	71	⬜
1.08	Cost to start a business*	105	⬜

2nd pillar: Environmental sustainability

	INDICATOR	RANK/133	
2.01	Stringency of environmental regulation	85	⬜
2.02	Enforcement of environmental regulation	89	⬜
2.03	Sustainability of T&T industry development	63	⬜
2.04	Carbon dioxide emissions*	35	🟦
2.05	Particulate matter concentration*	95	⬜
2.06	Threatened species*	115	⬜
2.07	Environmental treaty ratification*	67	⬜

3rd pillar: Safety and security

	INDICATOR	RANK/133	
3.01	Business costs of terrorism	101	⬜
3.02	Reliability of police services	127	⬜
3.03	Business costs of crime and violence	130	⬜
3.04	Road traffic accidents*	48	🟦

4th pillar: Health and hygiene

	INDICATOR	RANK/133	
4.01	Physician density*	89	⬜
4.02	Access to improved sanitation*	70	⬜
4.03	Access to improved drinking water*	58	⬜
4.04	Hospital beds*	116	⬜

5th pillar: Prioritization of Travel & Tourism

	INDICATOR	RANK/133	
5.01	Government prioritization of the T&T industry	51	⬜
5.02	T&T government expenditure*	40	🟦
5.03	Effectiveness of marketing and branding	62	⬜
5.04	T&T fair attendance*	62	⬜

6th pillar: Air transport infrastructure

	INDICATOR	RANK/133	
6.01	Quality of air transport infrastructure	53	⬜
6.02	Available seat kilometers, domestic*	70	⬜
6.03	Available seat kilometers, international*	87	⬜
6.04	Departures per 1,000 population*	n/a	
6.05	Airport density*	120	⬜
6.06	Number of operating airlines*	95	⬜
6.07	International air transport network	46	🟦

7th pillar: Ground transport infrastructure

	INDICATOR	RANK/133	
7.01	Quality of roads	52	⬜
7.02	Quality of railroad infrastructure	114	⬜
7.03	Quality of port infrastructure	63	⬜
7.04	Quality of ground transport network	105	⬜
7.05	Road density*	90	⬜

8th pillar: Tourism infrastructure

	INDICATOR	RANK/133	
8.01	Hotel rooms*	66	⬜
8.02	Presence of major car rental companies*	73	⬜
8.03	ATMs accepting Visa cards*	86	⬜

9th pillar: ICT infrastructure

	INDICATOR	RANK/133	
9.01	Extent of business Internet use	32	🟦
9.02	Internet users*	93	⬜
9.03	Telephone lines*	88	⬜
9.04	Broadband Internet subscribers*	96	⬜
9.05	Mobile telephone subscribers*	68	⬜

10th pillar: Price competitiveness in the T&T industry

	INDICATOR	RANK/133	
10.01	Ticket taxes and airport charges*	39	🟦
10.02	Purchasing power parity*	62	⬜
10.03	Extent and effect of taxation	40	🟦
10.04	Fuel price levels*	36	🟦
10.05	Hotel price index*	20	🟦

11th pillar: Human resources

	INDICATOR	RANK/133	
11.01	Primary education enrollment*	57	⬜
11.02	Secondary education enrollment*	105	⬜
11.03	Quality of the educational system	118	⬜
11.04	Local availability of research and training services	48	🟦
11.05	Extent of staff training	55	⬜
11.06	Hiring and firing practices	41	🟦
11.07	Ease of hiring foreign labor	42	🟦
11.08	HIV prevalence*	94	⬜
11.09	Business impact of HIV/AIDS	74	⬜
11.10	Life expectancy*	89	⬜

12th pillar: Affinity for Travel & Tourism

	INDICATOR	RANK/133	
12.01	Tourism openness*	49	🟦
12.02	Attitude of population toward foreign visitors	69	⬜
12.03	Extension of business trips recommended	21	🟦

13th pillar: Natural resources

	INDICATOR	RANK/133	
13.01	Number of World Heritage natural sites*	40	🟦
13.02	Protected areas*	10	🟦
13.03	Quality of the natural environment	70	⬜
13.04	Total known species*	27	🟦

14th pillar: Cultural resources

	INDICATOR	RANK/133	
14.01	Number of World Heritage cultural sites*	45	🟦
14.02	Sports stadiums*	77	⬜
14.03	Number of international fairs and exhibitions*	70	⬜
14.04	Creative industries exports*	58	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Guyana

Key indicators

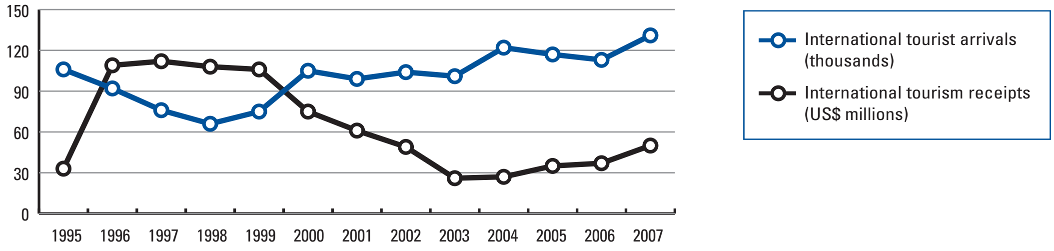
Population (millions), 2007	0.8
Surface area (1,000 square kilometers)	215.0
Gross domestic product (US$ billions), 2007	1.1
Gross domestic product (PPP, US$) per capita, 2007	3,841.2
Real GDP growth (percent), 2007	5.5
Environmental Performance Index, 2008 (out of 149 countries)	108

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	24	2.2	5.1
Employment (1,000 jobs)	6	1.8	3.7
T&T economy, 2008 estimates			
GDP (US$ millions)	90	8.3	4.4
Employment (1,000 jobs)	21	6.8	3.0

Source: World Travel & Tourism Council, TSA Research 2008

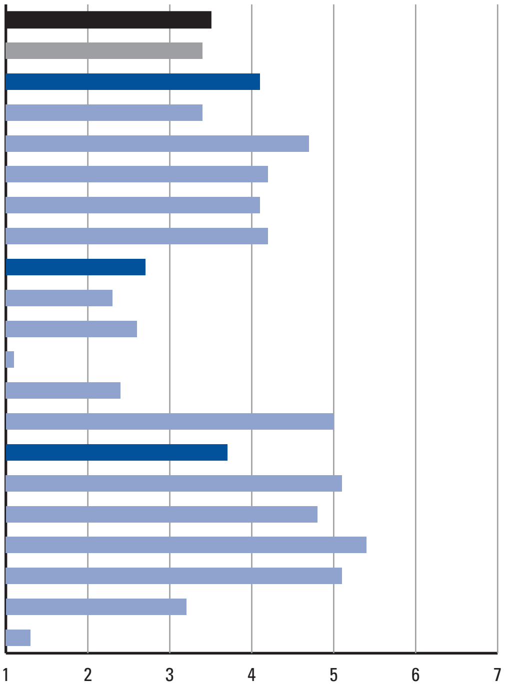
International tourist arrivals (thousands), 2007	131
International tourism receipts (US$ millions), 2007	50



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**102**	**3.5**
2008 Index	109	3.4
T&T regulatory framework	**94**	**4.1**
Policy rules and regulations	118	3.4
Environmental sustainability	50	4.7
Safety and security	111	4.2
Health and hygiene	84	4.1
Prioritization of Travel & Tourism	72	4.2
T&T business environment and infrastructure	**111**	**2.7**
Air transport infrastructure	112	2.3
Ground transport infrastructure	109	2.6
Tourism infrastructure	128	1.1
ICT infrastructure	82	2.4
Price competitiveness in the T&T industry	41	5.0
T&T human, cultural, and natural resources	**88**	**3.7**
Human resources	60	5.1
Education and training	62	4.8
Availability of qualified labor	71	5.4
Affinity for Travel & Tourism	38	5.1
Natural resources	64	3.2
Cultural resources	122	1.3



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Guyana

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ▨ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	95	▨
1.02	Property rights	104	▨
1.03	Business impact of rules on FDI	86	▨
1.04	Visa requirements*	91	▨
1.05	Openness of bilateral Air Service Agreements*	108	▨
1.06	Transparency of government policymaking	95	▨
1.07	Time required to start a business*	100	▨
1.08	Cost to start a business*	111	▨
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	82	▨
2.02	Enforcement of environmental regulation	78	▨
2.03	Sustainability of T&T industry development	90	▨
2.04	Carbon dioxide emissions*	51	▨
2.05	Particulate matter concentration*	64	▨
2.06	Threatened species*	10	🟦
2.07	Environmental treaty ratification*	94	▨
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	120	▨
3.02	Reliability of police services	118	▨
3.03	Business costs of crime and violence	127	▨
3.04	Road traffic accidents*	9	🟦
	4th pillar: Health and hygiene		
4.01	Physician density*	101	▨
4.02	Access to improved sanitation*	75	▨
4.03	Access to improved drinking water*	68	▨
4.04	Hospital beds*	66	▨
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	93	▨
5.02	T&T government expenditure*	24	🟦
5.03	Effectiveness of marketing and branding	94	▨
5.04	T&T fair attendance*	81	▨
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	115	▨
6.02	Available seat kilometers, domestic*	100	▨
6.03	Available seat kilometers, international*	126	▨
6.04	Departures per 1,000 population*	111	▨
6.05	Airport density*	35	🟦
6.06	Number of operating airlines*	130	▨
6.07	International air transport network	115	▨
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	72	▨
7.02	Quality of railroad infrastructure	106	▨
7.03	Quality of port infrastructure	105	▨
7.04	Quality of ground transport network	85	▨
7.05	Road density*	122	▨

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	n/a	
8.02	Presence of major car rental companies*	122	▨
8.03	ATMs accepting Visa cards*	101	▨
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	82	▨
9.02	Internet users*	58	▨
9.03	Telephone lines*	79	▨
9.04	Broadband Internet subscribers*	95	▨
9.05	Mobile telephone subscribers*	100	▨
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	24	🟦
10.02	Purchasing power parity*	38	🟦
10.03	Extent and effect of taxation	121	▨
10.04	Fuel price levels*	32	🟦
10.05	Hotel price index*	46	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	31	🟦
11.02	Secondary education enrollment*	15	🟦
11.03	Quality of the educational system	67	▨
11.04	Local availability of research and training services	120	▨
11.05	Extent of staff training	82	▨
11.06	Hiring and firing practices	34	🟦
11.07	Ease of hiring foreign labor	12	🟦
11.08	HIV prevalence*	118	▨
11.09	Business impact of HIV/AIDS	118	▨
11.10	Life expectancy*	100	▨
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	23	🟦
12.02	Attitude of population toward foreign visitors	89	▨
12.03	Extension of business trips recommended	103	▨
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	▨
13.02	Protected areas*	112	▨
13.03	Quality of the natural environment	47	🟦
13.04	Total known species*	25	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	116	▨
14.02	Sports stadiums*	70	▨
14.03	Number of international fairs and exhibitions*	122	▨
14.04	Creative industries exports*	112	▨

* Hard data

Note: For further details and explanation, please refer to the section “How to Read the Country/Economy Profiles” at the beginning of this chapter.

Honduras

Key indicators

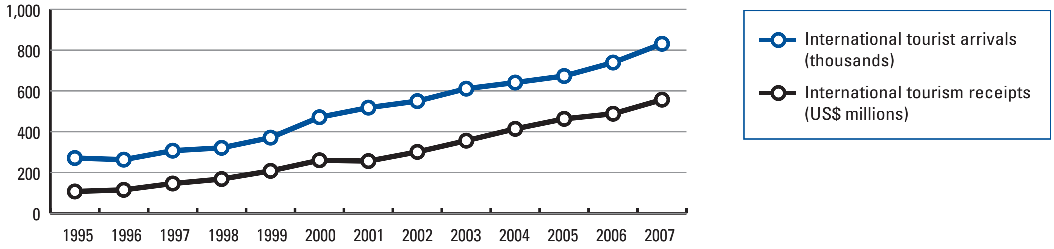
Population (millions), 2007	7.5
Surface area (1,000 square kilometers)	112.1
Gross domestic product (US$ billions), 2007	12.3
Gross domestic product (PPP, US$) per capita, 2007	4,085.0
Real GDP growth (percent), 2007	6.3
Environmental Performance Index, 2008 (out of 149 countries)	73

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	409	3.6	5.1
Employment (1,000 jobs)	95	2.9	4.3
T&T economy, 2008 estimates			
GDP (US$ millions)	1,049	9.3	4.8
Employment (1,000 jobs)	246	7.6	4.0

Source: World Travel & Tourism Council, TSA Research 2008

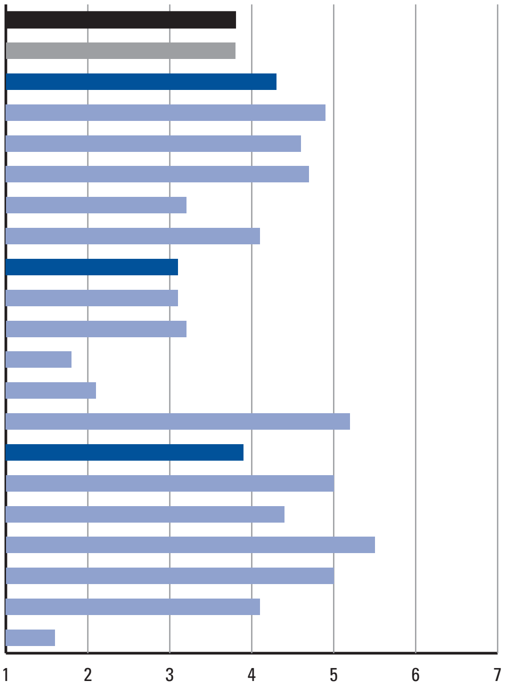
International tourist arrivals (thousands), 2007	831
International tourism receipts (US$ millions), 2007	557



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**83**	**3.8**
2008 Index	75	3.8
T&T regulatory framework	**83**	**4.3**
Policy rules and regulations	41	4.9
Environmental sustainability	59	4.6
Safety and security	89	4.7
Health and hygiene	103	3.2
Prioritization of Travel & Tourism	83	4.1
T&T business environment and infrastructure	**87**	**3.1**
Air transport infrastructure	66	3.1
Ground transport infrastructure	77	3.2
Tourism infrastructure	103	1.8
ICT infrastructure	95	2.1
Price competitiveness in the T&T industry	30	5.2
T&T human, cultural, and natural resources	**63**	**3.9**
Human resources	76	5.0
Education and training	81	4.4
Availability of qualified labor	48	5.5
Affinity for Travel & Tourism	44	5.0
Natural resources	38	4.1
Cultural resources	97	1.6



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Honduras

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	44	🟦
1.02	Property rights	77	⬜
1.03	Business impact of rules on FDI	54	⬜
1.04	Visa requirements*	18	🟦
1.05	Openness of bilateral Air Service Agreements*	2	🟦
1.06	Transparency of government policymaking	56	⬜
1.07	Time required to start a business*	61	⬜
1.08	Cost to start a business*	106	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	62	⬜
2.02	Enforcement of environmental regulation	56	⬜
2.03	Sustainability of T&T industry development	58	⬜
2.04	Carbon dioxide emissions*	37	🟦
2.05	Particulate matter concentration*	80	⬜
2.06	Threatened species*	97	⬜
2.07	Environmental treaty ratification*	81	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	80	⬜
3.02	Reliability of police services	103	⬜
3.03	Business costs of crime and violence	117	⬜
3.04	Road traffic accidents*	53	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	96	⬜
4.02	Access to improved sanitation*	89	⬜
4.03	Access to improved drinking water*	92	⬜
4.04	Hospital beds*	105	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	49	🟦
5.02	T&T government expenditure*	48	🟦
5.03	Effectiveness of marketing and branding	66	⬜
5.04	T&T fair attendance*	98	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	69	⬜
6.02	Available seat kilometers, domestic*	67	⬜
6.03	Available seat kilometers, international*	107	⬜
6.04	Departures per 1,000 population*	n/a	
6.05	Airport density*	39	🟦
6.06	Number of operating airlines*	101	⬜
6.07	International air transport network	66	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	61	⬜
7.02	Quality of railroad infrastructure	101	⬜
7.03	Quality of port infrastructure	36	🟦
7.04	Quality of ground transport network	64	⬜
7.05	Road density*	94	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	73	⬜
8.02	Presence of major car rental companies*	95	⬜
8.03	ATMs accepting Visa cards*	91	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	49	🟦
9.02	Internet users*	108	⬜
9.03	Telephone lines*	91	⬜
9.04	Broadband Internet subscribers*	127	⬜
9.05	Mobile telephone subscribers*	109	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	64	⬜
10.02	Purchasing power parity*	30	🟦
10.03	Extent and effect of taxation	41	🟦
10.04	Fuel price levels*	47	🟦
10.05	Hotel price index*	22	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	41	🟦
11.02	Secondary education enrollment*	91	⬜
11.03	Quality of the educational system	116	⬜
11.04	Local availability of research and training services	83	⬜
11.05	Extent of staff training	77	⬜
11.06	Hiring and firing practices	54	⬜
11.07	Ease of hiring foreign labor	32	🟦
11.08	HIV prevalence*	91	⬜
11.09	Business impact of HIV/AIDS	100	⬜
11.10	Life expectancy*	83	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	41	🟦
12.02	Attitude of population toward foreign visitors	66	⬜
12.03	Extension of business trips recommended	62	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	40	🟦
13.02	Protected areas*	34	🟦
13.03	Quality of the natural environment	44	🟦
13.04	Total known species*	30	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	82	⬜
14.02	Sports stadiums*	63	⬜
14.03	Number of international fairs and exhibitions*	96	⬜
14.04	Creative industries exports*	75	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Hong Kong SAR

Key indicators

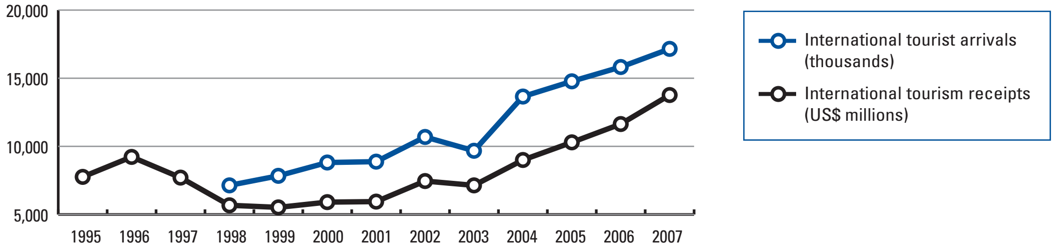
Population (millions), 2007	7.2
Surface area (1,000 square kilometers)	1.1
Gross domestic product (US$ billions), 2007	207.2
Gross domestic product (PPP, US$) per capita, 2007	42,123.6
Real GDP growth (percent), 2007	6.4
Environmental Performance Index, 2008 (out of 149 countries)	n/a

Travel & Tourism indicators

T&T industry, 2008 estimates		Percent of total	2009–2018 annual growth (%, forecast)
GDP (US$ millions)	8,209	3.7	6.1
Employment (1,000 jobs)	110	5.4	2.5
T&T economy, 2008 estimates			
GDP (US$ millions)	34,773	15.7	6.4
Employment (1,000 jobs)	545	15.3	3.1

Source: World Travel & Tourism Council, TSA Research 2008

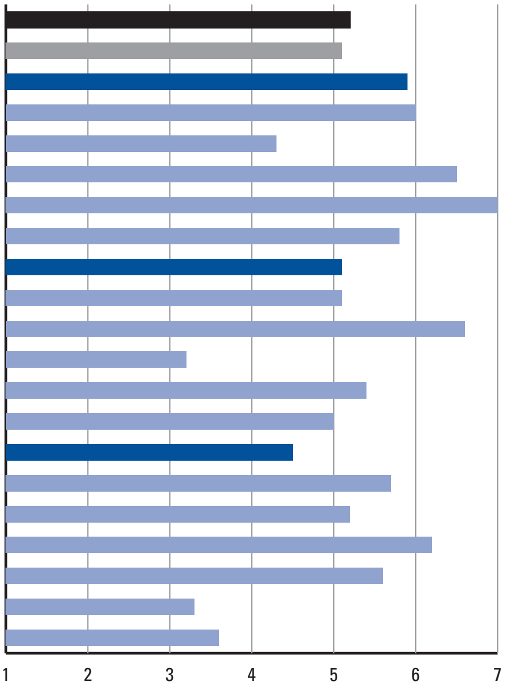
International tourist arrivals (thousands), 2007	17,154
International tourism receipts (US$ millions), 2007	13,766



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**12**	**5.2**
2008 Index	14	5.1
T&T regulatory framework	**2**	**5.9**
Policy rules and regulations	2	6.0
Environmental sustainability	80	4.3
Safety and security	5	6.5
Health and hygiene	1	7.0
Prioritization of Travel & Tourism	8	5.8
T&T business environment and infrastructure	**12**	**5.1**
Air transport infrastructure	13	5.1
Ground transport infrastructure	2	6.6
Tourism infrastructure	68	3.2
ICT infrastructure	9	5.4
Price competitiveness in the T&T industry	45	5.0
T&T human, cultural, and natural resources	**30**	**4.5**
Human resources	15	5.7
Education and training	35	5.2
Availability of qualified labor	4	6.2
Affinity for Travel & Tourism	11	5.6
Natural resources	62	3.3
Cultural resources	34	3.6



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Hong Kong SAR

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	]INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	1	🟦
1.02	Property rights	12	⬜
1.03	Business impact of rules on FDI	3	🟦
1.04	Visa requirements*	4	🟦
1.05	Openness of bilateral Air Service Agreements*	25	⬜
1.06	Transparency of government policymaking	2	🟦
1.07	Time required to start a business*	29	⬜
1.08	Cost to start a business*	18	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	58	⬜
2.02	Enforcement of environmental regulation	40	⬜
2.03	Sustainability of T&T industry development	10	🟦
2.04	Carbon dioxide emissions*	80	⬜
2.05	Particulate matter concentration*	104	⬜
2.06	Threatened species*	108	⬜
2.07	Environmental treaty ratification*	n/a	
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	6	🟦
3.02	Reliability of police services	7	🟦
3.03	Business costs of crime and violence	7	🟦
3.04	Road traffic accidents*	n/a	
	4th pillar: Health and hygiene		
4.01	Physician density*	n/a	
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	n/a	
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	8	🟦
5.02	T&T government expenditure*	16	⬜
5.03	Effectiveness of marketing and branding	5	🟦
5.04	T&T fair attendance*	25	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	2	🟦
6.02	Available seat kilometers, domestic*	100	⬜
6.03	Available seat kilometers, international*	9	🟦
6.04	Departures per 1,000 population*	19	⬜
6.05	Airport density*	109	⬜
6.06	Number of operating airlines*	24	⬜
6.07	International air transport network	3	🟦
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	5	🟦
7.02	Quality of railroad infrastructure	5	🟦
7.03	Quality of port infrastructure	2	🟦
7.04	Quality of ground transport network	3	🟦
7.05	Road density*	12	⬜

	]INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	37	⬜
8.02	Presence of major car rental companies*	95	⬜
8.03	ATMs accepting Visa cards*	41	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	20	⬜
9.02	Internet users*	23	⬜
9.03	Telephone lines*	11	🟦
9.04	Broadband Internet subscribers*	10	🟦
9.05	Mobile telephone subscribers*	5	🟦
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	35	⬜
10.02	Purchasing power parity*	93	⬜
10.03	Extent and effect of taxation	3	🟦
10.04	Fuel price levels*	83	⬜
10.05	Hotel price index*	72	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	101	⬜
11.02	Secondary education enrollment*	72	⬜
11.03	Quality of the educational system	22	⬜
11.04	Local availability of research and training services	25	⬜
11.05	Extent of staff training	29	⬜
11.06	Hiring and firing practices	7	🟦
11.07	Ease of hiring foreign labor	24	⬜
11.08	HIV prevalence*	1	🟦
11.09	Business impact of HIV/AIDS	22	⬜
11.10	Life expectancy*	4	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	12	⬜
12.02	Attitude of population toward foreign visitors	35	⬜
12.03	Extension of business trips recommended	69	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	3	🟦
13.03	Quality of the natural environment	120	⬜
13.04	Total known species*	123	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	116	⬜
14.02	Sports stadiums*	76	⬜
14.03	Number of international fairs and exhibitions*	31	⬜
14.04	Creative industries exports*	4	🟦

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Hungary

Key indicators

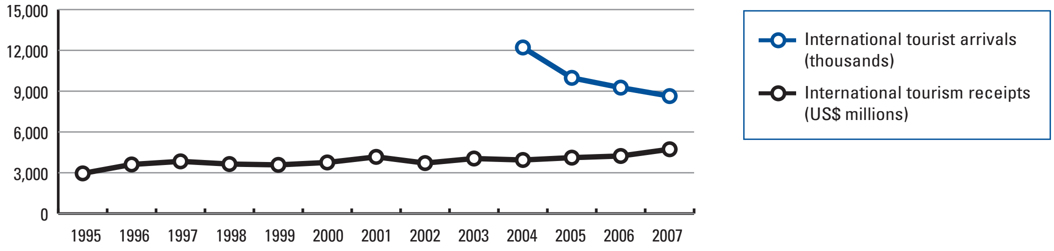
Population (millions), 2007	10.0
Surface area (1,000 square kilometers)	93.0
Gross domestic product (US$ billions), 2007	138.4
Gross domestic product (PPP, US$) per capita, 2007	19,019.7
Real GDP growth (percent), 2007	1.3
Environmental Performance Index, 2008 (out of 149 countries)	23

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	4,078	2.6	3.1
Employment (1,000 jobs)	170	4.3	–1.2
T&T economy, 2008 estimates			
GDP (US$ millions)	10,419	6.7	3.8
Employment (1,000 jobs)	244	6.1	–1.5

Source: World Travel & Tourism Council, TSA Research 2008

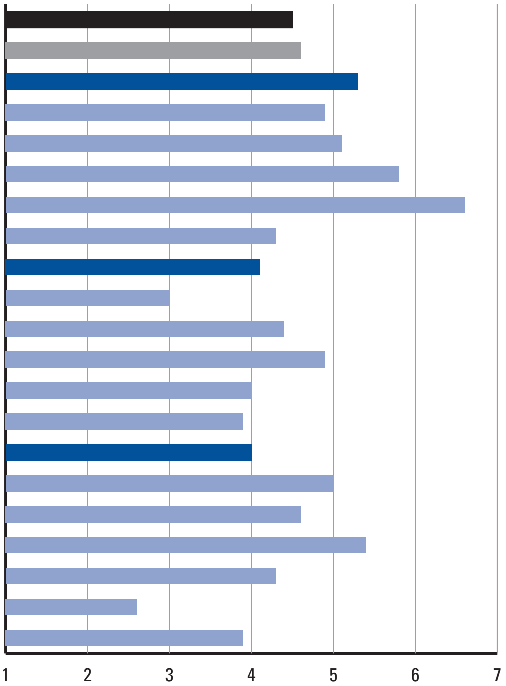
International tourist arrivals (thousands), 2007	8,638
International tourism receipts (US$ millions), 2007	4,728



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**38**	**4.5**
2008 Index	33	4.6
T&T regulatory framework	**26**	**5.3**
Policy rules and regulations	37	4.9
Environmental sustainability	24	5.1
Safety and security	41	5.8
Health and hygiene	11	6.6
Prioritization of Travel & Tourism	68	4.3
T&T business environment and infrastructure	**42**	**4.1**
Air transport infrastructure	68	3.0
Ground transport infrastructure	33	4.4
Tourism infrastructure	27	4.9
ICT infrastructure	36	4.0
Price competitiveness in the T&T industry	112	3.9
T&T human, cultural, and natural resources	**59**	**4.0**
Human resources	77	5.0
Education and training	73	4.6
Availability of qualified labor	74	5.4
Affinity for Travel & Tourism	115	4.3
Natural resources	103	2.6
Cultural resources	31	3.9



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Hungary

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	9	🟦
1.02	Property rights	46	⬜
1.03	Business impact of rules on FDI	40	⬜
1.04	Visa requirements*	40	⬜
1.05	Openness of bilateral Air Service Agreements*	46	⬜
1.06	Transparency of government policymaking	117	⬜
1.07	Time required to start a business*	6	🟦
1.08	Cost to start a business*	57	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	35	🟦
2.02	Enforcement of environmental regulation	59	⬜
2.03	Sustainability of T&T industry development	102	⬜
2.04	Carbon dioxide emissions*	82	⬜
2.05	Particulate matter concentration*	16	🟦
2.06	Threatened species*	37	🟦
2.07	Environmental treaty ratification*	21	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	21	🟦
3.02	Reliability of police services	46	⬜
3.03	Business costs of crime and violence	45	⬜
3.04	Road traffic accidents*	63	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	31	🟦
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	9	🟦
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	71	⬜
5.02	T&T government expenditure*	32	🟦
5.03	Effectiveness of marketing and branding	107	⬜
5.04	T&T fair attendance*	62	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	70	⬜
6.02	Available seat kilometers, domestic*	100	⬜
6.03	Available seat kilometers, international*	65	⬜
6.04	Departures per 1,000 population*	54	⬜
6.05	Airport density*	105	⬜
6.06	Number of operating airlines*	38	⬜
6.07	International air transport network	61	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	67	⬜
7.02	Quality of railroad infrastructure	41	⬜
7.03	Quality of port infrastructure	70	⬜
7.04	Quality of ground transport network	74	⬜
7.05	Road density*	15	🟦

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	43	⬜
8.02	Presence of major car rental companies*	1	🟦
8.03	ATMs accepting Visa cards*	31	🟦
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	59	⬜
9.02	Internet users*	39	⬜
9.03	Telephone lines*	37	🟦
9.04	Broadband Internet subscribers*	33	🟦
9.05	Mobile telephone subscribers*	31	🟦
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	54	⬜
10.02	Purchasing power parity*	98	⬜
10.03	Extent and effect of taxation	132	⬜
10.04	Fuel price levels*	114	⬜
10.05	Hotel price index*	68	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	96	⬜
11.02	Secondary education enrollment*	42	⬜
11.03	Quality of the educational system	87	⬜
11.04	Local availability of research and training services	73	⬜
11.05	Extent of staff training	101	⬜
11.06	Hiring and firing practices	67	⬜
11.07	Ease of hiring foreign labor	70	⬜
11.08	HIV prevalence*	22	🟦
11.09	Business impact of HIV/AIDS	13	🟦
11.10	Life expectancy*	55	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	58	⬜
12.02	Attitude of population toward foreign visitors	112	⬜
12.03	Extension of business trips recommended	127	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	40	⬜
13.02	Protected areas*	92	⬜
13.03	Quality of the natural environment	94	⬜
13.04	Total known species*	103	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	26	🟦
14.02	Sports stadiums*	35	🟦
14.03	Number of international fairs and exhibitions*	22	🟦
14.04	Creative industries exports*	44	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Iceland

Key indicators

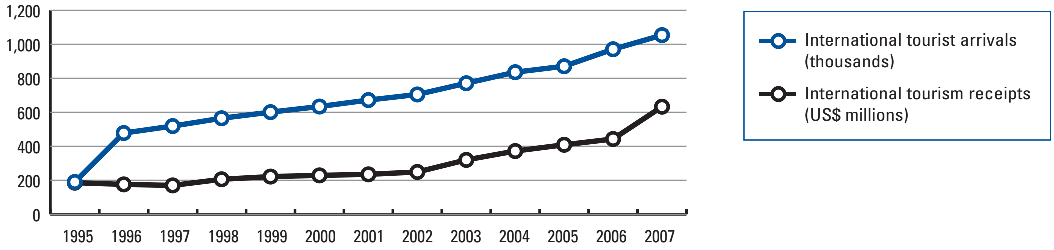
Population (millions), 2007	0.3
Surface area (1,000 square kilometers)	103.0
Gross domestic product (US$ billions), 2007	20.2
Gross domestic product (PPP, US$) per capita, 2007	39,167.6
Real GDP growth (percent), 2007	4.9
Environmental Performance Index, 2008 (out of 149 countries)	11

Travel & Tourism indicators

T&T industry, 2008 estimates		Percent of total	2009–2018 annual growth (%, forecast)
GDP (US$ millions)	907	4.6	3.5
Employment (1,000 jobs)	8	4.2	1.4
T&T economy, 2008 estimates			
GDP (US$ millions)	2,586	13.3	3.3
Employment (1,000 jobs)	24	13.5	1.3

Source: World Travel & Tourism Council, TSA Research 2008

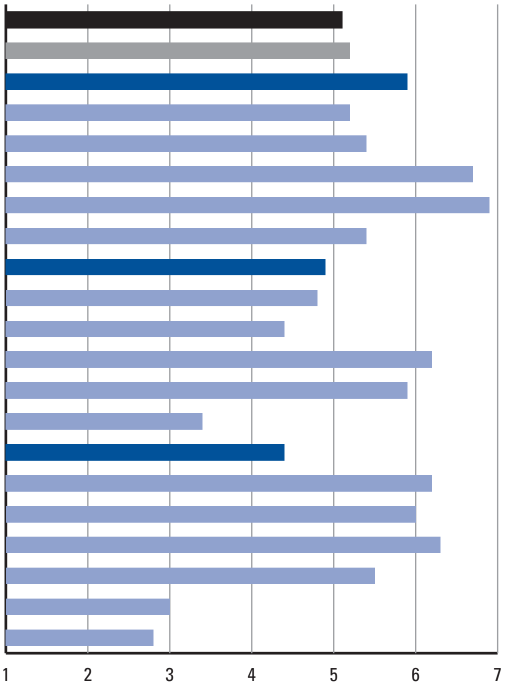
International tourist arrivals (thousands), 2007	1,054
International tourism receipts (US$ millions), 2007	633



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**16**	**5.1**
2008 Index	11	5.2
T&T regulatory framework	**3**	**5.9**
Policy rules and regulations	21	5.2
Environmental sustainability	13	5.4
Safety and security	2	6.7
Health and hygiene	4	6.9
Prioritization of Travel & Tourism	20	5.4
T&T business environment and infrastructure	**17**	**4.9**
Air transport infrastructure	18	4.8
Ground transport infrastructure	34	4.4
Tourism infrastructure	13	6.2
ICT infrastructure	2	5.9
Price competitiveness in the T&T industry	128	3.4
T&T human, cultural, and natural resources	**39**	**4.4**
Human resources	3	6.2
Education and training	9	6.0
Availability of qualified labor	2	6.3
Affinity for Travel & Tourism	17	5.5
Natural resources	73	3.0
Cultural resources	50	2.8



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Iceland

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	103	⬜
1.02	Property rights	10	🟦
1.03	Business impact of rules on FDI	95	⬜
1.04	Visa requirements*	40	⬜
1.05	Openness of bilateral Air Service Agreements*	17	⬜
1.06	Transparency of government policymaking	6	🟦
1.07	Time required to start a business*	6	🟦
1.08	Cost to start a business*	24	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	17	⬜
2.02	Enforcement of environmental regulation	15	🟦
2.03	Sustainability of T&T industry development	30	⬜
2.04	Carbon dioxide emissions*	91	⬜
2.05	Particulate matter concentration*	13	🟦
2.06	Threatened species*	51	⬜
2.07	Environmental treaty ratification*	52	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	2	🟦
3.02	Reliability of police services	5	🟦
3.03	Business costs of crime and violence	2	🟦
3.04	Road traffic accidents*	3	🟦
	4th pillar: Health and hygiene		
4.01	Physician density*	9	🟦
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	14	🟦
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	47	⬜
5.02	T&T government expenditure*	5	🟦
5.03	Effectiveness of marketing and branding	22	⬜
5.04	T&T fair attendance*	81	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	11	🟦
6.02	Available seat kilometers, domestic*	60	⬜
6.03	Available seat kilometers, international*	78	⬜
6.04	Departures per 1,000 population*	7	🟦
6.05	Airport density*	1	🟦
6.06	Number of operating airlines*	116	⬜
6.07	International air transport network	18	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	42	⬜
7.02	Quality of railroad infrastructure	n/a	
7.03	Quality of port infrastructure	9	🟦
7.04	Quality of ground transport network	18	⬜
7.05	Road density*	92	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	5	🟦
8.02	Presence of major car rental companies*	56	⬜
8.03	ATMs accepting Visa cards*	8	🟦
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	16	⬜
9.02	Internet users*	12	🟦
9.03	Telephone lines*	4	🟦
9.04	Broadband Internet subscribers*	2	🟦
9.05	Mobile telephone subscribers*	19	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	46	⬜
10.02	Purchasing power parity*	132	⬜
10.03	Extent and effect of taxation	11	🟦
10.04	Fuel price levels*	130	⬜
10.05	Hotel price index*	94	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	25	⬜
11.02	Secondary education enrollment*	11	🟦
11.03	Quality of the educational system	5	🟦
11.04	Local availability of research and training services	17	⬜
11.05	Extent of staff training	9	🟦
11.06	Hiring and firing practices	8	🟦
11.07	Ease of hiring foreign labor	11	🟦
11.08	HIV prevalence*	49	⬜
11.09	Business impact of HIV/AIDS	2	🟦
11.10	Life expectancy*	5	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	25	⬜
12.02	Attitude of population toward foreign visitors	5	🟦
12.03	Extension of business trips recommended	35	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	40	⬜
13.02	Protected areas*	76	⬜
13.03	Quality of the natural environment	1	🟦
13.04	Total known species*	132	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	97	⬜
14.02	Sports stadiums*	4	🟦
14.03	Number of international fairs and exhibitions*	49	⬜
14.04	Creative industries exports*	106	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

India

Key indicators

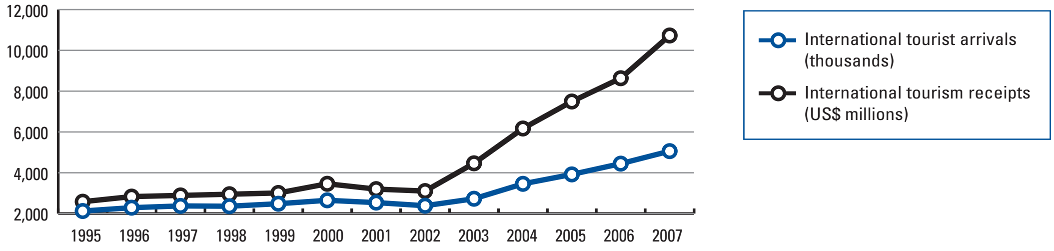
Population (millions), 2007	1,135.6
Surface area (1,000 square kilometers)	3,287.3
Gross domestic product (US$ billions), 2007	1,100.7
Gross domestic product (PPP, US$) per capita, 2007	2,563.3
Real GDP growth (percent), 2007	9.3
Environmental Performance Index, 2008 (out of 149 countries)	120

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	28,143	2.3	6.7
Employment (1,000 jobs)	13,127	2.8	2.3
T&T economy, 2008 estimates			
GDP (US$ millions)	73,558	6.1	7.6
Employment (1,000 jobs)	30,491	6.4	2.7

Source: World Travel & Tourism Council, TSA Research 2008

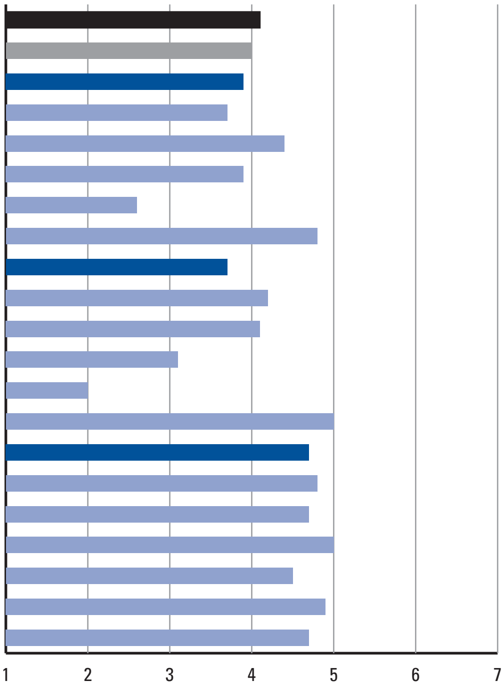
International tourist arrivals (thousands), 2007	5,060
International tourism receipts (US$ millions), 2007	10,729



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**62**	**4.1**
2008 Index	65	4.0
T&T regulatory framework	**107**	**3.9**
Policy rules and regulations	108	3.7
Environmental sustainability	74	4.4
Safety and security	120	3.9
Health and hygiene	111	2.6
Prioritization of Travel & Tourism	42	4.8
T&T business environment and infrastructure	**63**	**3.7**
Air transport infrastructure	37	4.2
Ground transport infrastructure	49	4.1
Tourism infrastructure	73	3.1
ICT infrastructure	104	2.0
Price competitiveness in the T&T industry	46	5.0
T&T human, cultural, and natural resources	**18**	**4.7**
Human resources	90	4.8
Education and training	70	4.7
Availability of qualified labor	109	5.0
Affinity for Travel & Tourism	96	4.5
Natural resources	14	4.9
Cultural resources	24	4.7



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

India

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	69	⬜
1.02	Property rights	52	⬜
1.03	Business impact of rules on FDI	61	⬜
1.04	Visa requirements*	127	⬜
1.05	Openness of bilateral Air Service Agreements*	93	⬜
1.06	Transparency of government policymaking	55	⬜
1.07	Time required to start a business*	83	⬜
1.08	Cost to start a business*	112	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	50	🟦
2.02	Enforcement of environmental regulation	60	⬜
2.03	Sustainability of T&T industry development	78	⬜
2.04	Carbon dioxide emissions*	44	🟦
2.05	Particulate matter concentration*	101	⬜
2.06	Threatened species*	125	⬜
2.07	Environmental treaty ratification*	10	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	106	⬜
3.02	Reliability of police services	62	⬜
3.03	Business costs of crime and violence	53	⬜
3.04	Road traffic accidents*	127	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	95	⬜
4.02	Access to improved sanitation*	116	⬜
4.03	Access to improved drinking water*	81	⬜
4.04	Hospital beds*	118	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	58	⬜
5.02	T&T government expenditure*	118	⬜
5.03	Effectiveness of marketing and branding	53	⬜
5.04	T&T fair attendance*	1	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	66	⬜
6.02	Available seat kilometers, domestic*	8	🟦
6.03	Available seat kilometers, international*	16	🟦
6.04	Departures per 1,000 population*	109	⬜
6.05	Airport density*	130	⬜
6.06	Number of operating airlines*	16	🟦
6.07	International air transport network	47	🟦
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	87	⬜
7.02	Quality of railroad infrastructure	21	🟦
7.03	Quality of port infrastructure	93	⬜
7.04	Quality of ground transport network	52	⬜
7.05	Road density*	32	🟦

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	123	⬜
8.02	Presence of major car rental companies*	1	🟦
8.03	ATMs accepting Visa cards*	99	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	41	🟦
9.02	Internet users*	99	⬜
9.03	Telephone lines*	108	⬜
9.04	Broadband Internet subscribers*	94	⬜
9.05	Mobile telephone subscribers*	120	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	9	🟦
10.02	Purchasing power parity*	15	🟦
10.03	Extent and effect of taxation	28	🟦
10.04	Fuel price levels*	51	⬜
10.05	Hotel price index*	107	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	94	⬜
11.02	Secondary education enrollment*	104	⬜
11.03	Quality of the educational system	37	🟦
11.04	Local availability of research and training services	32	🟦
11.05	Extent of staff training	34	🟦
11.06	Hiring and firing practices	103	⬜
11.07	Ease of hiring foreign labor	107	⬜
11.08	HIV prevalence*	67	⬜
11.09	Business impact of HIV/AIDS	98	⬜
11.10	Life expectancy*	104	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	122	⬜
12.02	Attitude of population toward foreign visitors	61	⬜
12.03	Extension of business trips recommended	60	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	7	🟦
13.02	Protected areas*	95	⬜
13.03	Quality of the natural environment	112	⬜
13.04	Total known species*	10	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	7	🟦
14.02	Sports stadiums*	131	⬜
14.03	Number of international fairs and exhibitions*	33	🟦
14.04	Creative industries exports*	10	🟦

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Indonesia

Key indicators

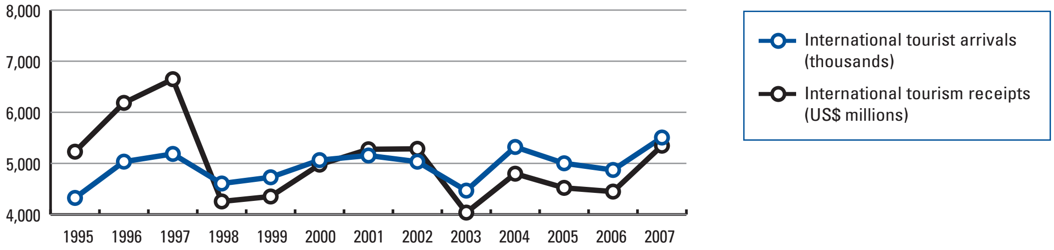
Population (millions), 2007	228.1
Surface area (1,000 square kilometers)	1,904.6
Gross domestic product (US$ billions), 2007	432.9
Gross domestic product (PPP, US$) per capita, 2007	3,728.2
Real GDP growth (percent), 2007	6.3
Environmental Performance Index, 2008 (out of 149 countries)	102

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	11,059	2.3	6.6
Employment (1,000 jobs)	1,926	1.9	2.6
T&T economy, 2008 estimates			
GDP (US$ millions)	33,993	7.2	5.6
Employment (1,000 jobs)	5,936	6.0	1.6

Source: World Travel & Tourism Council, TSA Research 2008

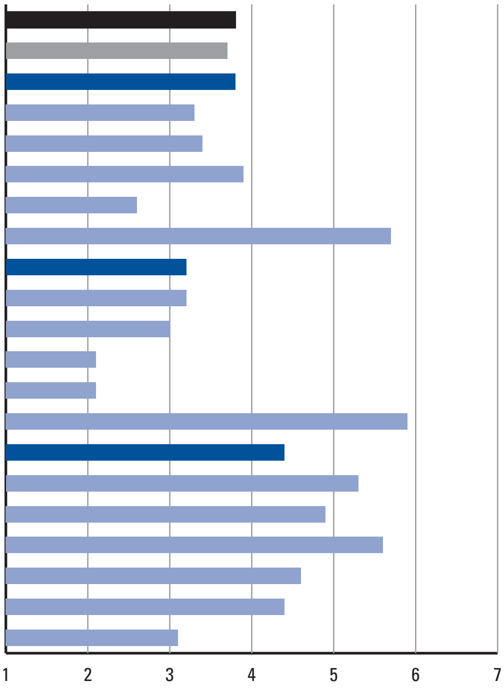
International tourist arrivals (thousands), 2007	5,506
International tourism receipts (US$ millions), 2007	5,346



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**81**	**3.8**
2008 Index	80	3.7
T&T regulatory framework	**113**	**3.8**
Policy rules and regulations	123	3.3
Environmental sustainability	130	3.4
Safety and security	119	3.9
Health and hygiene	110	2.6
Prioritization of Travel & Tourism	10	5.7
T&T business environment and infrastructure	**79**	**3.2**
Air transport infrastructure	60	3.2
Ground transport infrastructure	89	3.0
Tourism infrastructure	88	2.1
ICT infrastructure	102	2.1
Price competitiveness in the T&T industry	3	5.9
T&T human, cultural, and natural resources	**40**	**4.4**
Human resources	42	5.3
Education and training	55	4.9
Availability of qualified labor	33	5.6
Affinity for Travel & Tourism	78	4.6
Natural resources	28	4.4
Cultural resources	37	3.1



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Indonesia

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	24	🟦
1.02	Property rights	117	⬜
1.03	Business impact of rules on FDI	42	🟦
1.04	Visa requirements*	89	⬜
1.05	Openness of bilateral Air Service Agreements*	31	🟦
1.06	Transparency of government policymaking	121	⬜
1.07	Time required to start a business*	122	⬜
1.08	Cost to start a business*	114	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	122	⬜
2.02	Enforcement of environmental regulation	116	⬜
2.03	Sustainability of T&T industry development	28	🟦
2.04	Carbon dioxide emissions*	48	🟦
2.05	Particulate matter concentration*	117	⬜
2.06	Threatened species*	124	⬜
2.07	Environmental treaty ratification*	104	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	81	⬜
3.02	Reliability of police services	85	⬜
3.03	Business costs of crime and violence	47	🟦
3.04	Road traffic accidents*	126	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	116	⬜
4.02	Access to improved sanitation*	96	⬜
4.03	Access to improved drinking water*	100	⬜
4.04	Hospital beds*	119	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	43	🟦
5.02	T&T government expenditure*	12	🟦
5.03	Effectiveness of marketing and branding	31	🟦
5.04	T&T fair attendance*	25	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	75	⬜
6.02	Available seat kilometers, domestic*	11	🟦
6.03	Available seat kilometers, international*	38	🟦
6.04	Departures per 1,000 population*	82	⬜
6.05	Airport density*	110	⬜
6.06	Number of operating airlines*	37	🟦
6.07	International air transport network	57	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	105	⬜
7.02	Quality of railroad infrastructure	58	⬜
7.03	Quality of port infrastructure	104	⬜
7.04	Quality of ground transport network	51	⬜
7.05	Road density*	79	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	92	⬜
8.02	Presence of major car rental companies*	73	⬜
8.03	ATMs accepting Visa cards*	88	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	73	⬜
9.02	Internet users*	106	⬜
9.03	Telephone lines*	97	⬜
9.04	Broadband Internet subscribers*	101	⬜
9.05	Mobile telephone subscribers*	102	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	12	🟦
10.02	Purchasing power parity*	50	🟦
10.03	Extent and effect of taxation	16	🟦
10.04	Fuel price levels*	16	🟦
10.05	Hotel price index*	7	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	48	🟦
11.02	Secondary education enrollment*	102	⬜
11.03	Quality of the educational system	39	🟦
11.04	Local availability of research and training services	43	🟦
11.05	Extent of staff training	31	🟦
11.06	Hiring and firing practices	19	🟦
11.07	Ease of hiring foreign labor	30	🟦
11.08	HIV prevalence*	49	🟦
11.09	Business impact of HIV/AIDS	78	⬜
11.10	Life expectancy*	89	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	112	⬜
12.02	Attitude of population toward foreign visitors	76	⬜
12.03	Extension of business trips recommended	29	🟦
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	10	🟦
13.02	Protected areas*	79	⬜
13.03	Quality of the natural environment	132	⬜
13.04	Total known species*	4	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	45	🟦
14.02	Sports stadiums*	116	⬜
14.03	Number of international fairs and exhibitions*	40	🟦
14.04	Creative industries exports*	25	🟦

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Ireland

Key indicators

Population (millions), 2007 ....4.3
Surface area (1,000 square kilometers) 70.3

Gross domestic product (US$ billions), 2007 ....261.2
Gross domestic product (PPP, US$) per capita, 2007 ....43,413.7
Real GDP growth (percent), 2007 ....6.0

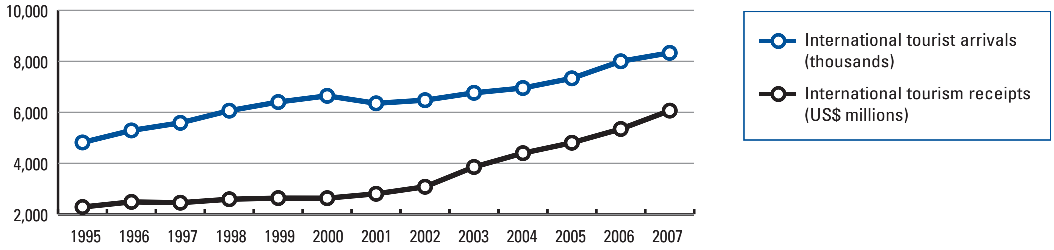
Environmental Performance Index, 2008 (out of 149 countries) 34

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	6,241	2.1	3.5
Employment (1,000 jobs)	44	2.0	2.2
T&T economy, 2008 estimates			
GDP (US$ millions)	21,258	7.3	3.7
Employment (1,000 jobs)	140	6.4	2.6

Source: World Travel & Tourism Council, TSA Research 2008

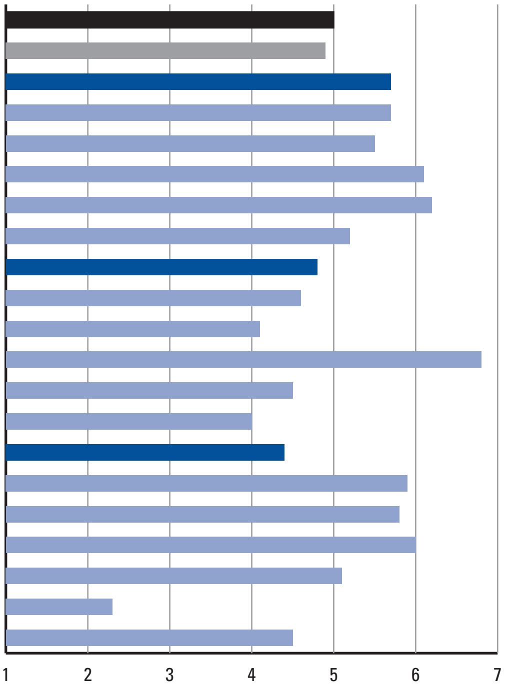
International tourist arrivals (thousands), 2007 8,332
International tourism receipts (US$ millions), 2007 6,066



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**18**	**5.0**
2008 Index	21	4.9
T&T regulatory framework	**7**	**5.7**
Policy rules and regulations	3	5.7
Environmental sustainability	12	5.5
Safety and security	18	6.1
Health and hygiene	25	6.2
Prioritization of Travel & Tourism	27	5.2
T&T business environment and infrastructure	**22**	**4.8**
Air transport infrastructure	23	4.6
Ground transport infrastructure	48	4.1
Tourism infrastructure	4	6.8
ICT infrastructure	28	4.5
Price competitiveness in the T&T industry	111	4.0
T&T human, cultural, and natural resources	**32**	**4.4**
Human resources	9	5.9
Education and training	18	5.8
Availability of qualified labor	7	6.0
Affinity for Travel & Tourism	36	5.1
Natural resources	116	2.3
Cultural resources	25	4.5



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Ireland

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	2	🟦
1.02	Property rights	11	🟦
1.03	Business impact of rules on FDI	1	🟦
1.04	Visa requirements*	14	🟦
1.05	Openness of bilateral Air Service Agreements*	27	⬜
1.06	Transparency of government policymaking	14	🟦
1.07	Time required to start a business*	33	⬜
1.08	Cost to start a business*	3	🟦
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	21	⬜
2.02	Enforcement of environmental regulation	27	⬜
2.03	Sustainability of T&T industry development	27	⬜
2.04	Carbon dioxide emissions*	109	⬜
2.05	Particulate matter concentration*	15	🟦
2.06	Threatened species*	22	⬜
2.07	Environmental treaty ratification*	10	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	17	🟦
3.02	Reliability of police services	25	⬜
3.03	Business costs of crime and violence	48	⬜
3.04	Road traffic accidents*	29	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	33	⬜
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	28	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	14	🟦
5.02	T&T government expenditure*	54	⬜
5.03	Effectiveness of marketing and branding	8	🟦
5.04	T&T fair attendance*	25	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	46	⬜
6.02	Available seat kilometers, domestic*	51	⬜
6.03	Available seat kilometers, international*	34	⬜
6.04	Departures per 1,000 population*	2	🟦
6.05	Airport density*	20	⬜
6.06	Number of operating airlines*	39	⬜
6.07	International air transport network	48	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	70	⬜
7.02	Quality of railroad infrastructure	51	⬜
7.03	Quality of port infrastructure	64	⬜
7.04	Quality of ground transport network	108	⬜
7.05	Road density*	24	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	14	🟦
8.02	Presence of major car rental companies*	1	🟦
8.03	ATMs accepting Visa cards*	11	🟦
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	31	⬜
9.02	Internet users*	42	⬜
9.03	Telephone lines*	17	🟦
9.04	Broadband Internet subscribers*	29	⬜
9.05	Mobile telephone subscribers*	21	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	43	⬜
10.02	Purchasing power parity*	128	⬜
10.03	Extent and effect of taxation	18	⬜
10.04	Fuel price levels*	119	⬜
10.05	Hotel price index*	70	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	54	⬜
11.02	Secondary education enrollment*	10	🟦
11.03	Quality of the educational system	7	🟦
11.04	Local availability of research and training services	22	⬜
11.05	Extent of staff training	21	⬜
11.06	Hiring and firing practices	84	⬜
11.07	Ease of hiring foreign labor	3	🟦
11.08	HIV prevalence*	49	⬜
11.09	Business impact of HIV/AIDS	24	⬜
11.10	Life expectancy*	12	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	54	⬜
12.02	Attitude of population toward foreign visitors	3	🟦
12.03	Extension of business trips recommended	30	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	126	⬜
13.03	Quality of the natural environment	20	⬜
13.04	Total known species*	125	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	82	⬜
14.02	Sports stadiums*	1	🟦
14.03	Number of international fairs and exhibitions*	32	⬜
14.04	Creative industries exports*	28	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Israel

Key indicators

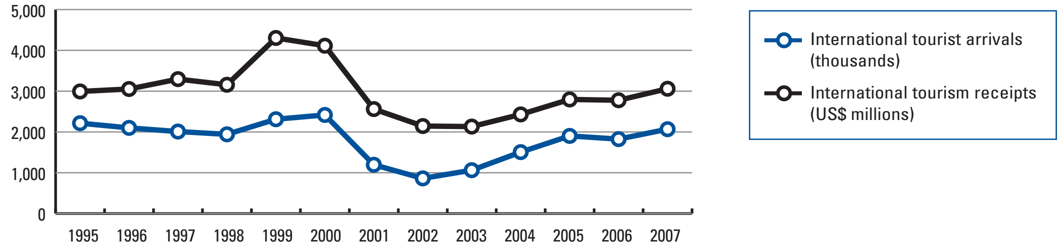
Population (millions), 2007	7.0
Surface area (1,000 square kilometers)	22.1
Gross domestic product (US$ billions), 2007	164.1
Gross domestic product (PPP, US$) per capita, 2007	27,146.8
Real GDP growth (percent), 2007	5.4
Environmental Performance Index, 2008 (out of 149 countries)	49

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	4,243	2.4	3.0
Employment (1,000 jobs)	92	3.4	1.1
T&T economy, 2008 estimates			
GDP (US$ millions)	11,806	6.7	3.2
Employment (1,000 jobs)	217	8.0	1.2

Source: World Travel & Tourism Council, TSA Research 2008

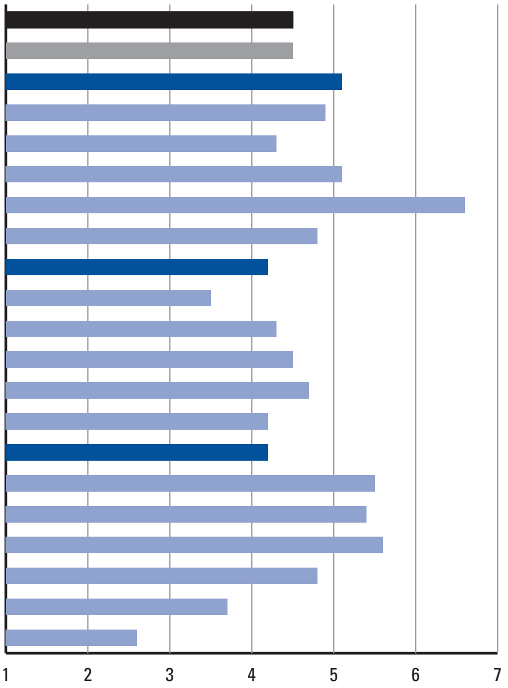
International tourist arrivals (thousands), 2007	2,068
International tourism receipts (US$ millions), 2007	3,059



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**36**	**4.5**
2008 Index	35	4.5
T&T regulatory framework	**37**	**5.1**
Policy rules and regulations	39	4.9
Environmental sustainability	81	4.3
Safety and security	73	5.1
Health and hygiene	14	6.6
Prioritization of Travel & Tourism	41	4.8
T&T business environment and infrastructure	**39**	**4.2**
Air transport infrastructure	52	3.5
Ground transport infrastructure	36	4.3
Tourism infrastructure	32	4.5
ICT infrastructure	24	4.7
Price competitiveness in the T&T industry	101	4.2
T&T human, cultural, and natural resources	**51**	**4.2**
Human resources	29	5.5
Education and training	27	5.4
Availability of qualified labor	44	5.6
Affinity for Travel & Tourism	60	4.8
Natural resources	49	3.7
Cultural resources	57	2.6



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Israel

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	23	🟦
1.02	Property rights	49	⬜
1.03	Business impact of rules on FDI	48	⬜
1.04	Visa requirements*	24	🟦
1.05	Openness of bilateral Air Service Agreements*	40	⬜
1.06	Transparency of government policymaking	37	⬜
1.07	Time required to start a business*	91	⬜
1.08	Cost to start a business*	37	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	42	⬜
2.02	Enforcement of environmental regulation	41	⬜
2.03	Sustainability of T&T industry development	86	⬜
2.04	Carbon dioxide emissions*	110	⬜
2.05	Particulate matter concentration*	52	⬜
2.06	Threatened species*	84	⬜
2.07	Environmental treaty ratification*	115	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	129	⬜
3.02	Reliability of police services	76	⬜
3.03	Business costs of crime and violence	43	⬜
3.04	Road traffic accidents*	39	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	14	🟦
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	25	🟦
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	72	⬜
5.02	T&T government expenditure*	98	⬜
5.03	Effectiveness of marketing and branding	78	⬜
5.04	T&T fair attendance*	3	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	39	⬜
6.02	Available seat kilometers, domestic*	63	⬜
6.03	Available seat kilometers, international*	37	⬜
6.04	Departures per 1,000 population*	50	⬜
6.05	Airport density*	80	⬜
6.06	Number of operating airlines*	46	⬜
6.07	International air transport network	27	🟦
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	45	⬜
7.02	Quality of railroad infrastructure	40	⬜
7.03	Quality of port infrastructure	53	⬜
7.04	Quality of ground transport network	27	🟦
7.05	Road density*	39	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	41	⬜
8.02	Presence of major car rental companies*	1	🟦
8.03	ATMs accepting Visa cards*	49	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	17	🟦
9.02	Internet users*	52	⬜
9.03	Telephone lines*	24	🟦
9.04	Broadband Internet subscribers*	19	🟦
9.05	Mobile telephone subscribers*	10	🟦
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	58	⬜
10.02	Purchasing power parity*	104	⬜
10.03	Extent and effect of taxation	77	⬜
10.04	Fuel price levels*	109	⬜
10.05	Hotel price index*	61	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	33	🟦
11.02	Secondary education enrollment*	53	⬜
11.03	Quality of the educational system	45	⬜
11.04	Local availability of research and training services	14	🟦
11.05	Extent of staff training	32	🟦
11.06	Hiring and firing practices	36	⬜
11.07	Ease of hiring foreign labor	131	⬜
11.08	HIV prevalence*	22	🟦
11.09	Business impact of HIV/AIDS	3	🟦
11.10	Life expectancy*	5	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	84	⬜
12.02	Attitude of population toward foreign visitors	27	🟦
12.03	Extension of business trips recommended	40	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	14	🟦
13.03	Quality of the natural environment	72	⬜
13.04	Total known species*	69	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	33	🟦
14.02	Sports stadiums*	67	⬜
14.03	Number of international fairs and exhibitions*	75	⬜
14.04	Creative industries exports*	36	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Italy

Key indicators

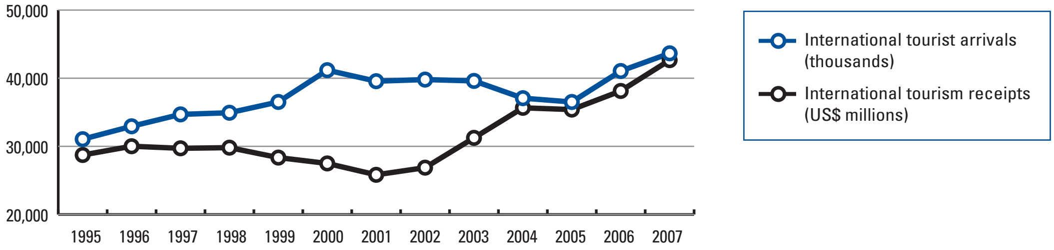
Population (millions), 2007	58.2
Surface area (1,000 square kilometers)	301.3
Gross domestic product (US$ billions), 2007	2,104.7
Gross domestic product (PPP, US$) per capita, 2007	30,365.2
Real GDP growth (percent), 2007	1.5
Environmental Performance Index, 2008 (out of 149 countries)	24

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	93,994	4.0	1.9
Employment (1,000 jobs)	1,006	4.4	0.6
T&T economy, 2008 estimates			
GDP (US$ millions)	226,072	9.7	1.8
Employment (1,000 jobs)	2,491	10.8	0.5

Source: World Travel & Tourism Council, TSA Research 2008

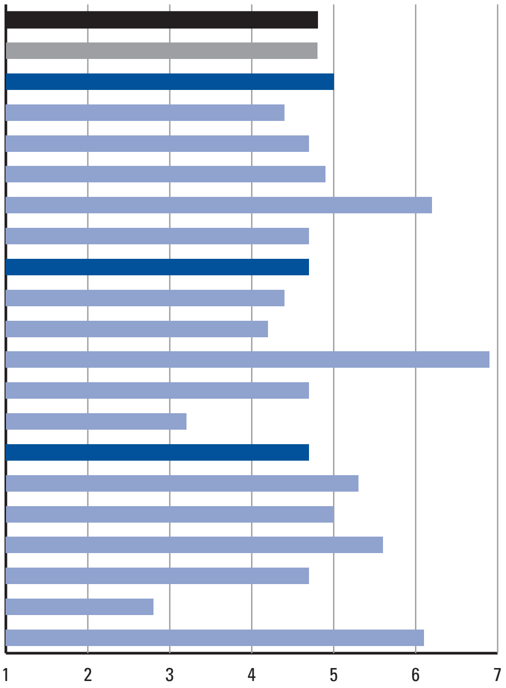
International tourist arrivals (thousands), 2007	43,654
International tourism receipts (US$ millions), 2007	42,651



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**28**	**4.8**
2008 Index	28	4.8
T&T regulatory framework	**46**	**5.0**
Policy rules and regulations	71	4.4
Environmental sustainability	51	4.7
Safety and security	82	4.9
Health and hygiene	27	6.2
Prioritization of Travel & Tourism	51	4.7
T&T business environment and infrastructure	**26**	**4.7**
Air transport infrastructure	27	4.4
Ground transport infrastructure	40	4.2
Tourism infrastructure	3	6.9
ICT infrastructure	25	4.7
Price competitiveness in the T&T industry	130	3.2
T&T human, cultural, and natural resources	**22**	**4.7**
Human resources	41	5.3
Education and training	45	5.0
Availability of qualified labor	46	5.6
Affinity for Travel & Tourism	71	4.7
Natural resources	90	2.8
Cultural resources	5	6.1



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Italy

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	106	⬜
1.02	Property rights	59	⬜
1.03	Business impact of rules on FDI	122	⬜
1.04	Visa requirements*	40	⬜
1.05	Openness of bilateral Air Service Agreements*	29	⬜
1.06	Transparency of government policymaking	111	⬜
1.07	Time required to start a business*	25	🟦
1.08	Cost to start a business*	81	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	41	⬜
2.02	Enforcement of environmental regulation	64	⬜
2.03	Sustainability of T&T industry development	119	⬜
2.04	Carbon dioxide emissions*	93	⬜
2.05	Particulate matter concentration*	44	⬜
2.06	Threatened species*	68	⬜
2.07	Environmental treaty ratification*	21	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	79	⬜
3.02	Reliability of police services	54	⬜
3.03	Business costs of crime and violence	73	⬜
3.04	Road traffic accidents*	107	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	12	🟦
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	43	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	107	⬜
5.02	T&T government expenditure*	61	⬜
5.03	Effectiveness of marketing and branding	108	⬜
5.04	T&T fair attendance*	3	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	78	⬜
6.02	Available seat kilometers, domestic*	12	🟦
6.03	Available seat kilometers, international*	14	🟦
6.04	Departures per 1,000 population*	42	⬜
6.05	Airport density*	69	⬜
6.06	Number of operating airlines*	5	🟦
6.07	International air transport network	89	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	55	⬜
7.02	Quality of railroad infrastructure	52	⬜
7.03	Quality of port infrastructure	95	⬜
7.04	Quality of ground transport network	99	⬜
7.05	Road density*	20	🟦

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	8	🟦
8.02	Presence of major car rental companies*	1	🟦
8.03	ATMs accepting Visa cards*	15	🟦
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	83	⬜
9.02	Internet users*	24	🟦
9.03	Telephone lines*	20	🟦
9.04	Broadband Internet subscribers*	26	🟦
9.05	Mobile telephone subscribers*	7	🟦
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	37	⬜
10.02	Purchasing power parity*	117	⬜
10.03	Extent and effect of taxation	128	⬜
10.04	Fuel price levels*	126	⬜
10.05	Hotel price index*	102	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	12	🟦
11.02	Secondary education enrollment*	26	🟦
11.03	Quality of the educational system	84	⬜
11.04	Local availability of research and training services	35	⬜
11.05	Extent of staff training	109	⬜
11.06	Hiring and firing practices	133	⬜
11.07	Ease of hiring foreign labor	14	🟦
11.08	HIV prevalence*	73	⬜
11.09	Business impact of HIV/AIDS	31	⬜
11.10	Life expectancy*	5	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	94	⬜
12.02	Attitude of population toward foreign visitors	78	⬜
12.03	Extension of business trips recommended	34	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	40	⬜
13.02	Protected areas*	91	⬜
13.03	Quality of the natural environment	87	⬜
13.04	Total known species*	68	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	1	🟦
14.02	Sports stadiums*	41	⬜
14.03	Number of international fairs and exhibitions*	6	🟦
14.04	Creative industries exports*	2	🟦

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Jamaica

Key indicators

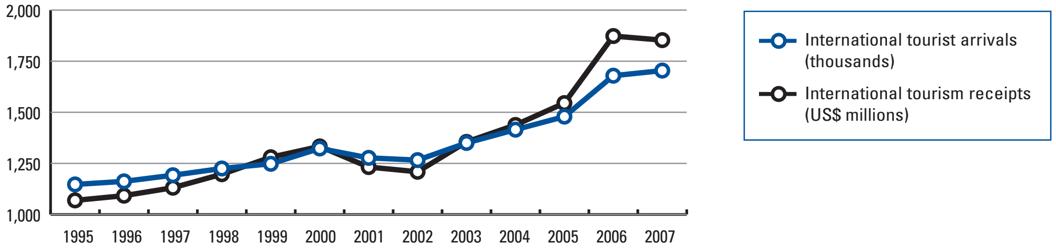
Population (millions), 2007	2.7
Surface area (1,000 square kilometers)	11.0
Gross domestic product (US$ billions), 2007	11.3
Gross domestic product (PPP, US$) per capita, 2007	7,688.2
Real GDP growth (percent), 2007	1.2
Environmental Performance Index, 2008 (out of 149 countries)	54

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	1,009	9.1	4.8
Employment (1,000 jobs)	88	8.2	3.9
T&T economy, 2008 estimates			
GDP (US$ millions)	3,415	30.8	3.7
Employment (1,000 jobs)	290	27.1	2.9

Source: World Travel & Tourism Council, TSA Research 2008

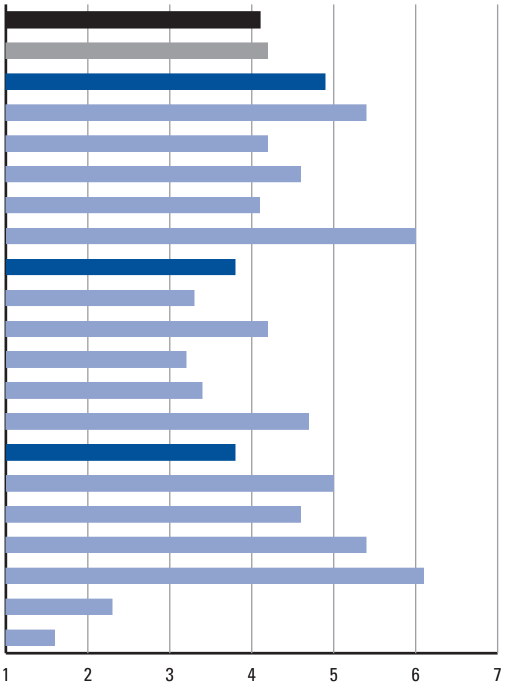
International tourist arrivals (thousands), 2007	1,704
International tourism receipts (US$ millions), 2007	1,853



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**60**	**4.1**
2008 Index	57	4.2
T&T regulatory framework	**51**	**4.9**
Policy rules and regulations	8	5.4
Environmental sustainability	93	4.2
Safety and security	96	4.6
Health and hygiene	85	4.1
Prioritization of Travel & Tourism	5	6.0
T&T business environment and infrastructure	**57**	**3.8**
Air transport infrastructure	55	3.3
Ground transport infrastructure	41	4.2
Tourism infrastructure	70	3.2
ICT infrastructure	48	3.4
Price competitiveness in the T&T industry	68	4.7
T&T human, cultural, and natural resources	**80**	**3.8**
Human resources	78	5.0
Education and training	74	4.6
Availability of qualified labor	78	5.4
Affinity for Travel & Tourism	8	6.1
Natural resources	114	2.3
Cultural resources	98	1.6



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Jamaica

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	28	🟦
1.02	Property rights	53	⬜
1.03	Business impact of rules on FDI	36	🟦
1.04	Visa requirements*	8	🟦
1.05	Openness of bilateral Air Service Agreements*	6	🟦
1.06	Transparency of government policymaking	77	⬜
1.07	Time required to start a business*	20	🟦
1.08	Cost to start a business*	54	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	78	⬜
2.02	Enforcement of environmental regulation	84	⬜
2.03	Sustainability of T&T industry development	46	🟦
2.04	Carbon dioxide emissions*	69	⬜
2.05	Particulate matter concentration*	71	⬜
2.06	Threatened species*	122	⬜
2.07	Environmental treaty ratification*	67	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	48	🟦
3.02	Reliability of police services	102	⬜
3.03	Business costs of crime and violence	131	⬜
3.04	Road traffic accidents*	4	🟦
	4th pillar: Health and hygiene		
4.01	Physician density*	90	⬜
4.02	Access to improved sanitation*	72	⬜
4.03	Access to improved drinking water*	68	⬜
4.04	Hospital beds*	89	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	9	🟦
5.02	T&T government expenditure*	2	🟦
5.03	Effectiveness of marketing and branding	13	🟦
5.04	T&T fair attendance*	41	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	41	🟦
6.02	Available seat kilometers, domestic*	78	⬜
6.03	Available seat kilometers, international*	68	⬜
6.04	Departures per 1,000 population*	41	🟦
6.05	Airport density*	62	⬜
6.06	Number of operating airlines*	55	⬜
6.07	International air transport network	28	🟦
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	60	⬜
7.02	Quality of railroad infrastructure	118	⬜
7.03	Quality of port infrastructure	32	🟦
7.04	Quality of ground transport network	92	⬜
7.05	Road density*	10	🟦

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	33	🟦
8.02	Presence of major car rental companies*	73	⬜
8.03	ATMs accepting Visa cards*	69	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	40	🟦
9.02	Internet users*	22	🟦
9.03	Telephone lines*	83	⬜
9.04	Broadband Internet subscribers*	59	⬜
9.05	Mobile telephone subscribers*	47	🟦
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	79	⬜
10.02	Purchasing power parity*	70	⬜
10.03	Extent and effect of taxation	120	⬜
10.04	Fuel price levels*	51	⬜
10.05	Hotel price index*	42	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	83	⬜
11.02	Secondary education enrollment*	68	⬜
11.03	Quality of the educational system	99	⬜
11.04	Local availability of research and training services	57	⬜
11.05	Extent of staff training	85	⬜
11.06	Hiring and firing practices	66	⬜
11.07	Ease of hiring foreign labor	94	⬜
11.08	HIV prevalence*	110	⬜
11.09	Business impact of HIV/AIDS	117	⬜
11.10	Life expectancy*	66	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	8	🟦
12.02	Attitude of population toward foreign visitors	37	🟦
12.03	Extension of business trips recommended	63	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	76	⬜
13.03	Quality of the natural environment	81	⬜
13.04	Total known species*	126	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	97	⬜
14.02	Sports stadiums*	51	⬜
14.03	Number of international fairs and exhibitions*	79	⬜
14.04	Creative industries exports*	109	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Japan

Key indicators

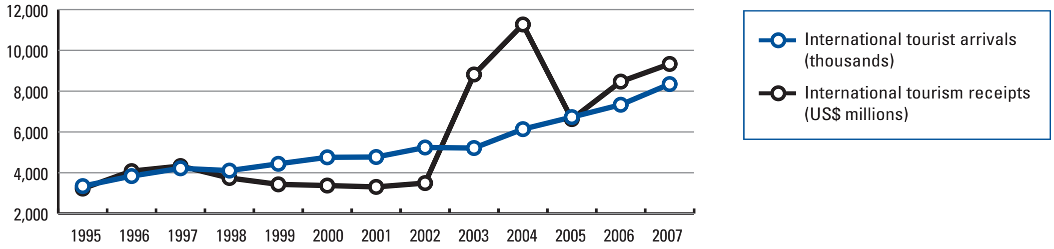
Population (millions), 2007	128.3
Surface area (1,000 square kilometers)	377.9
Gross domestic product (US$ billions), 2007	4,381.6
Gross domestic product (PPP, US$) per capita, 2007	33,596.5
Real GDP growth (percent), 2007	2.1
Environmental Performance Index, 2008 (out of 149 countries)	21

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	162,528	3.4	2.2
Employment (1,000 jobs)	2,645	4.1	0.8
T&T economy, 2008 estimates			
GDP (US$ millions)	438,080	9.2	2.7
Employment (1,000 jobs)	6,833	10.6	1.2

Source: World Travel & Tourism Council, TSA Research 2008

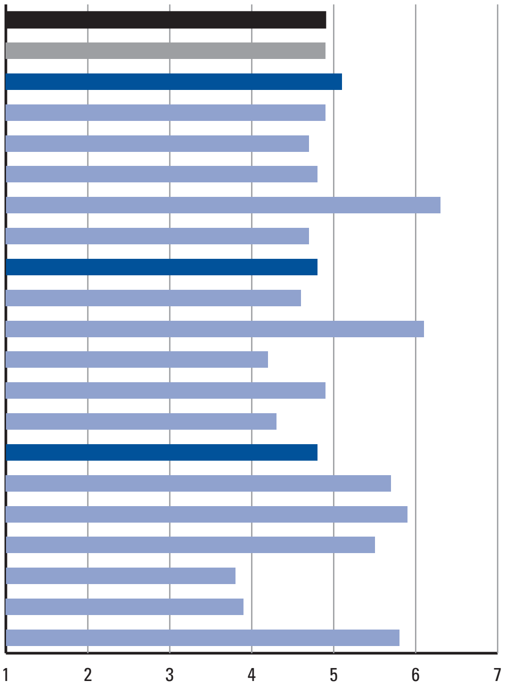
International tourist arrivals (thousands), 2007	8,347
International tourism receipts (US$ millions), 2007	9,334



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**25**	**4.9**
2008 Index	23	4.9
T&T regulatory framework	**40**	**5.1**
Policy rules and regulations	38	4.9
Environmental sustainability	49	4.7
Safety and security	84	4.8
Health and hygiene	21	6.3
Prioritization of Travel & Tourism	49	4.7
T&T business environment and infrastructure	**20**	**4.8**
Air transport infrastructure	24	4.6
Ground transport infrastructure	8	6.1
Tourism infrastructure	40	4.2
ICT infrastructure	21	4.9
Price competitiveness in the T&T industry	86	4.3
T&T human, cultural, and natural resources	**15**	**4.8**
Human resources	20	5.7
Education and training	12	5.9
Availability of qualified labor	67	5.5
Affinity for Travel & Tourism	131	3.8
Natural resources	41	3.9
Cultural resources	10	5.8



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Japan

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	99	⬜
1.02	Property rights	15	🟦
1.03	Business impact of rules on FDI	90	⬜
1.04	Visa requirements*	37	⬜
1.05	Openness of bilateral Air Service Agreements*	20	🟦
1.06	Transparency of government policymaking	19	🟦
1.07	Time required to start a business*	66	⬜
1.08	Cost to start a business*	51	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	11	🟦
2.02	Enforcement of environmental regulation	14	🟦
2.03	Sustainability of T&T industry development	89	⬜
2.04	Carbon dioxide emissions*	107	⬜
2.05	Particulate matter concentration*	51	⬜
2.06	Threatened species*	126	⬜
2.07	Environmental treaty ratification*	10	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	112	⬜
3.02	Reliability of police services	22	🟦
3.03	Business costs of crime and violence	57	⬜
3.04	Road traffic accidents*	114	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	51	⬜
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	1	🟦
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	83	⬜
5.02	T&T government expenditure*	45	⬜
5.03	Effectiveness of marketing and branding	89	⬜
5.04	T&T fair attendance*	20	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	49	⬜
6.02	Available seat kilometers, domestic*	3	🟦
6.03	Available seat kilometers, international*	5	🟦
6.04	Departures per 1,000 population*	48	⬜
6.05	Airport density*	79	⬜
6.06	Number of operating airlines*	18	🟦
6.07	International air transport network	17	🟦
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	19	🟦
7.02	Quality of railroad infrastructure	3	🟦
7.03	Quality of port infrastructure	25	⬜
7.04	Quality of ground transport network	10	🟦
7.05	Road density*	6	🟦

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	17	🟦
8.02	Presence of major car rental companies*	56	⬜
8.03	ATMs accepting Visa cards*	57	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	11	🟦
9.02	Internet users*	10	🟦
9.03	Telephone lines*	32	⬜
9.04	Broadband Internet subscribers*	18	🟦
9.05	Mobile telephone subscribers*	60	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	52	⬜
10.02	Purchasing power parity*	112	⬜
10.03	Extent and effect of taxation	92	⬜
10.04	Fuel price levels*	74	⬜
10.05	Hotel price index*	51	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	2	🟦
11.02	Secondary education enrollment*	22	🟦
11.03	Quality of the educational system	31	⬜
11.04	Local availability of research and training services	12	🟦
11.05	Extent of staff training	5	🟦
11.06	Hiring and firing practices	110	⬜
11.07	Ease of hiring foreign labor	115	⬜
11.08	HIV prevalence*	1	🟦
11.09	Business impact of HIV/AIDS	46	⬜
11.10	Life expectancy*	1	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	130	⬜
12.02	Attitude of population toward foreign visitors	106	⬜
12.03	Extension of business trips recommended	130	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	16	🟦
13.02	Protected areas*	65	⬜
13.03	Quality of the natural environment	38	⬜
13.04	Total known species*	54	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	11	🟦
14.02	Sports stadiums*	64	⬜
14.03	Number of international fairs and exhibitions*	8	🟦
14.04	Creative industries exports*	16	🟦

* Hard data

Note: For further details and explanation, please refer to the section “How to Read the Country/Economy Profiles” at the beginning of this chapter.

Jordan

Key indicators

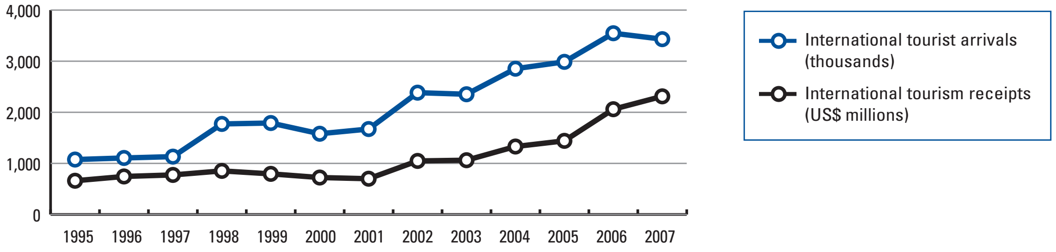
Population (millions), 2007	6.0
Surface area (1,000 square kilometers)	88.8
Gross domestic product (US$ billions), 2007	15.8
Gross domestic product (PPP, US$) per capita, 2007	4,906.3
Real GDP growth (percent), 2007	6.0
Environmental Performance Index, 2008 (out of 149 countries)	70

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	1,360	7.9	4.8
Employment (1,000 jobs)	134	7.6	3.3
T&T economy, 2008 estimates			
GDP (US$ millions)	3,280	19.2	4.9
Employment (1,000 jobs)	312	17.6	3.4

Source: World Travel & Tourism Council, TSA Research 2008

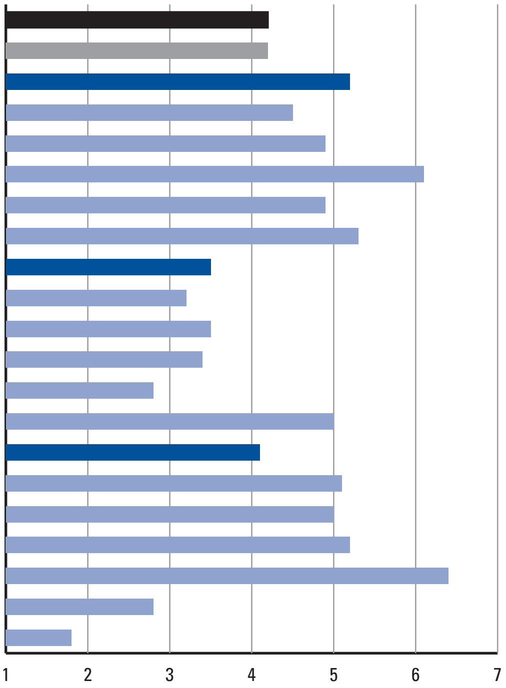
International tourist arrivals (thousands), 2007	3,431
International tourism receipts (US$ millions), 2007	2,312



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**54**	**4.2**
2008 Index	53	4.2
T&T regulatory framework	**36**	**5.2**
Policy rules and regulations	61	4.5
Environmental sustainability	35	4.9
Safety and security	17	6.1
Health and hygiene	58	4.9
Prioritization of Travel & Tourism	24	5.3
T&T business environment and infrastructure	**67**	**3.5**
Air transport infrastructure	63	3.2
Ground transport infrastructure	69	3.5
Tourism infrastructure	65	3.4
ICT infrastructure	70	2.8
Price competitiveness in the T&T industry	42	5.0
T&T human, cultural, and natural resources	**54**	**4.1**
Human resources	59	5.1
Education and training	44	5.0
Availability of qualified labor	92	5.2
Affinity for Travel & Tourism	6	6.4
Natural resources	87	2.8
Cultural resources	87	1.8



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Jordan

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	45	🟦
1.02	Property rights	23	🟦
1.03	Business impact of rules on FDI	44	🟦
1.04	Visa requirements*	35	🟦
1.05	Openness of bilateral Air Service Agreements*	37	🟦
1.06	Transparency of government policymaking	49	🟦
1.07	Time required to start a business*	38	🟦
1.08	Cost to start a business*	108	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	52	⬜
2.02	Enforcement of environmental regulation	42	🟦
2.03	Sustainability of T&T industry development	41	🟦
2.04	Carbon dioxide emissions*	60	⬜
2.05	Particulate matter concentration*	86	⬜
2.06	Threatened species*	75	⬜
2.07	Environmental treaty ratification*	21	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	52	⬜
3.02	Reliability of police services	20	🟦
3.03	Business costs of crime and violence	14	🟦
3.04	Road traffic accidents*	61	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	46	🟦
4.02	Access to improved sanitation*	68	⬜
4.03	Access to improved drinking water*	47	🟦
4.04	Hospital beds*	83	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	50	🟦
5.02	T&T government expenditure*	7	🟦
5.03	Effectiveness of marketing and branding	46	🟦
5.04	T&T fair attendance*	81	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	31	🟦
6.02	Available seat kilometers, domestic*	80	⬜
6.03	Available seat kilometers, international*	63	⬜
6.04	Departures per 1,000 population*	52	⬜
6.05	Airport density*	97	⬜
6.06	Number of operating airlines*	62	⬜
6.07	International air transport network	30	🟦
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	38	🟦
7.02	Quality of railroad infrastructure	91	⬜
7.03	Quality of port infrastructure	46	🟦
7.04	Quality of ground transport network	37	🟦
7.05	Road density*	107	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	61	⬜
8.02	Presence of major car rental companies*	23	🟦
8.03	ATMs accepting Visa cards*	75	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	39	🟦
9.02	Internet users*	72	⬜
9.03	Telephone lines*	90	⬜
9.04	Broadband Internet subscribers*	72	⬜
9.05	Mobile telephone subscribers*	65	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	104	⬜
10.02	Purchasing power parity*	65	⬜
10.03	Extent and effect of taxation	79	⬜
10.04	Fuel price levels*	17	🟦
10.05	Hotel price index*	29	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	89	⬜
11.02	Secondary education enrollment*	61	⬜
11.03	Quality of the educational system	27	🟦
11.04	Local availability of research and training services	53	⬜
11.05	Extent of staff training	50	🟦
11.06	Hiring and firing practices	108	⬜
11.07	Ease of hiring foreign labor	101	⬜
11.08	HIV prevalence*	1	🟦
11.09	Business impact of HIV/AIDS	10	🟦
11.10	Life expectancy*	76	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	5	🟦
12.02	Attitude of population toward foreign visitors	41	🟦
12.03	Extension of business trips recommended	15	🟦
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	60	⬜
13.03	Quality of the natural environment	39	🟦
13.04	Total known species*	89	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	54	⬜
14.02	Sports stadiums*	95	⬜
14.03	Number of international fairs and exhibitions*	83	⬜
14.04	Creative industries exports*	46	🟦

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Kazakhstan

Key indicators

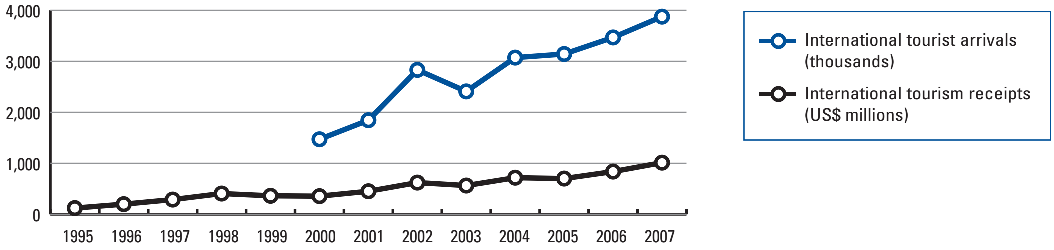
Population (millions), 2007	14.8
Surface area (1,000 square kilometers)	2,724.9
Gross domestic product (US$ billions), 2007	104.9
Gross domestic product (PPP, US$) per capita, 2007	10,837.2
Real GDP growth (percent), 2007	8.9
Environmental Performance Index, 2008 (out of 149 countries)	107

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	n/a	n/a	n/a
Employment (1,000 jobs)	n/a	n/a	n/a
T&T economy, 2008 estimates			
GDP (US$ millions)	n/a	n/a	n/a
Employment (1,000 jobs)	n/a	n/a	n/a

Source: World Travel & Tourism Council, TSA Research 2008

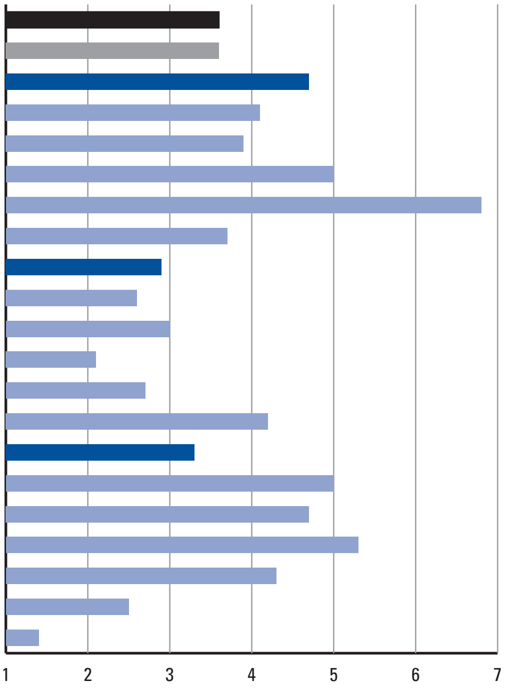
International tourist arrivals (thousands), 2007	3,876
International tourism receipts (US$ millions), 2007	1,013



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**92**	**3.6**
2008 Index	91	3.6
T&T regulatory framework	**60**	**4.7**
Policy rules and regulations	86	4.1
Environmental sustainability	117	3.9
Safety and security	76	5.0
Health and hygiene	8	6.8
Prioritization of Travel & Tourism	101	3.7
T&T business environment and infrastructure	**96**	**2.9**
Air transport infrastructure	89	2.6
Ground transport infrastructure	87	3.0
Tourism infrastructure	91	2.1
ICT infrastructure	72	2.7
Price competitiveness in the T&T industry	93	4.2
T&T human, cultural, and natural resources	**121**	**3.3**
Human resources	74	5.0
Education and training	68	4.7
Availability of qualified labor	84	5.3
Affinity for Travel & Tourism	112	4.3
Natural resources	106	2.5
Cultural resources	116	1.4



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Kazakhstan

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	110	⬜
1.02	Property rights	95	⬜
1.03	Business impact of rules on FDI	101	⬜
1.04	Visa requirements*	112	⬜
1.05	Openness of bilateral Air Service Agreements*	101	⬜
1.06	Transparency of government policymaking	70	⬜
1.07	Time required to start a business*	63	⬜
1.08	Cost to start a business*	42	🟦
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	108	⬜
2.02	Enforcement of environmental regulation	90	⬜
2.03	Sustainability of T&T industry development	97	⬜
2.04	Carbon dioxide emissions*	116	⬜
2.05	Particulate matter concentration*	24	🟦
2.06	Threatened species*	88	⬜
2.07	Environmental treaty ratification*	115	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	84	⬜
3.02	Reliability of police services	97	⬜
3.03	Business costs of crime and violence	71	⬜
3.04	Road traffic accidents*	76	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	7	🟦
4.02	Access to improved sanitation*	40	🟦
4.03	Access to improved drinking water*	58	⬜
4.04	Hospital beds*	10	🟦
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	104	⬜
5.02	T&T government expenditure*	n/a	
5.03	Effectiveness of marketing and branding	105	⬜
5.04	T&T fair attendance*	98	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	102	⬜
6.02	Available seat kilometers, domestic*	32	🟦
6.03	Available seat kilometers, international*	73	⬜
6.04	Departures per 1,000 population*	86	⬜
6.05	Airport density*	45	🟦
6.06	Number of operating airlines*	64	⬜
6.07	International air transport network	96	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	108	⬜
7.02	Quality of railroad infrastructure	34	🟦
7.03	Quality of port infrastructure	101	⬜
7.04	Quality of ground transport network	55	⬜
7.05	Road density*	124	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	90	⬜
8.02	Presence of major car rental companies*	95	⬜
8.03	ATMs accepting Visa cards*	63	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	87	⬜
9.02	Internet users*	84	⬜
9.03	Telephone lines*	62	⬜
9.04	Broadband Internet subscribers*	64	⬜
9.05	Mobile telephone subscribers*	63	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	n/a	
10.02	Purchasing power parity*	74	⬜
10.03	Extent and effect of taxation	82	⬜
10.04	Fuel price levels*	17	🟦
10.05	Hotel price index*	108	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	85	⬜
11.02	Secondary education enrollment*	51	⬜
11.03	Quality of the educational system	68	⬜
11.04	Local availability of research and training services	82	⬜
11.05	Extent of staff training	92	⬜
11.06	Hiring and firing practices	4	🟦
11.07	Ease of hiring foreign labor	111	⬜
11.08	HIV prevalence*	22	🟦
11.09	Business impact of HIV/AIDS	95	⬜
11.10	Life expectancy*	100	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	114	⬜
12.02	Attitude of population toward foreign visitors	114	⬜
12.03	Extension of business trips recommended	68	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	40	🟦
13.02	Protected areas*	109	⬜
13.03	Quality of the natural environment	125	⬜
13.04	Total known species*	56	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	82	⬜
14.02	Sports stadiums*	96	⬜
14.03	Number of international fairs and exhibitions*	107	⬜
14.04	Creative industries exports*	90	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Kenya

Key indicators

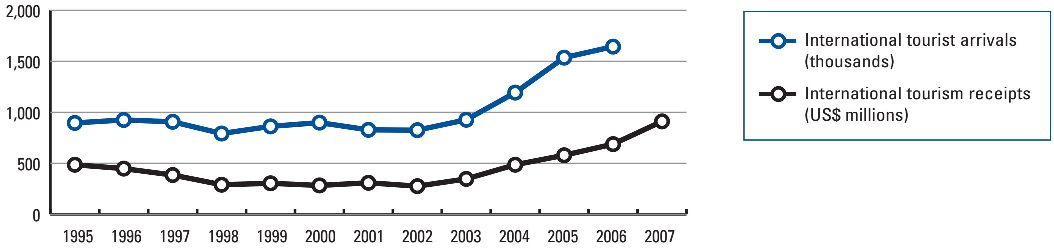
Population (millions), 2007	36.0
Surface area (1,000 square kilometers)	580.4
Gross domestic product (US$ billions), 2007	27.0
Gross domestic product (PPP, US$) per capita, 2007	1,672.6
Real GDP growth (percent), 2007	7.0
Environmental Performance Index, 2008 (out of 149 countries)	96

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	1,572	4.9	3.8
Employment (1,000 jobs)	217	3.9	2.4
T&T economy, 2008 estimates			
GDP (US$ millions)	3,464	10.8	4.0
Employment (1,000 jobs)	483	8.7	2.6

Source: World Travel & Tourism Council, TSA Research 2008

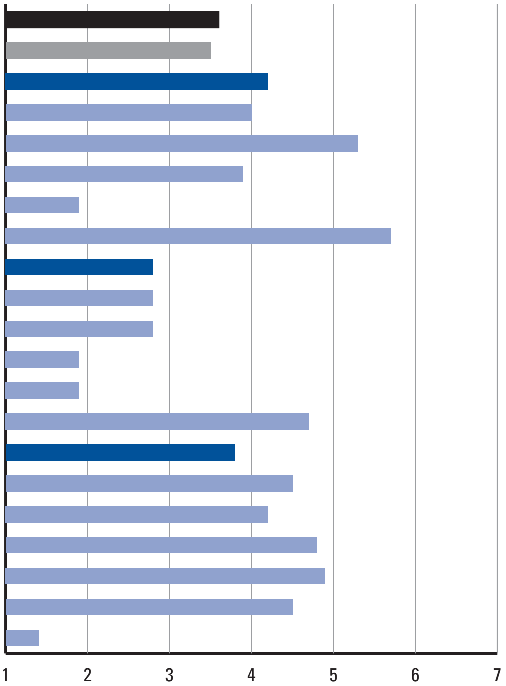
International tourist arrivals (thousands), 2006	1,644
International tourism receipts (US$ millions), 2007	911



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**97**	**3.6**
2008 Index	101	3.5
T&T regulatory framework	**93**	**4.2**
Policy rules and regulations	90	4.0
Environmental sustainability	16	5.3
Safety and security	121	3.9
Health and hygiene	121	1.9
Prioritization of Travel & Tourism	12	5.7
T&T business environment and infrastructure	**100**	**2.8**
Air transport infrastructure	77	2.8
Ground transport infrastructure	98	2.8
Tourism infrastructure	98	1.9
ICT infrastructure	110	1.9
Price competitiveness in the T&T industry	70	4.7
T&T human, cultural, and natural resources	**72**	**3.8**
Human resources	100	4.5
Education and training	95	4.2
Availability of qualified labor	114	4.8
Affinity for Travel & Tourism	50	4.9
Natural resources	25	4.5
Cultural resources	114	1.4



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Kenya

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

1st pillar: Policy rules and regulations

	INDICATOR	RANK/133	
1.01	Prevalence of foreign ownership	57	⬜
1.02	Property rights	81	⬜
1.03	Business impact of rules on FDI	79	⬜
1.04	Visa requirements*	87	⬜
1.05	Openness of bilateral Air Service Agreements*	115	⬜
1.06	Transparency of government policymaking	68	⬜
1.07	Time required to start a business*	83	⬜
1.08	Cost to start a business*	101	⬜

2nd pillar: Environmental sustainability

	INDICATOR	RANK/133	
2.01	Stringency of environmental regulation	56	⬜
2.02	Enforcement of environmental regulation	58	⬜
2.03	Sustainability of T&T industry development	9	🟦
2.04	Carbon dioxide emissions*	19	🟦
2.05	Particulate matter concentration*	70	⬜
2.06	Threatened species*	55	⬜
2.07	Environmental treaty ratification*	10	🟦

3rd pillar: Safety and security

	INDICATOR	RANK/133	
3.01	Business costs of terrorism	128	⬜
3.02	Reliability of police services	88	⬜
3.03	Business costs of crime and violence	125	⬜
3.04	Road traffic accidents*	105	⬜

4th pillar: Health and hygiene

	INDICATOR	RANK/133	
4.01	Physician density*	115	⬜
4.02	Access to improved sanitation*	106	⬜
4.03	Access to improved drinking water*	121	⬜
4.04	Hospital beds*	93	⬜

5th pillar: Prioritization of Travel & Tourism

	INDICATOR	RANK/133	
5.01	Government prioritization of the T&T industry	17	🟦
5.02	T&T government expenditure*	19	🟦
5.03	Effectiveness of marketing and branding	9	🟦
5.04	T&T fair attendance*	25	🟦

6th pillar: Air transport infrastructure

	INDICATOR	RANK/133	
6.01	Quality of air transport infrastructure	68	⬜
6.02	Available seat kilometers, domestic*	48	🟦
6.03	Available seat kilometers, international*	53	⬜
6.04	Departures per 1,000 population*	96	⬜
6.05	Airport density*	106	⬜
6.06	Number of operating airlines*	54	⬜
6.07	International air transport network	59	⬜

7th pillar: Ground transport infrastructure

	INDICATOR	RANK/133	
7.01	Quality of roads	95	⬜
7.02	Quality of railroad infrastructure	68	⬜
7.03	Quality of port infrastructure	83	⬜
7.04	Quality of ground transport network	82	⬜
7.05	Road density*	100	⬜

8th pillar: Tourism infrastructure

	INDICATOR	RANK/133	
8.01	Hotel rooms*	109	⬜
8.02	Presence of major car rental companies*	73	⬜
8.03	ATMs accepting Visa cards*	98	⬜

9th pillar: ICT infrastructure

	INDICATOR	RANK/133	
9.01	Extent of business Internet use	88	⬜
9.02	Internet users*	98	⬜
9.03	Telephone lines*	124	⬜
9.04	Broadband Internet subscribers*	108	⬜
9.05	Mobile telephone subscribers*	108	⬜

10th pillar: Price competitiveness in the T&T industry

	INDICATOR	RANK/133	
10.01	Ticket taxes and airport charges*	111	⬜
10.02	Purchasing power parity*	48	🟦
10.03	Extent and effect of taxation	110	⬜
10.04	Fuel price levels*	77	⬜
10.05	Hotel price index*	16	🟦

11th pillar: Human resources

	INDICATOR	RANK/133	
11.01	Primary education enrollment*	116	⬜
11.02	Secondary education enrollment*	107	⬜
11.03	Quality of the educational system	33	🟦
11.04	Local availability of research and training services	36	🟦
11.05	Extent of staff training	47	🟦
11.06	Hiring and firing practices	21	🟦
11.07	Ease of hiring foreign labor	85	⬜
11.08	HIV prevalence*	124	⬜
11.09	Business impact of HIV/AIDS	119	⬜
11.10	Life expectancy*	117	⬜

12th pillar: Affinity for Travel & Tourism

	INDICATOR	RANK/133	
12.01	Tourism openness*	82	⬜
12.02	Attitude of population toward foreign visitors	22	🟦
12.03	Extension of business trips recommended	26	🟦

13th pillar: Natural resources

	INDICATOR	RANK/133	
13.01	Number of World Heritage natural sites*	23	🟦
13.02	Protected areas*	57	⬜
13.03	Quality of the natural environment	90	⬜
13.04	Total known species*	14	🟦

14th pillar: Cultural resources

	INDICATOR	RANK/133	
14.01	Number of World Heritage cultural sites*	82	⬜
14.02	Sports stadiums*	113	⬜
14.03	Number of international fairs and exhibitions*	73	⬜
14.04	Creative industries exports*	76	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Korea, Rep.

Key indicators

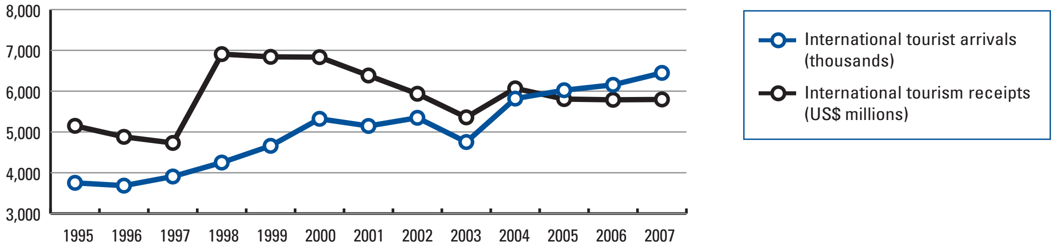
Population (millions), 2007	48.1
Surface area (1,000 square kilometers)	99.3
Gross domestic product (US$ billions), 2007	969.9
Gross domestic product (PPP, US$) per capita, 2007	24,803.1
Real GDP growth (percent), 2007	5.0
Environmental Performance Index, 2008 (out of 149 countries)	51

Travel & Tourism indicators

T&T industry, 2008 estimates		Percent of total	2009–2018 annual growth (%, forecast)
GDP (US$ millions)	14,872	1.4	4.0
Employment (1,000 jobs)	471	2.0	0.6
T&T economy, 2008 estimates			
GDP (US$ millions)	69,258	6.6	5.4
Employment (1,000 jobs)	1,707	7.2	1.7

Source: World Travel & Tourism Council, TSA Research 2008

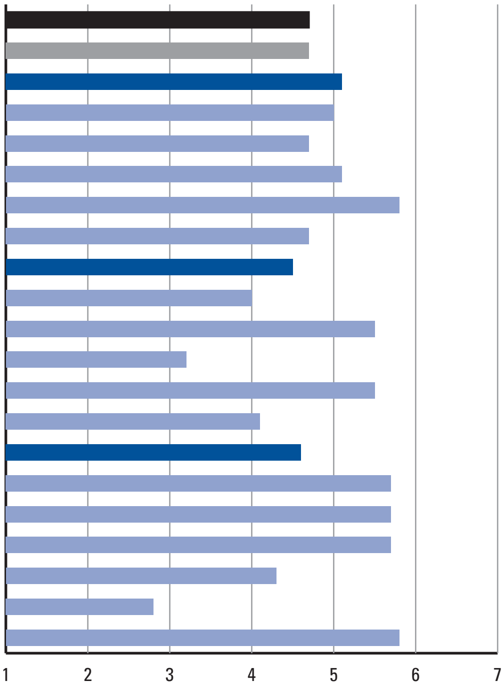
International tourist arrivals (thousands), 2007	6,448
International tourism receipts (US$ millions), 2007	5,797



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**31**	**4.7**
2008 Index	31	4.7
T&T regulatory framework	**41**	**5.1**
Policy rules and regulations	34	5.0
Environmental sustainability	55	4.7
Safety and security	71	5.1
Health and hygiene	37	5.8
Prioritization of Travel & Tourism	52	4.7
T&T business environment and infrastructure	**35**	**4.5**
Air transport infrastructure	39	4.0
Ground transport infrastructure	15	5.5
Tourism infrastructure	71	3.2
ICT infrastructure	8	5.5
Price competitiveness in the T&T industry	102	4.1
T&T human, cultural, and natural resources	**26**	**4.6**
Human resources	19	5.7
Education and training	21	5.7
Availability of qualified labor	29	5.7
Affinity for Travel & Tourism	114	4.3
Natural resources	91	2.8
Cultural resources	13	5.8



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Korea, Rep.

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	54	⬜
1.02	Property rights	39	⬜
1.03	Business impact of rules on FDI	51	⬜
1.04	Visa requirements*	6	🟦
1.05	Openness of bilateral Air Service Agreements*	42	⬜
1.06	Transparency of government policymaking	44	⬜
1.07	Time required to start a business*	50	⬜
1.08	Cost to start a business*	78	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	31	⬜
2.02	Enforcement of environmental regulation	26	🟦
2.03	Sustainability of T&T industry development	77	⬜
2.04	Carbon dioxide emissions*	103	⬜
2.05	Particulate matter concentration*	67	⬜
2.06	Threatened species*	111	⬜
2.07	Environmental treaty ratification*	34	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	65	⬜
3.02	Reliability of police services	31	⬜
3.03	Business costs of crime and violence	42	⬜
3.04	Road traffic accidents*	113	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	64	⬜
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	74	⬜
4.04	Hospital beds*	4	🟦
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	95	⬜
5.02	T&T government expenditure*	86	⬜
5.03	Effectiveness of marketing and branding	71	⬜
5.04	T&T fair attendance*	14	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	26	🟦
6.02	Available seat kilometers, domestic*	24	🟦
6.03	Available seat kilometers, international*	17	🟦
6.04	Departures per 1,000 population*	53	⬜
6.05	Airport density*	99	⬜
6.06	Number of operating airlines*	32	⬜
6.07	International air transport network	38	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	13	🟦
7.02	Quality of railroad infrastructure	7	🟦
7.03	Quality of port infrastructure	29	🟦
7.04	Quality of ground transport network	13	🟦
7.05	Road density*	31	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	93	⬜
8.02	Presence of major car rental companies*	73	⬜
8.03	ATMs accepting Visa cards*	29	🟦
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	3	🟦
9.02	Internet users*	7	🟦
9.03	Telephone lines*	16	🟦
9.04	Broadband Internet subscribers*	8	🟦
9.05	Mobile telephone subscribers*	49	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	31	⬜
10.02	Purchasing power parity*	101	⬜
10.03	Extent and effect of taxation	31	⬜
10.04	Fuel price levels*	116	⬜
10.05	Hotel price index*	97	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	24	🟦
11.02	Secondary education enrollment*	35	⬜
11.03	Quality of the educational system	29	🟦
11.04	Local availability of research and training services	20	🟦
11.05	Extent of staff training	10	🟦
11.06	Hiring and firing practices	45	⬜
11.07	Ease of hiring foreign labor	55	⬜
11.08	HIV prevalence*	1	🟦
11.09	Business impact of HIV/AIDS	60	⬜
11.10	Life expectancy*	22	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	101	⬜
12.02	Attitude of population toward foreign visitors	115	⬜
12.03	Extension of business trips recommended	92	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	40	⬜
13.02	Protected areas*	100	⬜
13.03	Quality of the natural environment	53	⬜
13.04	Total known species*	76	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	19	🟦
14.02	Sports stadiums*	30	🟦
14.03	Number of international fairs and exhibitions*	17	🟦
14.04	Creative industries exports*	20	🟦

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Kuwait

Key indicators

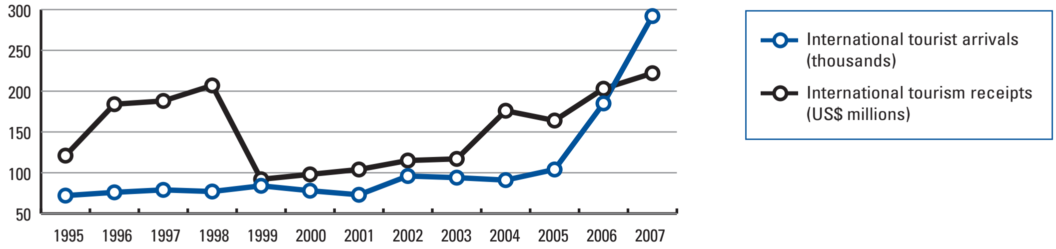
Population (millions), 2007	2.8
Surface area (1,000 square kilometers)	17.8
Gross domestic product (US$ billions), 2007	111.5
Gross domestic product (PPP, US$) per capita, 2007	39,343.8
Real GDP growth (percent), 2007	4.6
Environmental Performance Index, 2008 (out of 149 countries)	111

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	638	0.5	5.6
Employment (1,000 jobs)	13	0.7	4.5
T&T economy, 2008 estimates			
GDP (US$ millions)	6,811	5.0	4.9
Employment (1,000 jobs)	91	4.6	3.8

Source: World Travel & Tourism Council, TSA Research 2008

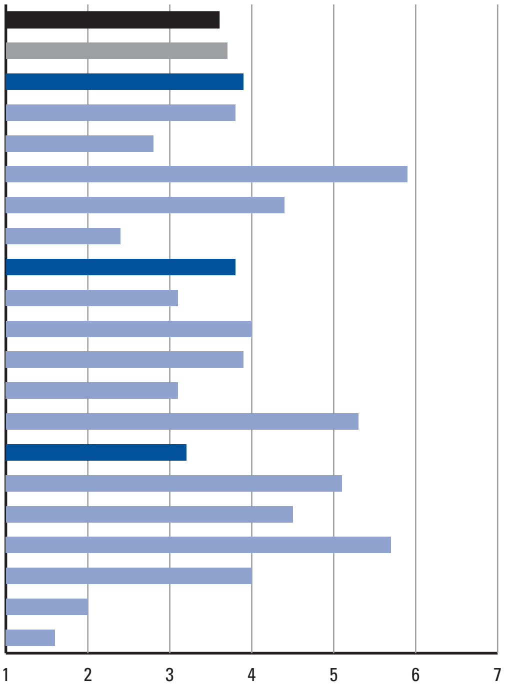
International tourist arrivals (thousands), 2007	292
International tourism receipts (US$ millions), 2007	222



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**95**	**3.6**
2008 Index	85	3.7
T&T regulatory framework	**109**	**3.9**
Policy rules and regulations	101	3.8
Environmental sustainability	133	2.8
Safety and security	28	5.9
Health and hygiene	76	4.4
Prioritization of Travel & Tourism	131	2.4
T&T business environment and infrastructure	**50**	**3.8**
Air transport infrastructure	64	3.1
Ground transport infrastructure	52	4.0
Tourism infrastructure	50	3.9
ICT infrastructure	58	3.1
Price competitiveness in the T&T industry	24	5.3
T&T human, cultural, and natural resources	**128**	**3.2**
Human resources	61	5.1
Education and training	78	4.5
Availability of qualified labor	22	5.7
Affinity for Travel & Tourism	128	4.0
Natural resources	131	2.0
Cultural resources	100	1.6



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Kuwait

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	131	⬜
1.02	Property rights	27	🟦
1.03	Business impact of rules on FDI	129	⬜
1.04	Visa requirements*	103	⬜
1.05	Openness of bilateral Air Service Agreements*	126	⬜
1.06	Transparency of government policymaking	91	⬜
1.07	Time required to start a business*	93	⬜
1.08	Cost to start a business*	16	🟦
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	105	⬜
2.02	Enforcement of environmental regulation	107	⬜
2.03	Sustainability of T&T industry development	131	⬜
2.04	Carbon dioxide emissions*	128	⬜
2.05	Particulate matter concentration*	119	⬜
2.06	Threatened species*	72	⬜
2.07	Environmental treaty ratification*	94	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	61	⬜
3.02	Reliability of police services	41	🟦
3.03	Business costs of crime and violence	18	🟦
3.04	Road traffic accidents*	28	🟦
	4th pillar: Health and hygiene		
4.01	Physician density*	61	⬜
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	n/a	
4.04	Hospital beds*	83	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	133	⬜
5.02	T&T government expenditure*	115	⬜
5.03	Effectiveness of marketing and branding	132	⬜
5.04	T&T fair attendance*	98	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	62	⬜
6.02	Available seat kilometers, domestic*	100	⬜
6.03	Available seat kilometers, international*	52	⬜
6.04	Departures per 1,000 population*	40	🟦
6.05	Airport density*	95	⬜
6.06	Number of operating airlines*	48	🟦
6.07	International air transport network	65	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	35	🟦
7.02	Quality of railroad infrastructure	n/a	
7.03	Quality of port infrastructure	65	⬜
7.04	Quality of ground transport network	53	⬜
7.05	Road density*	62	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	76	⬜
8.02	Presence of major car rental companies*	1	🟦
8.03	ATMs accepting Visa cards*	60	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	63	⬜
9.02	Internet users*	50	🟦
9.03	Telephone lines*	67	⬜
9.04	Broadband Internet subscribers*	83	⬜
9.05	Mobile telephone subscribers*	43	🟦
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	4	🟦
10.02	Purchasing power parity*	103	⬜
10.03	Extent and effect of taxation	6	🟦
10.04	Fuel price levels*	9	🟦
10.05	Hotel price index*	105	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	108	⬜
11.02	Secondary education enrollment*	60	⬜
11.03	Quality of the educational system	94	⬜
11.04	Local availability of research and training services	64	⬜
11.05	Extent of staff training	57	⬜
11.06	Hiring and firing practices	50	🟦
11.07	Ease of hiring foreign labor	9	🟦
11.08	HIV prevalence*	1	🟦
11.09	Business impact of HIV/AIDS	14	🟦
11.10	Life expectancy*	29	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	55	⬜
12.02	Attitude of population toward foreign visitors	130	⬜
12.03	Extension of business trips recommended	132	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	122	⬜
13.03	Quality of the natural environment	93	⬜
13.04	Total known species*	122	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	116	⬜
14.02	Sports stadiums*	43	🟦
14.03	Number of international fairs and exhibitions*	101	⬜
14.04	Creative industries exports*	118	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Kyrgyz Republic

Key indicators

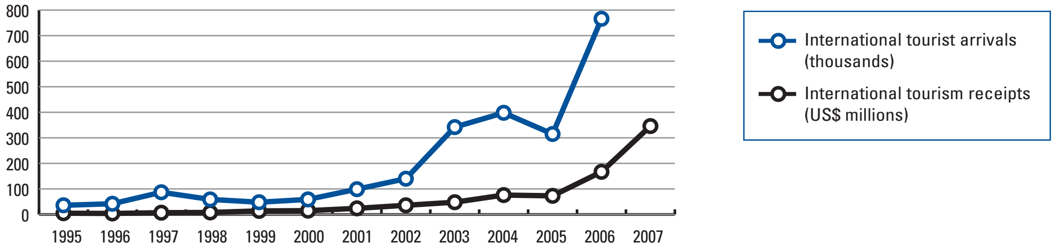
Population (millions), 2007	5.4
Surface area (1,000 square kilometers)	199.9
Gross domestic product (US$ billions), 2007	3.7
Gross domestic product (PPP, US$) per capita, 2007	2,000.3
Real GDP growth (percent), 2007	8.2
Environmental Performance Index, 2008 (out of 149 countries)	94

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	n/a	n/a	n/a
Employment (1,000 jobs)	n/a	n/a	n/a
T&T economy, 2008 estimates			
GDP (US$ millions)	n/a	n/a	n/a
Employment (1,000 jobs)	n/a	n/a	n/a

Source: World Travel & Tourism Council, TSA Research 2008

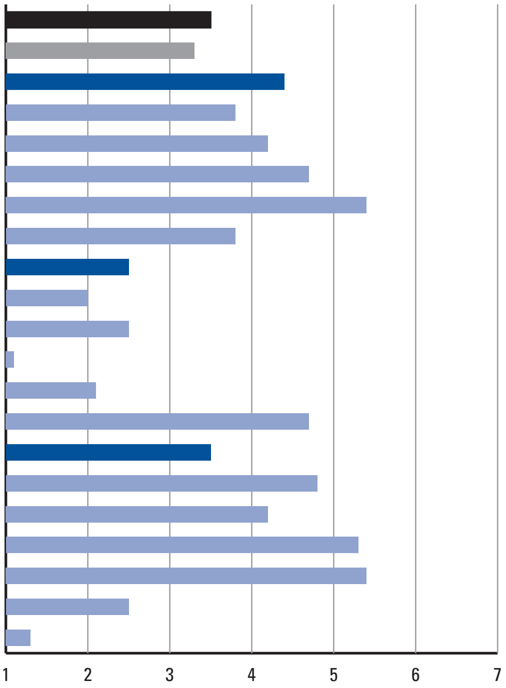
International tourist arrivals (thousands), 2006	766
International tourism receipts (US$ millions), 2007	346



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**106**	**3.5**
2008 Index	113	3.3
T&T regulatory framework	**76**	**4.4**
Policy rules and regulations	102	3.8
Environmental sustainability	89	4.2
Safety and security	90	4.7
Health and hygiene	50	5.4
Prioritization of Travel & Tourism	97	3.8
T&T business environment and infrastructure	**124**	**2.5**
Air transport infrastructure	127	2.0
Ground transport infrastructure	112	2.5
Tourism infrastructure	129	1.1
ICT infrastructure	98	2.1
Price competitiveness in the T&T industry	65	4.7
T&T human, cultural, and natural resources	**105**	**3.5**
Human resources	94	4.8
Education and training	97	4.2
Availability of qualified labor	89	5.3
Affinity for Travel & Tourism	28	5.4
Natural resources	107	2.5
Cultural resources	121	1.3



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Kyrgyz Republic

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	116	⬜
1.02	Property rights	124	⬜
1.03	Business impact of rules on FDI	123	⬜
1.04	Visa requirements*	95	⬜
1.05	Openness of bilateral Air Service Agreements*	119	⬜
1.06	Transparency of government policymaking	125	⬜
1.07	Time required to start a business*	41	🟦
1.08	Cost to start a business*	50	🟦
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	123	⬜
2.02	Enforcement of environmental regulation	113	⬜
2.03	Sustainability of T&T industry development	113	⬜
2.04	Carbon dioxide emissions*	36	🟦
2.05	Particulate matter concentration*	36	🟦
2.06	Threatened species*	65	⬜
2.07	Environmental treaty ratification*	121	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	110	⬜
3.02	Reliability of police services	113	⬜
3.03	Business costs of crime and violence	97	⬜
3.04	Road traffic accidents*	44	🟦
	4th pillar: Health and hygiene		
4.01	Physician density*	45	🟦
4.02	Access to improved sanitation*	52	⬜
4.03	Access to improved drinking water*	81	⬜
4.04	Hospital beds*	34	🟦
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	78	⬜
5.02	T&T government expenditure*	n/a	
5.03	Effectiveness of marketing and branding	96	⬜
5.04	T&T fair attendance*	115	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	120	⬜
6.02	Available seat kilometers, domestic*	82	⬜
6.03	Available seat kilometers, international*	112	⬜
6.04	Departures per 1,000 population*	94	⬜
6.05	Airport density*	94	⬜
6.06	Number of operating airlines*	103	⬜
6.07	International air transport network	124	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	101	⬜
7.02	Quality of railroad infrastructure	60	⬜
7.03	Quality of port infrastructure	131	⬜
7.04	Quality of ground transport network	75	⬜
7.05	Road density*	105	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	117	⬜
8.02	Presence of major car rental companies*	122	⬜
8.03	ATMs accepting Visa cards*	113	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	101	⬜
9.02	Internet users*	82	⬜
9.03	Telephone lines*	95	⬜
9.04	Broadband Internet subscribers*	106	⬜
9.05	Mobile telephone subscribers*	95	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	76	⬜
10.02	Purchasing power parity*	10	🟦
10.03	Extent and effect of taxation	106	⬜
10.04	Fuel price levels*	25	🟦
10.05	Hotel price index*	98	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	104	⬜
11.02	Secondary education enrollment*	69	⬜
11.03	Quality of the educational system	74	⬜
11.04	Local availability of research and training services	128	⬜
11.05	Extent of staff training	102	⬜
11.06	Hiring and firing practices	14	🟦
11.07	Ease of hiring foreign labor	113	⬜
11.08	HIV prevalence*	22	🟦
11.09	Business impact of HIV/AIDS	101	⬜
11.10	Life expectancy*	96	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	19	🟦
12.02	Attitude of population toward foreign visitors	117	⬜
12.03	Extension of business trips recommended	27	🟦
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	105	⬜
13.03	Quality of the natural environment	31	🟦
13.04	Total known species*	91	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	97	⬜
14.02	Sports stadiums*	105	⬜
14.03	Number of international fairs and exhibitions*	n/a	
14.04	Creative industries exports*	100	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Latvia

Key indicators

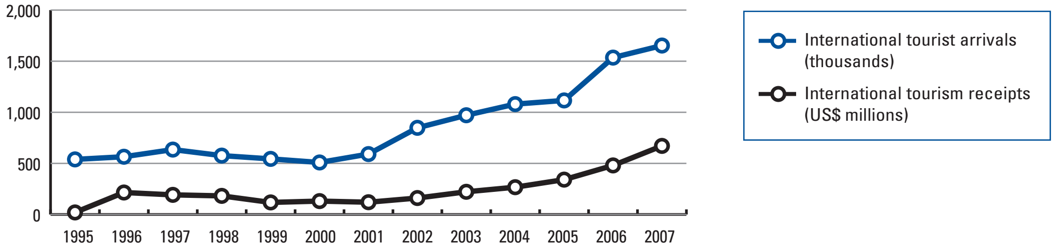
Population (millions), 2007	2.3
Surface area (1,000 square kilometers)	64.6
Gross domestic product (US$ billions), 2007	27.2
Gross domestic product (PPP, US$) per capita, 2007	17,488.4
Real GDP growth (percent), 2007	10.3
Environmental Performance Index, 2008 (out of 149 countries)	8

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	496	1.5	4.3
Employment (1,000 jobs)	14	1.3	–1.1
T&T economy, 2008 estimates			
GDP (US$ millions)	2,433	7.5	4.4
Employment (1,000 jobs)	66	6.4	–1.1

Source: World Travel & Tourism Council, TSA Research 2008

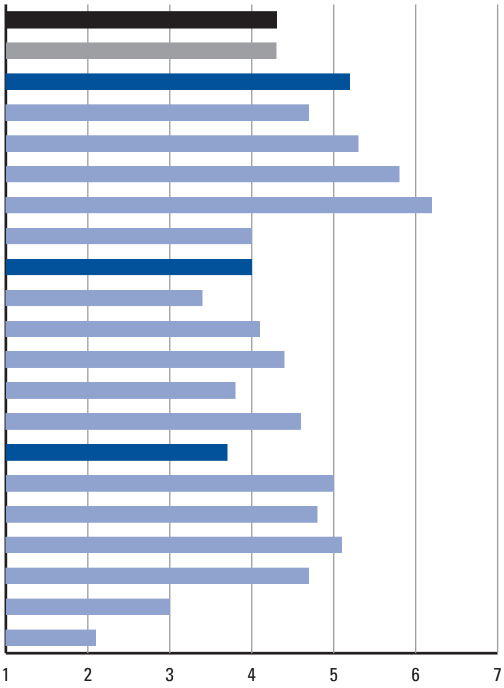
International tourist arrivals (thousands), 2007	1,653
International tourism receipts (US$ millions), 2007	671



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**48**	**4.3**
2008 Index	45	4.3
T&T regulatory framework	**32**	**5.2**
Policy rules and regulations	51	4.7
Environmental sustainability	14	5.3
Safety and security	35	5.8
Health and hygiene	26	6.2
Prioritization of Travel & Tourism	88	4.0
T&T business environment and infrastructure	**43**	**4.0**
Air transport infrastructure	53	3.4
Ground transport infrastructure	44	4.1
Tourism infrastructure	36	4.4
ICT infrastructure	43	3.8
Price competitiveness in the T&T industry	76	4.6
T&T human, cultural, and natural resources	**86**	**3.7**
Human resources	79	5.0
Education and training	57	4.8
Availability of qualified labor	103	5.1
Affinity for Travel & Tourism	73	4.7
Natural resources	75	3.0
Cultural resources	73	2.1



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Latvia

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	33	🟦
1.02	Property rights	45	🟦
1.03	Business impact of rules on FDI	69	⬜
1.04	Visa requirements*	40	🟦
1.05	Openness of bilateral Air Service Agreements*	113	⬜
1.06	Transparency of government policymaking	98	⬜
1.07	Time required to start a business*	45	🟦
1.08	Cost to start a business*	22	🟦
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	43	🟦
2.02	Enforcement of environmental regulation	38	🟦
2.03	Sustainability of T&T industry development	101	⬜
2.04	Carbon dioxide emissions*	59	⬜
2.05	Particulate matter concentration*	9	🟦
2.06	Threatened species*	8	🟦
2.07	Environmental treaty ratification*	34	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	24	🟦
3.02	Reliability of police services	64	⬜
3.03	Business costs of crime and violence	29	🟦
3.04	Road traffic accidents*	43	🟦
	4th pillar: Health and hygiene		
4.01	Physician density*	28	🟦
4.02	Access to improved sanitation*	80	⬜
4.03	Access to improved drinking water*	38	🟦
4.04	Hospital beds*	11	🟦
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	108	⬜
5.02	T&T government expenditure*	73	⬜
5.03	Effectiveness of marketing and branding	97	⬜
5.04	T&T fair attendance*	41	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	36	🟦
6.02	Available seat kilometers, domestic*	86	⬜
6.03	Available seat kilometers, international*	82	⬜
6.04	Departures per 1,000 population*	30	🟦
6.05	Airport density*	54	⬜
6.06	Number of operating airlines*	84	⬜
6.07	International air transport network	37	🟦
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	90	⬜
7.02	Quality of railroad infrastructure	35	🟦
7.03	Quality of port infrastructure	52	⬜
7.04	Quality of ground transport network	56	⬜
7.05	Road density*	30	🟦
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	56	⬜
8.02	Presence of major car rental companies*	23	🟦
8.03	ATMs accepting Visa cards*	27	🟦
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	45	🟦
9.02	Internet users*	27	🟦
9.03	Telephone lines*	46	🟦
9.04	Broadband Internet subscribers*	45	🟦
9.05	Mobile telephone subscribers*	42	🟦
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	47	🟦
10.02	Purchasing power parity*	85	⬜
10.03	Extent and effect of taxation	69	⬜
10.04	Fuel price levels*	95	⬜
10.05	Hotel price index*	45	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	86	⬜
11.02	Secondary education enrollment*	32	🟦
11.03	Quality of the educational system	63	⬜
11.04	Local availability of research and training services	75	⬜
11.05	Extent of staff training	62	⬜
11.06	Hiring and firing practices	83	⬜
11.07	Ease of hiring foreign labor	126	⬜
11.08	HIV prevalence*	94	⬜
11.09	Business impact of HIV/AIDS	52	⬜
11.10	Life expectancy*	76	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	53	⬜
12.02	Attitude of population toward foreign visitors	116	⬜
12.03	Extension of business trips recommended	75	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	50	⬜
13.03	Quality of the natural environment	26	🟦
13.04	Total known species*	111	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	65	⬜
14.02	Sports stadiums*	61	⬜
14.03	Number of international fairs and exhibitions*	44	🟦
14.04	Creative industries exports*	70	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Lesotho

Key indicators

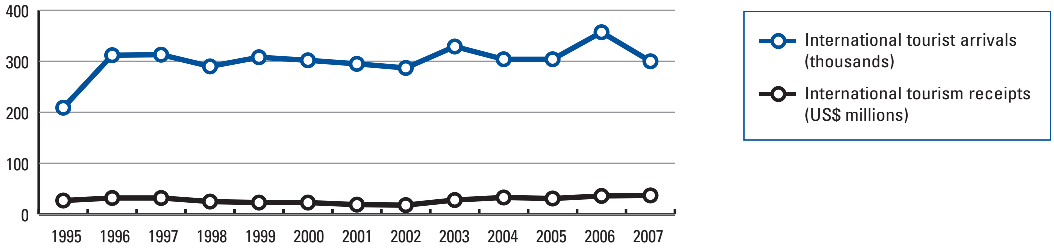
Population (millions), 2007	1.8
Surface area (1,000 square kilometers)	30.4
Gross domestic product (US$ billions), 2007	1.6
Gross domestic product (PPP, US$) per capita, 2007	1,285.6
Real GDP growth (percent), 2007	4.9
Environmental Performance Index, 2008 (out of 149 countries)	n/a

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	31	2.1	3.6
Employment (1,000 jobs)	6	1.7	1.2
T&T economy, 2008 estimates			
GDP (US$ millions)	102	6.9	3.8
Employment (1,000 jobs)	21	5.6	1.3

Source: World Travel & Tourism Council, TSA Research 2008

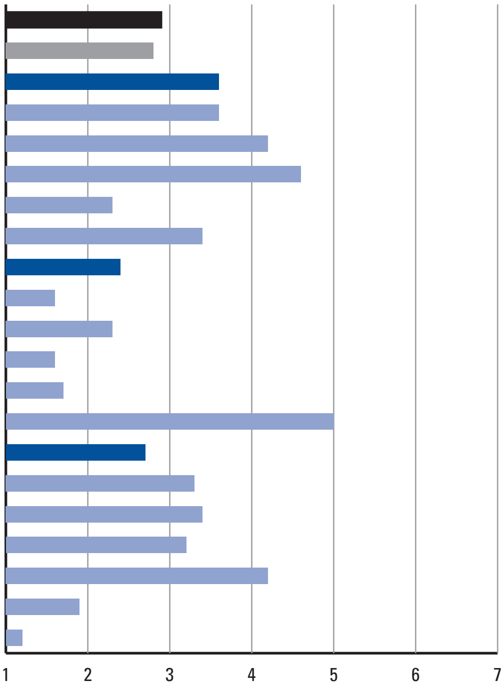
International tourist arrivals (thousands), 2007	300
International tourism receipts (US$ millions), 2007	37



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**132**	**2.9**
2008 Index	129	2.8
T&T regulatory framework	**121**	**3.6**
Policy rules and regulations	112	3.6
Environmental sustainability	90	4.2
Safety and security	95	4.6
Health and hygiene	113	2.3
Prioritization of Travel & Tourism	114	3.4
T&T business environment and infrastructure	**128**	**2.4**
Air transport infrastructure	132	1.6
Ground transport infrastructure	121	2.3
Tourism infrastructure	113	1.6
ICT infrastructure	117	1.7
Price competitiveness in the T&T industry	44	5.0
T&T human, cultural, and natural resources	**133**	**2.7**
Human resources	133	3.3
Education and training	118	3.4
Availability of qualified labor	132	3.2
Affinity for Travel & Tourism	119	4.2
Natural resources	132	1.9
Cultural resources	128	1.2



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Lesotho

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	81	⬜
1.02	Property rights	120	⬜
1.03	Business impact of rules on FDI	100	⬜
1.04	Visa requirements*	32	🟦
1.05	Openness of bilateral Air Service Agreements*	128	⬜
1.06	Transparency of government policymaking	105	⬜
1.07	Time required to start a business*	100	⬜
1.08	Cost to start a business*	99	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	99	⬜
2.02	Enforcement of environmental regulation	98	⬜
2.03	Sustainability of T&T industry development	94	⬜
2.04	Carbon dioxide emissions*	n/a	
2.05	Particulate matter concentration*	77	⬜
2.06	Threatened species*	18	🟦
2.07	Environmental treaty ratification*	94	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	119	⬜
3.02	Reliability of police services	100	⬜
3.03	Business costs of crime and violence	114	⬜
3.04	Road traffic accidents*	31	🟦
	4th pillar: Health and hygiene		
4.01	Physician density*	124	⬜
4.02	Access to improved sanitation*	108	⬜
4.03	Access to improved drinking water*	104	⬜
4.04	Hospital beds*	95	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	96	⬜
5.02	T&T government expenditure*	114	⬜
5.03	Effectiveness of marketing and branding	83	⬜
5.04	T&T fair attendance*	98	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	132	⬜
6.02	Available seat kilometers, domestic*	100	⬜
6.03	Available seat kilometers, international*	132	⬜
6.04	Departures per 1,000 population*	n/a	
6.05	Airport density*	83	⬜
6.06	Number of operating airlines*	133	⬜
6.07	International air transport network	133	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	124	⬜
7.02	Quality of railroad infrastructure	81	⬜
7.03	Quality of port infrastructure	122	⬜
7.04	Quality of ground transport network	113	⬜
7.05	Road density*	80	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	96	⬜
8.02	Presence of major car rental companies*	95	⬜
8.03	ATMs accepting Visa cards*	100	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	112	⬜
9.02	Internet users*	114	⬜
9.03	Telephone lines*	110	⬜
9.04	Broadband Internet subscribers*	123	⬜
9.05	Mobile telephone subscribers*	114	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	2	🟦
10.02	Purchasing power parity*	52	⬜
10.03	Extent and effect of taxation	101	⬜
10.04	Fuel price levels*	72	⬜
10.05	Hotel price index*	n/a	
	11th pillar: Human resources		
11.01	Primary education enrollment*	119	⬜
11.02	Secondary education enrollment*	115	⬜
11.03	Quality of the educational system	79	⬜
11.04	Local availability of research and training services	109	⬜
11.05	Extent of staff training	75	⬜
11.06	Hiring and firing practices	64	⬜
11.07	Ease of hiring foreign labor	91	⬜
11.08	HIV prevalence*	132	⬜
11.09	Business impact of HIV/AIDS	133	⬜
11.10	Life expectancy*	133	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	93	⬜
12.02	Attitude of population toward foreign visitors	126	⬜
12.03	Extension of business trips recommended	112	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	130	⬜
13.03	Quality of the natural environment	106	⬜
13.04	Total known species*	118	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	116	⬜
14.02	Sports stadiums*	104	⬜
14.03	Number of international fairs and exhibitions*	n/a	
14.04	Creative industries exports*	n/a	

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Libya

Key indicators

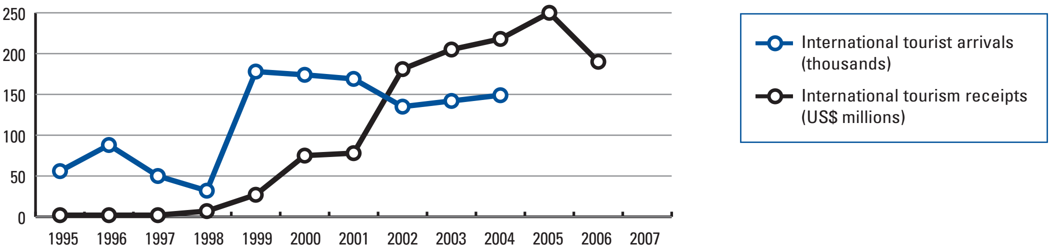
Population (millions), 2007	6.1
Surface area (1,000 square kilometers)	1,759.5
Gross domestic product (US$ billions), 2007	69.9
Gross domestic product (PPP, US$) per capita, 2007	13,593.3
Real GDP growth (percent), 2007	6.8
Environmental Performance Index, 2008 (out of 149 countries)	n/a

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	1,672	2.2	9.3
Employment (1,000 jobs)	56	3.1	5.6
T&T economy, 2008 estimates			
GDP (US$ millions)	9,383	12.6	7.7
Employment (1,000 jobs)	216	12.2	4.3

Source: World Travel & Tourism Council, TSA Research 2008

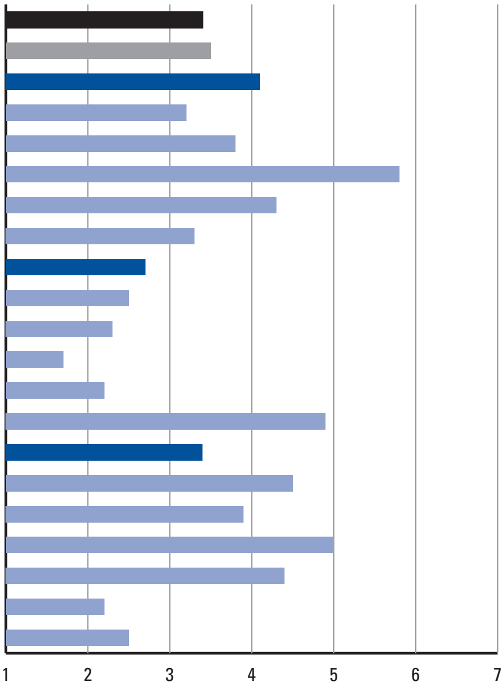
International tourist arrivals (thousands), 2004	149
International tourism receipts (US$ millions), 2006	190



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**112**	**3.4**
2008 Index	104	3.5
T&T regulatory framework	**97**	**4.1**
Policy rules and regulations	125	3.2
Environmental sustainability	122	3.8
Safety and security	34	5.8
Health and hygiene	77	4.3
Prioritization of Travel & Tourism	120	3.3
T&T business environment and infrastructure	**109**	**2.7**
Air transport infrastructure	102	2.5
Ground transport infrastructure	122	2.3
Tourism infrastructure	107	1.7
ICT infrastructure	91	2.2
Price competitiveness in the T&T industry	48	4.9
T&T human, cultural, and natural resources	**114**	**3.4**
Human resources	104	4.5
Education and training	104	3.9
Availability of qualified labor	108	5.0
Affinity for Travel & Tourism	110	4.4
Natural resources	124	2.2
Cultural resources	61	2.5



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Libya

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

1st pillar: Policy rules and regulations

	INDICATOR	RANK/133	
1.01	Prevalence of foreign ownership	133	⬜
1.02	Property rights	103	⬜
1.03	Business impact of rules on FDI	109	⬜
1.04	Visa requirements*	112	⬜
1.05	Openness of bilateral Air Service Agreements*	57	⬜
1.06	Transparency of government policymaking	100	⬜
1.07	Time required to start a business*	n/a	
1.08	Cost to start a business*	n/a	

2nd pillar: Environmental sustainability

	INDICATOR	RANK/133	
2.01	Stringency of environmental regulation	88	⬜
2.02	Enforcement of environmental regulation	80	⬜
2.03	Sustainability of T&T industry development	112	⬜
2.04	Carbon dioxide emissions*	108	⬜
2.05	Particulate matter concentration*	114	⬜
2.06	Threatened species*	67	⬜
2.07	Environmental treaty ratification*	34	🟦

3rd pillar: Safety and security

	INDICATOR	RANK/133	
3.01	Business costs of terrorism	16	🟦
3.02	Reliability of police services	94	⬜
3.03	Business costs of crime and violence	6	🟦
3.04	Road traffic accidents*	51	⬜

4th pillar: Health and hygiene

	INDICATOR	RANK/133	
4.01	Physician density*	76	⬜
4.02	Access to improved sanitation*	40	🟦
4.03	Access to improved drinking water*	111	⬜
4.04	Hospital beds*	48	🟦

5th pillar: Prioritization of Travel & Tourism

	INDICATOR	RANK/133	
5.01	Government prioritization of the T&T industry	116	⬜
5.02	T&T government expenditure*	80	⬜
5.03	Effectiveness of marketing and branding	111	⬜
5.04	T&T fair attendance*	98	⬜

6th pillar: Air transport infrastructure

	INDICATOR	RANK/133	
6.01	Quality of air transport infrastructure	126	⬜
6.02	Available seat kilometers, domestic*	43	🟦
6.03	Available seat kilometers, international*	81	⬜
6.04	Departures per 1,000 population*	73	⬜
6.05	Airport density*	38	🟦
6.06	Number of operating airlines*	70	⬜
6.07	International air transport network	110	⬜

7th pillar: Ground transport infrastructure

	INDICATOR	RANK/133	
7.01	Quality of roads	85	⬜
7.02	Quality of railroad infrastructure	115	⬜
7.03	Quality of port infrastructure	110	⬜
7.04	Quality of ground transport network	121	⬜
7.05	Road density*	118	⬜

8th pillar: Tourism infrastructure

	INDICATOR	RANK/133	
8.01	Hotel rooms*	78	⬜
8.02	Presence of major car rental companies*	95	⬜
8.03	ATMs accepting Visa cards*	115	⬜

9th pillar: ICT infrastructure

	INDICATOR	RANK/133	
9.01	Extent of business Internet use	125	⬜
9.02	Internet users*	110	⬜
9.03	Telephone lines*	80	⬜
9.04	Broadband Internet subscribers*	98	⬜
9.05	Mobile telephone subscribers*	75	⬜

10th pillar: Price competitiveness in the T&T industry

	INDICATOR	RANK/133	
10.01	Ticket taxes and airport charges*	1	🟦
10.02	Purchasing power parity*	81	⬜
10.03	Extent and effect of taxation	37	🟦
10.04	Fuel price levels*	4	🟦
10.05	Hotel price index*	112	⬜

11th pillar: Human resources

	INDICATOR	RANK/133	
11.01	Primary education enrollment*	n/a	
11.02	Secondary education enrollment*	49	🟦
11.03	Quality of the educational system	121	⬜
11.04	Local availability of research and training services	106	⬜
11.05	Extent of staff training	114	⬜
11.06	Hiring and firing practices	120	⬜
11.07	Ease of hiring foreign labor	127	⬜
11.08	HIV prevalence*	67	⬜
11.09	Business impact of HIV/AIDS	80	⬜
11.10	Life expectancy*	66	⬜

12th pillar: Affinity for Travel & Tourism

	INDICATOR	RANK/133	
12.01	Tourism openness*	121	⬜
12.02	Attitude of population toward foreign visitors	70	⬜
12.03	Extension of business trips recommended	89	⬜

13th pillar: Natural resources

	INDICATOR	RANK/133	
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	132	⬜
13.03	Quality of the natural environment	57	⬜
13.04	Total known species*	108	⬜

14th pillar: Cultural resources

	INDICATOR	RANK/133	
14.01	Number of World Heritage cultural sites*	45	🟦
14.02	Sports stadiums*	50	🟦
14.03	Number of international fairs and exhibitions*	107	⬜
14.04	Creative industries exports*	n/a	

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Lithuania

Key indicators

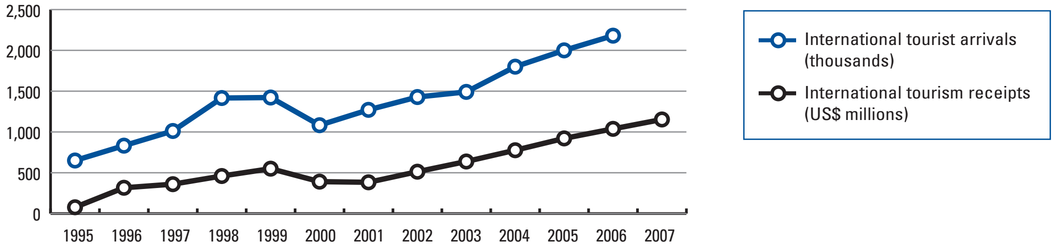
Population (millions), 2007	3.4
Surface area (1,000 square kilometers)	65.3
Gross domestic product (US$ billions), 2007	38.9
Gross domestic product (PPP, US$) per capita, 2007	17,732.6
Real GDP growth (percent), 2007	8.9
Environmental Performance Index, 2008 (out of 149 countries)	16

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	467	1.1	5.4
Employment (1,000 jobs)	14	0.9	–0.4
T&T economy, 2008 estimates			
GDP (US$ millions)	2,690	6.2	5.7
Employment (1,000 jobs)	80	5.2	–0.1

Source: World Travel & Tourism Council, TSA Research 2008

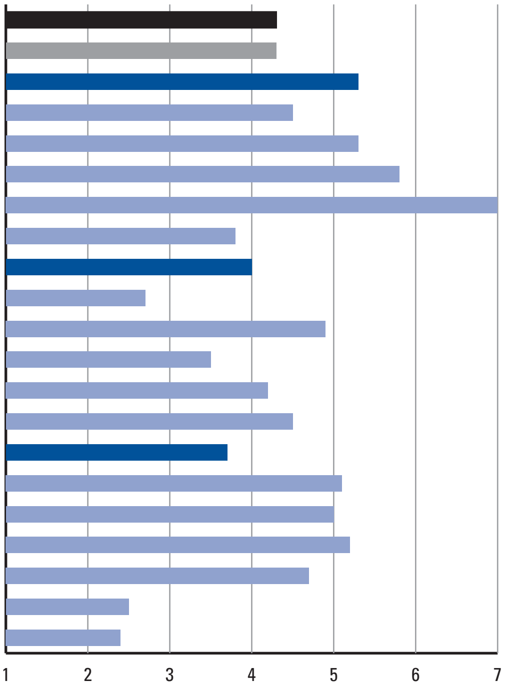
International tourist arrivals (thousands), 2006	2,180
International tourism receipts (US$ millions), 2007	1,153



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**49**	**4.3**
2008 Index	47	4.3
T&T regulatory framework	**30**	**5.3**
Policy rules and regulations	59	4.5
Environmental sustainability	21	5.3
Safety and security	33	5.8
Health and hygiene	2	7.0
Prioritization of Travel & Tourism	95	3.8
T&T business environment and infrastructure	**46**	**4.0**
Air transport infrastructure	80	2.7
Ground transport infrastructure	22	4.9
Tourism infrastructure	62	3.5
ICT infrastructure	35	4.2
Price competitiveness in the T&T industry	78	4.5
T&T human, cultural, and natural resources	**89**	**3.7**
Human resources	66	5.1
Education and training	50	5.0
Availability of qualified labor	96	5.2
Affinity for Travel & Tourism	74	4.7
Natural resources	108	2.5
Cultural resources	62	2.4



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Lithuania

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	76	⬜
1.02	Property rights	50	⬜
1.03	Business impact of rules on FDI	102	⬜
1.04	Visa requirements*	40	🟦
1.05	Openness of bilateral Air Service Agreements*	89	⬜
1.06	Transparency of government policymaking	64	⬜
1.07	Time required to start a business*	71	⬜
1.08	Cost to start a business*	26	🟦
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	38	🟦
2.02	Enforcement of environmental regulation	39	🟦
2.03	Sustainability of T&T industry development	99	⬜
2.04	Carbon dioxide emissions*	68	⬜
2.05	Particulate matter concentration*	23	🟦
2.06	Threatened species*	20	🟦
2.07	Environmental treaty ratification*	34	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	9	🟦
3.02	Reliability of police services	65	⬜
3.03	Business costs of crime and violence	34	🟦
3.04	Road traffic accidents*	46	🟦
	4th pillar: Health and hygiene		
4.01	Physician density*	6	🟦
4.02	Access to improved sanitation*	n/a	
4.03	Access to improved drinking water*	n/a	
4.04	Hospital beds*	8	🟦
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	112	⬜
5.02	T&T government expenditure*	74	⬜
5.03	Effectiveness of marketing and branding	103	⬜
5.04	T&T fair attendance*	62	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	72	⬜
6.02	Available seat kilometers, domestic*	100	⬜
6.03	Available seat kilometers, international*	95	⬜
6.04	Departures per 1,000 population*	58	⬜
6.05	Airport density*	53	⬜
6.06	Number of operating airlines*	92	⬜
6.07	International air transport network	63	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	27	🟦
7.02	Quality of railroad infrastructure	27	🟦
7.03	Quality of port infrastructure	43	🟦
7.04	Quality of ground transport network	26	🟦
7.05	Road density*	29	🟦

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	67	⬜
8.02	Presence of major car rental companies*	56	⬜
8.03	ATMs accepting Visa cards*	39	🟦
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	33	🟦
9.02	Internet users*	43	🟦
9.03	Telephone lines*	58	⬜
9.04	Broadband Internet subscribers*	34	🟦
9.05	Mobile telephone subscribers*	6	🟦
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	102	⬜
10.02	Purchasing power parity*	79	⬜
10.03	Extent and effect of taxation	63	⬜
10.04	Fuel price levels*	88	⬜
10.05	Hotel price index*	32	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	90	⬜
11.02	Secondary education enrollment*	30	🟦
11.03	Quality of the educational system	64	⬜
11.04	Local availability of research and training services	56	⬜
11.05	Extent of staff training	38	🟦
11.06	Hiring and firing practices	94	⬜
11.07	Ease of hiring foreign labor	109	⬜
11.08	HIV prevalence*	22	🟦
11.09	Business impact of HIV/AIDS	51	⬜
11.10	Life expectancy*	76	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	51	⬜
12.02	Attitude of population toward foreign visitors	111	⬜
12.03	Extension of business trips recommended	88	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	86	⬜
13.03	Quality of the natural environment	42	🟦
13.04	Total known species*	119	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	33	🟦
14.02	Sports stadiums*	66	⬜
14.03	Number of international fairs and exhibitions*	51	⬜
14.04	Creative industries exports*	59	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Luxembourg

Key indicators

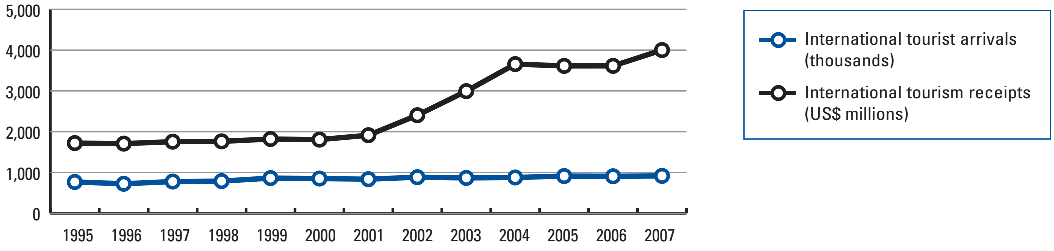
Population (millions), 2007	0.5
Surface area (1,000 square kilometers)	2.6
Gross domestic product (US$ billions), 2007	49.5
Gross domestic product (PPP, US$) per capita, 2007	79,659.7
Real GDP growth (percent), 2007	4.5
Environmental Performance Index, 2008 (out of 149 countries)	31

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	1,517	2.7	3.0
Employment (1,000 jobs)	8	3.5	1.2
T&T economy, 2008 estimates			
GDP (US$ millions)	4,564	8.1	3.4
Employment (1,000 jobs)	23	11.0	1.9

Source: World Travel & Tourism Council, TSA Research 2008

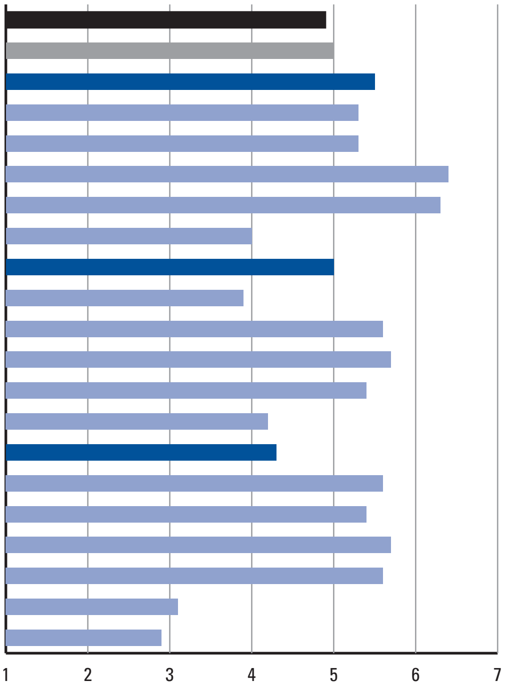
International tourist arrivals (thousands), 2007	917
International tourism receipts (US$ millions), 2007	4,001



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**23**	**4.9**
2008 Index	20	5.0
T&T regulatory framework	**20**	**5.5**
Policy rules and regulations	12	5.3
Environmental sustainability	15	5.3
Safety and security	7	6.4
Health and hygiene	22	6.3
Prioritization of Travel & Tourism	89	4.0
T&T business environment and infrastructure	**16**	**5.0**
Air transport infrastructure	41	3.9
Ground transport infrastructure	13	5.6
Tourism infrastructure	21	5.7
ICT infrastructure	10	5.4
Price competitiveness in the T&T industry	92	4.2
T&T human, cultural, and natural resources	**42**	**4.3**
Human resources	26	5.6
Education and training	29	5.4
Availability of qualified labor	20	5.7
Affinity for Travel & Tourism	12	5.6
Natural resources	67	3.1
Cultural resources	46	2.9



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Luxembourg

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ▨ Competitive **Disadvantage**

1st pillar: Policy rules and regulations

	INDICATOR	RANK/133	
1.01	Prevalence of foreign ownership	5	🟦
1.02	Property rights	17	🟦
1.03	Business impact of rules on FDI	4	🟦
1.04	Visa requirements*	40	▨
1.05	Openness of bilateral Air Service Agreements*	15	🟦
1.06	Transparency of government policymaking	12	🟦
1.07	Time required to start a business*	71	▨
1.08	Cost to start a business*	48	▨

2nd pillar: Environmental sustainability

	INDICATOR	RANK/133	
2.01	Stringency of environmental regulation	7	🟦
2.02	Enforcement of environmental regulation	10	🟦
2.03	Sustainability of T&T industry development	34	▨
2.04	Carbon dioxide emissions*	126	▨
2.05	Particulate matter concentration*	8	🟦
2.06	Threatened species*	1	🟦
2.07	Environmental treaty ratification*	21	🟦

3rd pillar: Safety and security

	INDICATOR	RANK/133	
3.01	Business costs of terrorism	28	▨
3.02	Reliability of police services	17	🟦
3.03	Business costs of crime and violence	10	🟦
3.04	Road traffic accidents*	7	🟦

4th pillar: Health and hygiene

	INDICATOR	RANK/133	
4.01	Physician density*	34	▨
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	21	🟦

5th pillar: Prioritization of Travel & Tourism

	INDICATOR	RANK/133	
5.01	Government prioritization of the T&T industry	84	▨
5.02	T&T government expenditure*	84	▨
5.03	Effectiveness of marketing and branding	57	▨
5.04	T&T fair attendance*	81	▨

6th pillar: Air transport infrastructure

	INDICATOR	RANK/133	
6.01	Quality of air transport infrastructure	54	▨
6.02	Available seat kilometers, domestic*	100	▨
6.03	Available seat kilometers, international*	109	▨
6.04	Departures per 1,000 population*	1	🟦
6.05	Airport density*	24	▨
6.06	Number of operating airlines*	108	▨
6.07	International air transport network	75	▨

7th pillar: Ground transport infrastructure

	INDICATOR	RANK/133	
7.01	Quality of roads	16	🟦
7.02	Quality of railroad infrastructure	18	🟦
7.03	Quality of port infrastructure	21	🟦
7.04	Quality of ground transport network	32	▨
7.05	Road density*	9	🟦

8th pillar: Tourism infrastructure

	INDICATOR	RANK/133	
8.01	Hotel rooms*	12	🟦
8.02	Presence of major car rental companies*	73	▨
8.03	ATMs accepting Visa cards*	6	🟦

9th pillar: ICT infrastructure

	INDICATOR	RANK/133	
9.01	Extent of business Internet use	25	▨
9.02	Internet users*	6	🟦
9.03	Telephone lines*	13	🟦
9.04	Broadband Internet subscribers*	14	🟦
9.05	Mobile telephone subscribers*	9	🟦

10th pillar: Price competitiveness in the T&T industry

	INDICATOR	RANK/133	
10.01	Ticket taxes and airport charges*	6	🟦
10.02	Purchasing power parity*	124	▨
10.03	Extent and effect of taxation	12	🟦
10.04	Fuel price levels*	120	▨
10.05	Hotel price index*	74	▨

11th pillar: Human resources

	INDICATOR	RANK/133	
11.01	Primary education enrollment*	32	▨
11.02	Secondary education enrollment*	38	▨
11.03	Quality of the educational system	41	▨
11.04	Local availability of research and training services	38	▨
11.05	Extent of staff training	14	🟦
11.06	Hiring and firing practices	112	▨
11.07	Ease of hiring foreign labor	13	🟦
11.08	HIV prevalence*	49	▨
11.09	Business impact of HIV/AIDS	34	▨
11.10	Life expectancy*	12	🟦

12th pillar: Affinity for Travel & Tourism

	INDICATOR	RANK/133	
12.01	Tourism openness*	10	🟦
12.02	Attitude of population toward foreign visitors	34	▨
12.03	Extension of business trips recommended	101	▨

13th pillar: Natural resources

	INDICATOR	RANK/133	
13.01	Number of World Heritage natural sites*	74	▨
13.02	Protected areas*	32	▨
13.03	Quality of the natural environment	17	🟦
13.04	Total known species*	127	▨

14th pillar: Cultural resources

	INDICATOR	RANK/133	
14.01	Number of World Heritage cultural sites*	97	▨
14.02	Sports stadiums*	11	🟦
14.03	Number of international fairs and exhibitions*	63	▨
14.04	Creative industries exports*	57	▨

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Macedonia, FYR

Key indicators

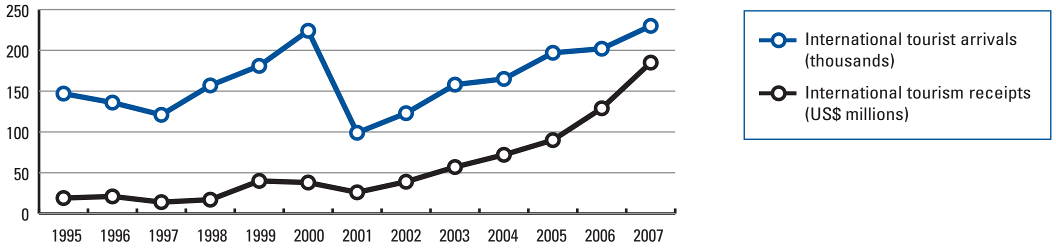
Population (millions), 2007	2.0
Surface area (1,000 square kilometers)	25.7
Gross domestic product (US$ billions), 2007	7.7
Gross domestic product (PPP, US$) per capita, 2007	8,490.5
Real GDP growth (percent), 2007	5.0
Environmental Performance Index, 2008 (out of 149 countries)	74

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	120	1.4	4.8
Employment (1,000 jobs)	8	1.4	1.4
T&T economy, 2008 estimates			
GDP (US$ millions)	514	6.2	5.3
Employment (1,000 jobs)	33	5.6	1.8

Source: World Travel & Tourism Council, TSA Research 2008

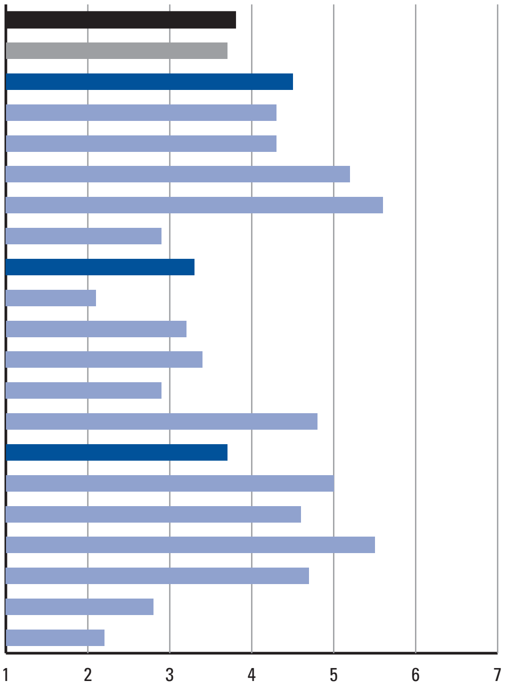
International tourist arrivals (thousands), 2007	230
International tourism receipts (US$ millions), 2007	185



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**80**	**3.8**
2008 Index	83	3.7
T&T regulatory framework	**69**	**4.5**
Policy rules and regulations	76	4.3
Environmental sustainability	83	4.3
Safety and security	64	5.2
Health and hygiene	42	5.6
Prioritization of Travel & Tourism	129	2.9
T&T business environment and infrastructure	**75**	**3.3**
Air transport infrastructure	119	2.1
Ground transport infrastructure	76	3.2
Tourism infrastructure	63	3.4
ICT infrastructure	67	2.9
Price competitiveness in the T&T industry	59	4.8
T&T human, cultural, and natural resources	**87**	**3.7**
Human resources	70	5.0
Education and training	75	4.6
Availability of qualified labor	61	5.5
Affinity for Travel & Tourism	69	4.7
Natural resources	92	2.8
Cultural resources	70	2.2



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Macedonia, FYR

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	113	⬜
1.02	Property rights	96	⬜
1.03	Business impact of rules on FDI	106	⬜
1.04	Visa requirements*	84	⬜
1.05	Openness of bilateral Air Service Agreements*	116	⬜
1.06	Transparency of government policymaking	79	⬜
1.07	Time required to start a business*	23	🟦
1.08	Cost to start a business*	33	🟦
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	119	⬜
2.02	Enforcement of environmental regulation	118	⬜
2.03	Sustainability of T&T industry development	116	⬜
2.04	Carbon dioxide emissions*	76	⬜
2.05	Particulate matter concentration*	26	🟦
2.06	Threatened species*	48	🟦
2.07	Environmental treaty ratification*	104	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	96	⬜
3.02	Reliability of police services	79	⬜
3.03	Business costs of crime and violence	76	⬜
3.04	Road traffic accidents*	12	🟦
	4th pillar: Health and hygiene		
4.01	Physician density*	40	🟦
4.02	Access to improved sanitation*	62	⬜
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	38	🟦
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	110	⬜
5.02	T&T government expenditure*	112	⬜
5.03	Effectiveness of marketing and branding	115	⬜
5.04	T&T fair attendance*	115	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	121	⬜
6.02	Available seat kilometers, domestic*	100	⬜
6.03	Available seat kilometers, international*	124	⬜
6.04	Departures per 1,000 population*	89	⬜
6.05	Airport density*	48	🟦
6.06	Number of operating airlines*	101	⬜
6.07	International air transport network	126	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	83	⬜
7.02	Quality of railroad infrastructure	70	⬜
7.03	Quality of port infrastructure	85	⬜
7.04	Quality of ground transport network	77	⬜
7.05	Road density*	48	🟦

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	63	⬜
8.02	Presence of major car rental companies*	23	🟦
8.03	ATMs accepting Visa cards*	66	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	129	⬜
9.02	Internet users*	71	⬜
9.03	Telephone lines*	59	⬜
9.04	Broadband Internet subscribers*	52	⬜
9.05	Mobile telephone subscribers*	46	🟦
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	82	⬜
10.02	Purchasing power parity*	22	🟦
10.03	Extent and effect of taxation	47	🟦
10.04	Fuel price levels*	88	⬜
10.05	Hotel price index*	n/a	
	11th pillar: Human resources		
11.01	Primary education enrollment*	73	⬜
11.02	Secondary education enrollment*	77	⬜
11.03	Quality of the educational system	65	⬜
11.04	Local availability of research and training services	99	⬜
11.05	Extent of staff training	83	⬜
11.06	Hiring and firing practices	78	⬜
11.07	Ease of hiring foreign labor	71	⬜
11.08	HIV prevalence*	1	🟦
11.09	Business impact of HIV/AIDS	77	⬜
11.10	Life expectancy*	55	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	86	⬜
12.02	Attitude of population toward foreign visitors	40	🟦
12.03	Extension of business trips recommended	67	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	40	🟦
13.02	Protected areas*	78	⬜
13.03	Quality of the natural environment	86	⬜
13.04	Total known species*	87	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	97	⬜
14.02	Sports stadiums*	19	🟦
14.03	Number of international fairs and exhibitions*	107	⬜
14.04	Creative industries exports*	87	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Madagascar

Key indicators

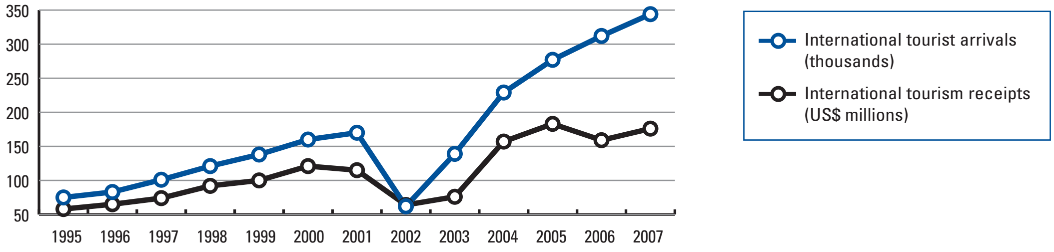
Population (millions), 2007	19.6
Surface area (1,000 square kilometers)	587.0
Gross domestic product (US$ billions), 2007	7.7
Gross domestic product (PPP, US$) per capita, 2007	979.4
Real GDP growth (percent), 2007	6.4
Environmental Performance Index, 2008 (out of 149 countries)	133

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	235	3.0	2.1
Employment (1,000 jobs)	99	2.4	0.9
T&T economy, 2008 estimates			
GDP (US$ millions)	612	7.8	1.8
Employment (1,000 jobs)	264	6.3	0.6

Source: World Travel & Tourism Council, TSA Research 2008

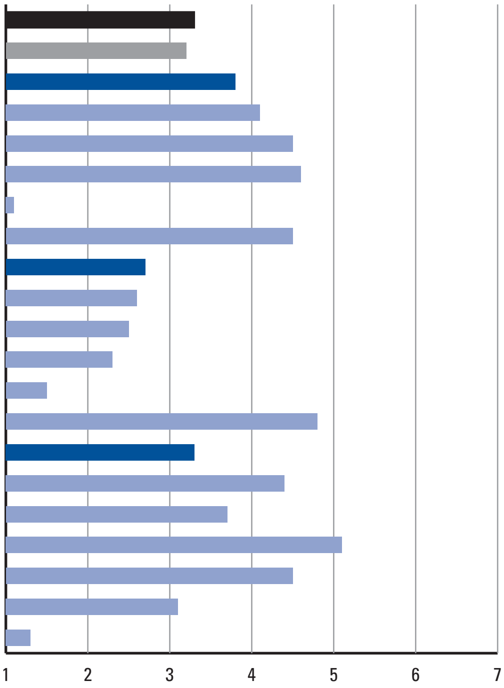
International tourist arrivals (thousands), 2007	344
International tourism receipts (US$ millions), 2007	176



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**116**	**3.3**
2008 Index	118	3.2
T&T regulatory framework	**112**	**3.8**
Policy rules and regulations	83	4.1
Environmental sustainability	65	4.5
Safety and security	93	4.6
Health and hygiene	131	1.1
Prioritization of Travel & Tourism	57	4.5
T&T business environment and infrastructure	**106**	**2.7**
Air transport infrastructure	93	2.6
Ground transport infrastructure	115	2.5
Tourism infrastructure	84	2.3
ICT infrastructure	127	1.5
Price competitiveness in the T&T industry	55	4.8
T&T human, cultural, and natural resources	**119**	**3.3**
Human resources	107	4.4
Education and training	110	3.7
Availability of qualified labor	104	5.1
Affinity for Travel & Tourism	93	4.5
Natural resources	70	3.1
Cultural resources	123	1.3



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Madagascar

The Travel & Tourism Competitiveness Index in detail

■ Competitive **Advantage** □ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	91	□
1.02	Property rights	107	□
1.03	Business impact of rules on FDI	103	□
1.04	Visa requirements*	132	□
1.05	Openness of bilateral Air Service Agreements*	95	□
1.06	Transparency of government policymaking	73	□
1.07	Time required to start a business*	15	■
1.08	Cost to start a business*	67	□
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	64	□
2.02	Enforcement of environmental regulation	52	□
2.03	Sustainability of T&T industry development	39	■
2.04	Carbon dioxide emissions*	12	■
2.05	Particulate matter concentration*	61	□
2.06	Threatened species*	132	□
2.07	Environmental treaty ratification*	34	■
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	105	□
3.02	Reliability of police services	73	□
3.03	Business costs of crime and violence	109	□
3.04	Road traffic accidents*	92	□
	4th pillar: Health and hygiene		
4.01	Physician density*	108	□
4.02	Access to improved sanitation*	123	□
4.03	Access to improved drinking water*	124	□
4.04	Hospital beds*	125	□
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	54	□
5.02	T&T government expenditure*	27	■
5.03	Effectiveness of marketing and branding	61	□
5.04	T&T fair attendance*	81	□
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	80	□
6.02	Available seat kilometers, domestic*	55	□
6.03	Available seat kilometers, international*	98	□
6.04	Departures per 1,000 population*	97	□
6.05	Airport density*	32	■
6.06	Number of operating airlines*	118	□
6.07	International air transport network	87	□
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	88	□
7.02	Quality of railroad infrastructure	94	□
7.03	Quality of port infrastructure	118	□
7.04	Quality of ground transport network	101	□
7.05	Road density*	108	□

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	108	□
8.02	Presence of major car rental companies*	56	□
8.03	ATMs accepting Visa cards*	118	□
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	119	□
9.02	Internet users*	129	□
9.03	Telephone lines*	126	□
9.04	Broadband Internet subscribers*	127	□
9.05	Mobile telephone subscribers*	124	□
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	92	□
10.02	Purchasing power parity*	19	■
10.03	Extent and effect of taxation	70	□
10.04	Fuel price levels*	79	□
10.05	Hotel price index*	36	■
	11th pillar: Human resources		
11.01	Primary education enrollment*	46	■
11.02	Secondary education enrollment*	125	□
11.03	Quality of the educational system	103	□
11.04	Local availability of research and training services	98	□
11.05	Extent of staff training	97	□
11.06	Hiring and firing practices	52	□
11.07	Ease of hiring foreign labor	81	□
11.08	HIV prevalence*	22	■
11.09	Business impact of HIV/AIDS	107	□
11.10	Life expectancy*	110	□
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	89	□
12.02	Attitude of population toward foreign visitors	95	□
12.03	Extension of business trips recommended	81	□
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	23	■
13.02	Protected areas*	111	□
13.03	Quality of the natural environment	102	□
13.04	Total known species*	50	■
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	82	□
14.02	Sports stadiums*	133	□
14.03	Number of international fairs and exhibitions*	122	□
14.04	Creative industries exports*	73	□

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Malawi

Key indicators

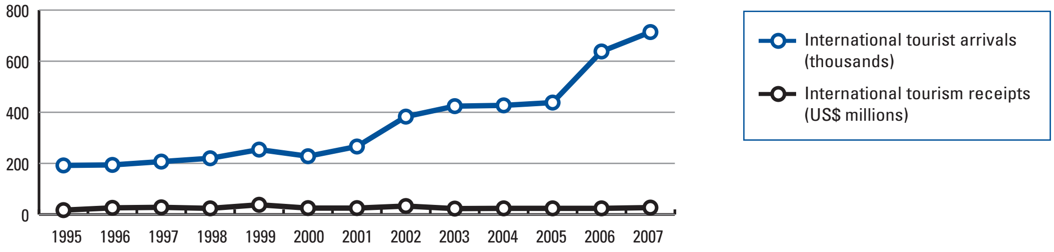
Population (millions), 2007	13.5
Surface area (1,000 square kilometers)	118.5
Gross domestic product (US$ billions), 2007	3.6
Gross domestic product (PPP, US$) per capita, 2007	792.6
Real GDP growth (percent), 2007	7.9
Environmental Performance Index, 2008 (out of 149 countries)	121

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	82	3.0	3.9
Employment (1,000 jobs)	72	2.4	2.0
T&T economy, 2008 estimates			
GDP (US$ millions)	159	5.9	4.1
Employment (1,000 jobs)	142	4.6	2.3

Source: World Travel & Tourism Council, TSA Research 2008

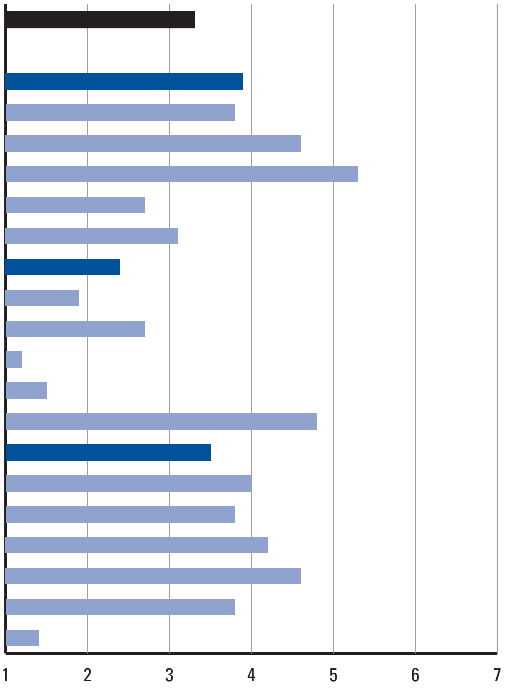
International tourist arrivals (thousands), 2007	714
International tourism receipts (US$ millions), 2007	27



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**117**	**3.3**
2008 Index	n/a	n/a
T&T regulatory framework	**106**	**3.9**
Policy rules and regulations	106	3.8
Environmental sustainability	60	4.6
Safety and security	53	5.3
Health and hygiene	108	2.7
Prioritization of Travel & Tourism	123	3.1
T&T business environment and infrastructure	**131**	**2.4**
Air transport infrastructure	129	1.9
Ground transport infrastructure	106	2.7
Tourism infrastructure	126	1.2
ICT infrastructure	126	1.5
Price competitiveness in the T&T industry	60	4.8
T&T human, cultural, and natural resources	**107**	**3.5**
Human resources	117	4.0
Education and training	106	3.8
Availability of qualified labor	126	4.2
Affinity for Travel & Tourism	80	4.6
Natural resources	46	3.8
Cultural resources	115	1.4



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Malawi

The Travel & Tourism Competitiveness Index in detail

■ Competitive **Advantage** □ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	72	□
1.02	Property rights	79	□
1.03	Business impact of rules on FDI	58	□
1.04	Visa requirements*	29	■
1.05	Openness of bilateral Air Service Agreements*	94	□
1.06	Transparency of government policymaking	41	■
1.07	Time required to start a business*	98	□
1.08	Cost to start a business*	121	□
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	76	□
2.02	Enforcement of environmental regulation	69	□
2.03	Sustainability of T&T industry development	76	□
2.04	Carbon dioxide emissions*	6	■
2.05	Particulate matter concentration*	59	□
2.06	Threatened species*	28	■
2.07	Environmental treaty ratification*	125	□
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	15	■
3.02	Reliability of police services	61	□
3.03	Business costs of crime and violence	87	□
3.04	Road traffic accidents*	84	□
	4th pillar: Health and hygiene		
4.01	Physician density*	131	□
4.02	Access to improved sanitation*	93	□
4.03	Access to improved drinking water*	108	□
4.04	Hospital beds*	101	□
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	73	□
5.02	T&T government expenditure*	111	□
5.03	Effectiveness of marketing and branding	93	□
5.04	T&T fair attendance*	126	□
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	127	□
6.02	Available seat kilometers, domestic*	84	□
6.03	Available seat kilometers, international*	123	□
6.04	Departures per 1,000 population*	110	□
6.05	Airport density*	116	□
6.06	Number of operating airlines*	126	□
6.07	International air transport network	111	□
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	106	□
7.02	Quality of railroad infrastructure	84	□
7.03	Quality of port infrastructure	82	□
7.04	Quality of ground transport network	88	□
7.05	Road density*	89	□

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	84	□
8.02	Presence of major car rental companies*	122	□
8.03	ATMs accepting Visa cards*	109	□
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	107	□
9.02	Internet users*	121	□
9.03	Telephone lines*	116	□
9.04	Broadband Internet subscribers*	118	□
9.05	Mobile telephone subscribers*	129	□
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	42	■
10.02	Purchasing power parity*	11	■
10.03	Extent and effect of taxation	97	□
10.04	Fuel price levels*	93	□
10.05	Hotel price index*	n/a	
	11th pillar: Human resources		
11.01	Primary education enrollment*	79	□
11.02	Secondary education enrollment*	121	□
11.03	Quality of the educational system	72	□
11.04	Local availability of research and training services	102	□
11.05	Extent of staff training	76	□
11.06	Hiring and firing practices	81	□
11.07	Ease of hiring foreign labor	79	□
11.08	HIV prevalence*	126	□
11.09	Business impact of HIV/AIDS	129	□
11.10	Life expectancy*	122	□
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	98	□
12.02	Attitude of population toward foreign visitors	25	■
12.03	Extension of business trips recommended	73	□
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	40	■
13.02	Protected areas*	40	■
13.03	Quality of the natural environment	66	□
13.04	Total known species*	38	■
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	65	□
14.02	Sports stadiums*	121	□
14.03	Number of international fairs and exhibitions*	117	□
14.04	Creative industries exports*	102	□

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Malaysia

Key indicators

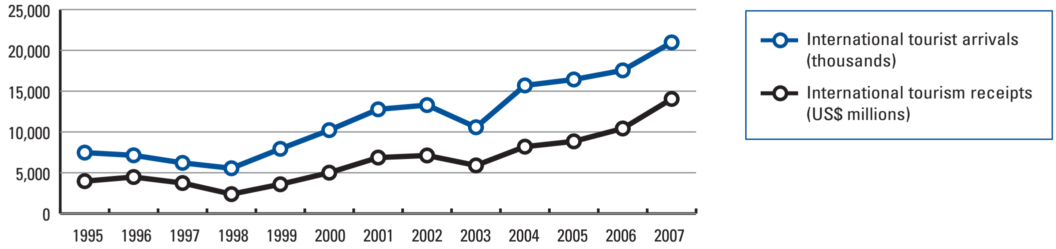
Population (millions), 2007	26.2
Surface area (1,000 square kilometers)	329.7
Gross domestic product (US$ billions), 2007	186.7
Gross domestic product (PPP, US$) per capita, 2007	13,385.1
Real GDP growth (percent), 2007	6.3
Environmental Performance Index, 2008 (out of 149 countries)	26

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	9,512	4.8	4.5
Employment (1,000 jobs)	532	4.9	2.0
T&T economy, 2008 estimates			
GDP (US$ millions)	26,504	13.2	5.3
Employment (1,000 jobs)	1,257	11.6	2.6

Source: World Travel & Tourism Council, TSA Research 2008

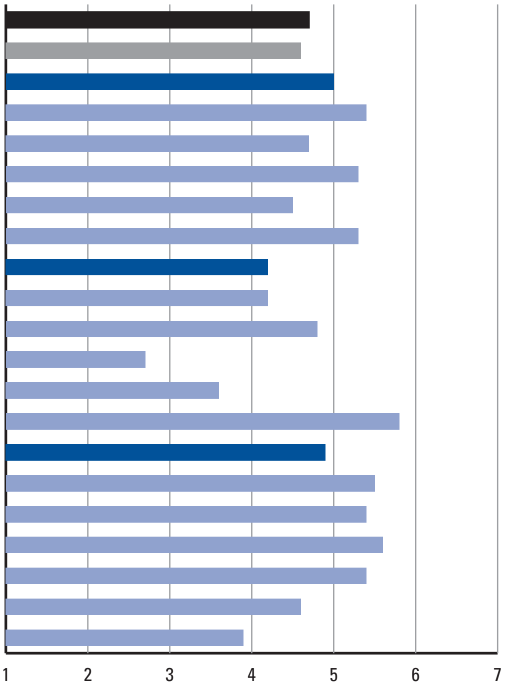
International tourist arrivals (thousands), 2007	20,973
International tourism receipts (US$ millions), 2007	14,047



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**32**	**4.7**
2008 Index	32	4.6
T&T regulatory framework	**42**	**5.0**
Policy rules and regulations	9	5.4
Environmental sustainability	54	4.7
Safety and security	59	5.3
Health and hygiene	69	4.5
Prioritization of Travel & Tourism	23	5.3
T&T business environment and infrastructure	**38**	**4.2**
Air transport infrastructure	35	4.2
Ground transport infrastructure	28	4.8
Tourism infrastructure	77	2.7
ICT infrastructure	46	3.6
Price competitiveness in the T&T industry	4	5.8
T&T human, cultural, and natural resources	**14**	**4.9**
Human resources	30	5.5
Education and training	30	5.4
Availability of qualified labor	36	5.6
Affinity for Travel & Tourism	21	5.4
Natural resources	21	4.6
Cultural resources	32	3.9



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Malaysia

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ▨ Competitive **Disadvantage**

1st pillar: Policy rules and regulations

	INDICATOR	RANK/133	
1.01	Prevalence of foreign ownership	67	▨
1.02	Property rights	38	▨
1.03	Business impact of rules on FDI	47	▨
1.04	Visa requirements*	1	🟦
1.05	Openness of bilateral Air Service Agreements*	52	▨
1.06	Transparency of government policymaking	20	🟦
1.07	Time required to start a business*	33	▨
1.08	Cost to start a business*	73	▨

2nd pillar: Environmental sustainability

	INDICATOR	RANK/133	
2.01	Stringency of environmental regulation	28	🟦
2.02	Enforcement of environmental regulation	32	▨
2.03	Sustainability of T&T industry development	11	🟦
2.04	Carbon dioxide emissions*	90	▨
2.05	Particulate matter concentration*	38	▨
2.06	Threatened species*	123	▨
2.07	Environmental treaty ratification*	67	▨

3rd pillar: Safety and security

	INDICATOR	RANK/133	
3.01	Business costs of terrorism	82	▨
3.02	Reliability of police services	37	▨
3.03	Business costs of crime and violence	74	▨
3.04	Road traffic accidents*	85	▨

4th pillar: Health and hygiene

	INDICATOR	RANK/133	
4.01	Physician density*	94	▨
4.02	Access to improved sanitation*	48	▨
4.03	Access to improved drinking water*	38	▨
4.04	Hospital beds*	83	▨

5th pillar: Prioritization of Travel & Tourism

	INDICATOR	RANK/133	
5.01	Government prioritization of the T&T industry	23	🟦
5.02	T&T government expenditure*	104	▨
5.03	Effectiveness of marketing and branding	12	🟦
5.04	T&T fair attendance*	1	🟦

6th pillar: Air transport infrastructure

	INDICATOR	RANK/133	
6.01	Quality of air transport infrastructure	20	🟦
6.02	Available seat kilometers, domestic*	17	🟦
6.03	Available seat kilometers, international*	23	🟦
6.04	Departures per 1,000 population*	44	▨
6.05	Airport density*	33	▨
6.06	Number of operating airlines*	27	🟦
6.07	International air transport network	33	▨

7th pillar: Ground transport infrastructure

	INDICATOR	RANK/133	
7.01	Quality of roads	17	🟦
7.02	Quality of railroad infrastructure	17	🟦
7.03	Quality of port infrastructure	16	🟦
7.04	Quality of ground transport network	21	🟦
7.05	Road density*	63	▨

8th pillar: Tourism infrastructure

	INDICATOR	RANK/133	
8.01	Hotel rooms*	45	▨
8.02	Presence of major car rental companies*	95	▨
8.03	ATMs accepting Visa cards*	55	▨

9th pillar: ICT infrastructure

	INDICATOR	RANK/133	
9.01	Extent of business Internet use	29	🟦
9.02	Internet users*	18	🟦
9.03	Telephone lines*	73	▨
9.04	Broadband Internet subscribers*	49	▨
9.05	Mobile telephone subscribers*	53	▨

10th pillar: Price competitiveness in the T&T industry

	INDICATOR	RANK/133	
10.01	Ticket taxes and airport charges*	13	🟦
10.02	Purchasing power parity*	46	▨
10.03	Extent and effect of taxation	20	🟦
10.04	Fuel price levels*	14	🟦
10.05	Hotel price index*	6	🟦

11th pillar: Human resources

	INDICATOR	RANK/133	
11.01	Primary education enrollment*	1	🟦
11.02	Secondary education enrollment*	95	▨
11.03	Quality of the educational system	18	🟦
11.04	Local availability of research and training services	27	🟦
11.05	Extent of staff training	20	🟦
11.06	Hiring and firing practices	42	▨
11.07	Ease of hiring foreign labor	50	▨
11.08	HIV prevalence*	78	▨
11.09	Business impact of HIV/AIDS	67	▨
11.10	Life expectancy*	66	▨

12th pillar: Affinity for Travel & Tourism

	INDICATOR	RANK/133	
12.01	Tourism openness*	21	🟦
12.02	Attitude of population toward foreign visitors	50	▨
12.03	Extension of business trips recommended	32	▨

13th pillar: Natural resources

	INDICATOR	RANK/133	
13.01	Number of World Heritage natural sites*	23	🟦
13.02	Protected areas*	40	▨
13.03	Quality of the natural environment	35	▨
13.04	Total known species*	22	🟦

14th pillar: Cultural resources

	INDICATOR	RANK/133	
14.01	Number of World Heritage cultural sites*	82	▨
14.02	Sports stadiums*	60	▨
14.03	Number of international fairs and exhibitions*	30	🟦
14.04	Creative industries exports*	21	🟦

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Mali

Key indicators

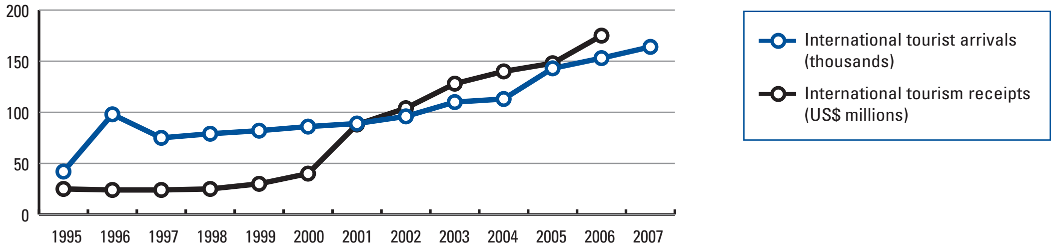
Population (millions), 2007	14.3
Surface area (1,000 square kilometers)	1,240.2
Gross domestic product (US$ billions), 2007	6.9
Gross domestic product (PPP, US$) per capita, 2007	1,038.5
Real GDP growth (percent), 2007	3.1
Environmental Performance Index, 2008 (out of 149 countries)	145

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	177	2.3	4.3
Employment (1,000 jobs)	57	1.8	3.0
T&T economy, 2008 estimates			
GDP (US$ millions)	421	5.4	4.4
Employment (1,000 jobs)	138	4.3	3.1

Source: World Travel & Tourism Council, TSA Research 2008

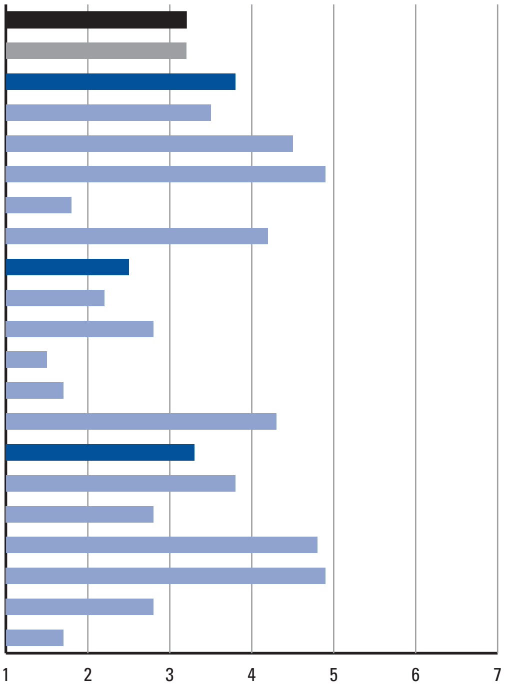
International tourist arrivals (thousands), 2007	164
International tourism receipts (US$ millions), 2006	175



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**119**	**3.2**
2008 Index	119	3.2
T&T regulatory framework	**114**	**3.8**
Policy rules and regulations	116	3.5
Environmental sustainability	70	4.5
Safety and security	77	4.9
Health and hygiene	124	1.8
Prioritization of Travel & Tourism	76	4.2
T&T business environment and infrastructure	**126**	**2.5**
Air transport infrastructure	118	2.2
Ground transport infrastructure	100	2.8
Tourism infrastructure	119	1.5
ICT infrastructure	116	1.7
Price competitiveness in the T&T industry	89	4.3
T&T human, cultural, and natural resources	**120**	**3.3**
Human resources	125	3.8
Education and training	130	2.8
Availability of qualified labor	116	4.8
Affinity for Travel & Tourism	54	4.9
Natural resources	88	2.8
Cultural resources	91	1.7



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Mali

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	101	⬜
1.02	Property rights	91	⬜
1.03	Business impact of rules on FDI	85	⬜
1.04	Visa requirements*	101	⬜
1.05	Openness of bilateral Air Service Agreements*	105	⬜
1.06	Transparency of government policymaking	40	🟦
1.07	Time required to start a business*	71	⬜
1.08	Cost to start a business*	119	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	79	⬜
2.02	Enforcement of environmental regulation	70	⬜
2.03	Sustainability of T&T industry development	7	🟦
2.04	Carbon dioxide emissions*	4	🟦
2.05	Particulate matter concentration*	130	⬜
2.06	Threatened species*	24	🟦
2.07	Environmental treaty ratification*	81	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	92	⬜
3.02	Reliability of police services	60	⬜
3.03	Business costs of crime and violence	89	⬜
3.04	Road traffic accidents*	90	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	121	⬜
4.02	Access to improved sanitation*	104	⬜
4.03	Access to improved drinking water*	118	⬜
4.04	Hospital beds*	125	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	21	🟦
5.02	T&T government expenditure*	107	⬜
5.03	Effectiveness of marketing and branding	10	🟦
5.04	T&T fair attendance*	98	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	95	⬜
6.02	Available seat kilometers, domestic*	100	⬜
6.03	Available seat kilometers, international*	106	⬜
6.04	Departures per 1,000 population*	121	⬜
6.05	Airport density*	129	⬜
6.06	Number of operating airlines*	95	⬜
6.07	International air transport network	104	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	96	⬜
7.02	Quality of railroad infrastructure	89	⬜
7.03	Quality of port infrastructure	77	⬜
7.04	Quality of ground transport network	47	🟦
7.05	Road density*	129	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	113	⬜
8.02	Presence of major car rental companies*	95	⬜
8.03	ATMs accepting Visa cards*	119	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	86	⬜
9.02	Internet users*	125	⬜
9.03	Telephone lines*	127	⬜
9.04	Broadband Internet subscribers*	113	⬜
9.05	Mobile telephone subscribers*	118	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	128	⬜
10.02	Purchasing power parity*	49	🟦
10.03	Extent and effect of taxation	57	⬜
10.04	Fuel price levels*	82	⬜
10.05	Hotel price index*	n/a	
	11th pillar: Human resources		
11.01	Primary education enrollment*	126	⬜
11.02	Secondary education enrollment*	122	⬜
11.03	Quality of the educational system	119	⬜
11.04	Local availability of research and training services	88	⬜
11.05	Extent of staff training	122	⬜
11.06	Hiring and firing practices	38	🟦
11.07	Ease of hiring foreign labor	51	⬜
11.08	HIV prevalence*	108	⬜
11.09	Business impact of HIV/AIDS	116	⬜
11.10	Life expectancy*	129	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	70	⬜
12.02	Attitude of population toward foreign visitors	32	🟦
12.03	Extension of business trips recommended	51	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	40	🟦
13.02	Protected areas*	113	⬜
13.03	Quality of the natural environment	89	⬜
13.04	Total known species*	48	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	45	🟦
14.02	Sports stadiums*	101	⬜
14.03	Number of international fairs and exhibitions*	107	⬜
14.04	Creative industries exports*	113	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Malta

Key indicators

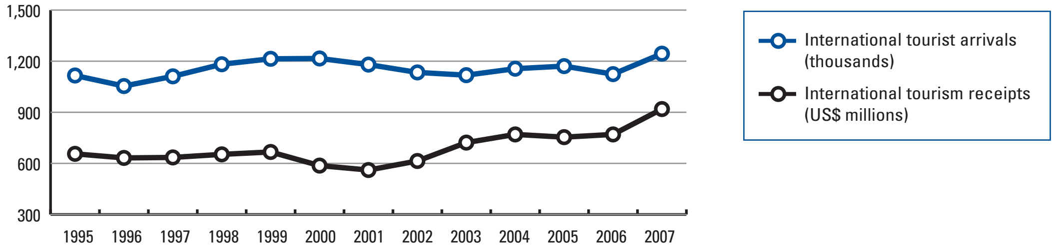
Population (millions), 2007	0.4
Surface area (1,000 square kilometers)	0.3
Gross domestic product (US$ billions), 2007	7.5
Gross domestic product (PPP, US$) per capita, 2007	23,025.9
Real GDP growth (percent), 2007	3.7
Environmental Performance Index, 2008 (out of 149 countries)	n/a

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	924	11.3	5.1
Employment (1,000 jobs)	24	15.8	2.5
T&T economy, 2008 estimates			
GDP (US$ millions)	1,882	23.0	4.5
Employment (1,000 jobs)	43	27.8	2.1

Source: World Travel & Tourism Council, TSA Research 2008

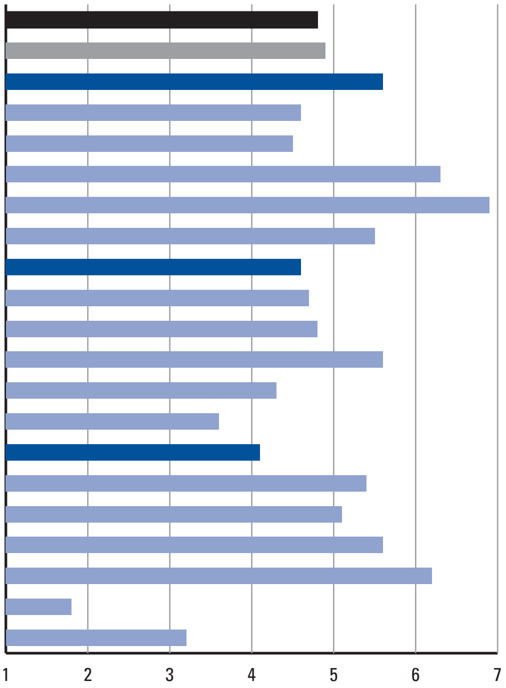
International tourist arrivals (thousands), 2007	1,244
International tourism receipts (US$ millions), 2007	919



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**29**	**4.8**
2008 Index	25	4.9
T&T regulatory framework	**11**	**5.6**
Policy rules and regulations	54	4.6
Environmental sustainability	66	4.5
Safety and security	11	6.3
Health and hygiene	3	6.9
Prioritization of Travel & Tourism	16	5.5
T&T business environment and infrastructure	**31**	**4.6**
Air transport infrastructure	22	4.7
Ground transport infrastructure	27	4.8
Tourism infrastructure	22	5.6
ICT infrastructure	33	4.3
Price competitiveness in the T&T industry	122	3.6
T&T human, cultural, and natural resources	**52**	**4.1**
Human resources	37	5.4
Education and training	37	5.1
Availability of qualified labor	35	5.6
Affinity for Travel & Tourism	7	6.2
Natural resources	133	1.8
Cultural resources	35	3.2



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Malta

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	27	🟦
1.02	Property rights	32	⬜
1.03	Business impact of rules on FDI	7	🟦
1.04	Visa requirements*	40	⬜
1.05	Openness of bilateral Air Service Agreements*	73	⬜
1.06	Transparency of government policymaking	42	⬜
1.07	Time required to start a business*	n/a	
1.08	Cost to start a business*	n/a	
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	83	⬜
2.02	Enforcement of environmental regulation	96	⬜
2.03	Sustainability of T&T industry development	66	⬜
2.04	Carbon dioxide emissions*	85	⬜
2.05	Particulate matter concentration*	n/a	
2.06	Threatened species*	30	⬜
2.07	Environmental treaty ratification*	67	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	11	🟦
3.02	Reliability of police services	29	⬜
3.03	Business costs of crime and violence	13	🟦
3.04	Road traffic accidents*	1	🟦
	4th pillar: Health and hygiene		
4.01	Physician density*	7	🟦
4.02	Access to improved sanitation*	n/a	
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	11	🟦
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	5	🟦
5.02	T&T government expenditure*	6	🟦
5.03	Effectiveness of marketing and branding	47	⬜
5.04	T&T fair attendance*	81	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	35	⬜
6.02	Available seat kilometers, domestic*	99	⬜
6.03	Available seat kilometers, international*	86	⬜
6.04	Departures per 1,000 population*	8	🟦
6.05	Airport density*	8	🟦
6.06	Number of operating airlines*	81	⬜
6.07	International air transport network	56	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	75	⬜
7.02	Quality of railroad infrastructure	n/a	
7.03	Quality of port infrastructure	28	🟦
7.04	Quality of ground transport network	104	⬜
7.05	Road density*	1	🟦

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	2	🟦
8.02	Presence of major car rental companies*	23	🟦
8.03	ATMs accepting Visa cards*	35	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	34	⬜
9.02	Internet users*	44	⬜
9.03	Telephone lines*	18	🟦
9.04	Broadband Internet subscribers*	32	⬜
9.05	Mobile telephone subscribers*	48	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	89	⬜
10.02	Purchasing power parity*	133	⬜
10.03	Extent and effect of taxation	48	⬜
10.04	Fuel price levels*	106	⬜
10.05	Hotel price index*	40	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	78	⬜
11.02	Secondary education enrollment*	29	⬜
11.03	Quality of the educational system	24	🟦
11.04	Local availability of research and training services	96	⬜
11.05	Extent of staff training	45	⬜
11.06	Hiring and firing practices	107	⬜
11.07	Ease of hiring foreign labor	65	⬜
11.08	HIV prevalence*	22	🟦
11.09	Business impact of HIV/AIDS	36	⬜
11.10	Life expectancy*	22	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	9	🟦
12.02	Attitude of population toward foreign visitors	4	🟦
12.03	Extension of business trips recommended	20	🟦
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	118	⬜
13.03	Quality of the natural environment	114	⬜
13.04	Total known species*	131	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	65	⬜
14.02	Sports stadiums*	7	🟦
14.03	Number of international fairs and exhibitions*	55	⬜
14.04	Creative industries exports*	61	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Mauritania

Key indicators

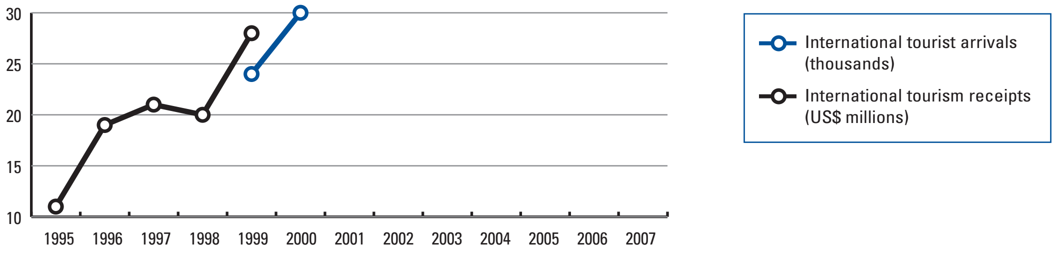
Population (millions), 2007	3.2
Surface area (1,000 square kilometers)	1,030.7
Gross domestic product (US$ billions), 2007	2.8
Gross domestic product (PPP, US$) per capita, 2007	2,011.5
Real GDP growth (percent), 2007	1.0
Environmental Performance Index, 2008 (out of 149 countries)	146

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	n/a	n/a	n/a
Employment (1,000 jobs)	n/a	n/a	n/a
T&T economy, 2008 estimates			
GDP (US$ millions)	n/a	n/a	n/a
Employment (1,000 jobs)	n/a	n/a	n/a

Source: World Travel & Tourism Council, TSA Research 2008

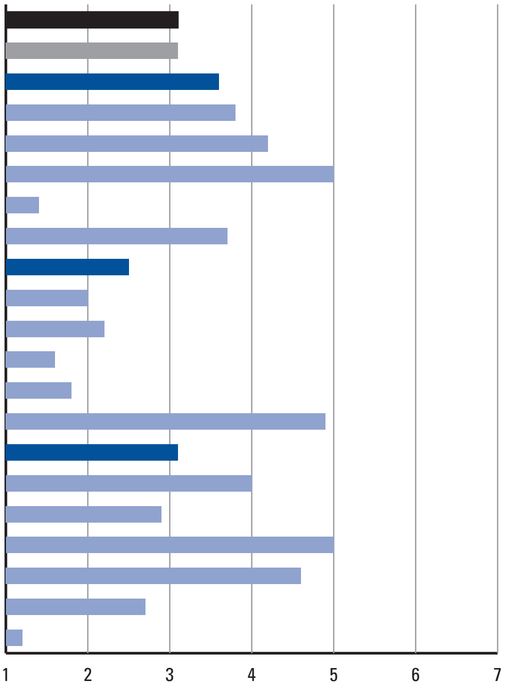
International tourist arrivals (thousands), 2000	30
International tourism receipts (US$ millions), 1999	28



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**127**	**3.1**
2008 Index	122	3.1
T&T regulatory framework	**123**	**3.6**
Policy rules and regulations	107	3.8
Environmental sustainability	96	4.2
Safety and security	75	5.0
Health and hygiene	128	1.4
Prioritization of Travel & Tourism	100	3.7
T&T business environment and infrastructure	**127**	**2.5**
Air transport infrastructure	128	2.0
Ground transport infrastructure	128	2.2
Tourism infrastructure	112	1.6
ICT infrastructure	115	1.8
Price competitiveness in the T&T industry	54	4.9
T&T human, cultural, and natural resources	**129**	**3.1**
Human resources	119	4.0
Education and training	128	2.9
Availability of qualified labor	106	5.0
Affinity for Travel & Tourism	76	4.6
Natural resources	98	2.7
Cultural resources	127	1.2



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Mauritania

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	128	⬜
1.02	Property rights	99	⬜
1.03	Business impact of rules on FDI	96	⬜
1.04	Visa requirements*	98	⬜
1.05	Openness of bilateral Air Service Agreements*	85	⬜
1.06	Transparency of government policymaking	81	⬜
1.07	Time required to start a business*	57	⬜
1.08	Cost to start a business*	98	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	113	⬜
2.02	Enforcement of environmental regulation	105	⬜
2.03	Sustainability of T&T industry development	85	⬜
2.04	Carbon dioxide emissions*	32	🟦
2.05	Particulate matter concentration*	120	⬜
2.06	Threatened species*	53	⬜
2.07	Environmental treaty ratification*	34	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	109	⬜
3.02	Reliability of police services	87	⬜
3.03	Business costs of crime and violence	75	⬜
3.04	Road traffic accidents*	56	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	119	⬜
4.02	Access to improved sanitation*	120	⬜
4.03	Access to improved drinking water*	118	⬜
4.04	Hospital beds*	122	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	79	⬜
5.02	T&T government expenditure*	n/a	
5.03	Effectiveness of marketing and branding	101	⬜
5.04	T&T fair attendance*	115	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	128	⬜
6.02	Available seat kilometers, domestic*	100	⬜
6.03	Available seat kilometers, international*	127	⬜
6.04	Departures per 1,000 population*	102	⬜
6.05	Airport density*	72	⬜
6.06	Number of operating airlines*	124	⬜
6.07	International air transport network	122	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	121	⬜
7.02	Quality of railroad infrastructure	97	⬜
7.03	Quality of port infrastructure	116	⬜
7.04	Quality of ground transport network	117	⬜
7.05	Road density*	130	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	n/a	
8.02	Presence of major car rental companies*	95	⬜
8.03	ATMs accepting Visa cards*	124	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	113	⬜
9.02	Internet users*	123	⬜
9.03	Telephone lines*	118	⬜
9.04	Broadband Internet subscribers*	111	⬜
9.05	Mobile telephone subscribers*	92	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	113	⬜
10.02	Purchasing power parity*	24	🟦
10.03	Extent and effect of taxation	43	🟦
10.04	Fuel price levels*	62	⬜
10.05	Hotel price index*	n/a	
	11th pillar: Human resources		
11.01	Primary education enrollment*	111	⬜
11.02	Secondary education enrollment*	123	⬜
11.03	Quality of the educational system	128	⬜
11.04	Local availability of research and training services	129	⬜
11.05	Extent of staff training	129	⬜
11.06	Hiring and firing practices	63	⬜
11.07	Ease of hiring foreign labor	69	⬜
11.08	HIV prevalence*	94	⬜
11.09	Business impact of HIV/AIDS	102	⬜
11.10	Life expectancy*	113	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	65	⬜
12.02	Attitude of population toward foreign visitors	84	⬜
12.03	Extension of business trips recommended	94	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	40	🟦
13.02	Protected areas*	117	⬜
13.03	Quality of the natural environment	78	⬜
13.04	Total known species*	60	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	97	⬜
14.02	Sports stadiums*	98	⬜
14.03	Number of international fairs and exhibitions*	122	⬜
14.04	Creative industries exports*	118	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Mauritius

Key indicators

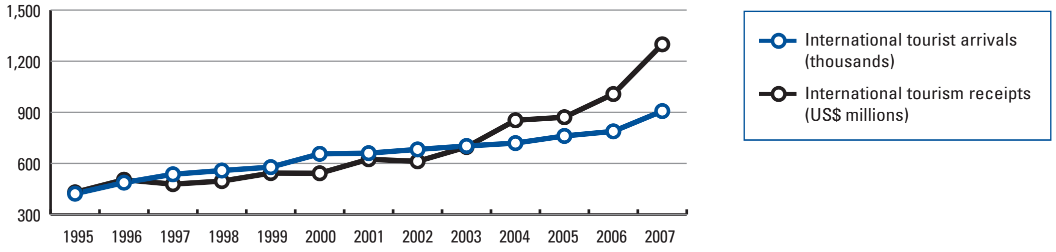
Population (millions), 2007	1.3
Surface area (1,000 square kilometers)	2.0
Gross domestic product (US$ billions), 2007	6.9
Gross domestic product (PPP, US$) per capita, 2007	11,126.0
Real GDP growth (percent), 2007	4.2
Environmental Performance Index, 2008 (out of 149 countries)	58

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	1,089	13.9	3.1
Employment (1,000 jobs)	87	16.2	0.7
T&T economy, 2008 estimates			
GDP (US$ millions)	2,361	30.2	3.2
Employment (1,000 jobs)	174	32.4	0.7

Source: World Travel & Tourism Council, TSA Research 2008

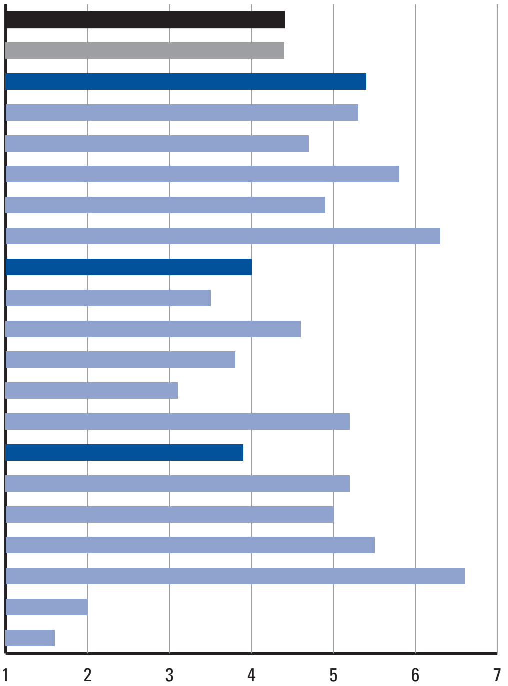
International tourist arrivals (thousands), 2007	907
International tourism receipts (US$ millions), 2007	1,299



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**40**	**4.4**
2008 Index	41	4.4
T&T regulatory framework	**24**	**5.4**
Policy rules and regulations	13	5.3
Environmental sustainability	53	4.7
Safety and security	40	5.8
Health and hygiene	60	4.9
Prioritization of Travel & Tourism	1	6.3
T&T business environment and infrastructure	**44**	**4.0**
Air transport infrastructure	49	3.5
Ground transport infrastructure	31	4.6
Tourism infrastructure	53	3.8
ICT infrastructure	59	3.1
Price competitiveness in the T&T industry	26	5.2
T&T human, cultural, and natural resources	**69**	**3.9**
Human resources	45	5.2
Education and training	49	5.0
Availability of qualified labor	58	5.5
Affinity for Travel & Tourism	3	6.6
Natural resources	130	2.0
Cultural resources	99	1.6



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Mauritius

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

1st pillar: Policy rules and regulations

	INDICATOR	RANK/133	
1.01	Prevalence of foreign ownership	43	⬜
1.02	Property rights	22	🟦
1.03	Business impact of rules on FDI	8	🟦
1.04	Visa requirements*	8	🟦
1.05	Openness of bilateral Air Service Agreements*	104	⬜
1.06	Transparency of government policymaking	30	🟦
1.07	Time required to start a business*	9	🟦
1.08	Cost to start a business*	40	⬜

2nd pillar: Environmental sustainability

	INDICATOR	RANK/133	
2.01	Stringency of environmental regulation	61	⬜
2.02	Enforcement of environmental regulation	50	⬜
2.03	Sustainability of T&T industry development	13	🟦
2.04	Carbon dioxide emissions*	58	⬜
2.05	Particulate matter concentration*	14	🟦
2.06	Threatened species*	131	⬜
2.07	Environmental treaty ratification*	34	🟦

3rd pillar: Safety and security

	INDICATOR	RANK/133	
3.01	Business costs of terrorism	5	🟦
3.02	Reliability of police services	66	⬜
3.03	Business costs of crime and violence	55	⬜
3.04	Road traffic accidents*	16	🟦

4th pillar: Health and hygiene

	INDICATOR	RANK/133	
4.01	Physician density*	88	⬜
4.02	Access to improved sanitation*	48	⬜
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	57	⬜

5th pillar: Prioritization of Travel & Tourism

	INDICATOR	RANK/133	
5.01	Government prioritization of the T&T industry	1	🟦
5.02	T&T government expenditure*	3	🟦
5.03	Effectiveness of marketing and branding	2	🟦
5.04	T&T fair attendance*	25	🟦

6th pillar: Air transport infrastructure

	INDICATOR	RANK/133	
6.01	Quality of air transport infrastructure	42	⬜
6.02	Available seat kilometers, domestic*	65	⬜
6.03	Available seat kilometers, international*	56	⬜
6.04	Departures per 1,000 population*	33	🟦
6.05	Airport density*	28	🟦
6.06	Number of operating airlines*	89	⬜
6.07	International air transport network	34	🟦

7th pillar: Ground transport infrastructure

	INDICATOR	RANK/133	
7.01	Quality of roads	43	⬜
7.02	Quality of railroad infrastructure	n/a	
7.03	Quality of port infrastructure	47	⬜
7.04	Quality of ground transport network	59	⬜
7.05	Road density*	33	🟦

8th pillar: Tourism infrastructure

	INDICATOR	RANK/133	
8.01	Hotel rooms*	35	🟦
8.02	Presence of major car rental companies*	56	⬜
8.03	ATMs accepting Visa cards*	56	⬜

9th pillar: ICT infrastructure

	INDICATOR	RANK/133	
9.01	Extent of business Internet use	65	⬜
9.02	Internet users*	54	⬜
9.03	Telephone lines*	45	⬜
9.04	Broadband Internet subscribers*	69	⬜
9.05	Mobile telephone subscribers*	73	⬜

10th pillar: Price competitiveness in the T&T industry

	INDICATOR	RANK/133	
10.01	Ticket taxes and airport charges*	83	⬜
10.02	Purchasing power parity*	26	🟦
10.03	Extent and effect of taxation	8	🟦
10.04	Fuel price levels*	27	🟦
10.05	Hotel price index*	87	⬜

11th pillar: Human resources

	INDICATOR	RANK/133	
11.01	Primary education enrollment*	51	⬜
11.02	Secondary education enrollment*	63	⬜
11.03	Quality of the educational system	47	⬜
11.04	Local availability of research and training services	90	⬜
11.05	Extent of staff training	36	🟦
11.06	Hiring and firing practices	109	⬜
11.07	Ease of hiring foreign labor	25	🟦
11.08	HIV prevalence*	113	⬜
11.09	Business impact of HIV/AIDS	65	⬜
11.10	Life expectancy*	55	⬜

12th pillar: Affinity for Travel & Tourism

	INDICATOR	RANK/133	
12.01	Tourism openness*	3	🟦
12.02	Attitude of population toward foreign visitors	17	🟦
12.03	Extension of business trips recommended	23	🟦

13th pillar: Natural resources

	INDICATOR	RANK/133	
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	124	⬜
13.03	Quality of the natural environment	46	⬜
13.04	Total known species*	133	⬜

14th pillar: Cultural resources

	INDICATOR	RANK/133	
14.01	Number of World Heritage cultural sites*	82	⬜
14.02	Sports stadiums*	74	⬜
14.03	Number of international fairs and exhibitions*	91	⬜
14.04	Creative industries exports*	69	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Mexico

Key indicators

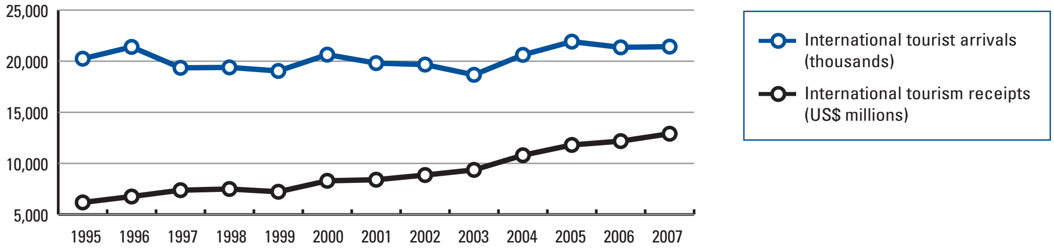
Population (millions), 2007	109.6
Surface area (1,000 square kilometers)	1,964.4
Gross domestic product (US$ billions), 2007	1,022.8
Gross domestic product (PPP, US$) per capita, 2007	14,119.8
Real GDP growth (percent), 2007	3.2
Environmental Performance Index, 2008 (out of 149 countries)	47

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	44,624	4.8	3.5
Employment (1,000 jobs)	2,058	4.4	1.4
T&T economy, 2008 estimates			
GDP (US$ millions)	130,199	14.0	4.4
Employment (1,000 jobs)	6,633	14.3	2.0

Source: World Travel & Tourism Council, TSA Research 2008

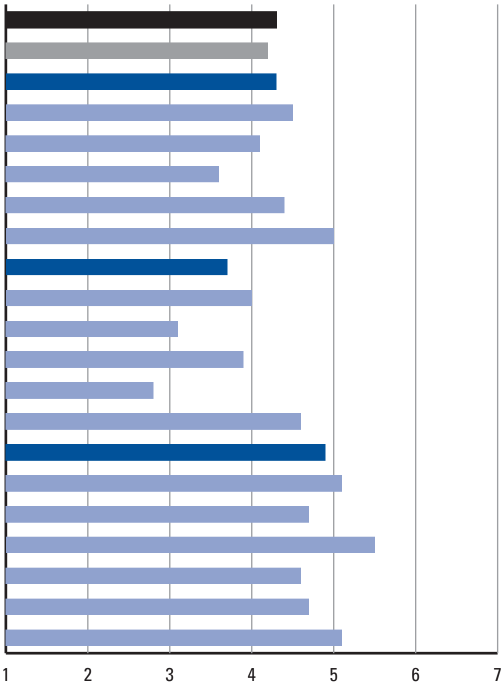
International tourist arrivals (thousands), 2007	21,424
International tourism receipts (US$ millions), 2007	12,901



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**51**	**4.3**
2008 Index	55	4.2
T&T regulatory framework	**80**	**4.3**
Policy rules and regulations	58	4.5
Environmental sustainability	101	4.1
Safety and security	126	3.6
Health and hygiene	74	4.4
Prioritization of Travel & Tourism	35	5.0
T&T business environment and infrastructure	**62**	**3.7**
Air transport infrastructure	40	4.0
Ground transport infrastructure	84	3.1
Tourism infrastructure	49	3.9
ICT infrastructure	69	2.8
Price competitiveness in the T&T industry	77	4.6
T&T human, cultural, and natural resources	**13**	**4.9**
Human resources	63	5.1
Education and training	65	4.7
Availability of qualified labor	64	5.5
Affinity for Travel & Tourism	90	4.6
Natural resources	18	4.7
Cultural resources	20	5.1



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Mexico

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

1st pillar: Policy rules and regulations

	INDICATOR	RANK/133	
1.01	Prevalence of foreign ownership	25	🟦
1.02	Property rights	89	⬜
1.03	Business impact of rules on FDI	62	⬜
1.04	Visa requirements*	82	⬜
1.05	Openness of bilateral Air Service Agreements*	22	🟦
1.06	Transparency of government policymaking	94	⬜
1.07	Time required to start a business*	79	⬜
1.08	Cost to start a business*	69	⬜

2nd pillar: Environmental sustainability

2.01	Stringency of environmental regulation	74	⬜
2.02	Enforcement of environmental regulation	77	⬜
2.03	Sustainability of T&T industry development	48	🟦
2.04	Carbon dioxide emissions*	73	⬜
2.05	Particulate matter concentration*	73	⬜
2.06	Threatened species*	130	⬜
2.07	Environmental treaty ratification*	52	⬜

3rd pillar: Safety and security

3.01	Business costs of terrorism	71	⬜
3.02	Reliability of police services	123	⬜
3.03	Business costs of crime and violence	124	⬜
3.04	Road traffic accidents*	115	⬜

4th pillar: Health and hygiene

4.01	Physician density*	55	⬜
4.02	Access to improved sanitation*	75	⬜
4.03	Access to improved drinking water*	62	⬜
4.04	Hospital beds*	105	⬜

5th pillar: Prioritization of Travel & Tourism

5.01	Government prioritization of the T&T industry	38	🟦
5.02	T&T government expenditure*	38	🟦
5.03	Effectiveness of marketing and branding	40	🟦
5.04	T&T fair attendance*	25	🟦

6th pillar: Air transport infrastructure

6.01	Quality of air transport infrastructure	56	⬜
6.02	Available seat kilometers, domestic*	9	🟦
6.03	Available seat kilometers, international*	20	🟦
6.04	Departures per 1,000 population*	61	⬜
6.05	Airport density*	75	⬜
6.06	Number of operating airlines*	23	🟦
6.07	International air transport network	42	🟦

7th pillar: Ground transport infrastructure

7.01	Quality of roads	66	⬜
7.02	Quality of railroad infrastructure	72	⬜
7.03	Quality of port infrastructure	94	⬜
7.04	Quality of ground transport network	54	⬜
7.05	Road density*	82	⬜

8th pillar: Tourism infrastructure

	INDICATOR	RANK/133	
8.01	Hotel rooms*	51	⬜
8.02	Presence of major car rental companies*	23	🟦
8.03	ATMs accepting Visa cards*	50	🟦

9th pillar: ICT infrastructure

9.01	Extent of business Internet use	79	⬜
9.02	Internet users*	65	⬜
9.03	Telephone lines*	68	⬜
9.04	Broadband Internet subscribers*	54	⬜
9.05	Mobile telephone subscribers*	81	⬜

10th pillar: Price competitiveness in the T&T industry

10.01	Ticket taxes and airport charges*	126	⬜
10.02	Purchasing power parity*	82	⬜
10.03	Extent and effect of taxation	88	⬜
10.04	Fuel price levels*	22	🟦
10.05	Hotel price index*	43	🟦

11th pillar: Human resources

11.01	Primary education enrollment*	23	🟦
11.02	Secondary education enrollment*	67	⬜
11.03	Quality of the educational system	109	⬜
11.04	Local availability of research and training services	55	⬜
11.05	Extent of staff training	87	⬜
11.06	Hiring and firing practices	90	⬜
11.07	Ease of hiring foreign labor	64	⬜
11.08	HIV prevalence*	67	⬜
11.09	Business impact of HIV/AIDS	68	⬜
11.10	Life expectancy*	50	🟦

12th pillar: Affinity for Travel & Tourism

12.01	Tourism openness*	111	⬜
12.02	Attitude of population toward foreign visitors	38	🟦
12.03	Extension of business trips recommended	77	⬜

13th pillar: Natural resources

13.01	Number of World Heritage natural sites*	10	🟦
13.02	Protected areas*	67	⬜
13.03	Quality of the natural environment	121	⬜
13.04	Total known species*	9	🟦

14th pillar: Cultural resources

14.01	Number of World Heritage cultural sites*	6	🟦
14.02	Sports stadiums*	81	⬜
14.03	Number of international fairs and exhibitions*	26	🟦
14.04	Creative industries exports*	17	🟦

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Moldova

Key indicators

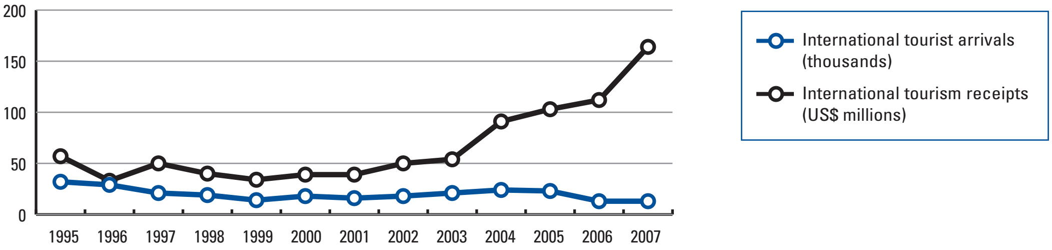
Population (millions), 2007	4.2
Surface area (1,000 square kilometers)	33.8
Gross domestic product (US$ billions), 2007	4.4
Gross domestic product (PPP, US$) per capita, 2007	2,897.4
Real GDP growth (percent), 2007	4.0
Environmental Performance Index, 2008 (out of 149 countries)	87

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	n/a	n/a	n/a
Employment (1,000 jobs)	n/a	n/a	n/a
T&T economy, 2008 estimates			
GDP (US$ millions)	n/a	n/a	n/a
Employment (1,000 jobs)	n/a	n/a	n/a

Source: World Travel & Tourism Council, TSA Research 2008

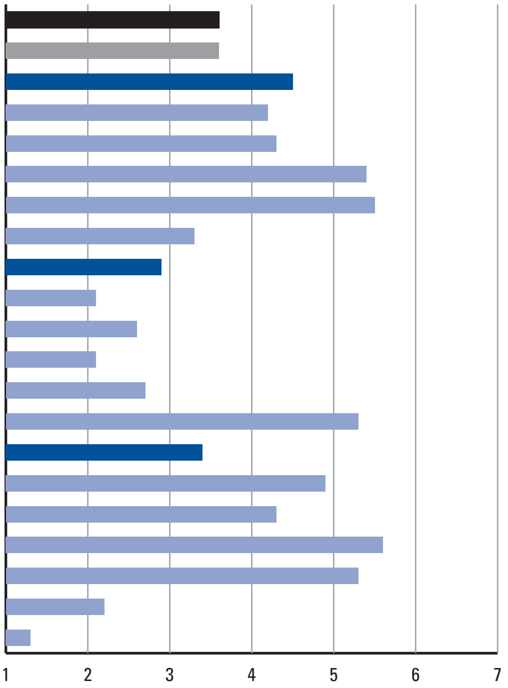
International tourist arrivals (thousands), 2007	13
International tourism receipts (US$ millions), 2007	164



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**93**	**3.6**
2008 Index	98	3.6
T&T regulatory framework	**67**	**4.5**
Policy rules and regulations	82	4.2
Environmental sustainability	82	4.3
Safety and security	52	5.4
Health and hygiene	48	5.5
Prioritization of Travel & Tourism	118	3.3
T&T business environment and infrastructure	**95**	**2.9**
Air transport infrastructure	122	2.1
Ground transport infrastructure	111	2.6
Tourism infrastructure	90	2.1
ICT infrastructure	73	2.7
Price competitiveness in the T&T industry	22	5.3
T&T human, cultural, and natural resources	**110**	**3.4**
Human resources	80	4.9
Education and training	94	4.3
Availability of qualified labor	40	5.6
Affinity for Travel & Tourism	30	5.3
Natural resources	122	2.2
Cultural resources	120	1.3



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Moldova

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	117	⬜
1.02	Property rights	98	⬜
1.03	Business impact of rules on FDI	94	⬜
1.04	Visa requirements*	85	⬜
1.05	Openness of bilateral Air Service Agreements*	120	⬜
1.06	Transparency of government policymaking	87	⬜
1.07	Time required to start a business*	41	🟦
1.08	Cost to start a business*	59	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	128	⬜
2.02	Enforcement of environmental regulation	104	⬜
2.03	Sustainability of T&T industry development	124	⬜
2.04	Carbon dioxide emissions*	52	⬜
2.05	Particulate matter concentration*	72	⬜
2.06	Threatened species*	56	⬜
2.07	Environmental treaty ratification*	81	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	31	🟦
3.02	Reliability of police services	112	⬜
3.03	Business costs of crime and violence	46	🟦
3.04	Road traffic accidents*	45	🟦
	4th pillar: Health and hygiene		
4.01	Physician density*	36	🟦
4.02	Access to improved sanitation*	78	⬜
4.03	Access to improved drinking water*	79	⬜
4.04	Hospital beds*	21	🟦
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	117	⬜
5.02	T&T government expenditure*	n/a	
5.03	Effectiveness of marketing and branding	127	⬜
5.04	T&T fair attendance*	98	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	93	⬜
6.02	Available seat kilometers, domestic*	100	⬜
6.03	Available seat kilometers, international*	120	⬜
6.04	Departures per 1,000 population*	90	⬜
6.05	Airport density*	112	⬜
6.06	Number of operating airlines*	117	⬜
6.07	International air transport network	123	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	132	⬜
7.02	Quality of railroad infrastructure	62	⬜
7.03	Quality of port infrastructure	130	⬜
7.04	Quality of ground transport network	87	⬜
7.05	Road density*	57	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	110	⬜
8.02	Presence of major car rental companies*	73	⬜
8.03	ATMs accepting Visa cards*	81	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	84	⬜
9.02	Internet users*	73	⬜
9.03	Telephone lines*	44	🟦
9.04	Broadband Internet subscribers*	77	⬜
9.05	Mobile telephone subscribers*	89	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	108	⬜
10.02	Purchasing power parity*	29	🟦
10.03	Extent and effect of taxation	99	⬜
10.04	Fuel price levels*	11	🟦
10.05	Hotel price index*	10	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	103	⬜
11.02	Secondary education enrollment*	59	⬜
11.03	Quality of the educational system	90	⬜
11.04	Local availability of research and training services	122	⬜
11.05	Extent of staff training	111	⬜
11.06	Hiring and firing practices	33	🟦
11.07	Ease of hiring foreign labor	31	🟦
11.08	HIV prevalence*	73	⬜
11.09	Business impact of HIV/AIDS	57	⬜
11.10	Life expectancy*	89	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	28	🟦
12.02	Attitude of population toward foreign visitors	64	⬜
12.03	Extension of business trips recommended	24	🟦
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	118	⬜
13.03	Quality of the natural environment	56	⬜
13.04	Total known species*	120	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	97	⬜
14.02	Sports stadiums*	92	⬜
14.03	Number of international fairs and exhibitions*	122	⬜
14.04	Creative industries exports*	77	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Mongolia

Key indicators

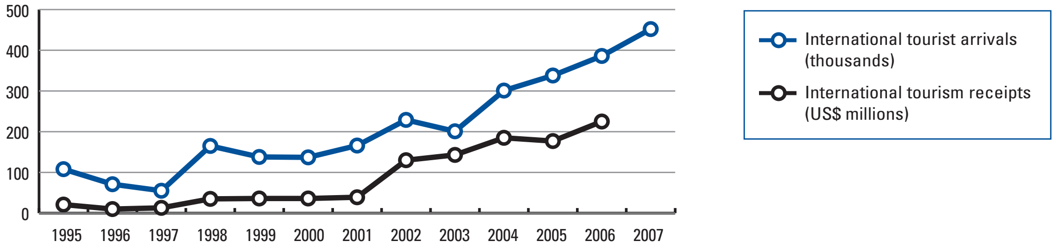
Population (millions), 2007	2.7
Surface area (1,000 square kilometers)	1,566.5
Gross domestic product (US$ billions), 2007	3.9
Gross domestic product (PPP, US$) per capita, 2007	3,222.4
Real GDP growth (percent), 2007	9.9
Environmental Performance Index, 2008 (out of 149 countries)	100

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	n/a	n/a	n/a
Employment (1,000 jobs)	n/a	n/a	n/a
T&T economy, 2008 estimates			
GDP (US$ millions)	n/a	n/a	n/a
Employment (1,000 jobs)	n/a	n/a	n/a

Source: World Travel & Tourism Council, TSA Research 2008

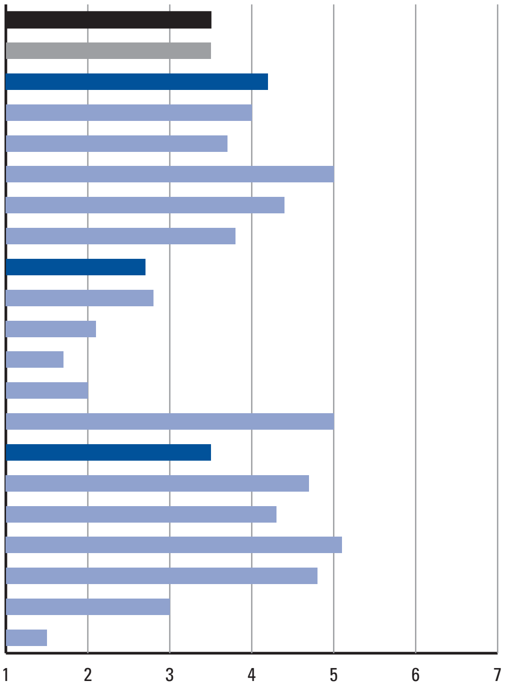
International tourist arrivals (thousands), 2007	452
International tourism receipts (US$ millions), 2006	225



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**105**	**3.5**
2008 Index	100	3.5
T&T regulatory framework	**90**	**4.2**
Policy rules and regulations	91	4.0
Environmental sustainability	124	3.7
Safety and security	74	5.0
Health and hygiene	72	4.4
Prioritization of Travel & Tourism	94	3.8
T&T business environment and infrastructure	**107**	**2.7**
Air transport infrastructure	76	2.8
Ground transport infrastructure	130	2.1
Tourism infrastructure	108	1.7
ICT infrastructure	105	2.0
Price competitiveness in the T&T industry	37	5.0
T&T human, cultural, and natural resources	**106**	**3.5**
Human resources	96	4.7
Education and training	90	4.3
Availability of qualified labor	101	5.1
Affinity for Travel & Tourism	64	4.8
Natural resources	76	3.0
Cultural resources	109	1.5



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Mongolia

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ▨ Competitive **Disadvantage**

1st pillar: Policy rules and regulations

	INDICATOR	RANK/133	
1.01	Prevalence of foreign ownership	74	▨
1.02	Property rights	101	▨
1.03	Business impact of rules on FDI	121	▨
1.04	Visa requirements*	122	▨
1.05	Openness of bilateral Air Service Agreements*	111	▨
1.06	Transparency of government policymaking	128	▨
1.07	Time required to start a business*	33	🟦
1.08	Cost to start a business*	34	🟦

2nd pillar: Environmental sustainability

2.01	Stringency of environmental regulation	131	▨
2.02	Enforcement of environmental regulation	133	▨
2.03	Sustainability of T&T industry development	127	▨
2.04	Carbon dioxide emissions*	62	▨
2.05	Particulate matter concentration*	97	▨
2.06	Threatened species*	92	▨
2.07	Environmental treaty ratification*	67	▨

3rd pillar: Safety and security

3.01	Business costs of terrorism	45	🟦
3.02	Reliability of police services	115	▨
3.03	Business costs of crime and violence	78	▨
3.04	Road traffic accidents*	57	▨

4th pillar: Health and hygiene

4.01	Physician density*	38	🟦
4.02	Access to improved sanitation*	100	▨
4.03	Access to improved drinking water*	109	▨
4.04	Hospital beds*	20	🟦

5th pillar: Prioritization of Travel & Tourism

5.01	Government prioritization of the T&T industry	99	▨
5.02	T&T government expenditure*	n/a	
5.03	Effectiveness of marketing and branding	121	▨
5.04	T&T fair attendance*	81	▨

6th pillar: Air transport infrastructure

6.01	Quality of air transport infrastructure	130	▨
6.02	Available seat kilometers, domestic*	61	▨
6.03	Available seat kilometers, international*	117	▨
6.04	Departures per 1,000 population*	68	▨
6.05	Airport density*	7	🟦
6.06	Number of operating airlines*	123	▨
6.07	International air transport network	127	▨

7th pillar: Ground transport infrastructure

7.01	Quality of roads	133	▨
7.02	Quality of railroad infrastructure	74	▨
7.03	Quality of port infrastructure	125	▨
7.04	Quality of ground transport network	112	▨
7.05	Road density*	125	▨

8th pillar: Tourism infrastructure

	INDICATOR	RANK/133	
8.01	Hotel rooms*	n/a	
8.02	Presence of major car rental companies*	95	▨
8.03	ATMs accepting Visa cards*	107	▨

9th pillar: ICT infrastructure

9.01	Extent of business Internet use	94	▨
9.02	Internet users*	86	▨
9.03	Telephone lines*	103	▨
9.04	Broadband Internet subscribers*	99	▨
9.05	Mobile telephone subscribers*	110	▨

10th pillar: Price competitiveness in the T&T industry

10.01	Ticket taxes and airport charges*	28	🟦
10.02	Purchasing power parity*	35	🟦
10.03	Extent and effect of taxation	64	▨
10.04	Fuel price levels*	68	▨
10.05	Hotel price index*	n/a	

11th pillar: Human resources

11.01	Primary education enrollment*	75	▨
11.02	Secondary education enrollment*	58	▨
11.03	Quality of the educational system	124	▨
11.04	Local availability of research and training services	108	▨
11.05	Extent of staff training	113	▨
11.06	Hiring and firing practices	18	🟦
11.07	Ease of hiring foreign labor	98	▨
11.08	HIV prevalence*	22	🟦
11.09	Business impact of HIV/AIDS	110	▨
11.10	Life expectancy*	96	▨

12th pillar: Affinity for Travel & Tourism

12.01	Tourism openness*	15	🟦
12.02	Attitude of population toward foreign visitors	132	▨
12.03	Extension of business trips recommended	119	▨

13th pillar: Natural resources

13.01	Number of World Heritage natural sites*	40	🟦
13.02	Protected areas*	53	▨
13.03	Quality of the natural environment	118	▨
13.04	Total known species*	71	▨

14th pillar: Cultural resources

14.01	Number of World Heritage cultural sites*	65	▨
14.02	Sports stadiums*	112	▨
14.03	Number of international fairs and exhibitions*	91	▨
14.04	Creative industries exports*	108	▨

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Montenegro

Key indicators

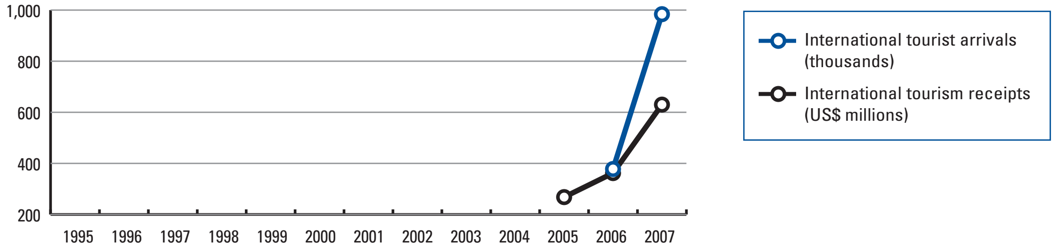
Population (millions), 2007	0.7
Surface area (1,000 square kilometers)	14.0
Gross domestic product (US$ billions), 2007	3.5
Gross domestic product (PPP, US$) per capita, 2007	n/a
Real GDP growth (percent), 2007	9.7
Environmental Performance Index, 2008 (out of 149 countries)	n/a

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	425	12.7	7.7
Employment (1,000 jobs)	17	10.8	4.7
T&T economy, 2008 estimates			
GDP (US$ millions)	823	24.6	5.6
Employment (1,000 jobs)	34	20.9	2.7

Source: World Travel & Tourism Council, TSA Research 2008

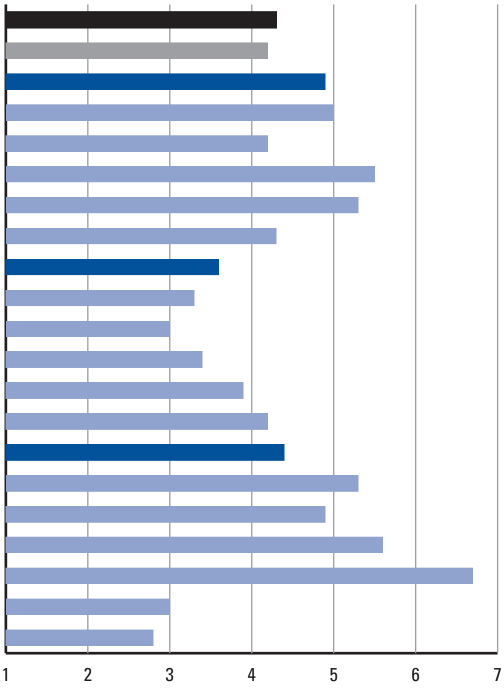
International tourist arrivals (thousands), 2007	984
International tourism receipts (US$ millions), 2007	630



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**52**	**4.3**
2008 Index	59	4.2
T&T regulatory framework	**50**	**4.9**
Policy rules and regulations	35	5.0
Environmental sustainability	98	4.2
Safety and security	48	5.5
Health and hygiene	52	5.3
Prioritization of Travel & Tourism	69	4.3
T&T business environment and infrastructure	**66**	**3.6**
Air transport infrastructure	56	3.3
Ground transport infrastructure	88	3.0
Tourism infrastructure	64	3.4
ICT infrastructure	39	3.9
Price competitiveness in the T&T industry	95	4.2
T&T human, cultural, and natural resources	**35**	**4.4**
Human resources	40	5.3
Education and training	52	4.9
Availability of qualified labor	34	5.6
Affinity for Travel & Tourism	1	6.7
Natural resources	80	3.0
Cultural resources	51	2.8



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Montenegro

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ▩ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	65	▩
1.02	Property rights	64	▩
1.03	Business impact of rules on FDI	37	🟦
1.04	Visa requirements*	72	▩
1.05	Openness of bilateral Air Service Agreements*	n/a	
1.06	Transparency of government policymaking	59	▩
1.07	Time required to start a business*	63	▩
1.08	Cost to start a business*	37	🟦
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	68	▩
2.02	Enforcement of environmental regulation	88	▩
2.03	Sustainability of T&T industry development	32	🟦
2.04	Carbon dioxide emissions*	n/a	
2.05	Particulate matter concentration*	n/a	
2.06	Threatened species*	60	▩
2.07	Environmental treaty ratification*	104	▩
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	14	🟦
3.02	Reliability of police services	58	▩
3.03	Business costs of crime and violence	40	🟦
3.04	Road traffic accidents*	n/a	
	4th pillar: Health and hygiene		
4.01	Physician density*	52	▩
4.02	Access to improved sanitation*	59	▩
4.03	Access to improved drinking water*	47	🟦
4.04	Hospital beds*	40	🟦
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	29	🟦
5.02	T&T government expenditure*	62	▩
5.03	Effectiveness of marketing and branding	23	🟦
5.04	T&T fair attendance*	98	▩
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	73	▩
6.02	Available seat kilometers, domestic*	100	▩
6.03	Available seat kilometers, international*	121	▩
6.04	Departures per 1,000 population*	38	🟦
6.05	Airport density*	16	🟦
6.06	Number of operating airlines*	112	▩
6.07	International air transport network	105	▩
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	119	▩
7.02	Quality of railroad infrastructure	78	▩
7.03	Quality of port infrastructure	75	▩
7.04	Quality of ground transport network	91	▩
7.05	Road density*	n/a	

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	n/a	
8.02	Presence of major car rental companies*	56	▩
8.03	ATMs accepting Visa cards*	71	▩
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	124	▩
9.02	Internet users*	32	🟦
9.03	Telephone lines*	6	🟦
9.04	Broadband Internet subscribers*	53	▩
9.05	Mobile telephone subscribers*	34	🟦
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	n/a	
10.02	Purchasing power parity*	67	▩
10.03	Extent and effect of taxation	30	🟦
10.04	Fuel price levels*	109	▩
10.05	Hotel price index*	n/a	
	11th pillar: Human resources		
11.01	Primary education enrollment*	30	🟦
11.02	Secondary education enrollment*	39	🟦
11.03	Quality of the educational system	57	▩
11.04	Local availability of research and training services	78	▩
11.05	Extent of staff training	84	▩
11.06	Hiring and firing practices	87	▩
11.07	Ease of hiring foreign labor	46	🟦
11.08	HIV prevalence*	1	🟦
11.09	Business impact of HIV/AIDS	15	🟦
11.10	Life expectancy*	49	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	4	🟦
12.02	Attitude of population toward foreign visitors	6	🟦
12.03	Extension of business trips recommended	10	🟦
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	40	🟦
13.02	Protected areas*	90	▩
13.03	Quality of the natural environment	29	🟦
13.04	Total known species*	85	▩
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	97	▩
14.02	Sports stadiums*	17	🟦
14.03	Number of international fairs and exhibitions*	101	▩
14.04	Creative industries exports*	n/a	

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Morocco

Key indicators

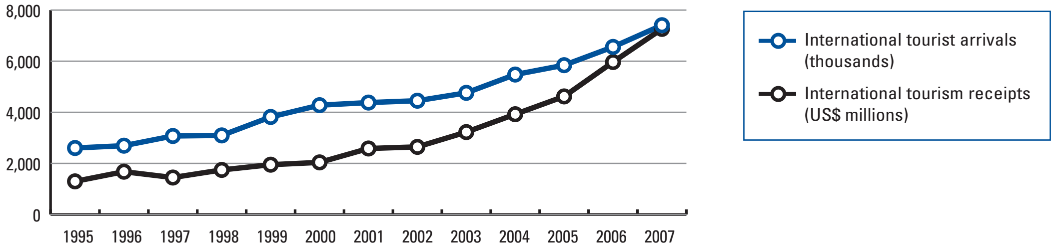
Population (millions), 2007	32.4
Surface area (1,000 square kilometers)	446.6
Gross domestic product (US$ billions), 2007	75.1
Gross domestic product (PPP, US$) per capita, 2007	4,093.7
Real GDP growth (percent), 2007	2.7
Environmental Performance Index, 2008 (out of 149 countries)	82

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	8,258	11.0	5.0
Employment (1,000 jobs)	1,035	9.6	3.0
T&T economy, 2008 estimates			
GDP (US$ millions)	14,214	18.9	5.0
Employment (1,000 jobs)	1,762	16.4	3.0

Source: World Travel & Tourism Council, TSA Research 2008

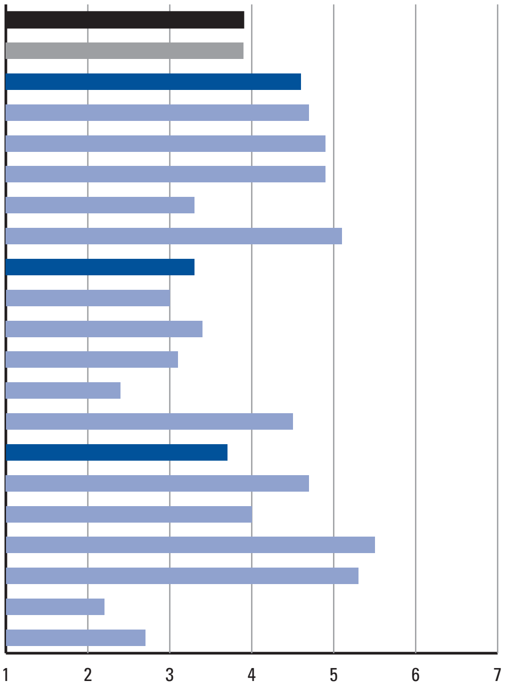
International tourist arrivals (thousands), 2007	7,408
International tourism receipts (US$ millions), 2007	7,264



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**75**	**3.9**
2008 Index	67	3.9
T&T regulatory framework	**64**	**4.6**
Policy rules and regulations	50	4.7
Environmental sustainability	36	4.9
Safety and security	79	4.9
Health and hygiene	100	3.3
Prioritization of Travel & Tourism	30	5.1
T&T business environment and infrastructure	**78**	**3.3**
Air transport infrastructure	67	3.0
Ground transport infrastructure	70	3.4
Tourism infrastructure	72	3.1
ICT infrastructure	88	2.4
Price competitiveness in the T&T industry	79	4.5
T&T human, cultural, and natural resources	**83**	**3.7**
Human resources	95	4.7
Education and training	102	4.0
Availability of qualified labor	68	5.5
Affinity for Travel & Tourism	29	5.3
Natural resources	125	2.2
Cultural resources	52	2.7



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Morocco

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	85	⬜
1.02	Property rights	66	⬜
1.03	Business impact of rules on FDI	74	⬜
1.04	Visa requirements*	32	🟦
1.05	Openness of bilateral Air Service Agreements*	55	⬜
1.06	Transparency of government policymaking	47	🟦
1.07	Time required to start a business*	31	🟦
1.08	Cost to start a business*	64	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	92	⬜
2.02	Enforcement of environmental regulation	82	⬜
2.03	Sustainability of T&T industry development	12	🟦
2.04	Carbon dioxide emissions*	45	🟦
2.05	Particulate matter concentration*	29	🟦
2.06	Threatened species*	87	⬜
2.07	Environmental treaty ratification*	67	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	113	⬜
3.02	Reliability of police services	47	🟦
3.03	Business costs of crime and violence	66	⬜
3.04	Road traffic accidents*	97	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	100	⬜
4.02	Access to improved sanitation*	85	⬜
4.03	Access to improved drinking water*	95	⬜
4.04	Hospital beds*	107	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	27	🟦
5.02	T&T government expenditure*	60	⬜
5.03	Effectiveness of marketing and branding	24	🟦
5.04	T&T fair attendance*	20	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	61	⬜
6.02	Available seat kilometers, domestic*	47	🟦
6.03	Available seat kilometers, international*	44	🟦
6.04	Departures per 1,000 population*	79	⬜
6.05	Airport density*	82	⬜
6.06	Number of operating airlines*	45	🟦
6.07	International air transport network	62	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	62	⬜
7.02	Quality of railroad infrastructure	47	🟦
7.03	Quality of port infrastructure	59	⬜
7.04	Quality of ground transport network	78	⬜
7.05	Road density*	91	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	80	⬜
8.02	Presence of major car rental companies*	23	🟦
8.03	ATMs accepting Visa cards*	80	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	110	⬜
9.02	Internet users*	66	⬜
9.03	Telephone lines*	98	⬜
9.04	Broadband Internet subscribers*	73	⬜
9.05	Mobile telephone subscribers*	80	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	84	⬜
10.02	Purchasing power parity*	68	⬜
10.03	Extent and effect of taxation	66	⬜
10.04	Fuel price levels*	68	⬜
10.05	Hotel price index*	86	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	98	⬜
11.02	Secondary education enrollment*	106	⬜
11.03	Quality of the educational system	100	⬜
11.04	Local availability of research and training services	69	⬜
11.05	Extent of staff training	79	⬜
11.06	Hiring and firing practices	60	⬜
11.07	Ease of hiring foreign labor	74	⬜
11.08	HIV prevalence*	22	🟦
11.09	Business impact of HIV/AIDS	88	⬜
11.10	Life expectancy*	66	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	20	🟦
12.02	Attitude of population toward foreign visitors	90	⬜
12.03	Extension of business trips recommended	61	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	120	⬜
13.03	Quality of the natural environment	101	⬜
13.04	Total known species*	72	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	19	🟦
14.02	Sports stadiums*	85	⬜
14.03	Number of international fairs and exhibitions*	61	⬜
14.04	Creative industries exports*	54	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Mozambique

Key indicators

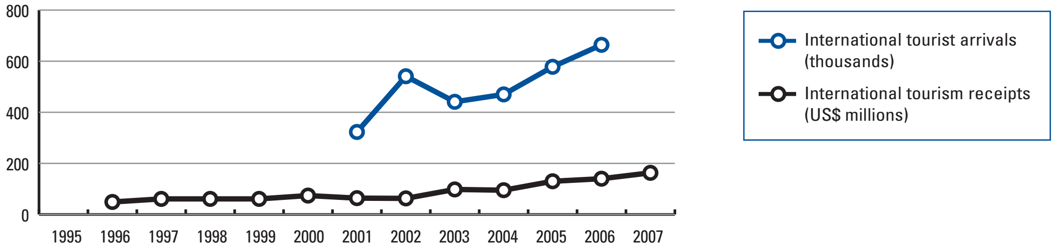
Population (millions), 2007	20.5
Surface area (1,000 square kilometers)	799.4
Gross domestic product (US$ billions), 2007	8.1
Gross domestic product (PPP, US$) per capita, 2007	842.9
Real GDP growth (percent), 2007	7.0
Environmental Performance Index, 2008 (out of 149 countries)	134

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	n/a	n/a	n/a
Employment (1,000 jobs)	n/a	n/a	n/a
T&T economy, 2008 estimates			
GDP (US$ millions)	n/a	n/a	n/a
Employment (1,000 jobs)	n/a	n/a	n/a

Source: World Travel & Tourism Council, TSA Research 2008

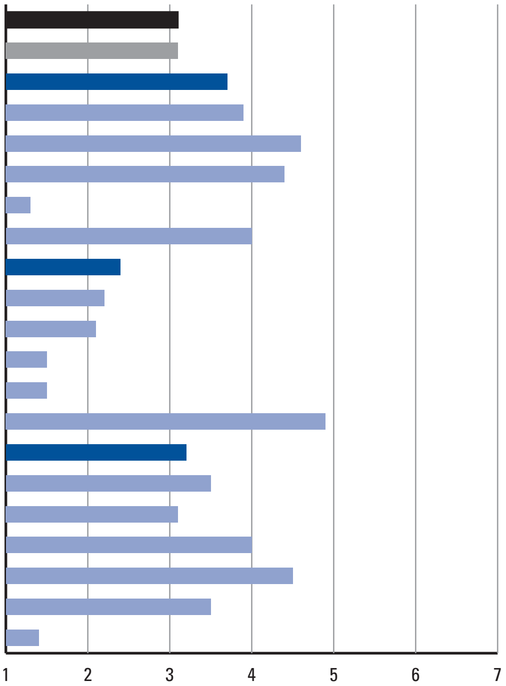
International tourist arrivals (thousands), 2006	664
International tourism receipts (US$ millions), 2007	163



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**124**	**3.1**
2008 Index	123	3.1
T&T regulatory framework	**120**	**3.7**
Policy rules and regulations	99	3.9
Environmental sustainability	57	4.6
Safety and security	103	4.4
Health and hygiene	130	1.3
Prioritization of Travel & Tourism	85	4.0
T&T business environment and infrastructure	**129**	**2.4**
Air transport infrastructure	116	2.2
Ground transport infrastructure	129	2.1
Tourism infrastructure	117	1.5
ICT infrastructure	129	1.5
Price competitiveness in the T&T industry	51	4.9
T&T human, cultural, and natural resources	**125**	**3.2**
Human resources	130	3.5
Education and training	122	3.1
Availability of qualified labor	128	4.0
Affinity for Travel & Tourism	95	4.5
Natural resources	56	3.5
Cultural resources	113	1.4



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Mozambique

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	88	⬜
1.02	Property rights	116	⬜
1.03	Business impact of rules on FDI	91	⬜
1.04	Visa requirements*	122	⬜
1.05	Openness of bilateral Air Service Agreements*	79	⬜
1.06	Transparency of government policymaking	93	⬜
1.07	Time required to start a business*	71	⬜
1.08	Cost to start a business*	87	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	102	⬜
2.02	Enforcement of environmental regulation	122	⬜
2.03	Sustainability of T&T industry development	80	⬜
2.04	Carbon dioxide emissions*	8	🟦
2.05	Particulate matter concentration*	46	🟦
2.06	Threatened species*	49	🟦
2.07	Environmental treaty ratification*	94	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	93	⬜
3.02	Reliability of police services	117	⬜
3.03	Business costs of crime and violence	115	⬜
3.04	Road traffic accidents*	77	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	128	⬜
4.02	Access to improved sanitation*	113	⬜
4.03	Access to improved drinking water*	126	⬜
4.04	Hospital beds*	114	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	46	🟦
5.02	T&T government expenditure*	n/a	
5.03	Effectiveness of marketing and branding	85	⬜
5.04	T&T fair attendance*	115	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	113	⬜
6.02	Available seat kilometers, domestic*	46	🟦
6.03	Available seat kilometers, international*	118	⬜
6.04	Departures per 1,000 population*	106	⬜
6.05	Airport density*	66	⬜
6.06	Number of operating airlines*	114	⬜
6.07	International air transport network	107	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	122	⬜
7.02	Quality of railroad infrastructure	82	⬜
7.03	Quality of port infrastructure	111	⬜
7.04	Quality of ground transport network	130	⬜
7.05	Road density*	121	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	112	⬜
8.02	Presence of major car rental companies*	95	⬜
8.03	ATMs accepting Visa cards*	102	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	126	⬜
9.02	Internet users*	124	⬜
9.03	Telephone lines*	131	⬜
9.04	Broadband Internet subscribers*	127	⬜
9.05	Mobile telephone subscribers*	122	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	23	🟦
10.02	Purchasing power parity*	32	🟦
10.03	Extent and effect of taxation	90	⬜
10.04	Fuel price levels*	83	⬜
10.05	Hotel price index*	30	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	115	⬜
11.02	Secondary education enrollment*	129	⬜
11.03	Quality of the educational system	115	⬜
11.04	Local availability of research and training services	116	⬜
11.05	Extent of staff training	74	⬜
11.06	Hiring and firing practices	96	⬜
11.07	Ease of hiring foreign labor	108	⬜
11.08	HIV prevalence*	127	⬜
11.09	Business impact of HIV/AIDS	131	⬜
11.10	Life expectancy*	122	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	77	⬜
12.02	Attitude of population toward foreign visitors	83	⬜
12.03	Extension of business trips recommended	106	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	45	🟦
13.03	Quality of the natural environment	79	⬜
13.04	Total known species*	35	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	65	⬜
14.02	Sports stadiums*	117	⬜
14.03	Number of international fairs and exhibitions*	117	⬜
14.04	Creative industries exports*	115	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Namibia

Key indicators

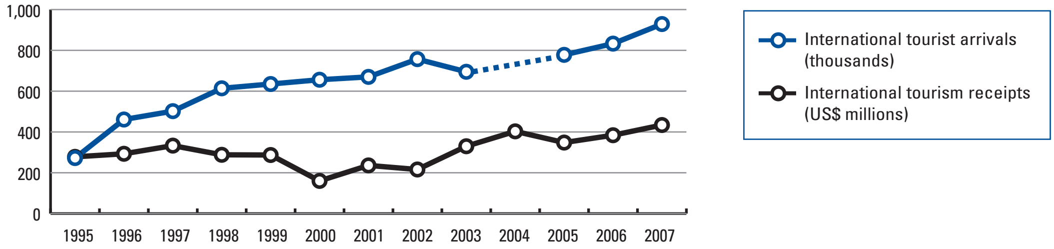
Population (millions), 2007	2.1
Surface area (1,000 square kilometers)	824.3
Gross domestic product (US$ billions), 2007	7.4
Gross domestic product (PPP, US$) per capita, 2007	5,249.6
Real GDP growth (percent), 2007	3.6
Environmental Performance Index, 2008 (out of 149 countries)	88

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	238	3.3	10.5
Employment (1,000 jobs)	20	4.6	7.4
T&T economy, 2008 estimates			
GDP (US$ millions)	1,052	14.5	7.7
Employment (1,000 jobs)	77	18.2	5.3

Source: World Travel & Tourism Council, TSA Research 2008

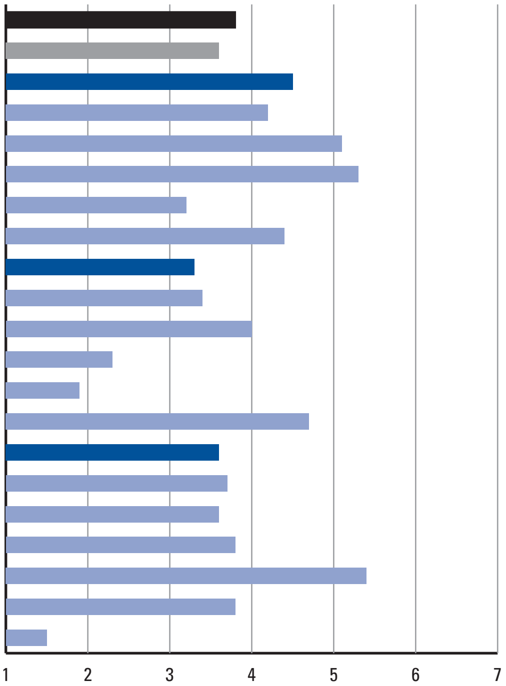
International tourist arrivals (thousands), 2007	929
International tourism receipts (US$ millions), 2007	434



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**82**	**3.8**
2008 Index	93	3.6
T&T regulatory framework	**71**	**4.5**
Policy rules and regulations	79	4.2
Environmental sustainability	26	5.1
Safety and security	60	5.3
Health and hygiene	102	3.2
Prioritization of Travel & Tourism	62	4.4
T&T business environment and infrastructure	**77**	**3.3**
Air transport infrastructure	54	3.4
Ground transport infrastructure	51	4.0
Tourism infrastructure	83	2.3
ICT infrastructure	106	1.9
Price competitiveness in the T&T industry	67	4.7
T&T human, cultural, and natural resources	**94**	**3.6**
Human resources	128	3.7
Education and training	111	3.6
Availability of qualified labor	129	3.8
Affinity for Travel & Tourism	25	5.4
Natural resources	44	3.8
Cultural resources	106	1.5



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Namibia

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	61	⬜
1.02	Property rights	25	🟦
1.03	Business impact of rules on FDI	72	⬜
1.04	Visa requirements*	76	⬜
1.05	Openness of bilateral Air Service Agreements*	50	🟦
1.06	Transparency of government policymaking	51	⬜
1.07	Time required to start a business*	119	⬜
1.08	Cost to start a business*	86	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	44	🟦
2.02	Enforcement of environmental regulation	48	🟦
2.03	Sustainability of T&T industry development	18	🟦
2.04	Carbon dioxide emissions*	43	🟦
2.05	Particulate matter concentration*	76	⬜
2.06	Threatened species*	54	⬜
2.07	Environmental treaty ratification*	52	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	30	🟦
3.02	Reliability of police services	80	⬜
3.03	Business costs of crime and violence	105	⬜
3.04	Road traffic accidents*	36	🟦
	4th pillar: Health and hygiene		
4.01	Physician density*	106	⬜
4.02	Access to improved sanitation*	110	⬜
4.03	Access to improved drinking water*	68	⬜
4.04	Hospital beds*	53	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	25	🟦
5.02	T&T government expenditure*	68	⬜
5.03	Effectiveness of marketing and branding	27	🟦
5.04	T&T fair attendance*	81	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	50	🟦
6.02	Available seat kilometers, domestic*	83	⬜
6.03	Available seat kilometers, international*	103	⬜
6.04	Departures per 1,000 population*	59	⬜
6.05	Airport density*	15	🟦
6.06	Number of operating airlines*	126	⬜
6.07	International air transport network	55	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	23	🟦
7.02	Quality of railroad infrastructure	24	🟦
7.03	Quality of port infrastructure	24	🟦
7.04	Quality of ground transport network	106	⬜
7.05	Road density*	116	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	86	⬜
8.02	Presence of major car rental companies*	73	⬜
8.03	ATMs accepting Visa cards*	72	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	95	⬜
9.02	Internet users*	107	⬜
9.03	Telephone lines*	102	⬜
9.04	Broadband Internet subscribers*	117	⬜
9.05	Mobile telephone subscribers*	97	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	90	⬜
10.02	Purchasing power parity*	77	⬜
10.03	Extent and effect of taxation	52	⬜
10.04	Fuel price levels*	68	⬜
10.05	Hotel price index*	n/a	
	11th pillar: Human resources		
11.01	Primary education enrollment*	114	⬜
11.02	Secondary education enrollment*	103	⬜
11.03	Quality of the educational system	114	⬜
11.04	Local availability of research and training services	133	⬜
11.05	Extent of staff training	44	🟦
11.06	Hiring and firing practices	130	⬜
11.07	Ease of hiring foreign labor	132	⬜
11.08	HIV prevalence*	129	⬜
11.09	Business impact of HIV/AIDS	124	⬜
11.10	Life expectancy*	109	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	37	🟦
12.02	Attitude of population toward foreign visitors	30	🟦
12.03	Extension of business trips recommended	2	🟦
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	46	🟦
13.03	Quality of the natural environment	5	🟦
13.04	Total known species*	41	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	97	⬜
14.02	Sports stadiums*	83	⬜
14.03	Number of international fairs and exhibitions*	117	⬜
14.04	Creative industries exports*	52	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Nepal

Key indicators

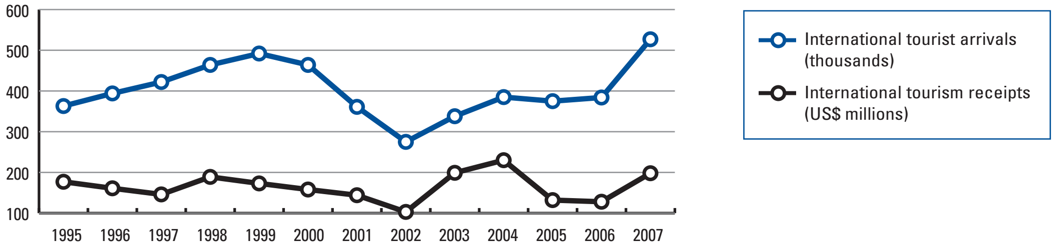
Population (millions), 2007	28.2
Surface area (1,000 square kilometers)	147.2
Gross domestic product (US$ billions), 2007	10.3
Gross domestic product (PPP, US$) per capita, 2007	1,078.4
Real GDP growth (percent), 2007	3.2
Environmental Performance Index, 2008 (out of 149 countries)	81

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	319	3.0	5.2
Employment (1,000 jobs)	237	2.3	4.5
T&T economy, 2008 estimates			
GDP (US$ millions)	717	6.8	4.9
Employment (1,000 jobs)	548	5.3	4.2

Source: World Travel & Tourism Council, TSA Research 2008

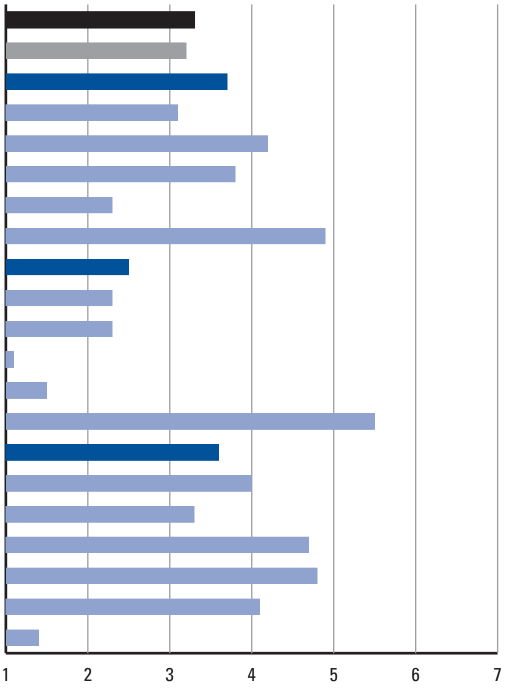
International tourist arrivals (thousands), 2007	527
International tourism receipts (US$ millions), 2007	198



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**118**	**3.3**
2008 Index	116	3.2
T&T regulatory framework	**119**	**3.7**
Policy rules and regulations	127	3.1
Environmental sustainability	87	4.2
Safety and security	123	3.8
Health and hygiene	114	2.3
Prioritization of Travel & Tourism	39	4.9
T&T business environment and infrastructure	**120**	**2.5**
Air transport infrastructure	109	2.3
Ground transport infrastructure	123	2.3
Tourism infrastructure	130	1.1
ICT infrastructure	130	1.5
Price competitiveness in the T&T industry	10	5.5
T&T human, cultural, and natural resources	**97**	**3.6**
Human resources	118	4.0
Education and training	121	3.3
Availability of qualified labor	119	4.7
Affinity for Travel & Tourism	61	4.8
Natural resources	37	4.1
Cultural resources	119	1.4



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Nepal

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	125	⬜
1.02	Property rights	111	⬜
1.03	Business impact of rules on FDI	113	⬜
1.04	Visa requirements*	131	⬜
1.05	Openness of bilateral Air Service Agreements*	124	⬜
1.06	Transparency of government policymaking	120	⬜
1.07	Time required to start a business*	85	⬜
1.08	Cost to start a business*	107	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	117	⬜
2.02	Enforcement of environmental regulation	110	⬜
2.03	Sustainability of T&T industry development	93	⬜
2.04	Carbon dioxide emissions*	10	🟦
2.05	Particulate matter concentration*	65	⬜
2.06	Threatened species*	90	⬜
2.07	Environmental treaty ratification*	115	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	131	⬜
3.02	Reliability of police services	109	⬜
3.03	Business costs of crime and violence	120	⬜
3.04	Road traffic accidents*	86	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	110	⬜
4.02	Access to improved sanitation*	119	⬜
4.03	Access to improved drinking water*	81	⬜
4.04	Hospital beds*	128	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	48	🟦
5.02	T&T government expenditure*	35	🟦
5.03	Effectiveness of marketing and branding	81	⬜
5.04	T&T fair attendance*	25	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	114	⬜
6.02	Available seat kilometers, domestic*	62	⬜
6.03	Available seat kilometers, international*	84	⬜
6.04	Departures per 1,000 population*	114	⬜
6.05	Airport density*	61	⬜
6.06	Number of operating airlines*	74	⬜
6.07	International air transport network	112	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	125	⬜
7.02	Quality of railroad infrastructure	111	⬜
7.03	Quality of port infrastructure	107	⬜
7.04	Quality of ground transport network	103	⬜
7.05	Road density*	96	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	116	⬜
8.02	Presence of major car rental companies*	122	⬜
8.03	ATMs accepting Visa cards*	116	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	121	⬜
9.02	Internet users*	120	⬜
9.03	Telephone lines*	111	⬜
9.04	Broadband Internet subscribers*	109	⬜
9.05	Mobile telephone subscribers*	130	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	40	🟦
10.02	Purchasing power parity*	14	🟦
10.03	Extent and effect of taxation	49	🟦
10.04	Fuel price levels*	47	🟦
10.05	Hotel price index*	2	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	112	⬜
11.02	Secondary education enrollment*	112	⬜
11.03	Quality of the educational system	97	⬜
11.04	Local availability of research and training services	119	⬜
11.05	Extent of staff training	131	⬜
11.06	Hiring and firing practices	106	⬜
11.07	Ease of hiring foreign labor	130	⬜
11.08	HIV prevalence*	78	⬜
11.09	Business impact of HIV/AIDS	105	⬜
11.10	Life expectancy*	107	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	67	⬜
12.02	Attitude of population toward foreign visitors	43	🟦
12.03	Extension of business trips recommended	71	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	23	🟦
13.02	Protected areas*	32	🟦
13.03	Quality of the natural environment	113	⬜
13.04	Total known species*	29	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	82	⬜
14.02	Sports stadiums*	125	⬜
14.03	Number of international fairs and exhibitions*	90	⬜
14.04	Creative industries exports*	65	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Netherlands

Key indicators

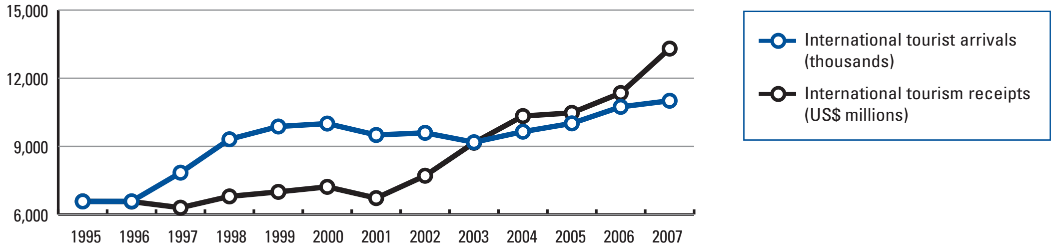
Population (millions), 2007	16.4
Surface area (1,000 square kilometers)	41.5
Gross domestic product (US$ billions), 2007	777.2
Gross domestic product (PPP, US$) per capita, 2007	38,994.7
Real GDP growth (percent), 2007	3.5
Environmental Performance Index, 2008 (out of 149 countries)	55

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	23,640	2.8	1.7
Employment (1,000 jobs)	203	2.8	–0.1
T&T economy, 2008 estimates			
GDP (US$ millions)	62,133	7.4	1.7
Employment (1,000 jobs)	505	6.9	–0.1

Source: World Travel & Tourism Council, TSA Research 2008

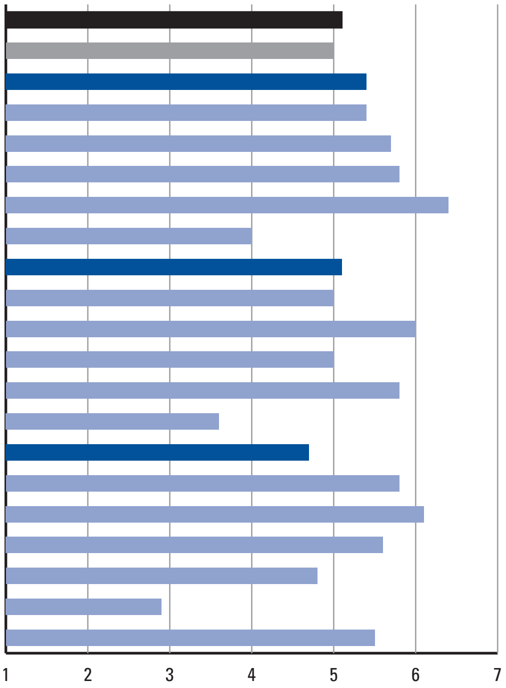
International tourist arrivals (thousands), 2007	11,008
International tourism receipts (US$ millions), 2007	13,305



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**13**	**5.1**
2008 Index	18	5.0
T&T regulatory framework	**22**	**5.4**
Policy rules and regulations	11	5.4
Environmental sustainability	5	5.7
Safety and security	36	5.8
Health and hygiene	20	6.4
Prioritization of Travel & Tourism	90	4.0
T&T business environment and infrastructure	**9**	**5.1**
Air transport infrastructure	16	5.0
Ground transport infrastructure	9	6.0
Tourism infrastructure	25	5.0
ICT infrastructure	5	5.8
Price competitiveness in the T&T industry	124	3.6
T&T human, cultural, and natural resources	**17**	**4.7**
Human resources	11	5.8
Education and training	5	6.1
Availability of qualified labor	42	5.6
Affinity for Travel & Tourism	63	4.8
Natural resources	81	2.9
Cultural resources	16	5.5



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Netherlands

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	26	⬜
1.02	Property rights	14	⬜
1.03	Business impact of rules on FDI	12	🟦
1.04	Visa requirements*	40	⬜
1.05	Openness of bilateral Air Service Agreements*	20	⬜
1.06	Transparency of government policymaking	13	⬜
1.07	Time required to start a business*	25	⬜
1.08	Cost to start a business*	46	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	3	🟦
2.02	Enforcement of environmental regulation	9	🟦
2.03	Sustainability of T&T industry development	36	⬜
2.04	Carbon dioxide emissions*	98	⬜
2.05	Particulate matter concentration*	62	⬜
2.06	Threatened species*	12	🟦
2.07	Environmental treaty ratification*	2	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	83	⬜
3.02	Reliability of police services	11	🟦
3.03	Business costs of crime and violence	62	⬜
3.04	Road traffic accidents*	55	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	11	🟦
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	35	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	82	⬜
5.02	T&T government expenditure*	93	⬜
5.03	Effectiveness of marketing and branding	42	⬜
5.04	T&T fair attendance*	81	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	9	🟦
6.02	Available seat kilometers, domestic*	85	⬜
6.03	Available seat kilometers, international*	15	⬜
6.04	Departures per 1,000 population*	24	⬜
6.05	Airport density*	103	⬜
6.06	Number of operating airlines*	12	🟦
6.07	International air transport network	5	🟦
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	25	⬜
7.02	Quality of railroad infrastructure	13	⬜
7.03	Quality of port infrastructure	3	🟦
7.04	Quality of ground transport network	14	⬜
7.05	Road density*	7	🟦

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	46	⬜
8.02	Presence of major car rental companies*	1	🟦
8.03	ATMs accepting Visa cards*	25	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	15	⬜
9.02	Internet users*	1	🟦
9.03	Telephone lines*	22	⬜
9.04	Broadband Internet subscribers*	4	🟦
9.05	Mobile telephone subscribers*	37	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	91	⬜
10.02	Purchasing power parity*	120	⬜
10.03	Extent and effect of taxation	60	⬜
10.04	Fuel price levels*	115	⬜
10.05	Hotel price index*	93	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	20	⬜
11.02	Secondary education enrollment*	5	🟦
11.03	Quality of the educational system	13	⬜
11.04	Local availability of research and training services	3	🟦
11.05	Extent of staff training	8	🟦
11.06	Hiring and firing practices	123	⬜
11.07	Ease of hiring foreign labor	49	⬜
11.08	HIV prevalence*	49	⬜
11.09	Business impact of HIV/AIDS	23	⬜
11.10	Life expectancy*	12	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	79	⬜
12.02	Attitude of population toward foreign visitors	11	🟦
12.03	Extension of business trips recommended	70	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	38	⬜
13.03	Quality of the natural environment	67	⬜
13.04	Total known species*	105	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	26	⬜
14.02	Sports stadiums*	40	⬜
14.03	Number of international fairs and exhibitions*	7	🟦
14.04	Creative industries exports*	13	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

New Zealand

Key indicators

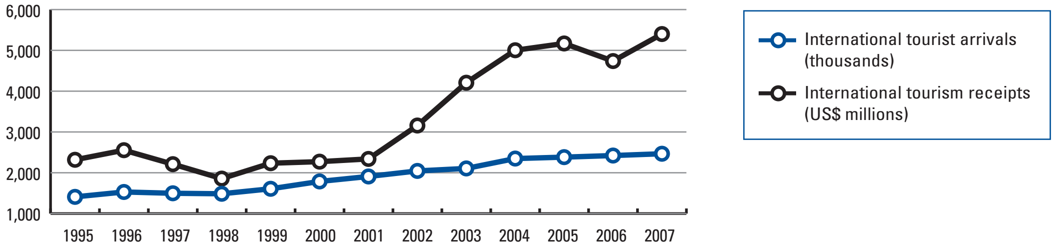
Population (millions), 2007	4.1
Surface area (1,000 square kilometers)	267.7
Gross domestic product (US$ billions), 2007	128.7
Gross domestic product (PPP, US$) per capita, 2007	26,610.5
Real GDP growth (percent), 2007	3.2
Environmental Performance Index, 2008 (out of 149 countries)	7

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	7,465	6.0	3.3
Employment (1,000 jobs)	135	6.2	0.6
T&T economy, 2008 estimates			
GDP (US$ millions)	16,225	13.0	3.0
Employment (1,000 jobs)	290	13.4	–0.1

Source: World Travel & Tourism Council, TSA Research 2008

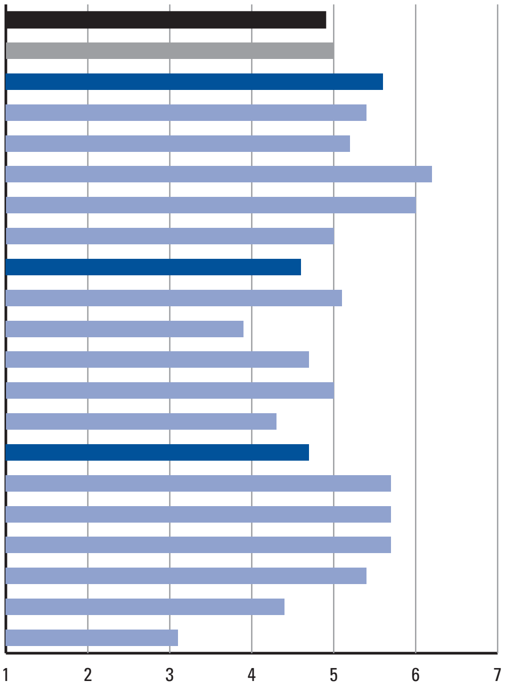
International tourist arrivals (thousands), 2007	2,466
International tourism receipts (US$ millions), 2007	5,400



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**20**	**4.9**
2008 Index	19	5.0
T&T regulatory framework	**14**	**5.6**
Policy rules and regulations	10	5.4
Environmental sustainability	22	5.2
Safety and security	15	6.2
Health and hygiene	31	6.0
Prioritization of Travel & Tourism	36	5.0
T&T business environment and infrastructure	**30**	**4.6**
Air transport infrastructure	11	5.1
Ground transport infrastructure	53	3.9
Tourism infrastructure	29	4.7
ICT infrastructure	18	5.0
Price competitiveness in the T&T industry	85	4.3
T&T human, cultural, and natural resources	**25**	**4.7**
Human resources	17	5.7
Education and training	20	5.7
Availability of qualified labor	24	5.7
Affinity for Travel & Tourism	24	5.4
Natural resources	27	4.4
Cultural resources	39	3.1



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

New Zealand

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	22	⬜
1.02	Property rights	16	🟦
1.03	Business impact of rules on FDI	63	⬜
1.04	Visa requirements*	68	⬜
1.05	Openness of bilateral Air Service Agreements*	26	⬜
1.06	Transparency of government policymaking	11	🟦
1.07	Time required to start a business*	1	🟦
1.08	Cost to start a business*	4	🟦
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	10	🟦
2.02	Enforcement of environmental regulation	11	🟦
2.03	Sustainability of T&T industry development	8	🟦
2.04	Carbon dioxide emissions*	92	⬜
2.05	Particulate matter concentration*	7	🟦
2.06	Threatened species*	133	⬜
2.07	Environmental treaty ratification*	2	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	29	⬜
3.02	Reliability of police services	23	⬜
3.03	Business costs of crime and violence	25	⬜
3.04	Road traffic accidents*	38	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	50	⬜
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	25	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	7	🟦
5.02	T&T government expenditure*	64	⬜
5.03	Effectiveness of marketing and branding	7	🟦
5.04	T&T fair attendance*	41	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	23	⬜
6.02	Available seat kilometers, domestic*	28	⬜
6.03	Available seat kilometers, international*	28	⬜
6.04	Departures per 1,000 population*	5	🟦
6.05	Airport density*	6	🟦
6.06	Number of operating airlines*	75	⬜
6.07	International air transport network	19	🟦
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	50	⬜
7.02	Quality of railroad infrastructure	44	⬜
7.03	Quality of port infrastructure	23	⬜
7.04	Quality of ground transport network	57	⬜
7.05	Road density*	58	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	49	⬜
8.02	Presence of major car rental companies*	23	⬜
8.03	ATMs accepting Visa cards*	23	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	26	⬜
9.02	Internet users*	3	🟦
9.03	Telephone lines*	29	⬜
9.04	Broadband Internet subscribers*	17	🟦
9.05	Mobile telephone subscribers*	40	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	66	⬜
10.02	Purchasing power parity*	116	⬜
10.03	Extent and effect of taxation	89	⬜
10.04	Fuel price levels*	45	⬜
10.05	Hotel price index*	39	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	8	🟦
11.02	Secondary education enrollment*	2	🟦
11.03	Quality of the educational system	21	⬜
11.04	Local availability of research and training services	24	⬜
11.05	Extent of staff training	26	⬜
11.06	Hiring and firing practices	102	⬜
11.07	Ease of hiring foreign labor	58	⬜
11.08	HIV prevalence*	22	⬜
11.09	Business impact of HIV/AIDS	18	🟦
11.10	Life expectancy*	12	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	43	⬜
12.02	Attitude of population toward foreign visitors	2	🟦
12.03	Extension of business trips recommended	1	🟦
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	16	🟦
13.02	Protected areas*	25	⬜
13.03	Quality of the natural environment	3	🟦
13.04	Total known species*	124	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	97	⬜
14.02	Sports stadiums*	10	🟦
14.03	Number of international fairs and exhibitions*	46	⬜
14.04	Creative industries exports*	53	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Nicaragua

Key indicators

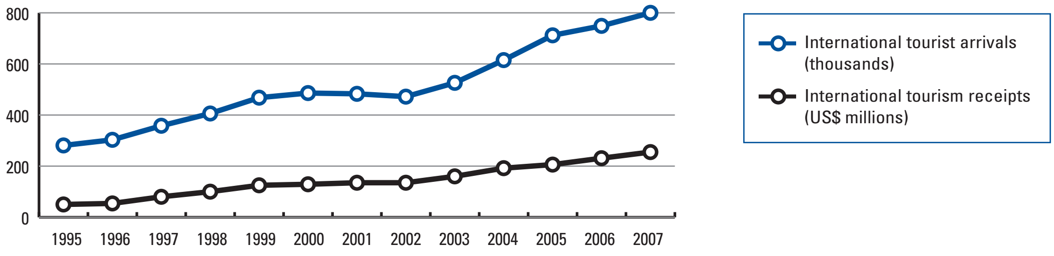
Population (millions), 2007	5.7
Surface area (1,000 square kilometers)	130.0
Gross domestic product (US$ billions), 2007	5.7
Gross domestic product (PPP, US$) per capita, 2007	2,628.6
Real GDP growth (percent), 2007	3.8
Environmental Performance Index, 2008 (out of 149 countries)	77

Travel & Tourism indicators

T&T industry, 2008 estimates		Percent of total	2009–2018 annual growth (%, forecast)
GDP (US$ millions)	145	2.4	3.9
Employment (1,000 jobs)	37	1.9	3.2
T&T economy, 2008 estimates			
GDP (US$ millions)	397	6.5	4.3
Employment (1,000 jobs)	102	5.2	3.7

Source: World Travel & Tourism Council, TSA Research 2008

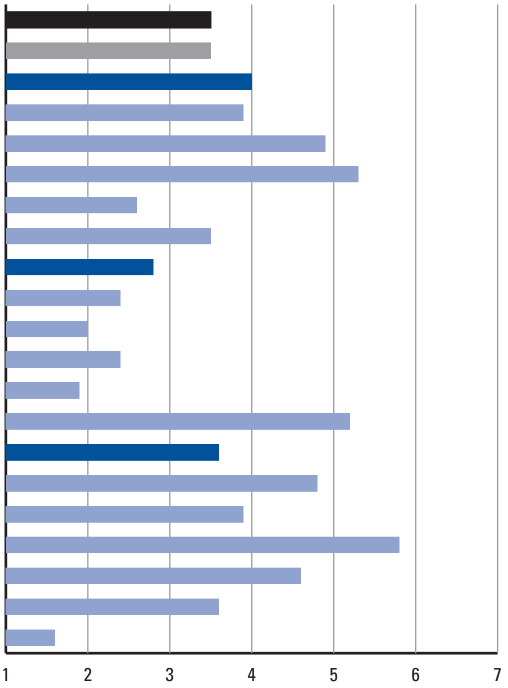
International tourist arrivals (thousands), 2007	800
International tourism receipts (US$ millions), 2007	255



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**103**	**3.5**
2008 Index	99	3.5
T&T regulatory framework	**98**	**4.0**
Policy rules and regulations	97	3.9
Environmental sustainability	41	4.9
Safety and security	56	5.3
Health and hygiene	109	2.6
Prioritization of Travel & Tourism	109	3.5
T&T business environment and infrastructure	**101**	**2.8**
Air transport infrastructure	103	2.4
Ground transport infrastructure	133	2.0
Tourism infrastructure	81	2.4
ICT infrastructure	111	1.9
Price competitiveness in the T&T industry	29	5.2
T&T human, cultural, and natural resources	**93**	**3.6**
Human resources	91	4.8
Education and training	105	3.9
Availability of qualified labor	17	5.8
Affinity for Travel & Tourism	86	4.6
Natural resources	53	3.6
Cultural resources	101	1.6



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Nicaragua

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

1st pillar: Policy rules and regulations

	INDICATOR	RANK/133	
1.01	Prevalence of foreign ownership	83	⬜
1.02	Property rights	119	⬜
1.03	Business impact of rules on FDI	88	⬜
1.04	Visa requirements*	18	🟦
1.05	Openness of bilateral Air Service Agreements*	5	🟦
1.06	Transparency of government policymaking	115	⬜
1.07	Time required to start a business*	98	⬜
1.08	Cost to start a business*	118	⬜

2nd pillar: Environmental sustainability

	INDICATOR	RANK/133	
2.01	Stringency of environmental regulation	73	⬜
2.02	Enforcement of environmental regulation	83	⬜
2.03	Sustainability of T&T industry development	98	⬜
2.04	Carbon dioxide emissions*	25	🟦
2.05	Particulate matter concentration*	47	🟦
2.06	Threatened species*	29	🟦
2.07	Environmental treaty ratification*	67	⬜

3rd pillar: Safety and security

	INDICATOR	RANK/133	
3.01	Business costs of terrorism	78	⬜
3.02	Reliability of police services	56	⬜
3.03	Business costs of crime and violence	90	⬜
3.04	Road traffic accidents*	50	🟦

4th pillar: Health and hygiene

	INDICATOR	RANK/133	
4.01	Physician density*	104	⬜
4.02	Access to improved sanitation*	101	⬜
4.03	Access to improved drinking water*	103	⬜
4.04	Hospital beds*	107	⬜

5th pillar: Prioritization of Travel & Tourism

	INDICATOR	RANK/133	
5.01	Government prioritization of the T&T industry	97	⬜
5.02	T&T government expenditure*	96	⬜
5.03	Effectiveness of marketing and branding	87	⬜
5.04	T&T fair attendance*	98	⬜

6th pillar: Air transport infrastructure

	INDICATOR	RANK/133	
6.01	Quality of air transport infrastructure	79	⬜
6.02	Available seat kilometers, domestic*	91	⬜
6.03	Available seat kilometers, international*	111	⬜
6.04	Departures per 1,000 population*	119	⬜
6.05	Airport density*	65	⬜
6.06	Number of operating airlines*	108	⬜
6.07	International air transport network	82	⬜

7th pillar: Ground transport infrastructure

	INDICATOR	RANK/133	
7.01	Quality of roads	112	⬜
7.02	Quality of railroad infrastructure	117	⬜
7.03	Quality of port infrastructure	129	⬜
7.04	Quality of ground transport network	127	⬜
7.05	Road density*	87	⬜

8th pillar: Tourism infrastructure

	INDICATOR	RANK/133	
8.01	Hotel rooms*	99	⬜
8.02	Presence of major car rental companies*	56	⬜
8.03	ATMs accepting Visa cards*	94	⬜

9th pillar: ICT infrastructure

	INDICATOR	RANK/133	
9.01	Extent of business Internet use	106	⬜
9.02	Internet users*	116	⬜
9.03	Telephone lines*	105	⬜
9.04	Broadband Internet subscribers*	91	⬜
9.05	Mobile telephone subscribers*	99	⬜

10th pillar: Price competitiveness in the T&T industry

	INDICATOR	RANK/133	
10.01	Ticket taxes and airport charges*	61	⬜
10.02	Purchasing power parity*	18	🟦
10.03	Extent and effect of taxation	85	⬜
10.04	Fuel price levels*	30	🟦
10.05	Hotel price index*	23	🟦

11th pillar: Human resources

	INDICATOR	RANK/133	
11.01	Primary education enrollment*	88	⬜
11.02	Secondary education enrollment*	99	⬜
11.03	Quality of the educational system	129	⬜
11.04	Local availability of research and training services	112	⬜
11.05	Extent of staff training	115	⬜
11.06	Hiring and firing practices	24	🟦
11.07	Ease of hiring foreign labor	5	🟦
11.08	HIV prevalence*	49	🟦
11.09	Business impact of HIV/AIDS	90	⬜
11.10	Life expectancy*	76	⬜

12th pillar: Affinity for Travel & Tourism

	INDICATOR	RANK/133	
12.01	Tourism openness*	44	🟦
12.02	Attitude of population toward foreign visitors	99	⬜
12.03	Extension of business trips recommended	118	⬜

13th pillar: Natural resources

	INDICATOR	RANK/133	
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	42	🟦
13.03	Quality of the natural environment	63	⬜
13.04	Total known species*	36	🟦

14th pillar: Cultural resources

	INDICATOR	RANK/133	
14.01	Number of World Heritage cultural sites*	65	⬜
14.02	Sports stadiums*	84	⬜
14.03	Number of international fairs and exhibitions*	107	⬜
14.04	Creative industries exports*	101	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Nigeria

Key indicators

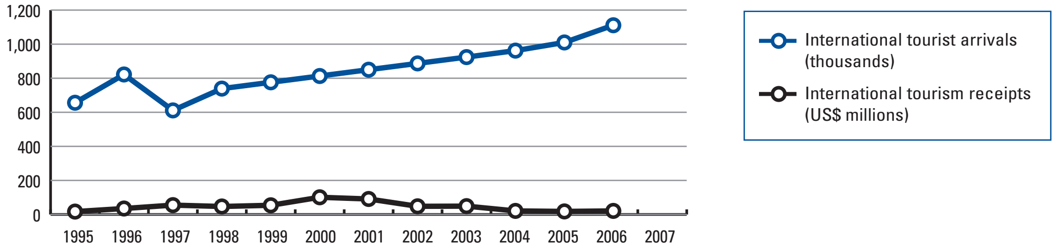
Population (millions), 2007	137.2
Surface area (1,000 square kilometers)	923.8
Gross domestic product (US$ billions), 2007	167.0
Gross domestic product (PPP, US$) per capita, 2007	2,027.8
Real GDP growth (percent), 2007	5.9
Environmental Performance Index, 2008 (out of 149 countries)	126

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	976	0.7	2.5
Employment (1,000 jobs)	308	0.6	0.2
T&T economy, 2008 estimates			
GDP (US$ millions)	7,745	5.5	–0.4
Employment (1,000 jobs)	2,381	4.6	–2.6

Source: World Travel & Tourism Council, TSA Research 2008

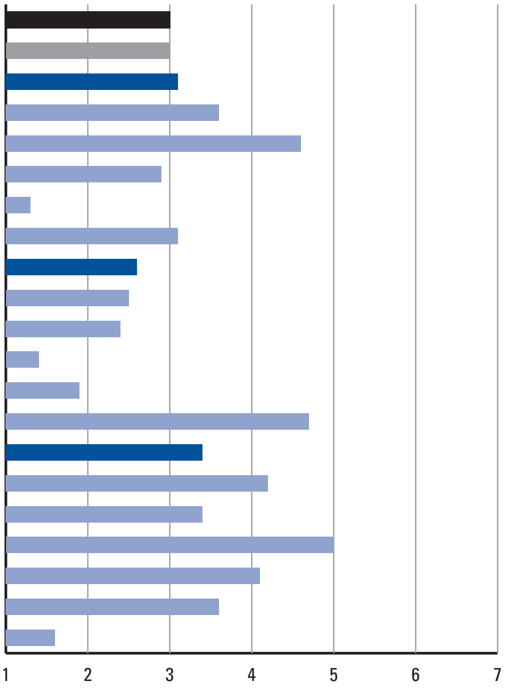
International tourist arrivals (thousands), 2006	1,111
International tourism receipts (US$ millions), 2006	21



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**128**	**3.0**
2008 Index	125	3.0
T&T regulatory framework	**132**	**3.1**
Policy rules and regulations	113	3.6
Environmental sustainability	61	4.6
Safety and security	133	2.9
Health and hygiene	129	1.3
Prioritization of Travel & Tourism	122	3.1
T&T business environment and infrastructure	**116**	**2.6**
Air transport infrastructure	95	2.5
Ground transport infrastructure	118	2.4
Tourism infrastructure	121	1.4
ICT infrastructure	108	1.9
Price competitiveness in the T&T industry	69	4.7
T&T human, cultural, and natural resources	**113**	**3.4**
Human resources	113	4.2
Education and training	119	3.4
Availability of qualified labor	107	5.0
Affinity for Travel & Tourism	124	4.1
Natural resources	51	3.6
Cultural resources	103	1.6



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Nigeria

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ▨ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	40	🟦
1.02	Property rights	86	▨
1.03	Business impact of rules on FDI	57	▨
1.04	Visa requirements*	108	▨
1.05	Openness of bilateral Air Service Agreements*	96	▨
1.06	Transparency of government policymaking	54	▨
1.07	Time required to start a business*	85	▨
1.08	Cost to start a business*	115	▨
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	86	▨
2.02	Enforcement of environmental regulation	94	▨
2.03	Sustainability of T&T industry development	75	▨
2.04	Carbon dioxide emissions*	29	🟦
2.05	Particulate matter concentration*	96	▨
2.06	Threatened species*	57	▨
2.07	Environmental treaty ratification*	34	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	118	▨
3.02	Reliability of police services	119	▨
3.03	Business costs of crime and violence	123	▨
3.04	Road traffic accidents*	122	▨
	4th pillar: Health and hygiene		
4.01	Physician density*	109	▨
4.02	Access to improved sanitation*	114	▨
4.03	Access to improved drinking water*	124	▨
4.04	Hospital beds*	120	▨
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	103	▨
5.02	T&T government expenditure*	125	▨
5.03	Effectiveness of marketing and branding	68	▨
5.04	T&T fair attendance*	115	▨
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	84	▨
6.02	Available seat kilometers, domestic*	36	🟦
6.03	Available seat kilometers, international*	58	▨
6.04	Departures per 1,000 population*	116	▨
6.05	Airport density*	127	▨
6.06	Number of operating airlines*	57	▨
6.07	International air transport network	78	▨
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	116	▨
7.02	Quality of railroad infrastructure	107	▨
7.03	Quality of port infrastructure	120	▨
7.04	Quality of ground transport network	98	▨
7.05	Road density*	76	▨

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	121	▨
8.02	Presence of major car rental companies*	95	▨
8.03	ATMs accepting Visa cards*	122	▨
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	64	▨
9.02	Internet users*	100	▨
9.03	Telephone lines*	119	▨
9.04	Broadband Internet subscribers*	125	▨
9.05	Mobile telephone subscribers*	111	▨
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	73	▨
10.02	Purchasing power parity*	66	▨
10.03	Extent and effect of taxation	39	🟦
10.04	Fuel price levels*	40	🟦
10.05	Hotel price index*	99	▨
	11th pillar: Human resources		
11.01	Primary education enrollment*	124	▨
11.02	Secondary education enrollment*	117	▨
11.03	Quality of the educational system	60	▨
11.04	Local availability of research and training services	52	▨
11.05	Extent of staff training	88	▨
11.06	Hiring and firing practices	10	🟦
11.07	Ease of hiring foreign labor	21	🟦
11.08	HIV prevalence*	119	▨
11.09	Business impact of HIV/AIDS	79	▨
11.10	Life expectancy*	127	▨
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	127	▨
12.02	Attitude of population toward foreign visitors	109	▨
12.03	Extension of business trips recommended	111	▨
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	▨
13.02	Protected areas*	38	🟦
13.03	Quality of the natural environment	117	▨
13.04	Total known species*	23	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	54	▨
14.02	Sports stadiums*	118	▨
14.03	Number of international fairs and exhibitions*	91	▨
14.04	Creative industries exports*	104	▨

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Norway

Key indicators

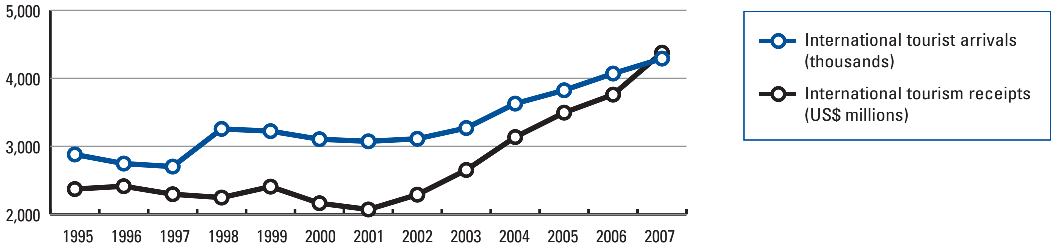
Population (millions), 2007	4.7
Surface area (1,000 square kilometers)	323.8
Gross domestic product (US$ billions), 2007	389.5
Gross domestic product (PPP, US$) per capita, 2007	53,152.4
Real GDP growth (percent), 2007	3.7
Environmental Performance Index, 2008 (out of 149 countries)	3

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	7,077	1.7	4.3
Employment (1,000 jobs)	44	1.8	1.0
T&T economy, 2008 estimates			
GDP (US$ millions)	25,938	6.1	4.0
Employment (1,000 jobs)	175	7.1	0.7

Source: World Travel & Tourism Council, TSA Research 2008

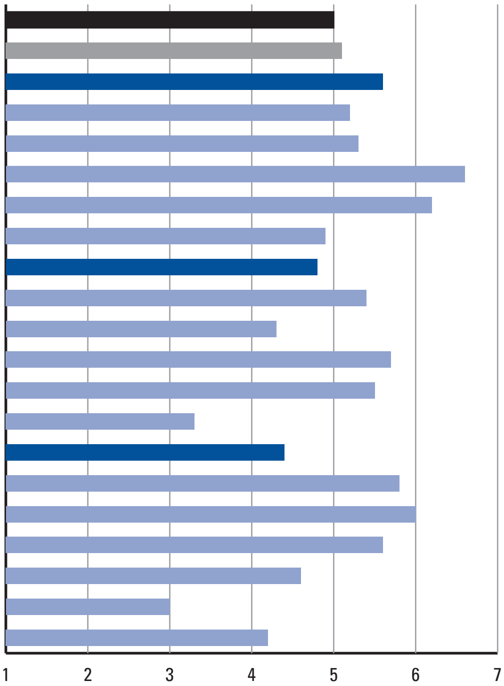
International tourist arrivals (thousands), 2007	4,290
International tourism receipts (US$ millions), 2007	4,377



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**19**	**5.0**
2008 Index	17	5.1
T&T regulatory framework	**9**	**5.6**
Policy rules and regulations	23	5.2
Environmental sustainability	19	5.3
Safety and security	3	6.6
Health and hygiene	24	6.2
Prioritization of Travel & Tourism	38	4.9
T&T business environment and infrastructure	**19**	**4.8**
Air transport infrastructure	8	5.4
Ground transport infrastructure	37	4.3
Tourism infrastructure	19	5.7
ICT infrastructure	6	5.5
Price competitiveness in the T&T industry	129	3.3
T&T human, cultural, and natural resources	**36**	**4.4**
Human resources	14	5.8
Education and training	10	6.0
Availability of qualified labor	38	5.6
Affinity for Travel & Tourism	82	4.6
Natural resources	72	3.0
Cultural resources	28	4.2



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Norway

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	56	⬜
1.02	Property rights	9	🟦
1.03	Business impact of rules on FDI	75	⬜
1.04	Visa requirements*	40	⬜
1.05	Openness of bilateral Air Service Agreements*	71	⬜
1.06	Transparency of government policymaking	8	🟦
1.07	Time required to start a business*	25	⬜
1.08	Cost to start a business*	20	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	6	🟦
2.02	Enforcement of environmental regulation	8	🟦
2.03	Sustainability of T&T industry development	43	⬜
2.04	Carbon dioxide emissions*	120	⬜
2.05	Particulate matter concentration*	25	⬜
2.06	Threatened species*	32	⬜
2.07	Environmental treaty ratification*	2	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	3	🟦
3.02	Reliability of police services	10	🟦
3.03	Business costs of crime and violence	4	🟦
3.04	Road traffic accidents*	25	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	9	🟦
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	41	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	65	⬜
5.02	T&T government expenditure*	26	⬜
5.03	Effectiveness of marketing and branding	45	⬜
5.04	T&T fair attendance*	41	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	10	🟦
6.02	Available seat kilometers, domestic*	22	⬜
6.03	Available seat kilometers, international*	49	⬜
6.04	Departures per 1,000 population*	4	🟦
6.05	Airport density*	2	🟦
6.06	Number of operating airlines*	35	⬜
6.07	International air transport network	21	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	48	⬜
7.02	Quality of railroad infrastructure	31	⬜
7.03	Quality of port infrastructure	12	🟦
7.04	Quality of ground transport network	24	⬜
7.05	Road density*	67	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	13	🟦
8.02	Presence of major car rental companies*	23	⬜
8.03	ATMs accepting Visa cards*	24	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	14	🟦
9.02	Internet users*	2	🟦
9.03	Telephone lines*	26	⬜
9.04	Broadband Internet subscribers*	7	🟦
9.05	Mobile telephone subscribers*	28	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	19	⬜
10.02	Purchasing power parity*	130	⬜
10.03	Extent and effect of taxation	55	⬜
10.04	Fuel price levels*	128	⬜
10.05	Hotel price index*	88	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	19	⬜
11.02	Secondary education enrollment*	8	🟦
11.03	Quality of the educational system	11	🟦
11.04	Local availability of research and training services	18	🟦
11.05	Extent of staff training	7	🟦
11.06	Hiring and firing practices	121	⬜
11.07	Ease of hiring foreign labor	40	⬜
11.08	HIV prevalence*	22	⬜
11.09	Business impact of HIV/AIDS	1	🟦
11.10	Life expectancy*	12	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	68	⬜
12.02	Attitude of population toward foreign visitors	36	⬜
12.03	Extension of business trips recommended	113	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	40	⬜
13.02	Protected areas*	99	⬜
13.03	Quality of the natural environment	7	🟦
13.04	Total known species*	112	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	33	⬜
14.02	Sports stadiums*	12	🟦
14.03	Number of international fairs and exhibitions*	29	⬜
14.04	Creative industries exports*	50	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Oman

Key indicators

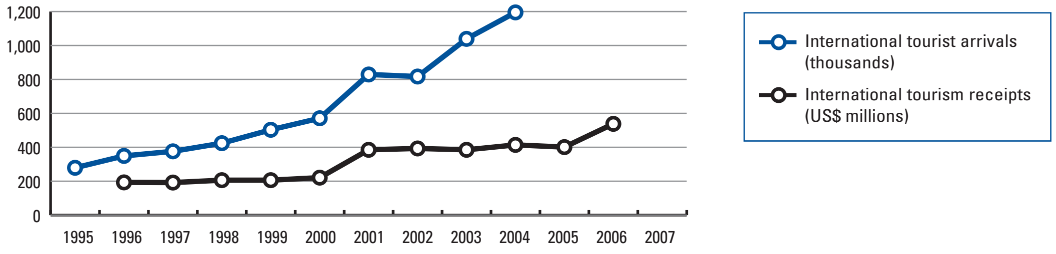
Population (millions), 2007	2.7
Surface area (1,000 square kilometers)	309.5
Gross domestic product (US$ billions), 2007	40.4
Gross domestic product (PPP, US$) per capita, 2007	23,987.1
Real GDP growth (percent), 2007	6.4
Environmental Performance Index, 2008 (out of 149 countries)	91

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	944	2.1	7.5
Employment (1,000 jobs)	30	3.0	5.0
T&T economy, 2008 estimates			
GDP (US$ millions)	4,366	9.8	5.0
Employment (1,000 jobs)	104	10.2	3.1

Source: World Travel & Tourism Council, TSA Research 2008

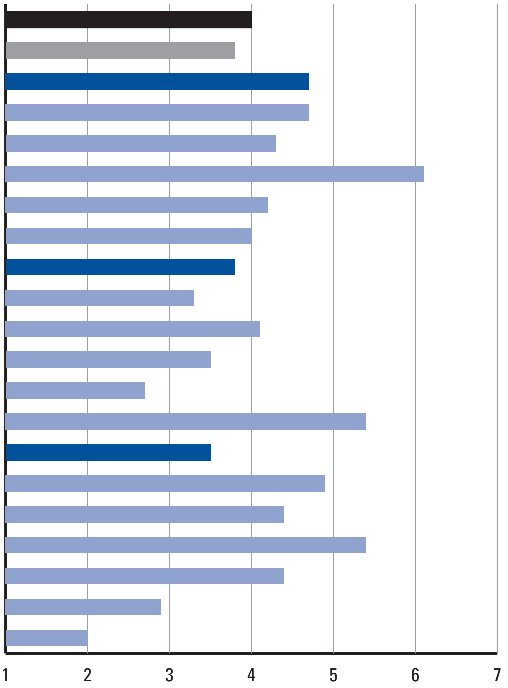
International tourist arrivals (thousands), 2004	1,195
International tourism receipts (US$ millions), 2006	538



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**68**	**4.0**
2008 Index	76	3.8
T&T regulatory framework	**59**	**4.7**
Policy rules and regulations	49	4.7
Environmental sustainability	78	4.3
Safety and security	16	6.1
Health and hygiene	78	4.2
Prioritization of Travel & Tourism	86	4.0
T&T business environment and infrastructure	**53**	**3.8**
Air transport infrastructure	57	3.3
Ground transport infrastructure	46	4.1
Tourism infrastructure	61	3.5
ICT infrastructure	75	2.7
Price competitiveness in the T&T industry	17	5.4
T&T human, cultural, and natural resources	**99**	**3.5**
Human resources	84	4.9
Education and training	82	4.4
Availability of qualified labor	79	5.4
Affinity for Travel & Tourism	107	4.4
Natural resources	82	2.9
Cultural resources	80	2.0



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Oman

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	92	⬜
1.02	Property rights	41	🟦
1.03	Business impact of rules on FDI	84	⬜
1.04	Visa requirements*	86	⬜
1.05	Openness of bilateral Air Service Agreements*	99	⬜
1.06	Transparency of government policymaking	18	🟦
1.07	Time required to start a business*	38	🟦
1.08	Cost to start a business*	30	🟦
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	19	🟦
2.02	Enforcement of environmental regulation	16	🟦
2.03	Sustainability of T&T industry development	22	🟦
2.04	Carbon dioxide emissions*	113	⬜
2.05	Particulate matter concentration*	126	⬜
2.06	Threatened species*	64	⬜
2.07	Environmental treaty ratification*	52	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	51	⬜
3.02	Reliability of police services	27	🟦
3.03	Business costs of crime and violence	20	🟦
3.04	Road traffic accidents*	26	🟦
	4th pillar: Health and hygiene		
4.01	Physician density*	63	⬜
4.02	Access to improved sanitation*	64	⬜
4.03	Access to improved drinking water*	96	⬜
4.04	Hospital beds*	81	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	52	⬜
5.02	T&T government expenditure*	113	⬜
5.03	Effectiveness of marketing and branding	59	⬜
5.04	T&T fair attendance*	62	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	57	⬜
6.02	Available seat kilometers, domestic*	54	⬜
6.03	Available seat kilometers, international*	75	⬜
6.04	Departures per 1,000 population*	29	🟦
6.05	Airport density*	40	🟦
6.06	Number of operating airlines*	63	⬜
6.07	International air transport network	71	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	21	🟦
7.02	Quality of railroad infrastructure	n/a	
7.03	Quality of port infrastructure	31	🟦
7.04	Quality of ground transport network	72	⬜
7.05	Road density*	97	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	62	⬜
8.02	Presence of major car rental companies*	23	🟦
8.03	ATMs accepting Visa cards*	64	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	67	⬜
9.02	Internet users*	83	⬜
9.03	Telephone lines*	89	⬜
9.04	Broadband Internet subscribers*	86	⬜
9.05	Mobile telephone subscribers*	45	🟦
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	11	🟦
10.02	Purchasing power parity*	80	⬜
10.03	Extent and effect of taxation	7	🟦
10.04	Fuel price levels*	12	🟦
10.05	Hotel price index*	91	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	118	⬜
11.02	Secondary education enrollment*	62	⬜
11.03	Quality of the educational system	51	⬜
11.04	Local availability of research and training services	79	⬜
11.05	Extent of staff training	49	🟦
11.06	Hiring and firing practices	58	⬜
11.07	Ease of hiring foreign labor	89	⬜
11.08	HIV prevalence*	22	🟦
11.09	Business impact of HIV/AIDS	54	⬜
11.10	Life expectancy*	50	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	92	⬜
12.02	Attitude of population toward foreign visitors	123	⬜
12.03	Extension of business trips recommended	64	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	73	⬜
13.03	Quality of the natural environment	13	🟦
13.04	Total known species*	90	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	54	⬜
14.02	Sports stadiums*	53	⬜
14.03	Number of international fairs and exhibitions*	107	⬜
14.04	Creative industries exports*	83	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Pakistan

Key indicators

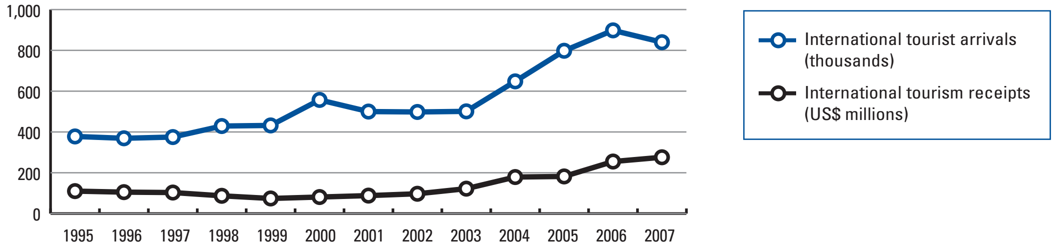
Population (millions), 2007	164.6
Surface area (1,000 square kilometers)	796.1
Gross domestic product (US$ billions), 2007	143.8
Gross domestic product (PPP, US$) per capita, 2007	2,594.0
Real GDP growth (percent), 2007	6.4
Environmental Performance Index, 2008 (out of 149 countries)	124

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	3,778	2.3	4.8
Employment (1,000 jobs)	1,056	1.9	2.7
T&T economy, 2008 estimates			
GDP (US$ millions)	9,856	6.1	4.7
Employment (1,000 jobs)	2,809	5.0	2.6

Source: World Travel & Tourism Council, TSA Research 2008

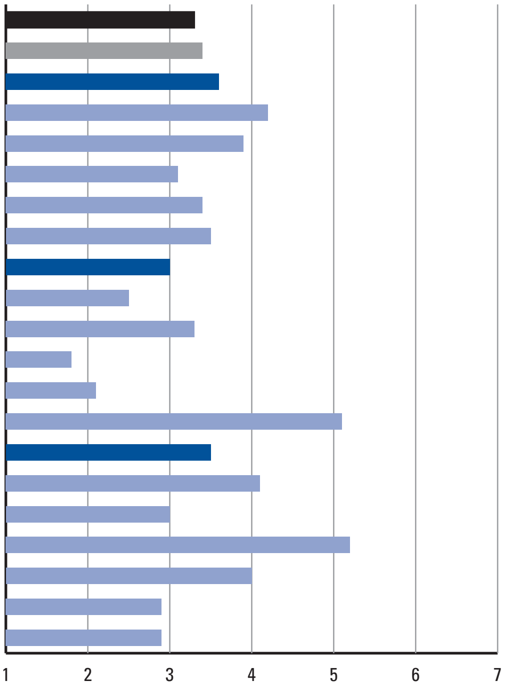
International tourist arrivals (thousands), 2007	840
International tourism receipts (US$ millions), 2007	276



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**113**	**3.3**
2008 Index	111	3.4
T&T regulatory framework	**124**	**3.6**
Policy rules and regulations	81	4.2
Environmental sustainability	118	3.9
Safety and security	132	3.1
Health and hygiene	98	3.4
Prioritization of Travel & Tourism	113	3.5
T&T business environment and infrastructure	**94**	**3.0**
Air transport infrastructure	99	2.5
Ground transport infrastructure	73	3.3
Tourism infrastructure	102	1.8
ICT infrastructure	101	2.1
Price competitiveness in the T&T industry	35	5.1
T&T human, cultural, and natural resources	**108**	**3.5**
Human resources	115	4.1
Education and training	126	3.0
Availability of qualified labor	94	5.2
Affinity for Travel & Tourism	129	4.0
Natural resources	83	2.9
Cultural resources	44	2.9



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Pakistan

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	73	⬜
1.02	Property rights	93	⬜
1.03	Business impact of rules on FDI	29	🟦
1.04	Visa requirements*	124	⬜
1.05	Openness of bilateral Air Service Agreements*	65	⬜
1.06	Transparency of government policymaking	109	⬜
1.07	Time required to start a business*	68	⬜
1.08	Cost to start a business*	70	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	91	⬜
2.02	Enforcement of environmental regulation	103	⬜
2.03	Sustainability of T&T industry development	117	⬜
2.04	Carbon dioxide emissions*	30	🟦
2.05	Particulate matter concentration*	122	⬜
2.06	Threatened species*	86	⬜
2.07	Environmental treaty ratification*	52	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	130	⬜
3.02	Reliability of police services	106	⬜
3.03	Business costs of crime and violence	110	⬜
3.04	Road traffic accidents*	118	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	91	⬜
4.02	Access to improved sanitation*	95	⬜
4.03	Access to improved drinking water*	79	⬜
4.04	Hospital beds*	99	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	114	⬜
5.02	T&T government expenditure*	101	⬜
5.03	Effectiveness of marketing and branding	117	⬜
5.04	T&T fair attendance*	62	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	83	⬜
6.02	Available seat kilometers, domestic*	29	🟦
6.03	Available seat kilometers, international*	48	🟦
6.04	Departures per 1,000 population*	112	⬜
6.05	Airport density*	119	⬜
6.06	Number of operating airlines*	59	⬜
6.07	International air transport network	108	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	69	⬜
7.02	Quality of railroad infrastructure	53	⬜
7.03	Quality of port infrastructure	78	⬜
7.04	Quality of ground transport network	89	⬜
7.05	Road density*	61	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	119	⬜
8.02	Presence of major car rental companies*	73	⬜
8.03	ATMs accepting Visa cards*	111	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	89	⬜
9.02	Internet users*	90	⬜
9.03	Telephone lines*	109	⬜
9.04	Broadband Internet subscribers*	102	⬜
9.05	Mobile telephone subscribers*	90	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	77	⬜
10.02	Purchasing power parity*	13	🟦
10.03	Extent and effect of taxation	42	🟦
10.04	Fuel price levels*	36	🟦
10.05	Hotel price index*	76	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	121	⬜
11.02	Secondary education enrollment*	120	⬜
11.03	Quality of the educational system	104	⬜
11.04	Local availability of research and training services	103	⬜
11.05	Extent of staff training	118	⬜
11.06	Hiring and firing practices	31	🟦
11.07	Ease of hiring foreign labor	56	⬜
11.08	HIV prevalence*	22	🟦
11.09	Business impact of HIV/AIDS	94	⬜
11.10	Life expectancy*	104	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	125	⬜
12.02	Attitude of population toward foreign visitors	127	⬜
12.03	Extension of business trips recommended	114	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	69	⬜
13.03	Quality of the natural environment	105	⬜
13.04	Total known species*	42	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	33	🟦
14.02	Sports stadiums*	120	⬜
14.03	Number of international fairs and exhibitions*	77	⬜
14.04	Creative industries exports*	27	🟦

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Panama

Key indicators

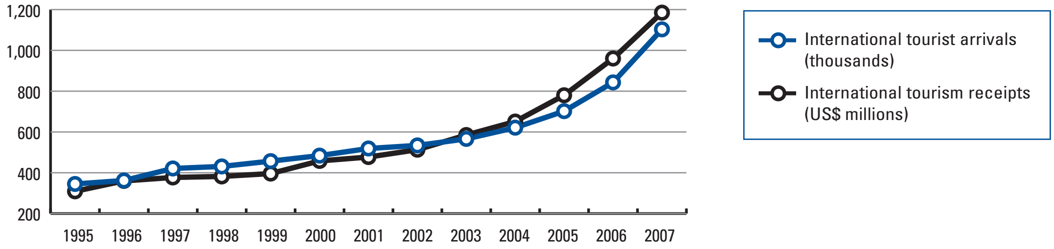
Population (millions), 2007	3.3
Surface area (1,000 square kilometers)	75.5
Gross domestic product (US$ billions), 2007	19.7
Gross domestic product (PPP, US$) per capita, 2007	10,351.4
Real GDP growth (percent), 2007	11.5
Environmental Performance Index, 2008 (out of 149 countries)	32

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	1,071	4.9	5.3
Employment (1,000 jobs)	68	4.9	3.2
T&T economy, 2008 estimates			
GDP (US$ millions)	2,650	12.1	4.7
Employment (1,000 jobs)	161	11.6	2.7

Source: World Travel & Tourism Council, TSA Research 2008

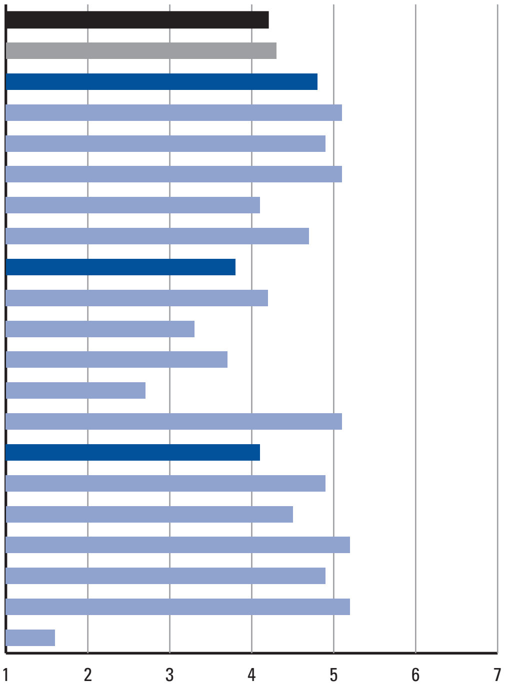
International tourist arrivals (thousands), 2007	1,103
International tourism receipts (US$ millions), 2007	1,185



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**55**	**4.2**
2008 Index	50	4.3
T&T regulatory framework	**53**	**4.8**
Policy rules and regulations	30	5.1
Environmental sustainability	34	4.9
Safety and security	70	5.1
Health and hygiene	83	4.1
Prioritization of Travel & Tourism	48	4.7
T&T business environment and infrastructure	**56**	**3.8**
Air transport infrastructure	36	4.2
Ground transport infrastructure	74	3.3
Tourism infrastructure	56	3.7
ICT infrastructure	76	2.7
Price competitiveness in the T&T industry	33	5.1
T&T human, cultural, and natural resources	**53**	**4.1**
Human resources	87	4.9
Education and training	76	4.5
Availability of qualified labor	93	5.2
Affinity for Travel & Tourism	58	4.9
Natural resources	9	5.2
Cultural resources	96	1.6



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Panama

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	20	🟦
1.02	Property rights	47	🟦
1.03	Business impact of rules on FDI	18	🟦
1.04	Visa requirements*	29	🟦
1.05	Openness of bilateral Air Service Agreements*	11	🟦
1.06	Transparency of government policymaking	65	⬜
1.07	Time required to start a business*	33	🟦
1.08	Cost to start a business*	84	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	75	⬜
2.02	Enforcement of environmental regulation	75	⬜
2.03	Sustainability of T&T industry development	40	🟦
2.04	Carbon dioxide emissions*	49	🟦
2.05	Particulate matter concentration*	63	⬜
2.06	Threatened species*	85	⬜
2.07	Environmental treaty ratification*	21	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	70	⬜
3.02	Reliability of police services	99	⬜
3.03	Business costs of crime and violence	81	⬜
3.04	Road traffic accidents*	33	🟦
	4th pillar: Health and hygiene		
4.01	Physician density*	67	⬜
4.02	Access to improved sanitation*	84	⬜
4.03	Access to improved drinking water*	74	⬜
4.04	Hospital beds*	87	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	42	🟦
5.02	T&T government expenditure*	37	🟦
5.03	Effectiveness of marketing and branding	33	🟦
5.04	T&T fair attendance*	62	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	30	🟦
6.02	Available seat kilometers, domestic*	66	⬜
6.03	Available seat kilometers, international*	62	⬜
6.04	Departures per 1,000 population*	36	🟦
6.05	Airport density*	5	🟦
6.06	Number of operating airlines*	89	⬜
6.07	International air transport network	24	🟦
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	57	⬜
7.02	Quality of railroad infrastructure	64	⬜
7.03	Quality of port infrastructure	15	🟦
7.04	Quality of ground transport network	132	⬜
7.05	Road density*	84	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	55	⬜
8.02	Presence of major car rental companies*	73	⬜
8.03	ATMs accepting Visa cards*	26	🟦
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	57	⬜
9.02	Internet users*	79	⬜
9.03	Telephone lines*	78	⬜
9.04	Broadband Internet subscribers*	82	⬜
9.05	Mobile telephone subscribers*	77	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	18	🟦
10.02	Purchasing power parity*	53	⬜
10.03	Extent and effect of taxation	76	⬜
10.04	Fuel price levels*	31	🟦
10.05	Hotel price index*	56	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	15	🟦
11.02	Secondary education enrollment*	93	⬜
11.03	Quality of the educational system	108	⬜
11.04	Local availability of research and training services	65	⬜
11.05	Extent of staff training	58	⬜
11.06	Hiring and firing practices	104	⬜
11.07	Ease of hiring foreign labor	117	⬜
11.08	HIV prevalence*	100	⬜
11.09	Business impact of HIV/AIDS	70	⬜
11.10	Life expectancy*	40	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	38	🟦
12.02	Attitude of population toward foreign visitors	104	⬜
12.03	Extension of business trips recommended	83	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	16	🟦
13.02	Protected areas*	28	🟦
13.03	Quality of the natural environment	41	🟦
13.04	Total known species*	18	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	82	⬜
14.02	Sports stadiums*	80	⬜
14.03	Number of international fairs and exhibitions*	58	⬜
14.04	Creative industries exports*	88	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Paraguay

Key indicators

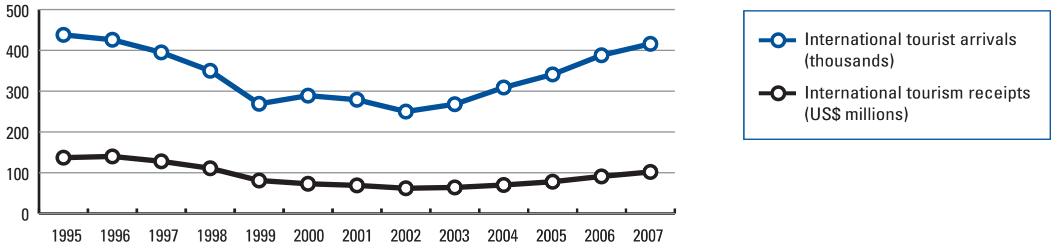
Population (millions), 2007	6.4
Surface area (1,000 square kilometers)	406.8
Gross domestic product (US$ billions), 2007	12.0
Gross domestic product (PPP, US$) per capita, 2007	4,509.7
Real GDP growth (percent), 2007	6.8
Environmental Performance Index, 2008 (out of 149 countries)	63

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	165	1.3	2.3
Employment (1,000 jobs)	34	1.2	1.7
T&T economy, 2008 estimates			
GDP (US$ millions)	582	4.6	2.9
Employment (1,000 jobs)	113	4.0	2.2

Source: World Travel & Tourism Council, TSA Research 2008

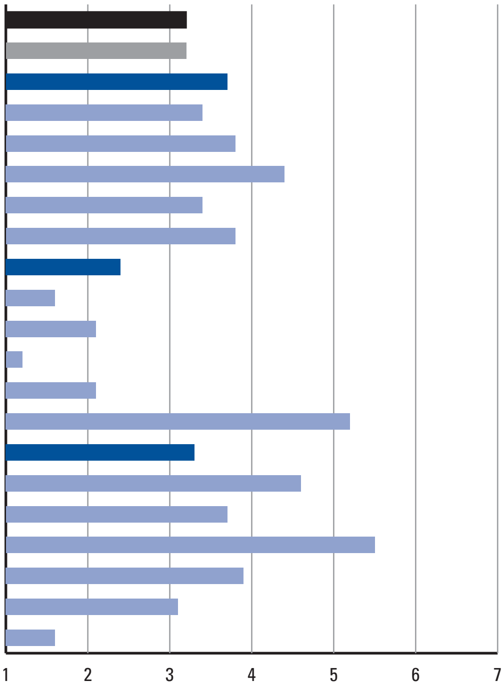
International tourist arrivals (thousands), 2007	416
International tourism receipts (US$ millions), 2007	102



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**122**	**3.2**
2008 Index	115	3.2
T&T regulatory framework	**116**	**3.7**
Policy rules and regulations	121	3.4
Environmental sustainability	121	3.8
Safety and security	105	4.4
Health and hygiene	99	3.4
Prioritization of Travel & Tourism	98	3.8
T&T business environment and infrastructure	**130**	**2.4**
Air transport infrastructure	133	1.6
Ground transport infrastructure	132	2.1
Tourism infrastructure	127	1.2
ICT infrastructure	99	2.1
Price competitiveness in the T&T industry	25	5.2
T&T human, cultural, and natural resources	**122**	**3.3**
Human resources	97	4.6
Education and training	109	3.7
Availability of qualified labor	51	5.5
Affinity for Travel & Tourism	130	3.9
Natural resources	66	3.1
Cultural resources	102	1.6



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Paraguay

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	115	⬜
1.02	Property rights	129	⬜
1.03	Business impact of rules on FDI	119	⬜
1.04	Visa requirements*	76	⬜
1.05	Openness of bilateral Air Service Agreements*	36	🟦
1.06	Transparency of government policymaking	126	⬜
1.07	Time required to start a business*	93	⬜
1.08	Cost to start a business*	110	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	111	⬜
2.02	Enforcement of environmental regulation	126	⬜
2.03	Sustainability of T&T industry development	128	⬜
2.04	Carbon dioxide emissions*	24	🟦
2.05	Particulate matter concentration*	110	⬜
2.06	Threatened species*	52	⬜
2.07	Environmental treaty ratification*	81	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	66	⬜
3.02	Reliability of police services	132	⬜
3.03	Business costs of crime and violence	121	⬜
3.04	Road traffic accidents*	40	🟦
	4th pillar: Health and hygiene		
4.01	Physician density*	86	⬜
4.02	Access to improved sanitation*	88	⬜
4.03	Access to improved drinking water*	106	⬜
4.04	Hospital beds*	95	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	130	⬜
5.02	T&T government expenditure*	15	🟦
5.03	Effectiveness of marketing and branding	129	⬜
5.04	T&T fair attendance*	81	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	133	⬜
6.02	Available seat kilometers, domestic*	81	⬜
6.03	Available seat kilometers, international*	116	⬜
6.04	Departures per 1,000 population*	80	⬜
6.05	Airport density*	100	⬜
6.06	Number of operating airlines*	129	⬜
6.07	International air transport network	132	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	129	⬜
7.02	Quality of railroad infrastructure	119	⬜
7.03	Quality of port infrastructure	68	⬜
7.04	Quality of ground transport network	133	⬜
7.05	Road density*	112	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	105	⬜
8.02	Presence of major car rental companies*	122	⬜
8.03	ATMs accepting Visa cards*	97	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	127	⬜
9.02	Internet users*	109	⬜
9.03	Telephone lines*	99	⬜
9.04	Broadband Internet subscribers*	85	⬜
9.05	Mobile telephone subscribers*	79	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	53	⬜
10.02	Purchasing power parity*	28	🟦
10.03	Extent and effect of taxation	22	🟦
10.04	Fuel price levels*	54	⬜
10.05	Hotel price index*	44	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	59	⬜
11.02	Secondary education enrollment*	98	⬜
11.03	Quality of the educational system	133	⬜
11.04	Local availability of research and training services	131	⬜
11.05	Extent of staff training	128	⬜
11.06	Hiring and firing practices	98	⬜
11.07	Ease of hiring foreign labor	22	🟦
11.08	HIV prevalence*	85	⬜
11.09	Business impact of HIV/AIDS	89	⬜
11.10	Life expectancy*	42	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	116	⬜
12.02	Attitude of population toward foreign visitors	97	⬜
12.03	Extension of business trips recommended	131	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	89	⬜
13.03	Quality of the natural environment	50	🟦
13.04	Total known species*	37	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	97	⬜
14.02	Sports stadiums*	59	⬜
14.03	Number of international fairs and exhibitions*	74	⬜
14.04	Creative industries exports*	99	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Peru

Key indicators

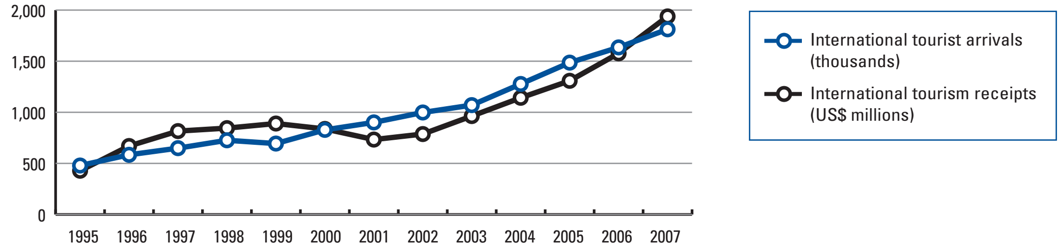
Population (millions), 2007	28.8
Surface area (1,000 square kilometers)	1,285.2
Gross domestic product (US$ billions), 2007	107.4
Gross domestic product (PPP, US$) per capita, 2007	7,809.4
Real GDP growth (percent), 2007	8.9
Environmental Performance Index, 2008 (out of 149 countries)	60

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	3,240	2.8	4.3
Employment (1,000 jobs)	348	2.7	2.8
T&T economy, 2008 estimates			
GDP (US$ millions)	8,701	7.5	4.1
Employment (1,000 jobs)	892	6.9	2.7

Source: World Travel & Tourism Council, TSA Research 2008

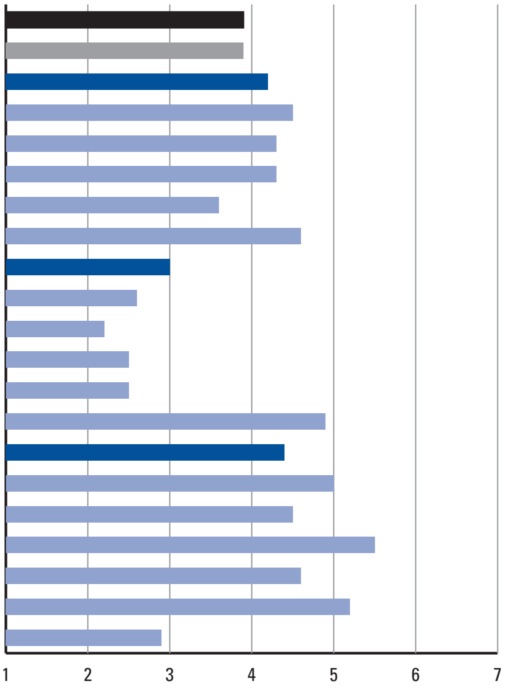
International tourist arrivals (thousands), 2007	1,812
International tourism receipts (US$ millions), 2007	1,938



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**74**	**3.9**
2008 Index	70	3.9
T&T regulatory framework	**89**	**4.2**
Policy rules and regulations	63	4.5
Environmental sustainability	85	4.3
Safety and security	108	4.3
Health and hygiene	96	3.6
Prioritization of Travel & Tourism	53	4.6
T&T business environment and infrastructure	**92**	**3.0**
Air transport infrastructure	92	2.6
Ground transport infrastructure	125	2.2
Tourism infrastructure	78	2.5
ICT infrastructure	81	2.5
Price competitiveness in the T&T industry	47	4.9
T&T human, cultural, and natural resources	**33**	**4.4**
Human resources	71	5.0
Education and training	77	4.5
Availability of qualified labor	50	5.5
Affinity for Travel & Tourism	85	4.6
Natural resources	8	5.2
Cultural resources	42	2.9



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Peru

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	19	🟦
1.02	Property rights	102	⬜
1.03	Business impact of rules on FDI	30	🟦
1.04	Visa requirements*	10	🟦
1.05	Openness of bilateral Air Service Agreements*	7	🟦
1.06	Transparency of government policymaking	96	⬜
1.07	Time required to start a business*	117	⬜
1.08	Cost to start a business*	88	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	95	⬜
2.02	Enforcement of environmental regulation	102	⬜
2.03	Sustainability of T&T industry development	70	⬜
2.04	Carbon dioxide emissions*	38	🟦
2.05	Particulate matter concentration*	93	⬜
2.06	Threatened species*	112	⬜
2.07	Environmental treaty ratification*	52	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	102	⬜
3.02	Reliability of police services	122	⬜
3.03	Business costs of crime and violence	113	⬜
3.04	Road traffic accidents*	88	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	80	⬜
4.02	Access to improved sanitation*	85	⬜
4.03	Access to improved drinking water*	92	⬜
4.04	Hospital beds*	107	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	59	⬜
5.02	T&T government expenditure*	81	⬜
5.03	Effectiveness of marketing and branding	43	🟦
5.04	T&T fair attendance*	25	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	94	⬜
6.02	Available seat kilometers, domestic*	33	🟦
6.03	Available seat kilometers, international*	47	🟦
6.04	Departures per 1,000 population*	75	⬜
6.05	Airport density*	73	⬜
6.06	Number of operating airlines*	78	⬜
6.07	International air transport network	90	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	99	⬜
7.02	Quality of railroad infrastructure	90	⬜
7.03	Quality of port infrastructure	127	⬜
7.04	Quality of ground transport network	120	⬜
7.05	Road density*	114	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	54	⬜
8.02	Presence of major car rental companies*	73	⬜
8.03	ATMs accepting Visa cards*	92	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	90	⬜
9.02	Internet users*	53	⬜
9.03	Telephone lines*	92	⬜
9.04	Broadband Internet subscribers*	68	⬜
9.05	Mobile telephone subscribers*	87	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	86	⬜
10.02	Purchasing power parity*	44	🟦
10.03	Extent and effect of taxation	74	⬜
10.04	Fuel price levels*	66	⬜
10.05	Hotel price index*	18	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	42	🟦
11.02	Secondary education enrollment*	46	🟦
11.03	Quality of the educational system	132	⬜
11.04	Local availability of research and training services	86	⬜
11.05	Extent of staff training	93	⬜
11.06	Hiring and firing practices	93	⬜
11.07	Ease of hiring foreign labor	20	🟦
11.08	HIV prevalence*	78	⬜
11.09	Business impact of HIV/AIDS	81	⬜
11.10	Life expectancy*	55	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	103	⬜
12.02	Attitude of population toward foreign visitors	85	⬜
12.03	Extension of business trips recommended	52	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	10	🟦
13.02	Protected areas*	55	⬜
13.03	Quality of the natural environment	76	⬜
13.04	Total known species*	3	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	19	🟦
14.02	Sports stadiums*	73	⬜
14.03	Number of international fairs and exhibitions*	50	🟦
14.04	Creative industries exports*	49	🟦

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Philippines

Key indicators

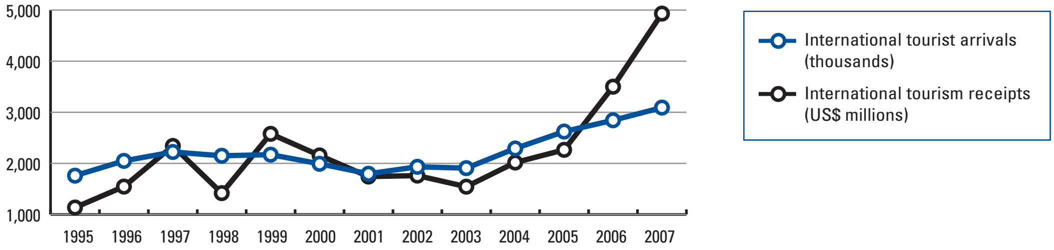
Population (millions), 2007	85.9
Surface area (1,000 square kilometers)	300.0
Gross domestic product (US$ billions), 2007	144.1
Gross domestic product (PPP, US$) per capita, 2007	3,383.3
Real GDP growth (percent), 2007	7.2
Environmental Performance Index, 2008 (out of 149 countries)	61

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	6,774	3.9	4.0
Employment (1,000 jobs)	1,377	4.0	1.3
T&T economy, 2008 estimates			
GDP (US$ millions)	15,115	8.8	4.5
Employment (1,000 jobs)	3,541	10.3	1.5

Source: World Travel & Tourism Council, TSA Research 2008

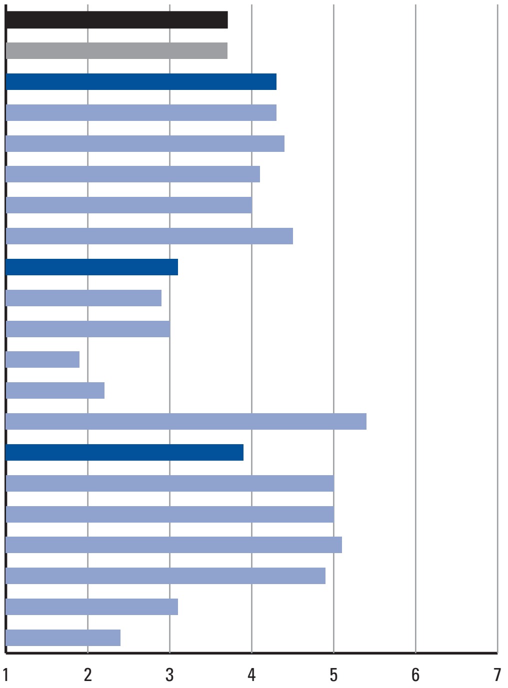
International tourist arrivals (thousands), 2007	3,092
International tourism receipts (US$ millions), 2007	4,931



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**86**	**3.7**
2008 Index	81	3.7
T&T regulatory framework	**85**	**4.3**
Policy rules and regulations	72	4.3
Environmental sustainability	73	4.4
Safety and security	113	4.1
Health and hygiene	87	4.0
Prioritization of Travel & Tourism	59	4.5
T&T business environment and infrastructure	**89**	**3.1**
Air transport infrastructure	73	2.9
Ground transport infrastructure	90	3.0
Tourism infrastructure	96	1.9
ICT infrastructure	92	2.2
Price competitiveness in the T&T industry	16	5.4
T&T human, cultural, and natural resources	**70**	**3.9**
Human resources	69	5.0
Education and training	51	5.0
Availability of qualified labor	98	5.1
Affinity for Travel & Tourism	53	4.9
Natural resources	65	3.1
Cultural resources	63	2.4



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Philippines

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	98	⬜
1.02	Property rights	92	⬜
1.03	Business impact of rules on FDI	97	⬜
1.04	Visa requirements*	3	🟦
1.05	Openness of bilateral Air Service Agreements*	28	🟦
1.06	Transparency of government policymaking	85	⬜
1.07	Time required to start a business*	114	⬜
1.08	Cost to start a business*	94	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	65	⬜
2.02	Enforcement of environmental regulation	97	⬜
2.03	Sustainability of T&T industry development	84	⬜
2.04	Carbon dioxide emissions*	34	🟦
2.05	Particulate matter concentration*	42	🟦
2.06	Threatened species*	129	⬜
2.07	Environmental treaty ratification*	34	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	125	⬜
3.02	Reliability of police services	98	⬜
3.03	Business costs of crime and violence	93	⬜
3.04	Road traffic accidents*	108	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	81	⬜
4.02	Access to improved sanitation*	80	⬜
4.03	Access to improved drinking water*	68	⬜
4.04	Hospital beds*	95	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	55	⬜
5.02	T&T government expenditure*	59	⬜
5.03	Effectiveness of marketing and branding	70	⬜
5.04	T&T fair attendance*	41	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	89	⬜
6.02	Available seat kilometers, domestic*	23	🟦
6.03	Available seat kilometers, international*	29	🟦
6.04	Departures per 1,000 population*	98	⬜
6.05	Airport density*	86	⬜
6.06	Number of operating airlines*	48	🟦
6.07	International air transport network	76	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	94	⬜
7.02	Quality of railroad infrastructure	85	⬜
7.03	Quality of port infrastructure	100	⬜
7.04	Quality of ground transport network	115	⬜
7.05	Road density*	44	🟦

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	118	⬜
8.02	Presence of major car rental companies*	73	⬜
8.03	ATMs accepting Visa cards*	93	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	75	⬜
9.02	Internet users*	103	⬜
9.03	Telephone lines*	107	⬜
9.04	Broadband Internet subscribers*	80	⬜
9.05	Mobile telephone subscribers*	85	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	17	🟦
10.02	Purchasing power parity*	40	🟦
10.03	Extent and effect of taxation	65	⬜
10.04	Fuel price levels*	42	🟦
10.05	Hotel price index*	12	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	76	⬜
11.02	Secondary education enrollment*	79	⬜
11.03	Quality of the educational system	46	🟦
11.04	Local availability of research and training services	51	⬜
11.05	Extent of staff training	30	🟦
11.06	Hiring and firing practices	100	⬜
11.07	Ease of hiring foreign labor	116	⬜
11.08	HIV prevalence*	1	🟦
11.09	Business impact of HIV/AIDS	61	⬜
11.10	Life expectancy*	89	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	76	⬜
12.02	Attitude of population toward foreign visitors	46	🟦
12.03	Extension of business trips recommended	38	🟦
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	23	🟦
13.02	Protected areas*	104	⬜
13.03	Quality of the natural environment	124	⬜
13.04	Total known species*	40	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	45	🟦
14.02	Sports stadiums*	124	⬜
14.03	Number of international fairs and exhibitions*	43	🟦
14.04	Creative industries exports*	37	🟦

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Poland

Key indicators

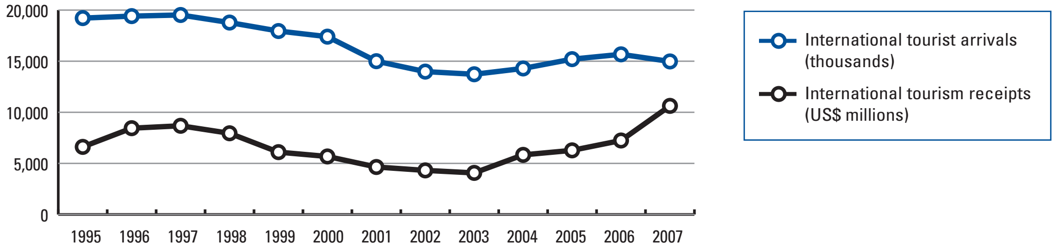
Population (millions), 2007	38.5
Surface area (1,000 square kilometers)	312.7
Gross domestic product (US$ billions), 2007	422.1
Gross domestic product (PPP, US$) per capita, 2007	16,316.2
Real GDP growth (percent), 2007	6.6
Environmental Performance Index, 2008 (out of 149 countries)	42

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	7,962	1.6	4.8
Employment (1,000 jobs)	244	1.6	–0.1
T&T economy, 2008 estimates			
GDP (US$ millions)	38,780	7.7	5.7
Employment (1,000 jobs)	1,092	7.1	0.7

Source: World Travel & Tourism Council, TSA Research 2008

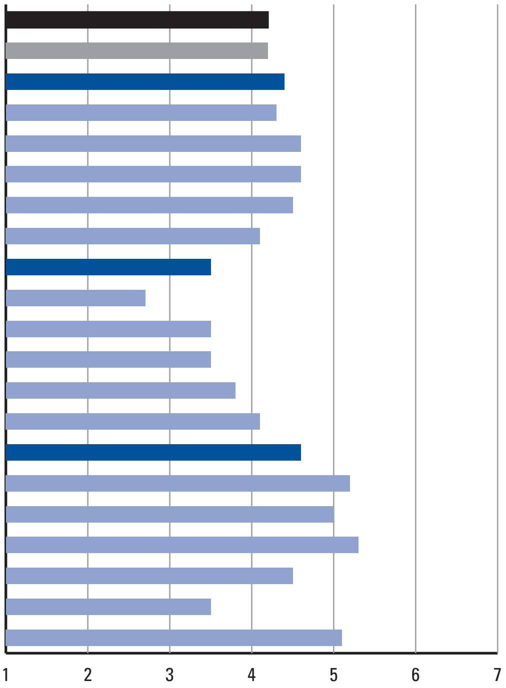
International tourist arrivals (thousands), 2007	14,975
International tourism receipts (US$ millions), 2007	10,627



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**58**	**4.2**
2008 Index	56	4.2
T&T regulatory framework	**72**	**4.4**
Policy rules and regulations	75	4.3
Environmental sustainability	63	4.6
Safety and security	91	4.6
Health and hygiene	67	4.5
Prioritization of Travel & Tourism	82	4.1
T&T business environment and infrastructure	**68**	**3.5**
Air transport infrastructure	79	2.7
Ground transport infrastructure	68	3.5
Tourism infrastructure	59	3.5
ICT infrastructure	41	3.8
Price competitiveness in the T&T industry	105	4.1
T&T human, cultural, and natural resources	**29**	**4.6**
Human resources	56	5.2
Education and training	41	5.0
Availability of qualified labor	88	5.3
Affinity for Travel & Tourism	102	4.5
Natural resources	54	3.5
Cultural resources	21	5.1



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Poland

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	77	⬜
1.02	Property rights	94	⬜
1.03	Business impact of rules on FDI	99	⬜
1.04	Visa requirements*	40	🟦
1.05	Openness of bilateral Air Service Agreements*	12	🟦
1.06	Transparency of government policymaking	127	⬜
1.07	Time required to start a business*	85	⬜
1.08	Cost to start a business*	82	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	72	⬜
2.02	Enforcement of environmental regulation	79	⬜
2.03	Sustainability of T&T industry development	118	⬜
2.04	Carbon dioxide emissions*	95	⬜
2.05	Particulate matter concentration*	69	⬜
2.06	Threatened species*	34	🟦
2.07	Environmental treaty ratification*	21	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	85	⬜
3.02	Reliability of police services	86	⬜
3.03	Business costs of crime and violence	95	⬜
3.04	Road traffic accidents*	98	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	56	⬜
4.02	Access to improved sanitation*	n/a	
4.03	Access to improved drinking water*	n/a	
4.04	Hospital beds*	33	🟦
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	126	⬜
5.02	T&T government expenditure*	82	⬜
5.03	Effectiveness of marketing and branding	114	⬜
5.04	T&T fair attendance*	14	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	103	⬜
6.02	Available seat kilometers, domestic*	50	🟦
6.03	Available seat kilometers, international*	43	🟦
6.04	Departures per 1,000 population*	71	⬜
6.05	Airport density*	108	⬜
6.06	Number of operating airlines*	32	🟦
6.07	International air transport network	92	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	127	⬜
7.02	Quality of railroad infrastructure	61	⬜
7.03	Quality of port infrastructure	119	⬜
7.04	Quality of ground transport network	90	⬜
7.05	Road density*	25	🟦

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	75	⬜
8.02	Presence of major car rental companies*	23	🟦
8.03	ATMs accepting Visa cards*	53	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	30	🟦
9.02	Internet users*	38	🟦
9.03	Telephone lines*	51	⬜
9.04	Broadband Internet subscribers*	41	🟦
9.05	Mobile telephone subscribers*	32	🟦
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	78	⬜
10.02	Purchasing power parity*	89	⬜
10.03	Extent and effect of taxation	127	⬜
10.04	Fuel price levels*	113	⬜
10.05	Hotel price index*	47	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	44	🟦
11.02	Secondary education enrollment*	28	🟦
11.03	Quality of the educational system	54	⬜
11.04	Local availability of research and training services	50	🟦
11.05	Extent of staff training	89	⬜
11.06	Hiring and firing practices	71	⬜
11.07	Ease of hiring foreign labor	114	⬜
11.08	HIV prevalence*	22	🟦
11.09	Business impact of HIV/AIDS	50	🟦
11.10	Life expectancy*	42	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	75	⬜
12.02	Attitude of population toward foreign visitors	125	⬜
12.03	Extension of business trips recommended	79	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	40	🟦
13.02	Protected areas*	20	🟦
13.03	Quality of the natural environment	92	⬜
13.04	Total known species*	94	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	14	🟦
14.02	Sports stadiums*	62	⬜
14.03	Number of international fairs and exhibitions*	25	🟦
14.04	Creative industries exports*	22	🟦

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Portugal

Key indicators

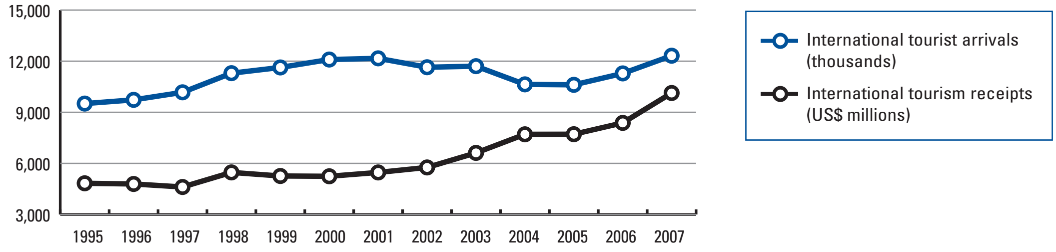
Population (millions), 2007	10.6
Surface area (1,000 square kilometers)	92.1
Gross domestic product (US$ billions), 2007	223.4
Gross domestic product (PPP, US$) per capita, 2007	21,778.7
Real GDP growth (percent), 2007	1.9
Environmental Performance Index, 2008 (out of 149 countries)	18

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	15,768	6.4	4.2
Employment (1,000 jobs)	396	7.6	1.8
T&T economy, 2008 estimates			
GDP (US$ millions)	38,675	15.7	4.1
Employment (1,000 jobs)	989	19.0	1.9

Source: World Travel & Tourism Council, TSA Research 2008

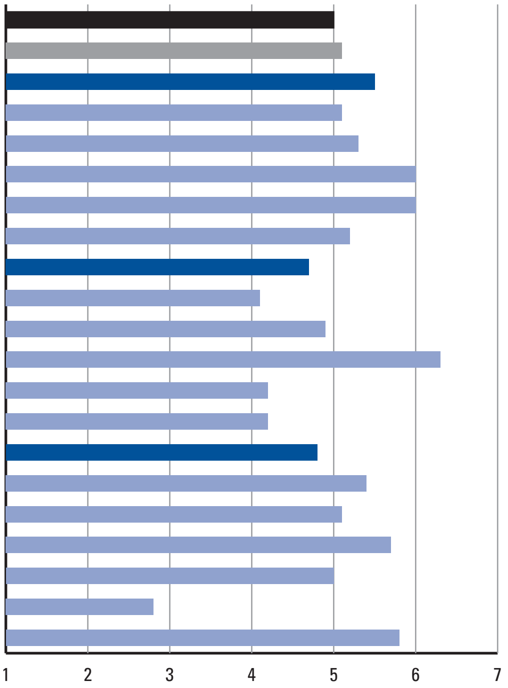
International tourist arrivals (thousands), 2007	12,321
International tourism receipts (US$ millions), 2007	10,132



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**17**	**5.0**
2008 Index	15	5.1
T&T regulatory framework	**15**	**5.5**
Policy rules and regulations	29	5.1
Environmental sustainability	18	5.3
Safety and security	22	6.0
Health and hygiene	32	6.0
Prioritization of Travel & Tourism	26	5.2
T&T business environment and infrastructure	**24**	**4.7**
Air transport infrastructure	38	4.1
Ground transport infrastructure	26	4.9
Tourism infrastructure	11	6.3
ICT infrastructure	34	4.2
Price competitiveness in the T&T industry	99	4.2
T&T human, cultural, and natural resources	**16**	**4.8**
Human resources	34	5.4
Education and training	36	5.1
Availability of qualified labor	26	5.7
Affinity for Travel & Tourism	39	5.0
Natural resources	86	2.8
Cultural resources	12	5.8



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Portugal

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	71	⬜
1.02	Property rights	35	⬜
1.03	Business impact of rules on FDI	34	⬜
1.04	Visa requirements*	40	⬜
1.05	Openness of bilateral Air Service Agreements*	19	⬜
1.06	Transparency of government policymaking	63	⬜
1.07	Time required to start a business*	9	🟦
1.08	Cost to start a business*	27	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	33	⬜
2.02	Enforcement of environmental regulation	33	⬜
2.03	Sustainability of T&T industry development	25	⬜
2.04	Carbon dioxide emissions*	81	⬜
2.05	Particulate matter concentration*	45	⬜
2.06	Threatened species*	71	⬜
2.07	Environmental treaty ratification*	10	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	20	⬜
3.02	Reliability of police services	34	⬜
3.03	Business costs of crime and violence	21	⬜
3.04	Road traffic accidents*	66	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	21	⬜
4.02	Access to improved sanitation*	34	⬜
4.03	Access to improved drinking water*	38	⬜
4.04	Hospital beds*	48	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	16	🟦
5.02	T&T government expenditure*	25	⬜
5.03	Effectiveness of marketing and branding	29	⬜
5.04	T&T fair attendance*	41	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	43	⬜
6.02	Available seat kilometers, domestic*	31	⬜
6.03	Available seat kilometers, international*	27	⬜
6.04	Departures per 1,000 population*	32	⬜
6.05	Airport density*	30	⬜
6.06	Number of operating airlines*	25	⬜
6.07	International air transport network	39	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	14	🟦
7.02	Quality of railroad infrastructure	25	⬜
7.03	Quality of port infrastructure	42	⬜
7.04	Quality of ground transport network	25	⬜
7.05	Road density*	37	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	22	⬜
8.02	Presence of major car rental companies*	1	🟦
8.03	ATMs accepting Visa cards*	3	🟦
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	38	⬜
9.02	Internet users*	47	⬜
9.03	Telephone lines*	33	⬜
9.04	Broadband Internet subscribers*	31	⬜
9.05	Mobile telephone subscribers*	13	🟦
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	69	⬜
10.02	Purchasing power parity*	106	⬜
10.03	Extent and effect of taxation	94	⬜
10.04	Fuel price levels*	91	⬜
10.05	Hotel price index*	53	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	21	⬜
11.02	Secondary education enrollment*	36	⬜
11.03	Quality of the educational system	73	⬜
11.04	Local availability of research and training services	34	⬜
11.05	Extent of staff training	70	⬜
11.06	Hiring and firing practices	124	⬜
11.07	Ease of hiring foreign labor	10	🟦
11.08	HIV prevalence*	78	⬜
11.09	Business impact of HIV/AIDS	17	⬜
11.10	Life expectancy*	22	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	45	⬜
12.02	Attitude of population toward foreign visitors	15	🟦
12.03	Extension of business trips recommended	49	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	40	⬜
13.02	Protected areas*	97	⬜
13.03	Quality of the natural environment	34	⬜
13.04	Total known species*	86	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	14	🟦
14.02	Sports stadiums*	14	🟦
14.03	Number of international fairs and exhibitions*	16	🟦
14.04	Creative industries exports*	33	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Puerto Rico

Key indicators

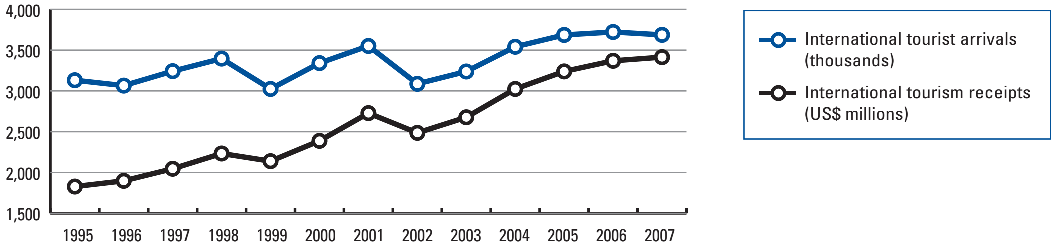
Population (millions), 2007	4.0
Surface area (1,000 square kilometers)	9.0
Gross domestic product (US$ billions), 2007	86.5
Gross domestic product (PPP, US$) per capita, 2007	n/a
Real GDP growth (percent), 2007	n/a
Environmental Performance Index, 2008 (out of 149 countries)	n/a

Travel & Tourism indicators

T&T industry, 2008 estimates		Percent of total	2009–2018 annual growth (%, forecast)
GDP (US$ millions)	1,593	1.6	1.8
Employment (1,000 jobs)	23	1.7	0.7
T&T economy, 2008 estimates			
GDP (US$ millions)	5,634	5.6	2.0
Employment (1,000 jobs)	77	5.8	0.8

Source: World Travel & Tourism Council, TSA Research 2008

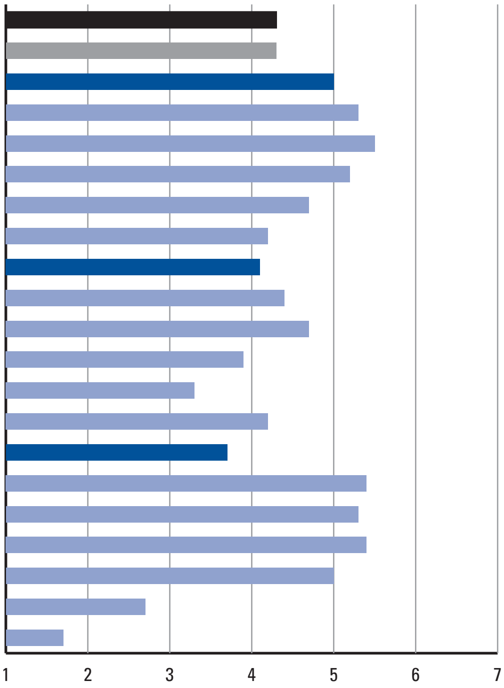
International tourist arrivals (thousands), 2007	3,687
International tourism receipts (US$ millions), 2007	3,414



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**53**	**4.3**
2008 Index	46	4.3
T&T regulatory framework	**44**	**5.0**
Policy rules and regulations	15	5.3
Environmental sustainability	11	5.5
Safety and security	65	5.2
Health and hygiene	63	4.7
Prioritization of Travel & Tourism	71	4.2
T&T business environment and infrastructure	**41**	**4.1**
Air transport infrastructure	29	4.4
Ground transport infrastructure	30	4.7
Tourism infrastructure	48	3.9
ICT infrastructure	52	3.3
Price competitiveness in the T&T industry	98	4.2
T&T human, cultural, and natural resources	**84**	**3.7**
Human resources	35	5.4
Education and training	32	5.3
Availability of qualified labor	72	5.4
Affinity for Travel & Tourism	41	5.0
Natural resources	96	2.7
Cultural resources	92	1.7



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Puerto Rico

The Travel & Tourism Competitiveness Index in detail

■ Competitive **Advantage** ▨ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	30	■
1.02	Property rights	21	■
1.03	Business impact of rules on FDI	22	■
1.04	Visa requirements*	96	▨
1.05	Openness of bilateral Air Service Agreements*	n/a	
1.06	Transparency of government policymaking	71	▨
1.07	Time required to start a business*	15	■
1.08	Cost to start a business*	10	■
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	22	■
2.02	Enforcement of environmental regulation	20	■
2.03	Sustainability of T&T industry development	23	■
2.04	Carbon dioxide emissions*	22	■
2.05	Particulate matter concentration*	27	■
2.06	Threatened species*	102	▨
2.07	Environmental treaty ratification*	n/a	
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	35	■
3.02	Reliability of police services	43	■
3.03	Business costs of crime and violence	82	▨
3.04	Road traffic accidents*	n/a	
	4th pillar: Health and hygiene		
4.01	Physician density*	48	■
4.02	Access to improved sanitation*	n/a	
4.03	Access to improved drinking water*	53	▨
4.04	Hospital beds*	63	▨
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	24	■
5.02	T&T government expenditure*	44	■
5.03	Effectiveness of marketing and branding	26	■
5.04	T&T fair attendance*	115	▨
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	14	■
6.02	Available seat kilometers, domestic*	n/a	
6.03	Available seat kilometers, international*	n/a	
6.04	Departures per 1,000 population*	9	■
6.05	Airport density*	29	■
6.06	Number of operating airlines*	89	▨
6.07	International air transport network	31	■
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	29	■
7.02	Quality of railroad infrastructure	77	▨
7.03	Quality of port infrastructure	27	■
7.04	Quality of ground transport network	84	▨
7.05	Road density*	8	■

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	65	▨
8.02	Presence of major car rental companies*	23	■
8.03	ATMs accepting Visa cards*	38	■
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	22	■
9.02	Internet users*	60	▨
9.03	Telephone lines*	54	▨
9.04	Broadband Internet subscribers*	58	▨
9.05	Mobile telephone subscribers*	58	▨
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	5	■
10.02	Purchasing power parity*	109	▨
10.03	Extent and effect of taxation	102	▨
10.04	Fuel price levels*	56	▨
10.05	Hotel price index*	103	▨
	11th pillar: Human resources		
11.01	Primary education enrollment*	26	■
11.02	Secondary education enrollment*	45	■
11.03	Quality of the educational system	58	▨
11.04	Local availability of research and training services	31	■
11.05	Extent of staff training	23	■
11.06	Hiring and firing practices	95	▨
11.07	Ease of hiring foreign labor	110	▨
11.08	HIV prevalence*	93	▨
11.09	Business impact of HIV/AIDS	85	▨
11.10	Life expectancy*	35	■
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	62	▨
12.02	Attitude of population toward foreign visitors	45	■
12.03	Extension of business trips recommended	19	■
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	▨
13.02	Protected areas*	61	▨
13.03	Quality of the natural environment	40	■
13.04	Total known species*	116	▨
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	116	▨
14.02	Sports stadiums*	52	▨
14.03	Number of international fairs and exhibitions*	67	▨
14.04	Creative industries exports*	n/a	

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Qatar

Key indicators

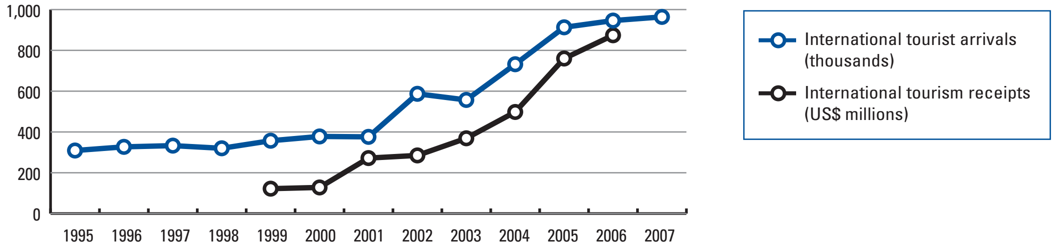
Population (millions), 2007	0.9
Surface area (1,000 square kilometers)	11.0
Gross domestic product (US$ billions), 2007	73.3
Gross domestic product (PPP, US$) per capita, 2007	85,638.0
Real GDP growth (percent), 2007	15.9
Environmental Performance Index, 2008 (out of 149 countries)	n/a

Travel & Tourism indicators

T&T industry, 2008 estimates		Percent of total	2009–2018 annual growth (%, forecast)
GDP (US$ millions)	849	1.2	7.8
Employment (1,000 jobs)	9	1.7	5.1
T&T economy, 2008 estimates			
GDP (US$ millions)	8,754	12.4	6.0
Employment (1,000 jobs)	62	12.1	3.7

Source: World Travel & Tourism Council, TSA Research 2008

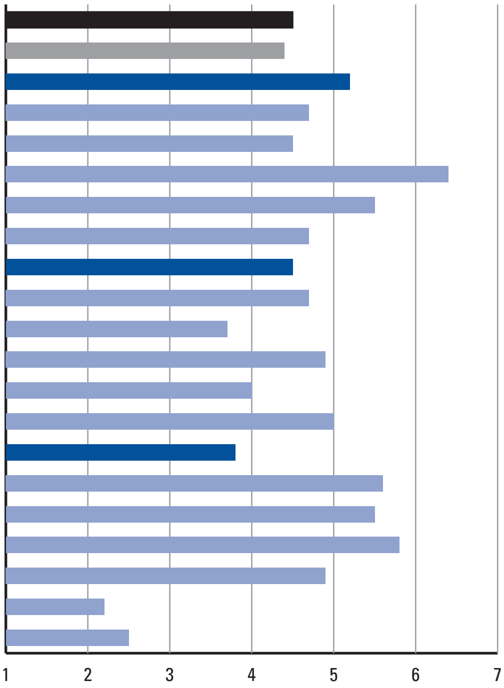
International tourist arrivals (thousands), 2007	964
International tourism receipts (US$ millions), 2006	874



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**37**	**4.5**
2008 Index	37	4.4
T&T regulatory framework	**35**	**5.2**
Policy rules and regulations	47	4.7
Environmental sustainability	69	4.5
Safety and security	9	6.4
Health and hygiene	49	5.5
Prioritization of Travel & Tourism	45	4.7
T&T business environment and infrastructure	**34**	**4.5**
Air transport infrastructure	20	4.7
Ground transport infrastructure	59	3.7
Tourism infrastructure	28	4.9
ICT infrastructure	37	4.0
Price competitiveness in the T&T industry	39	5.0
T&T human, cultural, and natural resources	**75**	**3.8**
Human resources	22	5.6
Education and training	24	5.5
Availability of qualified labor	15	5.8
Affinity for Travel & Tourism	51	4.9
Natural resources	119	2.2
Cultural resources	58	2.5



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Qatar

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	97	⬜
1.02	Property rights	31	🟦
1.03	Business impact of rules on FDI	71	⬜
1.04	Visa requirements*	107	⬜
1.05	Openness of bilateral Air Service Agreements*	52	⬜
1.06	Transparency of government policymaking	21	🟦
1.07	Time required to start a business*	9	🟦
1.08	Cost to start a business*	61	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	23	🟦
2.02	Enforcement of environmental regulation	18	🟦
2.03	Sustainability of T&T industry development	20	🟦
2.04	Carbon dioxide emissions*	129	⬜
2.05	Particulate matter concentration*	89	⬜
2.06	Threatened species*	27	🟦
2.07	Environmental treaty ratification*	67	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	55	⬜
3.02	Reliability of police services	15	🟦
3.03	Business costs of crime and violence	5	🟦
3.04	Road traffic accidents*	13	🟦
	4th pillar: Health and hygiene		
4.01	Physician density*	37	⬜
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	73	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	53	⬜
5.02	T&T government expenditure*	29	🟦
5.03	Effectiveness of marketing and branding	48	⬜
5.04	T&T fair attendance*	62	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	22	🟦
6.02	Available seat kilometers, domestic*	100	⬜
6.03	Available seat kilometers, international*	35	🟦
6.04	Departures per 1,000 population*	3	🟦
6.05	Airport density*	18	🟦
6.06	Number of operating airlines*	66	⬜
6.07	International air transport network	13	🟦
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	46	⬜
7.02	Quality of railroad infrastructure	n/a	
7.03	Quality of port infrastructure	51	⬜
7.04	Quality of ground transport network	45	⬜
7.05	Road density*	99	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	47	⬜
8.02	Presence of major car rental companies*	23	🟦
8.03	ATMs accepting Visa cards*	22	🟦
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	53	⬜
9.02	Internet users*	40	⬜
9.03	Telephone lines*	48	⬜
9.04	Broadband Internet subscribers*	39	⬜
9.05	Mobile telephone subscribers*	2	🟦
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	10	🟦
10.02	Purchasing power parity*	105	⬜
10.03	Extent and effect of taxation	4	🟦
10.04	Fuel price levels*	7	🟦
10.05	Hotel price index*	110	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	66	⬜
11.02	Secondary education enrollment*	23	🟦
11.03	Quality of the educational system	16	🟦
11.04	Local availability of research and training services	45	⬜
11.05	Extent of staff training	33	🟦
11.06	Hiring and firing practices	48	⬜
11.07	Ease of hiring foreign labor	17	🟦
11.08	HIV prevalence*	1	🟦
11.09	Business impact of HIV/AIDS	30	🟦
11.10	Life expectancy*	37	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	29	🟦
12.02	Attitude of population toward foreign visitors	80	⬜
12.03	Extension of business trips recommended	108	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	128	⬜
13.03	Quality of the natural environment	23	🟦
13.04	Total known species*	130	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	116	⬜
14.02	Sports stadiums*	2	🟦
14.03	Number of international fairs and exhibitions*	82	⬜
14.04	Creative industries exports*	92	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Romania

Key indicators

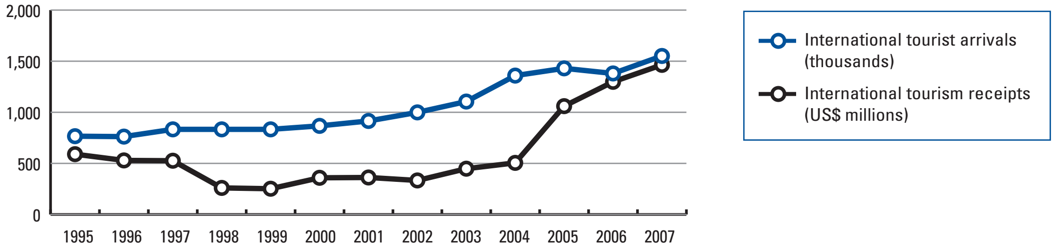
Population (millions), 2007	21.5
Surface area (1,000 square kilometers)	238.4
Gross domestic product (US$ billions), 2007	166.0
Gross domestic product (PPP, US$) per capita, 2007	11,400.8
Real GDP growth (percent), 2007	6.0
Environmental Performance Index, 2008 (out of 149 countries)	83

Travel & Tourism indicators

T&T industry, 2008 estimates		Percent of total	2009–2018 annual growth (%, forecast)
GDP (US$ millions)	3,631	2.2	7.8
Employment (1,000 jobs)	304	3.5	2.2
T&T economy, 2008 estimates			
GDP (US$ millions)	9,352	5.8	6.7
Employment (1,000 jobs)	600	6.9	1.6

Source: World Travel & Tourism Council, TSA Research 2008

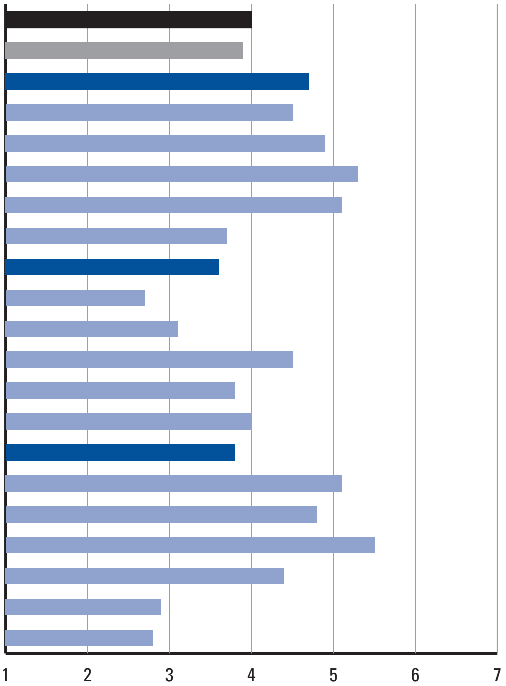
International tourist arrivals (thousands), 2007	1,551
International tourism receipts (US$ millions), 2007	1,464



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**66**	**4.0**
2008 Index	69	3.9
T&T regulatory framework	**61**	**4.7**
Policy rules and regulations	64	4.5
Environmental sustainability	37	4.9
Safety and security	62	5.3
Health and hygiene	54	5.1
Prioritization of Travel & Tourism	102	3.7
T&T business environment and infrastructure	**64**	**3.6**
Air transport infrastructure	81	2.7
Ground transport infrastructure	83	3.1
Tourism infrastructure	34	4.5
ICT infrastructure	42	3.8
Price competitiveness in the T&T industry	110	4.0
T&T human, cultural, and natural resources	**77**	**3.8**
Human resources	58	5.1
Education and training	61	4.8
Availability of qualified labor	59	5.5
Affinity for Travel & Tourism	105	4.4
Natural resources	85	2.9
Cultural resources	49	2.8



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Romania

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	87	⬜
1.02	Property rights	85	⬜
1.03	Business impact of rules on FDI	89	⬜
1.04	Visa requirements*	40	🟦
1.05	Openness of bilateral Air Service Agreements*	83	⬜
1.06	Transparency of government policymaking	124	⬜
1.07	Time required to start a business*	25	🟦
1.08	Cost to start a business*	30	🟦
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	60	⬜
2.02	Enforcement of environmental regulation	67	⬜
2.03	Sustainability of T&T industry development	121	⬜
2.04	Carbon dioxide emissions*	71	⬜
2.05	Particulate matter concentration*	6	🟦
2.06	Threatened species*	62	⬜
2.07	Environmental treaty ratification*	34	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	57	⬜
3.02	Reliability of police services	74	⬜
3.03	Business costs of crime and violence	69	⬜
3.04	Road traffic accidents*	80	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	58	⬜
4.02	Access to improved sanitation*	85	⬜
4.03	Access to improved drinking water*	87	⬜
4.04	Hospital beds*	19	🟦
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	121	⬜
5.02	T&T government expenditure*	42	🟦
5.03	Effectiveness of marketing and branding	119	⬜
5.04	T&T fair attendance*	62	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	96	⬜
6.02	Available seat kilometers, domestic*	52	⬜
6.03	Available seat kilometers, international*	64	⬜
6.04	Departures per 1,000 population*	77	⬜
6.05	Airport density*	67	⬜
6.06	Number of operating airlines*	39	🟦
6.07	International air transport network	94	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	126	⬜
7.02	Quality of railroad infrastructure	59	⬜
7.03	Quality of port infrastructure	102	⬜
7.04	Quality of ground transport network	110	⬜
7.05	Road density*	38	🟦

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	53	⬜
8.02	Presence of major car rental companies*	1	🟦
8.03	ATMs accepting Visa cards*	43	🟦
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	69	⬜
9.02	Internet users*	21	🟦
9.03	Telephone lines*	65	⬜
9.04	Broadband Internet subscribers*	36	🟦
9.05	Mobile telephone subscribers*	35	🟦
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	97	⬜
10.02	Purchasing power parity*	84	⬜
10.03	Extent and effect of taxation	109	⬜
10.04	Fuel price levels*	104	⬜
10.05	Hotel price index*	90	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	67	⬜
11.02	Secondary education enrollment*	70	⬜
11.03	Quality of the educational system	71	⬜
11.04	Local availability of research and training services	63	⬜
11.05	Extent of staff training	54	⬜
11.06	Hiring and firing practices	59	⬜
11.07	Ease of hiring foreign labor	62	⬜
11.08	HIV prevalence*	22	🟦
11.09	Business impact of HIV/AIDS	59	⬜
11.10	Life expectancy*	55	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	118	⬜
12.02	Attitude of population toward foreign visitors	88	⬜
12.03	Extension of business trips recommended	65	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	40	🟦
13.02	Protected areas*	58	⬜
13.03	Quality of the natural environment	110	⬜
13.04	Total known species*	80	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	26	🟦
14.02	Sports stadiums*	57	⬜
14.03	Number of international fairs and exhibitions*	51	⬜
14.04	Creative industries exports*	39	🟦

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Russian Federation

Key indicators

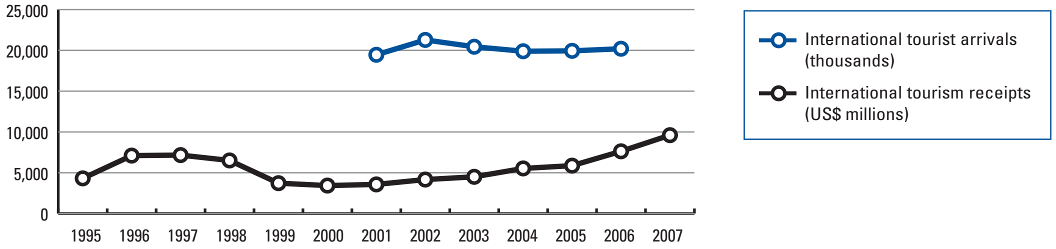
Population (millions), 2007	141.9
Surface area (1,000 square kilometers)	17,098.2
Gross domestic product (US$ billions), 2007	1,289.5
Gross domestic product (PPP, US$) per capita, 2007	14,705.0
Real GDP growth (percent), 2007	8.1
Environmental Performance Index, 2008 (out of 149 countries)	28

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	17,922	1.2	5.7
Employment (1,000 jobs)	732	1.0	–0.1
T&T economy, 2008 estimates			
GDP (US$ millions)	103,497	6.9	6.9
Employment (1,000 jobs)	4,126	5.8	1.0

Source: World Travel & Tourism Council, TSA Research 2008

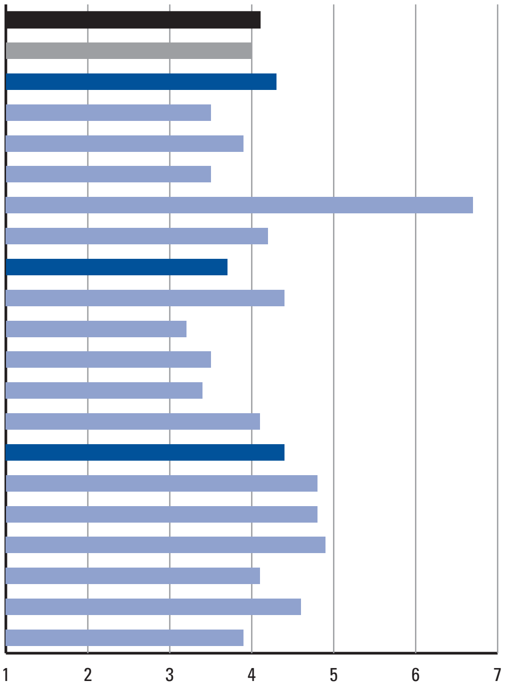
International tourist arrivals (thousands), 2006	20,199
International tourism receipts (US$ millions), 2007	9,607



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**59**	**4.1**
2008 Index	64	4.0
T&T regulatory framework	**79**	**4.3**
Policy rules and regulations	114	3.5
Environmental sustainability	114	3.9
Safety and security	129	3.5
Health and hygiene	10	6.7
Prioritization of Travel & Tourism	75	4.2
T&T business environment and infrastructure	**61**	**3.7**
Air transport infrastructure	30	4.4
Ground transport infrastructure	81	3.2
Tourism infrastructure	60	3.5
ICT infrastructure	50	3.4
Price competitiveness in the T&T industry	108	4.1
T&T human, cultural, and natural resources	**38**	**4.4**
Human resources	88	4.8
Education and training	64	4.8
Availability of qualified labor	110	4.9
Affinity for Travel & Tourism	123	4.1
Natural resources	23	4.6
Cultural resources	30	3.9



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Russian Federation

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	126	⬜
1.02	Property rights	122	⬜
1.03	Business impact of rules on FDI	128	⬜
1.04	Visa requirements*	120	⬜
1.05	Openness of bilateral Air Service Agreements*	121	⬜
1.06	Transparency of government policymaking	119	⬜
1.07	Time required to start a business*	81	⬜
1.08	Cost to start a business*	24	🟦
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	89	⬜
2.02	Enforcement of environmental regulation	95	⬜
2.03	Sustainability of T&T industry development	123	⬜
2.04	Carbon dioxide emissions*	111	⬜
2.05	Particulate matter concentration*	21	🟦
2.06	Threatened species*	109	⬜
2.07	Environmental treaty ratification*	94	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	100	⬜
3.02	Reliability of police services	104	⬜
3.03	Business costs of crime and violence	80	⬜
3.04	Road traffic accidents*	124	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	3	🟦
4.02	Access to improved sanitation*	64	⬜
4.03	Access to improved drinking water*	53	⬜
4.04	Hospital beds*	2	🟦
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	127	⬜
5.02	T&T government expenditure*	83	⬜
5.03	Effectiveness of marketing and branding	122	⬜
5.04	T&T fair attendance*	3	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	88	⬜
6.02	Available seat kilometers, domestic*	4	🟦
6.03	Available seat kilometers, international*	19	🟦
6.04	Departures per 1,000 population*	63	⬜
6.05	Airport density*	60	⬜
6.06	Number of operating airlines*	8	🟦
6.07	International air transport network	79	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	104	⬜
7.02	Quality of railroad infrastructure	32	🟦
7.03	Quality of port infrastructure	76	⬜
7.04	Quality of ground transport network	65	⬜
7.05	Road density*	126	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	85	⬜
8.02	Presence of major car rental companies*	23	🟦
8.03	ATMs accepting Visa cards*	48	🟦
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	52	⬜
9.02	Internet users*	67	⬜
9.03	Telephone lines*	40	🟦
9.04	Broadband Internet subscribers*	62	⬜
9.05	Mobile telephone subscribers*	24	🟦
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	67	⬜
10.02	Purchasing power parity*	72	⬜
10.03	Extent and effect of taxation	93	⬜
10.04	Fuel price levels*	40	🟦
10.05	Hotel price index*	115	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	81	⬜
11.02	Secondary education enrollment*	76	⬜
11.03	Quality of the educational system	36	🟦
11.04	Local availability of research and training services	71	⬜
11.05	Extent of staff training	80	⬜
11.06	Hiring and firing practices	23	🟦
11.07	Ease of hiring foreign labor	128	⬜
11.08	HIV prevalence*	102	⬜
11.09	Business impact of HIV/AIDS	28	🟦
11.10	Life expectancy*	96	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	108	⬜
12.02	Attitude of population toward foreign visitors	131	⬜
12.03	Extension of business trips recommended	55	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	5	🟦
13.02	Protected areas*	67	⬜
13.03	Quality of the natural environment	107	⬜
13.04	Total known species*	34	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	9	🟦
14.02	Sports stadiums*	114	⬜
14.03	Number of international fairs and exhibitions*	39	🟦
14.04	Creative industries exports*	29	🟦

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Saudi Arabia

Key indicators

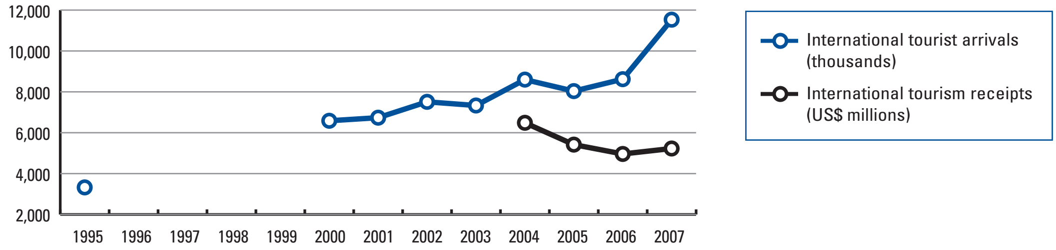
Population (millions), 2007	25.8
Surface area (1,000 square kilometers)	2,000.0
Gross domestic product (US$ billions), 2007	381.9
Gross domestic product (PPP, US$) per capita, 2007	22,851.8
Real GDP growth (percent), 2007	3.5
Environmental Performance Index, 2008 (out of 149 countries)	78

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	7,920	1.8	5.0
Employment (1,000 jobs)	193	2.5	3.8
T&T economy, 2008 estimates			
GDP (US$ millions)	41,300	9.2	3.0
Employment (1,000 jobs)	732	9.4	2.3

Source: World Travel & Tourism Council, TSA Research 2008

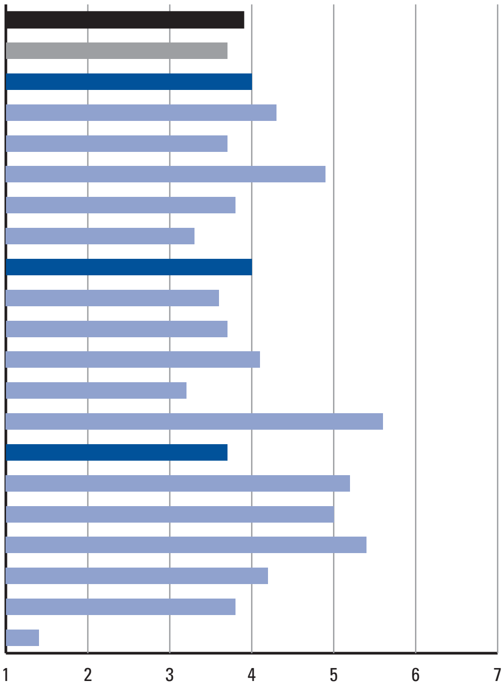
International tourist arrivals (thousands), 2007	11,531
International tourism receipts (US$ millions), 2007	5,228



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**71**	**3.9**
2008 Index	82	3.7
T&T regulatory framework	**104**	**4.0**
Policy rules and regulations	73	4.3
Environmental sustainability	123	3.7
Safety and security	81	4.9
Health and hygiene	93	3.8
Prioritization of Travel & Tourism	121	3.3
T&T business environment and infrastructure	**45**	**4.0**
Air transport infrastructure	48	3.6
Ground transport infrastructure	61	3.7
Tourism infrastructure	43	4.1
ICT infrastructure	56	3.2
Price competitiveness in the T&T industry	8	5.6
T&T human, cultural, and natural resources	**90**	**3.7**
Human resources	50	5.2
Education and training	43	5.0
Availability of qualified labor	82	5.4
Affinity for Travel & Tourism	118	4.2
Natural resources	47	3.8
Cultural resources	112	1.4



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Saudi Arabia

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	114	⬜
1.02	Property rights	44	🟦
1.03	Business impact of rules on FDI	92	⬜
1.04	Visa requirements*	125	⬜
1.05	Openness of bilateral Air Service Agreements*	75	⬜
1.06	Transparency of government policymaking	45	🟦
1.07	Time required to start a business*	31	🟦
1.08	Cost to start a business*	74	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	57	⬜
2.02	Enforcement of environmental regulation	46	🟦
2.03	Sustainability of T&T industry development	65	⬜
2.04	Carbon dioxide emissions*	117	⬜
2.05	Particulate matter concentration*	123	⬜
2.06	Threatened species*	73	⬜
2.07	Environmental treaty ratification*	81	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	115	⬜
3.02	Reliability of police services	45	🟦
3.03	Business costs of crime and violence	67	⬜
3.04	Road traffic accidents*	96	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	72	⬜
4.02	Access to improved sanitation*	n/a	
4.03	Access to improved drinking water*	81	⬜
4.04	Hospital beds*	75	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	87	⬜
5.02	T&T government expenditure*	119	⬜
5.03	Effectiveness of marketing and branding	84	⬜
5.04	T&T fair attendance*	115	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	47	🟦
6.02	Available seat kilometers, domestic*	18	🟦
6.03	Available seat kilometers, international*	33	🟦
6.04	Departures per 1,000 population*	47	🟦
6.05	Airport density*	43	🟦
6.06	Number of operating airlines*	39	🟦
6.07	International air transport network	54	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	37	🟦
7.02	Quality of railroad infrastructure	57	⬜
7.03	Quality of port infrastructure	45	🟦
7.04	Quality of ground transport network	46	🟦
7.05	Road density*	111	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	39	🟦
8.02	Presence of major car rental companies*	23	🟦
8.03	ATMs accepting Visa cards*	51	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	48	🟦
9.02	Internet users*	59	⬜
9.03	Telephone lines*	74	⬜
9.04	Broadband Internet subscribers*	65	⬜
9.05	Mobile telephone subscribers*	22	🟦
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	16	🟦
10.02	Purchasing power parity*	88	⬜
10.03	Extent and effect of taxation	9	🟦
10.04	Fuel price levels*	2	🟦
10.05	Hotel price index*	81	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	68	⬜
11.02	Secondary education enrollment*	39	🟦
11.03	Quality of the educational system	70	⬜
11.04	Local availability of research and training services	42	🟦
11.05	Extent of staff training	52	⬜
11.06	Hiring and firing practices	44	🟦
11.07	Ease of hiring foreign labor	59	⬜
11.08	HIV prevalence*	1	🟦
11.09	Business impact of HIV/AIDS	91	⬜
11.10	Life expectancy*	83	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	105	⬜
12.02	Attitude of population toward foreign visitors	124	⬜
12.03	Extension of business trips recommended	98	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	6	🟦
13.03	Quality of the natural environment	59	⬜
13.04	Total known species*	74	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	97	⬜
14.02	Sports stadiums*	103	⬜
14.03	Number of international fairs and exhibitions*	96	⬜
14.04	Creative industries exports*	47	🟦

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Senegal

Key indicators

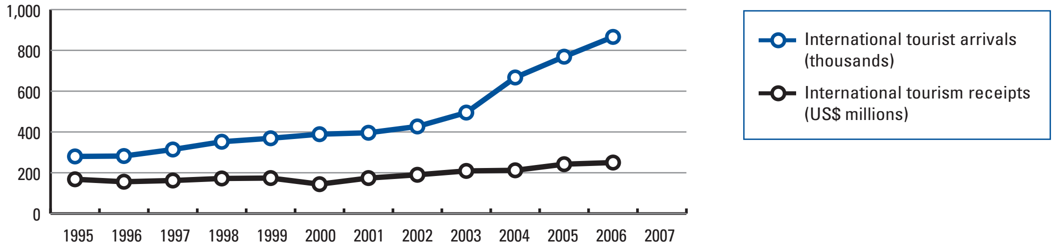
Population (millions), 2007	12.2
Surface area (1,000 square kilometers)	196.7
Gross domestic product (US$ billions), 2007	11.2
Gross domestic product (PPP, US$) per capita, 2007	1,692.3
Real GDP growth (percent), 2007	4.8
Environmental Performance Index, 2008 (out of 149 countries)	115

Travel & Tourism indicators

T&T industry, 2008 estimates		Percent of total	2009–2018 annual growth (%, forecast)
GDP (US$ millions)	411	3.2	3.4
Employment (1,000 jobs)	68	2.6	1.4
T&T economy, 2008 estimates			
GDP (US$ millions)	980	7.6	4.0
Employment (1,000 jobs)	162	6.3	2.0

Source: World Travel & Tourism Council, TSA Research 2008

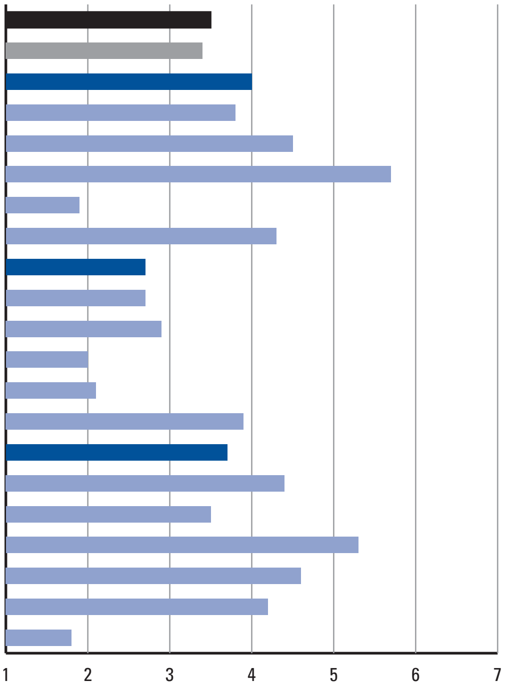
International tourist arrivals (thousands), 2006	866
International tourism receipts (US$ millions), 2006	250



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**101**	**3.5**
2008 Index	108	3.4
T&T regulatory framework	**101**	**4.0**
Policy rules and regulations	103	3.8
Environmental sustainability	67	4.5
Safety and security	43	5.7
Health and hygiene	120	1.9
Prioritization of Travel & Tourism	70	4.3
T&T business environment and infrastructure	**108**	**2.7**
Air transport infrastructure	82	2.7
Ground transport infrastructure	93	2.9
Tourism infrastructure	94	2.0
ICT infrastructure	103	2.1
Price competitiveness in the T&T industry	115	3.9
T&T human, cultural, and natural resources	**82**	**3.7**
Human resources	105	4.4
Education and training	114	3.5
Availability of qualified labor	86	5.3
Affinity for Travel & Tourism	87	4.6
Natural resources	33	4.2
Cultural resources	90	1.8



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Senegal

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	55	⬜
1.02	Property rights	76	⬜
1.03	Business impact of rules on FDI	66	⬜
1.04	Visa requirements*	100	⬜
1.05	Openness of bilateral Air Service Agreements*	86	⬜
1.06	Transparency of government policymaking	118	⬜
1.07	Time required to start a business*	20	🟦
1.08	Cost to start a business*	113	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	96	⬜
2.02	Enforcement of environmental regulation	87	⬜
2.03	Sustainability of T&T industry development	61	⬜
2.04	Carbon dioxide emissions*	21	🟦
2.05	Particulate matter concentration*	115	⬜
2.06	Threatened species*	41	🟦
2.07	Environmental treaty ratification*	10	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	32	🟦
3.02	Reliability of police services	36	🟦
3.03	Business costs of crime and violence	51	⬜
3.04	Road traffic accidents*	83	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	123	⬜
4.02	Access to improved sanitation*	116	⬜
4.03	Access to improved drinking water*	106	⬜
4.04	Hospital beds*	130	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	57	⬜
5.02	T&T government expenditure*	57	⬜
5.03	Effectiveness of marketing and branding	52	⬜
5.04	T&T fair attendance*	81	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	59	⬜
6.02	Available seat kilometers, domestic*	87	⬜
6.03	Available seat kilometers, international*	66	⬜
6.04	Departures per 1,000 population*	103	⬜
6.05	Airport density*	92	⬜
6.06	Number of operating airlines*	73	⬜
6.07	International air transport network	51	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	78	⬜
7.02	Quality of railroad infrastructure	93	⬜
7.03	Quality of port infrastructure	73	⬜
7.04	Quality of ground transport network	66	⬜
7.05	Road density*	113	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	89	⬜
8.02	Presence of major car rental companies*	73	⬜
8.03	ATMs accepting Visa cards*	106	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	43	🟦
9.02	Internet users*	101	⬜
9.03	Telephone lines*	113	⬜
9.04	Broadband Internet subscribers*	93	⬜
9.05	Mobile telephone subscribers*	106	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	130	⬜
10.02	Purchasing power parity*	60	⬜
10.03	Extent and effect of taxation	86	⬜
10.04	Fuel price levels*	88	⬜
10.05	Hotel price index*	59	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	120	⬜
11.02	Secondary education enrollment*	126	⬜
11.03	Quality of the educational system	59	⬜
11.04	Local availability of research and training services	30	🟦
11.05	Extent of staff training	110	⬜
11.06	Hiring and firing practices	43	🟦
11.07	Ease of hiring foreign labor	29	🟦
11.08	HIV prevalence*	100	⬜
11.09	Business impact of HIV/AIDS	83	⬜
11.10	Life expectancy*	110	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	95	⬜
12.02	Attitude of population toward foreign visitors	8	🟦
12.03	Extension of business trips recommended	105	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	23	🟦
13.02	Protected areas*	19	🟦
13.03	Quality of the natural environment	97	⬜
13.04	Total known species*	45	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	54	⬜
14.02	Sports stadiums*	90	⬜
14.03	Number of international fairs and exhibitions*	76	⬜
14.04	Creative industries exports*	80	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Serbia

Key indicators

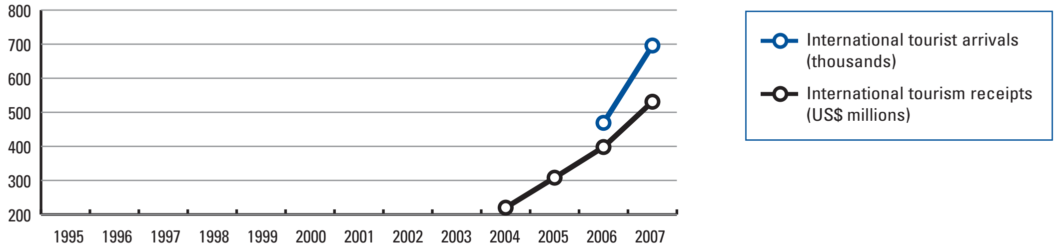
Population (millions), 2007	7.4
Surface area (1,000 square kilometers)	88.4
Gross domestic product (US$ billions), 2007	39.9
Gross domestic product (PPP, US$) per capita, 2007	10,071.4
Real GDP growth (percent), 2007	7.1
Environmental Performance Index, 2008 (out of 149 countries)	n/a

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	445	1.0	4.4
Employment (1,000 jobs)	20	0.9	1.2
T&T economy, 2008 estimates			
GDP (US$ millions)	2,090	4.7	5.1
Employment (1,000 jobs)	88	4.1	1.8

Source: World Travel & Tourism Council, TSA Research 2008

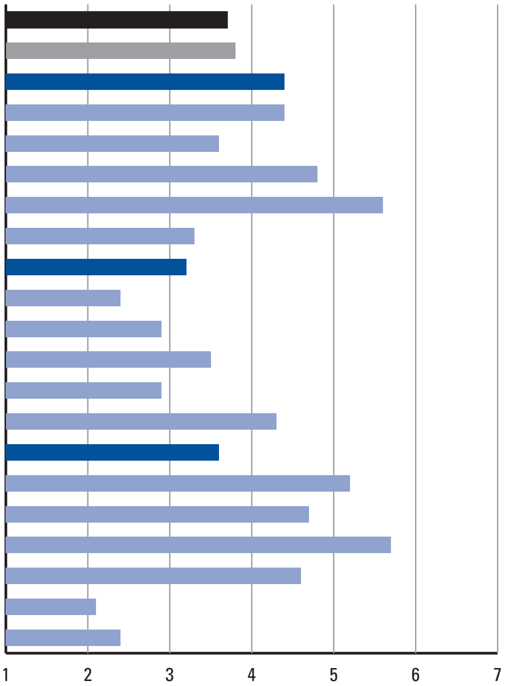
International tourist arrivals (thousands), 2007	696
International tourism receipts (US$ millions), 2007	531



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**88**	**3.7**
2008 Index	78	3.8
T&T regulatory framework	**78**	**4.4**
Policy rules and regulations	67	4.4
Environmental sustainability	127	3.6
Safety and security	85	4.8
Health and hygiene	44	5.6
Prioritization of Travel & Tourism	119	3.3
T&T business environment and infrastructure	**80**	**3.2**
Air transport infrastructure	105	2.4
Ground transport infrastructure	91	2.9
Tourism infrastructure	58	3.5
ICT infrastructure	63	2.9
Price competitiveness in the T&T industry	90	4.3
T&T human, cultural, and natural resources	**96**	**3.6**
Human resources	54	5.2
Education and training	66	4.7
Availability of qualified labor	31	5.7
Affinity for Travel & Tourism	83	4.6
Natural resources	126	2.1
Cultural resources	64	2.4



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Serbia

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	109	⬜
1.02	Property rights	108	⬜
1.03	Business impact of rules on FDI	112	⬜
1.04	Visa requirements*	71	⬜
1.05	Openness of bilateral Air Service Agreements*	n/a	
1.06	Transparency of government policymaking	82	⬜
1.07	Time required to start a business*	66	⬜
1.08	Cost to start a business*	53	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	126	⬜
2.02	Enforcement of environmental regulation	130	⬜
2.03	Sustainability of T&T industry development	106	⬜
2.04	Carbon dioxide emissions*	n/a	
2.05	Particulate matter concentration*	n/a	
2.06	Threatened species*	58	⬜
2.07	Environmental treaty ratification*	94	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	90	⬜
3.02	Reliability of police services	67	⬜
3.03	Business costs of crime and violence	64	⬜
3.04	Road traffic accidents*	n/a	
	4th pillar: Health and hygiene		
4.01	Physician density*	54	⬜
4.02	Access to improved sanitation*	55	⬜
4.03	Access to improved drinking water*	38	🟦
4.04	Hospital beds*	31	🟦
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	100	⬜
5.02	T&T government expenditure*	120	⬜
5.03	Effectiveness of marketing and branding	110	⬜
5.04	T&T fair attendance*	81	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	98	⬜
6.02	Available seat kilometers, domestic*	100	⬜
6.03	Available seat kilometers, international*	93	⬜
6.04	Departures per 1,000 population*	65	⬜
6.05	Airport density*	91	⬜
6.06	Number of operating airlines*	59	⬜
6.07	International air transport network	118	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	115	⬜
7.02	Quality of railroad infrastructure	88	⬜
7.03	Quality of port infrastructure	84	⬜
7.04	Quality of ground transport network	93	⬜
7.05	Road density*	49	🟦

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	68	⬜
8.02	Presence of major car rental companies*	23	🟦
8.03	ATMs accepting Visa cards*	61	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	109	⬜
9.02	Internet users*	80	⬜
9.03	Telephone lines*	41	🟦
9.04	Broadband Internet subscribers*	56	⬜
9.05	Mobile telephone subscribers*	57	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	72	⬜
10.02	Purchasing power parity*	61	⬜
10.03	Extent and effect of taxation	73	⬜
10.04	Fuel price levels*	n/a	
10.05	Hotel price index*	111	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	34	🟦
11.02	Secondary education enrollment*	64	⬜
11.03	Quality of the educational system	49	🟦
11.04	Local availability of research and training services	74	⬜
11.05	Extent of staff training	120	⬜
11.06	Hiring and firing practices	32	🟦
11.07	Ease of hiring foreign labor	67	⬜
11.08	HIV prevalence*	22	🟦
11.09	Business impact of HIV/AIDS	55	⬜
11.10	Life expectancy*	55	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	110	⬜
12.02	Attitude of population toward foreign visitors	47	🟦
12.03	Extension of business trips recommended	58	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	110	⬜
13.03	Quality of the natural environment	109	⬜
13.04	Total known species*	83	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	54	⬜
14.02	Sports stadiums*	55	⬜
14.03	Number of international fairs and exhibitions*	65	⬜
14.04	Creative industries exports*	n/a	

* Hard data

Note: For further details and explanation, please refer to the section “How to Read the Country/Economy Profiles” at the beginning of this chapter.

Singapore

Key indicators

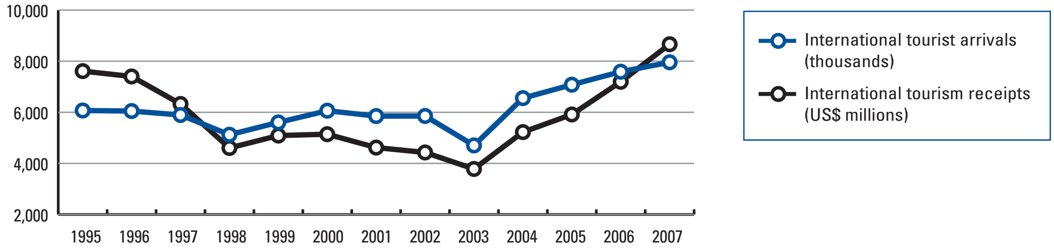
Population (millions), 2007	4.4
Surface area (1,000 square kilometers)	0.7
Gross domestic product (US$ billions), 2007	161.3
Gross domestic product (PPP, US$) per capita, 2007	49,754.4
Real GDP growth (percent), 2007	7.7
Environmental Performance Index, 2008 (out of 149 countries)	n/a

Travel & Tourism indicators

T&T industry, 2008 estimates		Percent of total	2009–2018 annual growth (%, forecast)
GDP (US$ millions)	4,117	2.3	1.6
Employment (1,000 jobs)	64	2.3	–1.5
T&T economy, 2008 estimates			
GDP (US$ millions)	15,380	8.6	2.9
Employment (1,000 jobs)	191	7.0	–0.2

Source: World Travel & Tourism Council, TSA Research 2008

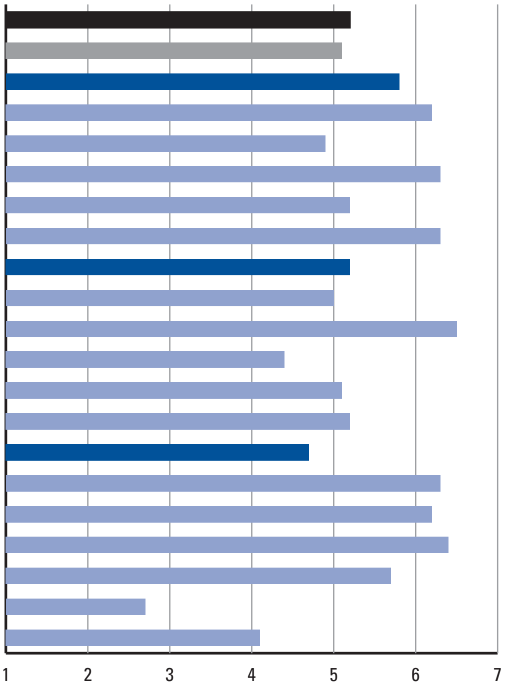
International tourist arrivals (thousands), 2007	7,957
International tourism receipts (US$ millions), 2007	8,664



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**10**	**5.2**
2008 Index	16	5.1
T&T regulatory framework	**6**	**5.8**
Policy rules and regulations	1	6.2
Environmental sustainability	42	4.9
Safety and security	10	6.3
Health and hygiene	53	5.2
Prioritization of Travel & Tourism	2	6.3
T&T business environment and infrastructure	**5**	**5.2**
Air transport infrastructure	15	5.0
Ground transport infrastructure	4	6.5
Tourism infrastructure	37	4.4
ICT infrastructure	17	5.1
Price competitiveness in the T&T industry	27	5.2
T&T human, cultural, and natural resources	**23**	**4.7**
Human resources	1	6.3
Education and training	3	6.2
Availability of qualified labor	1	6.4
Affinity for Travel & Tourism	10	5.7
Natural resources	94	2.7
Cultural resources	29	4.1



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Singapore

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	3	🟦
1.02	Property rights	4	🟦
1.03	Business impact of rules on FDI	2	🟦
1.04	Visa requirements*	2	🟦
1.05	Openness of bilateral Air Service Agreements*	29	⬜
1.06	Transparency of government policymaking	1	🟦
1.07	Time required to start a business*	4	🟦
1.08	Cost to start a business*	8	🟦
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	12	⬜
2.02	Enforcement of environmental regulation	7	🟦
2.03	Sustainability of T&T industry development	2	🟦
2.04	Carbon dioxide emissions*	114	⬜
2.05	Particulate matter concentration*	74	⬜
2.06	Threatened species*	82	⬜
2.07	Environmental treaty ratification*	104	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	76	⬜
3.02	Reliability of police services	6	🟦
3.03	Business costs of crime and violence	9	🟦
3.04	Road traffic accidents*	19	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	67	⬜
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	54	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	4	🟦
5.02	T&T government expenditure*	8	🟦
5.03	Effectiveness of marketing and branding	3	🟦
5.04	T&T fair attendance*	25	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	1	🟦
6.02	Available seat kilometers, domestic*	100	⬜
6.03	Available seat kilometers, international*	10	🟦
6.04	Departures per 1,000 population*	18	⬜
6.05	Airport density*	89	⬜
6.06	Number of operating airlines*	28	⬜
6.07	International air transport network	2	🟦
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	3	🟦
7.02	Quality of railroad infrastructure	10	🟦
7.03	Quality of port infrastructure	1	🟦
7.04	Quality of ground transport network	4	🟦
7.05	Road density*	4	🟦

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	34	⬜
8.02	Presence of major car rental companies*	56	⬜
8.03	ATMs accepting Visa cards*	30	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	18	⬜
9.02	Internet users*	9	🟦
9.03	Telephone lines*	28	⬜
9.04	Broadband Internet subscribers*	24	⬜
9.05	Mobile telephone subscribers*	12	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	36	⬜
10.02	Purchasing power parity*	90	⬜
10.03	Extent and effect of taxation	5	🟦
10.04	Fuel price levels*	35	⬜
10.05	Hotel price index*	73	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	38	⬜
11.02	Secondary education enrollment*	21	⬜
11.03	Quality of the educational system	2	🟦
11.04	Local availability of research and training services	13	⬜
11.05	Extent of staff training	3	🟦
11.06	Hiring and firing practices	2	🟦
11.07	Ease of hiring foreign labor	4	🟦
11.08	HIV prevalence*	49	⬜
11.09	Business impact of HIV/AIDS	19	⬜
11.10	Life expectancy*	12	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	16	⬜
12.02	Attitude of population toward foreign visitors	7	🟦
12.03	Extension of business trips recommended	50	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	105	⬜
13.03	Quality of the natural environment	12	⬜
13.04	Total known species*	77	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	116	⬜
14.02	Sports stadiums*	72	⬜
14.03	Number of international fairs and exhibitions*	18	⬜
14.04	Creative industries exports*	19	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Slovak Republic

Key indicators

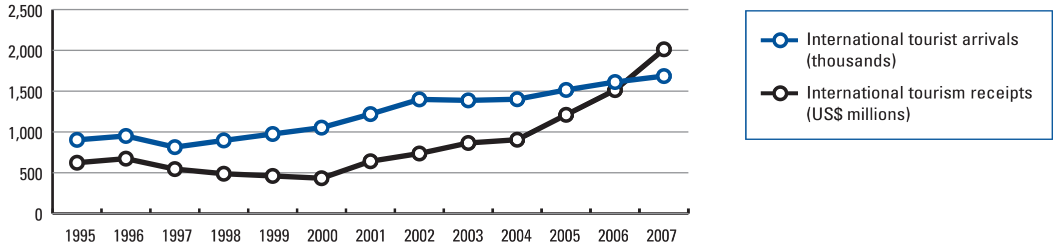
Population (millions), 2007	5.4
Surface area (1,000 square kilometers)	49.0
Gross domestic product (US$ billions), 2007	75.0
Gross domestic product (PPP, US$) per capita, 2007	20,267.8
Real GDP growth (percent), 2007	10.4
Environmental Performance Index, 2008 (out of 149 countries)	17

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	1,312	1.5	2.3
Employment (1,000 jobs)	34	1.4	–1.9
T&T economy, 2008 estimates			
GDP (US$ millions)	11,324	12.6	4.9
Employment (1,000 jobs)	261	11.1	0.4

Source: World Travel & Tourism Council, TSA Research 2008

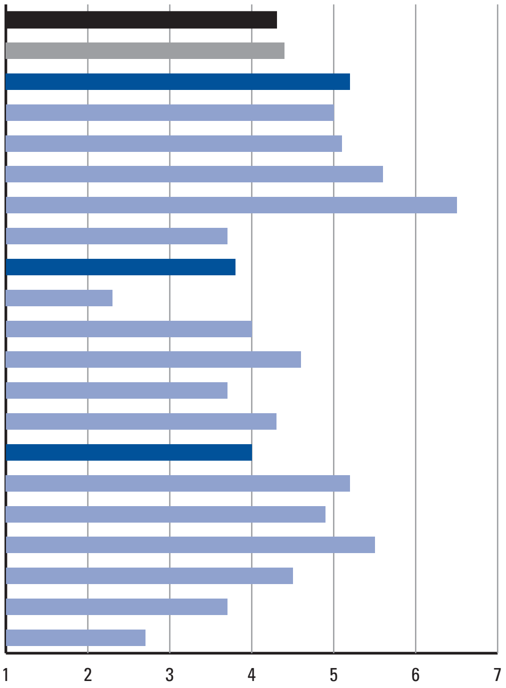
International tourist arrivals (thousands), 2007	1,685
International tourism receipts (US$ millions), 2007	2,013



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**46**	**4.3**
2008 Index	38	4.4
T&T regulatory framework	**34**	**5.2**
Policy rules and regulations	33	5.0
Environmental sustainability	25	5.1
Safety and security	46	5.6
Health and hygiene	17	6.5
Prioritization of Travel & Tourism	103	3.7
T&T business environment and infrastructure	**54**	**3.8**
Air transport infrastructure	108	2.3
Ground transport infrastructure	50	4.0
Tourism infrastructure	31	4.6
ICT infrastructure	45	3.7
Price competitiveness in the T&T industry	88	4.3
T&T human, cultural, and natural resources	**55**	**4.0**
Human resources	48	5.2
Education and training	54	4.9
Availability of qualified labor	53	5.5
Affinity for Travel & Tourism	91	4.5
Natural resources	48	3.7
Cultural resources	53	2.7



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Slovak Republic

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ▨ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	4	🟦
1.02	Property rights	55	▨
1.03	Business impact of rules on FDI	5	🟦
1.04	Visa requirements*	40	🟦
1.05	Openness of bilateral Air Service Agreements*	79	▨
1.06	Transparency of government policymaking	50	▨
1.07	Time required to start a business*	45	🟦
1.08	Cost to start a business*	29	🟦
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	27	🟦
2.02	Enforcement of environmental regulation	35	🟦
2.03	Sustainability of T&T industry development	122	▨
2.04	Carbon dioxide emissions*	88	▨
2.05	Particulate matter concentration*	12	🟦
2.06	Threatened species*	25	🟦
2.07	Environmental treaty ratification*	34	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	7	🟦
3.02	Reliability of police services	101	▨
3.03	Business costs of crime and violence	44	🟦
3.04	Road traffic accidents*	6	🟦
	4th pillar: Health and hygiene		
4.01	Physician density*	30	🟦
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	17	🟦
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	115	▨
5.02	T&T government expenditure*	94	▨
5.03	Effectiveness of marketing and branding	126	▨
5.04	T&T fair attendance*	25	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	109	▨
6.02	Available seat kilometers, domestic*	68	▨
6.03	Available seat kilometers, international*	101	▨
6.04	Departures per 1,000 population*	64	▨
6.05	Airport density*	51	▨
6.06	Number of operating airlines*	118	▨
6.07	International air transport network	103	▨
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	82	▨
7.02	Quality of railroad infrastructure	29	🟦
7.03	Quality of port infrastructure	56	▨
7.04	Quality of ground transport network	70	▨
7.05	Road density*	36	🟦

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	38	🟦
8.02	Presence of major car rental companies*	23	🟦
8.03	ATMs accepting Visa cards*	32	🟦
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	58	▨
9.02	Internet users*	36	🟦
9.03	Telephone lines*	60	▨
9.04	Broadband Internet subscribers*	40	🟦
9.05	Mobile telephone subscribers*	26	🟦
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	106	▨
10.02	Purchasing power parity*	87	▨
10.03	Extent and effect of taxation	17	🟦
10.04	Fuel price levels*	123	▨
10.05	Hotel price index*	85	▨
	11th pillar: Human resources		
11.01	Primary education enrollment*	71	▨
11.02	Secondary education enrollment*	47	▨
11.03	Quality of the educational system	76	▨
11.04	Local availability of research and training services	59	▨
11.05	Extent of staff training	40	🟦
11.06	Hiring and firing practices	65	▨
11.07	Ease of hiring foreign labor	35	🟦
11.08	HIV prevalence*	1	🟦
11.09	Business impact of HIV/AIDS	11	🟦
11.10	Life expectancy*	50	▨
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	71	▨
12.02	Attitude of population toward foreign visitors	120	▨
12.03	Extension of business trips recommended	74	▨
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	23	🟦
13.02	Protected areas*	27	🟦
13.03	Quality of the natural environment	73	▨
13.04	Total known species*	92	▨
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	33	🟦
14.02	Sports stadiums*	45	🟦
14.03	Number of international fairs and exhibitions*	60	▨
14.04	Creative industries exports*	42	🟦

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Slovenia

Key indicators

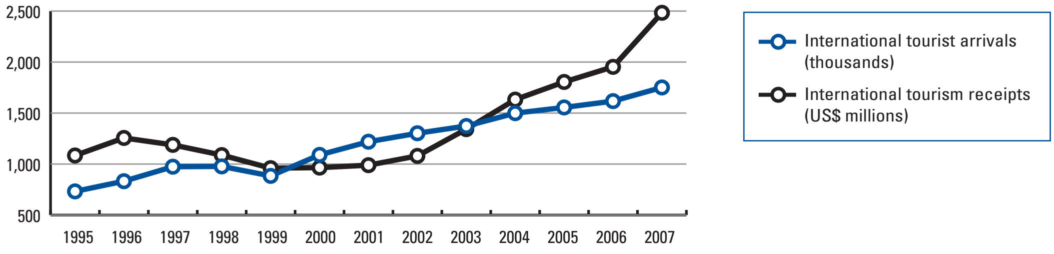
Population (millions), 2007	2.0
Surface area (1,000 square kilometers)	20.3
Gross domestic product (US$ billions), 2007	46.1
Gross domestic product (PPP, US$) per capita, 2007	27,227.2
Real GDP growth (percent), 2007	6.1
Environmental Performance Index, 2008 (out of 149 countries)	15

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	1,238	2.4	4.8
Employment (1,000 jobs)	28	3.3	1.2
T&T economy, 2008 estimates			
GDP (US$ millions)	6,101	11.9	4.8
Employment (1,000 jobs)	113	13.2	1.1

Source: World Travel & Tourism Council, TSA Research 2008

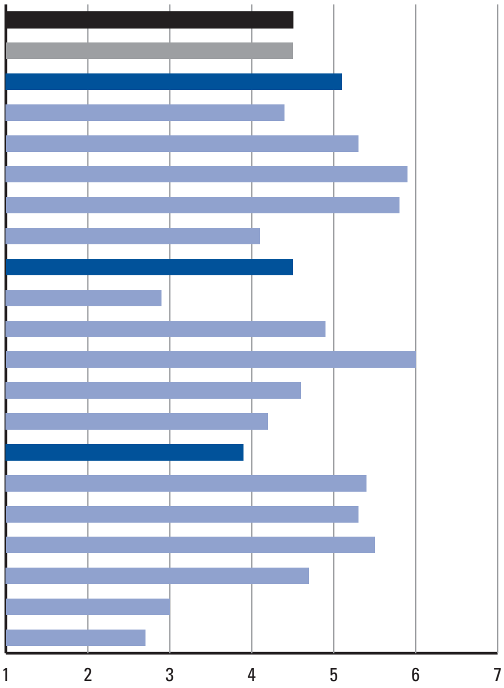
International tourist arrivals (thousands), 2007	1,751
International tourism receipts (US$ millions), 2007	2,483



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**35**	**4.5**
2008 Index	36	4.5
T&T regulatory framework	**38**	**5.1**
Policy rules and regulations	66	4.4
Environmental sustainability	20	5.3
Safety and security	24	5.9
Health and hygiene	36	5.8
Prioritization of Travel & Tourism	80	4.1
T&T business environment and infrastructure	**33**	**4.5**
Air transport infrastructure	70	2.9
Ground transport infrastructure	23	4.9
Tourism infrastructure	16	6.0
ICT infrastructure	27	4.6
Price competitiveness in the T&T industry	94	4.2
T&T human, cultural, and natural resources	**61**	**3.9**
Human resources	36	5.4
Education and training	33	5.3
Availability of qualified labor	66	5.5
Affinity for Travel & Tourism	70	4.7
Natural resources	79	3.0
Cultural resources	54	2.7



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Slovenia

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	107	⬜
1.02	Property rights	57	⬜
1.03	Business impact of rules on FDI	114	⬜
1.04	Visa requirements*	40	⬜
1.05	Openness of bilateral Air Service Agreements*	122	⬜
1.06	Transparency of government policymaking	43	⬜
1.07	Time required to start a business*	57	⬜
1.08	Cost to start a business*	2	🟦
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	25	🟦
2.02	Enforcement of environmental regulation	23	🟦
2.03	Sustainability of T&T industry development	92	⬜
2.04	Carbon dioxide emissions*	96	⬜
2.05	Particulate matter concentration*	49	⬜
2.06	Threatened species*	26	🟦
2.07	Environmental treaty ratification*	10	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	25	🟦
3.02	Reliability of police services	57	⬜
3.03	Business costs of crime and violence	22	🟦
3.04	Road traffic accidents*	21	🟦
	4th pillar: Health and hygiene		
4.01	Physician density*	44	⬜
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	36	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	94	⬜
5.02	T&T government expenditure*	43	⬜
5.03	Effectiveness of marketing and branding	92	⬜
5.04	T&T fair attendance*	62	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	63	⬜
6.02	Available seat kilometers, domestic*	100	⬜
6.03	Available seat kilometers, international*	113	⬜
6.04	Departures per 1,000 population*	37	⬜
6.05	Airport density*	47	⬜
6.06	Number of operating airlines*	103	⬜
6.07	International air transport network	81	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	41	⬜
7.02	Quality of railroad infrastructure	43	⬜
7.03	Quality of port infrastructure	39	⬜
7.04	Quality of ground transport network	40	⬜
7.05	Road density*	11	🟦

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	32	🟦
8.02	Presence of major car rental companies*	1	🟦
8.03	ATMs accepting Visa cards*	7	🟦
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	35	⬜
9.02	Internet users*	14	🟦
9.03	Telephone lines*	25	🟦
9.04	Broadband Internet subscribers*	28	🟦
9.05	Mobile telephone subscribers*	44	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	103	⬜
10.02	Purchasing power parity*	102	⬜
10.03	Extent and effect of taxation	95	⬜
10.04	Fuel price levels*	99	⬜
10.05	Hotel price index*	24	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	49	⬜
11.02	Secondary education enrollment*	43	⬜
11.03	Quality of the educational system	35	⬜
11.04	Local availability of research and training services	33	🟦
11.05	Extent of staff training	43	⬜
11.06	Hiring and firing practices	117	⬜
11.07	Ease of hiring foreign labor	68	⬜
11.08	HIV prevalence*	1	🟦
11.09	Business impact of HIV/AIDS	25	🟦
11.10	Life expectancy*	29	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	36	⬜
12.02	Attitude of population toward foreign visitors	68	⬜
12.03	Extension of business trips recommended	124	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	40	⬜
13.02	Protected areas*	82	⬜
13.03	Quality of the natural environment	27	🟦
13.04	Total known species*	95	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	116	⬜
14.02	Sports stadiums*	20	🟦
14.03	Number of international fairs and exhibitions*	38	⬜
14.04	Creative industries exports*	41	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

South Africa

Key indicators

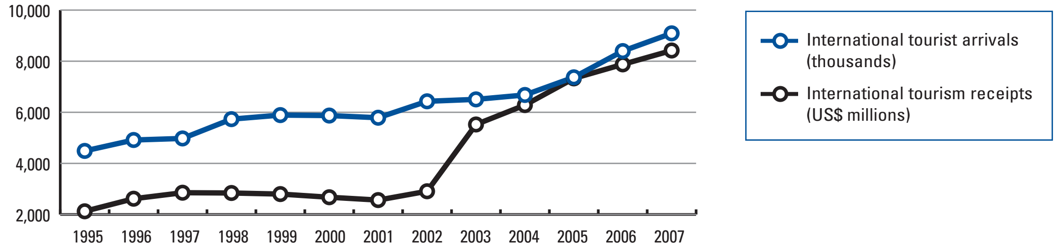
Population (millions), 2007	47.7
Surface area (1,000 square kilometers)	1,219.1
Gross domestic product (US$ billions), 2007	283.1
Gross domestic product (PPP, US$) per capita, 2007	9,767.5
Real GDP growth (percent), 2007	5.1
Environmental Performance Index, 2008 (out of 149 countries)	97

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	9,969	3.3	4.1
Employment (1,000 jobs)	445	3.3	2.2
T&T economy, 2008 estimates			
GDP (US$ millions)	25,234	8.4	4.2
Employment (1,000 jobs)	1,011	7.6	2.4

Source: World Travel & Tourism Council, TSA Research 2008

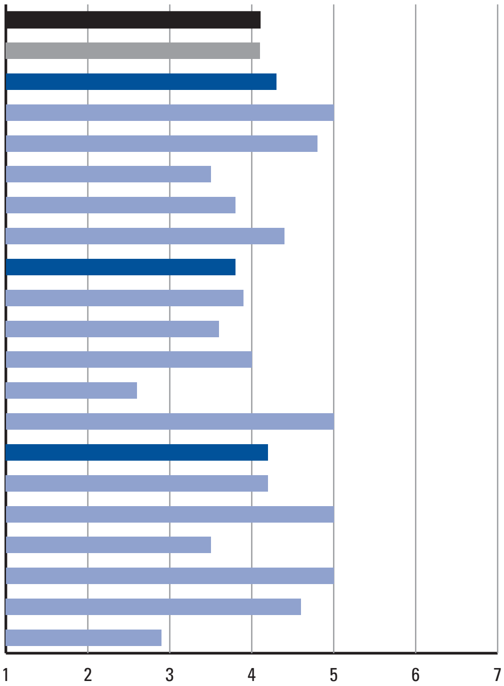
International tourist arrivals (thousands), 2007	9,090
International tourism receipts (US$ millions), 2007	8,418



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**61**	**4.1**
2008 Index	60	4.1
T&T regulatory framework	**82**	**4.3**
Policy rules and regulations	36	5.0
Environmental sustainability	44	4.8
Safety and security	128	3.5
Health and hygiene	94	3.8
Prioritization of Travel & Tourism	60	4.4
T&T business environment and infrastructure	**52**	**3.8**
Air transport infrastructure	43	3.9
Ground transport infrastructure	64	3.6
Tourism infrastructure	46	4.0
ICT infrastructure	80	2.6
Price competitiveness in the T&T industry	38	5.0
T&T human, cultural, and natural resources	**49**	**4.2**
Human resources	112	4.2
Education and training	48	5.0
Availability of qualified labor	131	3.5
Affinity for Travel & Tourism	43	5.0
Natural resources	22	4.6
Cultural resources	45	2.9



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

South Africa

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ◻ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	58	◻
1.02	Property rights	20	🟦
1.03	Business impact of rules on FDI	77	◻
1.04	Visa requirements*	28	🟦
1.05	Openness of bilateral Air Service Agreements*	61	◻
1.06	Transparency of government policymaking	29	🟦
1.07	Time required to start a business*	65	◻
1.08	Cost to start a business*	47	🟦
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	47	🟦
2.02	Enforcement of environmental regulation	57	◻
2.03	Sustainability of T&T industry development	16	🟦
2.04	Carbon dioxide emissions*	101	◻
2.05	Particulate matter concentration*	28	🟦
2.06	Threatened species*	94	◻
2.07	Environmental treaty ratification*	34	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	36	🟦
3.02	Reliability of police services	108	◻
3.03	Business costs of crime and violence	133	◻
3.04	Road traffic accidents*	117	◻
	4th pillar: Health and hygiene		
4.01	Physician density*	93	◻
4.02	Access to improved sanitation*	94	◻
4.03	Access to improved drinking water*	68	◻
4.04	Hospital beds*	66	◻
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	18	🟦
5.02	T&T government expenditure*	124	◻
5.03	Effectiveness of marketing and branding	17	🟦
5.04	T&T fair attendance*	41	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	25	🟦
6.02	Available seat kilometers, domestic*	16	🟦
6.03	Available seat kilometers, international*	24	🟦
6.04	Departures per 1,000 population*	60	◻
6.05	Airport density*	90	◻
6.06	Number of operating airlines*	30	🟦
6.07	International air transport network	12	🟦
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	40	🟦
7.02	Quality of railroad infrastructure	37	🟦
7.03	Quality of port infrastructure	49	🟦
7.04	Quality of ground transport network	126	◻
7.05	Road density*	64	◻

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	91	◻
8.02	Presence of major car rental companies*	1	🟦
8.03	ATMs accepting Visa cards*	45	🟦
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	47	🟦
9.02	Internet users*	97	◻
9.03	Telephone lines*	93	◻
9.04	Broadband Internet subscribers*	87	◻
9.05	Mobile telephone subscribers*	55	◻
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	70	◻
10.02	Purchasing power parity*	69	◻
10.03	Extent and effect of taxation	25	🟦
10.04	Fuel price levels*	62	◻
10.05	Hotel price index*	38	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	97	◻
11.02	Secondary education enrollment*	44	🟦
11.03	Quality of the educational system	110	◻
11.04	Local availability of research and training services	29	🟦
11.05	Extent of staff training	15	🟦
11.06	Hiring and firing practices	128	◻
11.07	Ease of hiring foreign labor	122	◻
11.08	HIV prevalence*	131	◻
11.09	Business impact of HIV/AIDS	132	◻
11.10	Life expectancy*	120	◻
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	78	◻
12.02	Attitude of population toward foreign visitors	49	🟦
12.03	Extension of business trips recommended	8	🟦
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	10	🟦
13.02	Protected areas*	86	◻
13.03	Quality of the natural environment	51	◻
13.04	Total known species*	24	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	45	🟦
14.02	Sports stadiums*	65	◻
14.03	Number of international fairs and exhibitions*	35	🟦
14.04	Creative industries exports*	43	🟦

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Spain

Key indicators

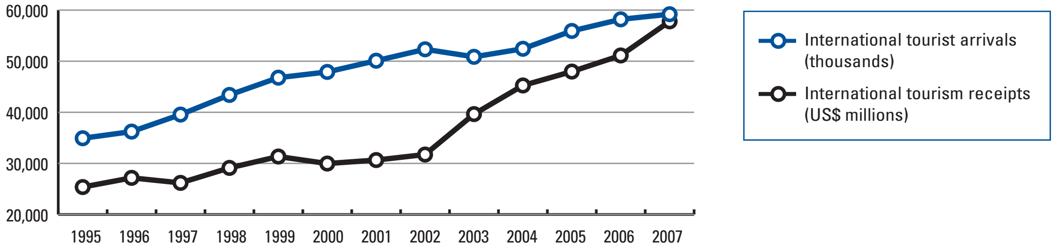
Population (millions), 2007	43.6
Surface area (1,000 square kilometers)	505.4
Gross domestic product (US$ billions), 2007	1,440.0
Gross domestic product (PPP, US$) per capita, 2007	30,118.4
Real GDP growth (percent), 2007	3.7
Environmental Performance Index, 2008 (out of 149 countries)	30

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	102,483	6.4	2.4
Employment (1,000 jobs)	1,427	6.9	1.3
T&T economy, 2008 estimates			
GDP (US$ millions)	276,740	17.2	2.9
Employment (1,000 jobs)	3,687	17.7	1.7

Source: World Travel & Tourism Council, TSA Research 2008

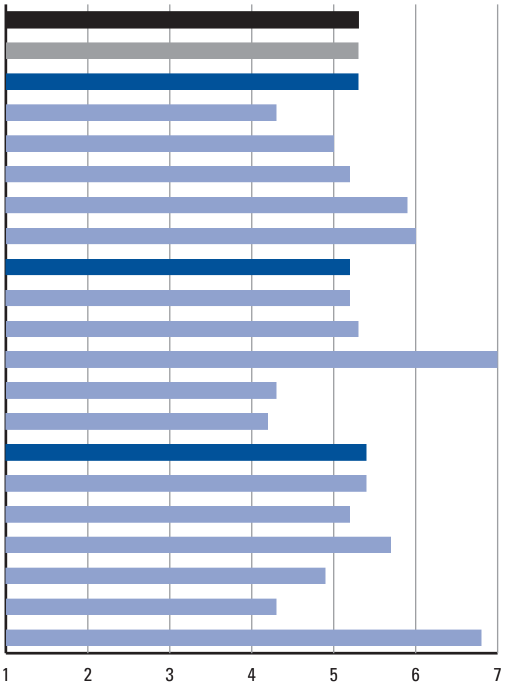
International tourist arrivals (thousands), 2007	59,193
International tourism receipts (US$ millions), 2007	57,795



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**6**	**5.3**
2008 Index	5	5.3
T&T regulatory framework	**29**	**5.3**
Policy rules and regulations	74	4.3
Environmental sustainability	31	5.0
Safety and security	66	5.2
Health and hygiene	35	5.9
Prioritization of Travel & Tourism	4	6.0
T&T business environment and infrastructure	**8**	**5.2**
Air transport infrastructure	10	5.2
Ground transport infrastructure	20	5.3
Tourism infrastructure	1	7.0
ICT infrastructure	31	4.3
Price competitiveness in the T&T industry	96	4.2
T&T human, cultural, and natural resources	**5**	**5.4**
Human resources	31	5.4
Education and training	34	5.2
Availability of qualified labor	32	5.7
Affinity for Travel & Tourism	48	4.9
Natural resources	30	4.3
Cultural resources	1	6.8



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Spain

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	63	⬜
1.02	Property rights	42	⬜
1.03	Business impact of rules on FDI	76	⬜
1.04	Visa requirements*	40	⬜
1.05	Openness of bilateral Air Service Agreements*	84	⬜
1.06	Transparency of government policymaking	89	⬜
1.07	Time required to start a business*	109	⬜
1.08	Cost to start a business*	74	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	36	⬜
2.02	Enforcement of environmental regulation	37	⬜
2.03	Sustainability of T&T industry development	35	⬜
2.04	Carbon dioxide emissions*	94	⬜
2.05	Particulate matter concentration*	56	⬜
2.06	Threatened species*	96	⬜
2.07	Environmental treaty ratification*	2	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	108	⬜
3.02	Reliability of police services	26	⬜
3.03	Business costs of crime and violence	59	⬜
3.04	Road traffic accidents*	102	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	25	⬜
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	51	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	13	⬜
5.02	T&T government expenditure*	21	⬜
5.03	Effectiveness of marketing and branding	16	⬜
5.04	T&T fair attendance*	3	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	34	⬜
6.02	Available seat kilometers, domestic*	10	🟦
6.03	Available seat kilometers, international*	6	🟦
6.04	Departures per 1,000 population*	26	⬜
6.05	Airport density*	52	⬜
6.06	Number of operating airlines*	6	🟦
6.07	International air transport network	41	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	30	⬜
7.02	Quality of railroad infrastructure	19	⬜
7.03	Quality of port infrastructure	33	⬜
7.04	Quality of ground transport network	20	⬜
7.05	Road density*	26	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	7	🟦
8.02	Presence of major car rental companies*	1	🟦
8.03	ATMs accepting Visa cards*	1	🟦
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	62	⬜
9.02	Internet users*	33	⬜
9.03	Telephone lines*	27	⬜
9.04	Broadband Internet subscribers*	27	⬜
9.05	Mobile telephone subscribers*	30	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	30	⬜
10.02	Purchasing power parity*	111	⬜
10.03	Extent and effect of taxation	75	⬜
10.04	Fuel price levels*	91	⬜
10.05	Hotel price index*	63	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	4	🟦
11.02	Secondary education enrollment*	4	🟦
11.03	Quality of the educational system	52	⬜
11.04	Local availability of research and training services	37	⬜
11.05	Extent of staff training	63	⬜
11.06	Hiring and firing practices	115	⬜
11.07	Ease of hiring foreign labor	37	⬜
11.08	HIV prevalence*	78	⬜
11.09	Business impact of HIV/AIDS	41	⬜
11.10	Life expectancy*	5	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	61	⬜
12.02	Attitude of population toward foreign visitors	53	⬜
12.03	Extension of business trips recommended	33	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	7	🟦
13.02	Protected areas*	69	⬜
13.03	Quality of the natural environment	69	⬜
13.04	Total known species*	65	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	2	🟦
14.02	Sports stadiums*	15	⬜
14.03	Number of international fairs and exhibitions*	4	🟦
14.04	Creative industries exports*	11	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Sri Lanka

Key indicators

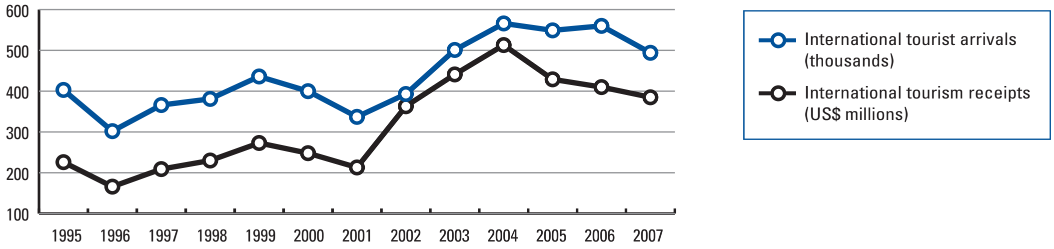
Population (millions), 2007	21.1
Surface area (1,000 square kilometers)	65.6
Gross domestic product (US$ billions), 2007	32.3
Gross domestic product (PPP, US$) per capita, 2007	4,264.9
Real GDP growth (percent), 2007	6.8
Environmental Performance Index, 2008 (out of 149 countries)	50

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	1,032	2.9	5.9
Employment (1,000 jobs)	195	2.4	2.3
T&T economy, 2008 estimates			
GDP (US$ millions)	2,968	8.4	5.5
Employment (1,000 jobs)	567	6.9	1.9

Source: World Travel & Tourism Council, TSA Research 2008

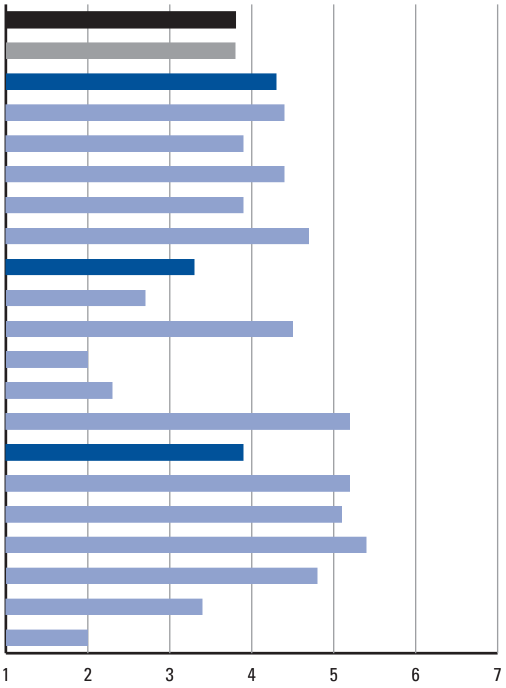
International tourist arrivals (thousands), 2007	494
International tourism receipts (US$ millions), 2007	385



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**78**	**3.8**
2008 Index	73	3.8
T&T regulatory framework	**86**	**4.3**
Policy rules and regulations	68	4.4
Environmental sustainability	112	3.9
Safety and security	107	4.4
Health and hygiene	90	3.9
Prioritization of Travel & Tourism	47	4.7
T&T business environment and infrastructure	**73**	**3.3**
Air transport infrastructure	87	2.7
Ground transport infrastructure	32	4.5
Tourism infrastructure	92	2.0
ICT infrastructure	90	2.3
Price competitiveness in the T&T industry	28	5.2
T&T human, cultural, and natural resources	**71**	**3.9**
Human resources	49	5.2
Education and training	39	5.1
Availability of qualified labor	80	5.4
Affinity for Travel & Tourism	65	4.8
Natural resources	59	3.4
Cultural resources	75	2.0



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Sri Lanka

The Travel & Tourism Competitiveness Index in detail

■ Competitive **Advantage** □ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	70	□
1.02	Property rights	60	□
1.03	Business impact of rules on FDI	27	■
1.04	Visa requirements*	90	□
1.05	Openness of bilateral Air Service Agreements*	82	□
1.06	Transparency of government policymaking	88	□
1.07	Time required to start a business*	97	□
1.08	Cost to start a business*	49	■
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	51	□
2.02	Enforcement of environmental regulation	47	■
2.03	Sustainability of T&T industry development	44	■
2.04	Carbon dioxide emissions*	23	■
2.05	Particulate matter concentration*	112	□
2.06	Threatened species*	128	□
2.07	Environmental treaty ratification*	52	□
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	132	□
3.02	Reliability of police services	93	□
3.03	Business costs of crime and violence	94	□
3.04	Road traffic accidents*	64	□
	4th pillar: Health and hygiene		
4.01	Physician density*	98	□
4.02	Access to improved sanitation*	66	□
4.03	Access to improved drinking water*	96	□
4.04	Hospital beds*	64	□
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	40	■
5.02	T&T government expenditure*	41	■
5.03	Effectiveness of marketing and branding	56	□
5.04	T&T fair attendance*	41	■
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	65	□
6.02	Available seat kilometers, domestic*	100	□
6.03	Available seat kilometers, international*	57	□
6.04	Departures per 1,000 population*	92	□
6.05	Airport density*	133	□
6.06	Number of operating airlines*	78	□
6.07	International air transport network	49	■
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	63	□
7.02	Quality of railroad infrastructure	46	■
7.03	Quality of port infrastructure	44	■
7.04	Quality of ground transport network	61	□
7.05	Road density*	23	■

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	104	□
8.02	Presence of major car rental companies*	73	□
8.03	ATMs accepting Visa cards*	89	□
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	50	■
9.02	Internet users*	113	□
9.03	Telephone lines*	81	□
9.04	Broadband Internet subscribers*	92	□
9.05	Mobile telephone subscribers*	93	□
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	118	□
10.02	Purchasing power parity*	16	■
10.03	Extent and effect of taxation	59	□
10.04	Fuel price levels*	26	■
10.05	Hotel price index*	5	■
	11th pillar: Human resources		
11.01	Primary education enrollment*	37	■
11.02	Secondary education enrollment*	66	□
11.03	Quality of the educational system	44	■
11.04	Local availability of research and training services	41	■
11.05	Extent of staff training	59	□
11.06	Hiring and firing practices	75	□
11.07	Ease of hiring foreign labor	102	□
11.08	HIV prevalence*	1	■
11.09	Business impact of HIV/AIDS	39	■
11.10	Life expectancy*	66	□
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	106	□
12.02	Attitude of population toward foreign visitors	60	□
12.03	Extension of business trips recommended	16	■
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	40	■
13.02	Protected areas*	48	■
13.03	Quality of the natural environment	60	□
13.04	Total known species*	60	□
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	33	■
14.02	Sports stadiums*	107	□
14.03	Number of international fairs and exhibitions*	68	□
14.04	Creative industries exports*	63	□

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Suriname

Key indicators

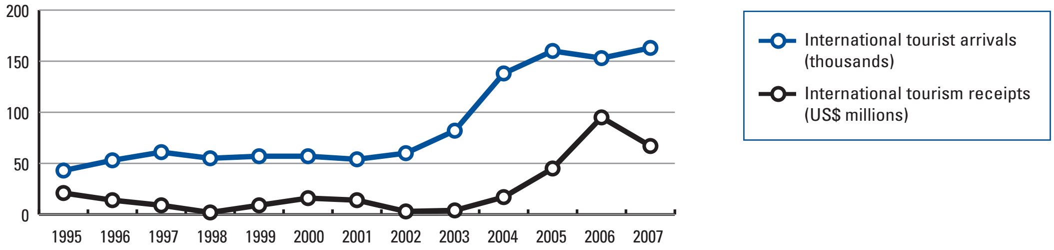
Population (millions), 2007	0.5
Surface area (1,000 square kilometers)	163.3
Gross domestic product (US$ billions), 2007	2.4
Gross domestic product (PPP, US$) per capita, 2007	7,762.2
Real GDP growth (percent), 2007	5.5
Environmental Performance Index, 2008 (out of 149 countries)	n/a

Travel & Tourism indicators

T&T industry, 2008 estimates		Percent of total	2009–2018 annual growth (%, forecast)
GDP (US$ millions)	63	2.9	3.3
Employment (1,000 jobs)	4	2.8	1.3
T&T economy, 2008 estimates			
GDP (US$ millions)	157	7.2	4.0
Employment (1,000 jobs)	10	6.6	1.9

Source: World Travel & Tourism Council, TSA Research 2008

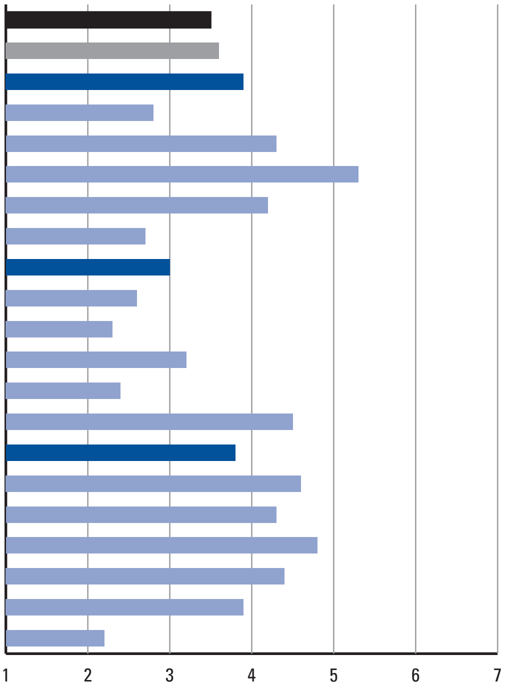
International tourist arrivals (thousands), 2007	163
International tourism receipts (US$ millions), 2007	67



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**99**	**3.5**
2008 Index	95	3.6
T&T regulatory framework	**110**	**3.9**
Policy rules and regulations	129	2.8
Environmental sustainability	77	4.3
Safety and security	61	5.3
Health and hygiene	82	4.2
Prioritization of Travel & Tourism	130	2.7
T&T business environment and infrastructure	**91**	**3.0**
Air transport infrastructure	91	2.6
Ground transport infrastructure	120	2.3
Tourism infrastructure	67	3.2
ICT infrastructure	86	2.4
Price competitiveness in the T&T industry	80	4.5
T&T human, cultural, and natural resources	**79**	**3.8**
Human resources	99	4.6
Education and training	91	4.3
Availability of qualified labor	115	4.8
Affinity for Travel & Tourism	103	4.4
Natural resources	43	3.9
Cultural resources	72	2.2



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Suriname

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	108	⬜
1.02	Property rights	106	⬜
1.03	Business impact of rules on FDI	126	⬜
1.04	Visa requirements*	98	⬜
1.05	Openness of bilateral Air Service Agreements*	24	🟦
1.06	Transparency of government policymaking	123	⬜
1.07	Time required to start a business*	129	⬜
1.08	Cost to start a business*	120	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	127	⬜
2.02	Enforcement of environmental regulation	124	⬜
2.03	Sustainability of T&T industry development	111	⬜
2.04	Carbon dioxide emissions*	75	⬜
2.05	Particulate matter concentration*	54	⬜
2.06	Threatened species*	2	🟦
2.07	Environmental treaty ratification*	94	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	77	⬜
3.02	Reliability of police services	55	⬜
3.03	Business costs of crime and violence	100	⬜
3.04	Road traffic accidents*	11	🟦
	4th pillar: Health and hygiene		
4.01	Physician density*	102	⬜
4.02	Access to improved sanitation*	74	⬜
4.03	Access to improved drinking water*	74	⬜
4.04	Hospital beds*	56	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	119	⬜
5.02	T&T government expenditure*	105	⬜
5.03	Effectiveness of marketing and branding	112	⬜
5.04	T&T fair attendance*	126	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	124	⬜
6.02	Available seat kilometers, domestic*	100	⬜
6.03	Available seat kilometers, international*	105	⬜
6.04	Departures per 1,000 population*	34	🟦
6.05	Airport density*	22	🟦
6.06	Number of operating airlines*	126	⬜
6.07	International air transport network	131	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	84	⬜
7.02	Quality of railroad infrastructure	105	⬜
7.03	Quality of port infrastructure	106	⬜
7.04	Quality of ground transport network	124	⬜
7.05	Road density*	127	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	31	🟦
8.02	Presence of major car rental companies*	56	⬜
8.03	ATMs accepting Visa cards*	124	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	111	⬜
9.02	Internet users*	95	⬜
9.03	Telephone lines*	70	⬜
9.04	Broadband Internet subscribers*	88	⬜
9.05	Mobile telephone subscribers*	78	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	105	⬜
10.02	Purchasing power parity*	75	⬜
10.03	Extent and effect of taxation	107	⬜
10.04	Fuel price levels*	n/a	
10.05	Hotel price index*	n/a	
	11th pillar: Human resources		
11.01	Primary education enrollment*	40	🟦
11.02	Secondary education enrollment*	86	⬜
11.03	Quality of the educational system	101	⬜
11.04	Local availability of research and training services	123	⬜
11.05	Extent of staff training	108	⬜
11.06	Hiring and firing practices	131	⬜
11.07	Ease of hiring foreign labor	80	⬜
11.08	HIV prevalence*	117	⬜
11.09	Business impact of HIV/AIDS	106	⬜
11.10	Life expectancy*	89	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	88	⬜
12.02	Attitude of population toward foreign visitors	102	⬜
12.03	Extension of business trips recommended	97	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	40	🟦
13.02	Protected areas*	55	⬜
13.03	Quality of the natural environment	43	🟦
13.04	Total known species*	32	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	97	⬜
14.02	Sports stadiums*	31	🟦
14.03	Number of international fairs and exhibitions*	n/a	
14.04	Creative industries exports*	118	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Sweden

Key indicators

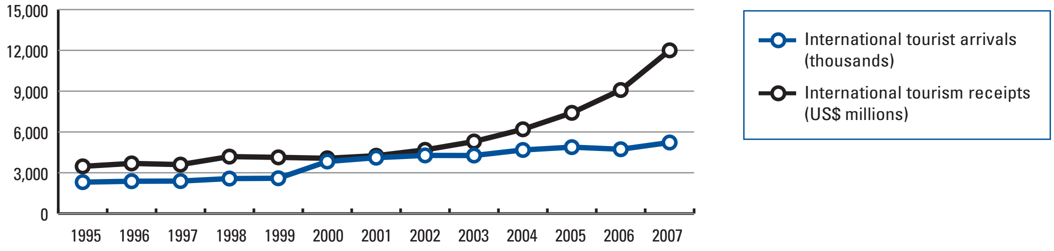
Population (millions), 2007	9.1
Surface area (1,000 square kilometers)	450.3
Gross domestic product (US$ billions), 2007	454.8
Gross domestic product (PPP, US$) per capita, 2007	36,577.7
Real GDP growth (percent), 2007	2.7
Environmental Performance Index, 2008 (out of 149 countries)	2

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	12,000	2.4	3.8
Employment (1,000 jobs)	110	2.4	1.8
T&T economy, 2008 estimates			
GDP (US$ millions)	35,496	7.1	3.5
Employment (1,000 jobs)	315	6.9	1.4

Source: World Travel & Tourism Council, TSA Research 2008

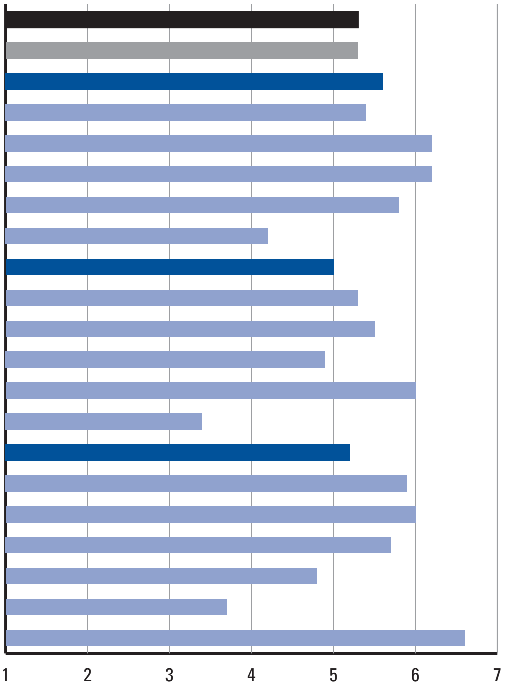
International tourist arrivals (thousands), 2007	5,224
International tourism receipts (US$ millions), 2007	12,002



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**7**	**5.3**
2008 Index	8	5.3
T&T regulatory framework	**12**	**5.6**
Policy rules and regulations	7	5.4
Environmental sustainability	1	6.2
Safety and security	13	6.2
Health and hygiene	38	5.8
Prioritization of Travel & Tourism	73	4.2
T&T business environment and infrastructure	**14**	**5.0**
Air transport infrastructure	9	5.3
Ground transport infrastructure	14	5.5
Tourism infrastructure	26	4.9
ICT infrastructure	1	6.0
Price competitiveness in the T&T industry	127	3.4
T&T human, cultural, and natural resources	**8**	**5.2**
Human resources	8	5.9
Education and training	6	6.0
Availability of qualified labor	21	5.7
Affinity for Travel & Tourism	62	4.8
Natural resources	50	3.7
Cultural resources	2	6.6



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Sweden

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	6	🟦
1.02	Property rights	7	🟦
1.03	Business impact of rules on FDI	9	🟦
1.04	Visa requirements*	40	⬜
1.05	Openness of bilateral Air Service Agreements*	76	⬜
1.06	Transparency of government policymaking	3	🟦
1.07	Time required to start a business*	41	⬜
1.08	Cost to start a business*	6	🟦
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	1	🟦
2.02	Enforcement of environmental regulation	2	🟦
2.03	Sustainability of T&T industry development	29	⬜
2.04	Carbon dioxide emissions*	83	⬜
2.05	Particulate matter concentration*	2	🟦
2.06	Threatened species*	3	🟦
2.07	Environmental treaty ratification*	1	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	40	⬜
3.02	Reliability of police services	12	⬜
3.03	Business costs of crime and violence	26	⬜
3.04	Road traffic accidents*	41	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	27	⬜
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	57	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	68	⬜
5.02	T&T government expenditure*	92	⬜
5.03	Effectiveness of marketing and branding	51	⬜
5.04	T&T fair attendance*	62	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	18	⬜
6.02	Available seat kilometers, domestic*	30	⬜
6.03	Available seat kilometers, international*	40	⬜
6.04	Departures per 1,000 population*	17	⬜
6.05	Airport density*	9	🟦
6.06	Number of operating airlines*	22	⬜
6.07	International air transport network	22	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	18	⬜
7.02	Quality of railroad infrastructure	11	⬜
7.03	Quality of port infrastructure	13	⬜
7.04	Quality of ground transport network	8	🟦
7.05	Road density*	34	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	20	⬜
8.02	Presence of major car rental companies*	23	⬜
8.03	ATMs accepting Visa cards*	36	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	2	🟦
9.02	Internet users*	5	🟦
9.03	Telephone lines*	5	🟦
9.04	Broadband Internet subscribers*	3	🟦
9.05	Mobile telephone subscribers*	25	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	26	⬜
10.02	Purchasing power parity*	126	⬜
10.03	Extent and effect of taxation	125	⬜
10.04	Fuel price levels*	124	⬜
10.05	Hotel price index*	77	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	52	⬜
11.02	Secondary education enrollment*	16	⬜
11.03	Quality of the educational system	12	⬜
11.04	Local availability of research and training services	7	🟦
11.05	Extent of staff training	4	🟦
11.06	Hiring and firing practices	101	⬜
11.07	Ease of hiring foreign labor	53	⬜
11.08	HIV prevalence*	22	⬜
11.09	Business impact of HIV/AIDS	5	🟦
11.10	Life expectancy*	5	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	56	⬜
12.02	Attitude of population toward foreign visitors	9	🟦
12.03	Extension of business trips recommended	104	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	23	⬜
13.02	Protected areas*	63	⬜
13.03	Quality of the natural environment	2	🟦
13.04	Total known species*	105	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	12	⬜
14.02	Sports stadiums*	18	⬜
14.03	Number of international fairs and exhibitions*	15	⬜
14.04	Creative industries exports*	18	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Switzerland

Key indicators

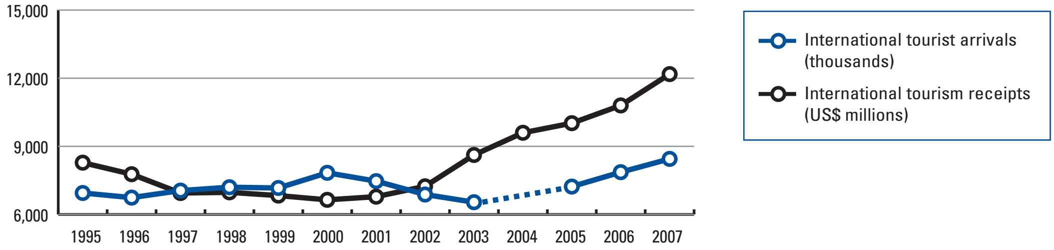
Population (millions), 2007	7.3
Surface area (1,000 square kilometers)	41.3
Gross domestic product (US$ billions), 2007	427.1
Gross domestic product (PPP, US$) per capita, 2007	41,264.7
Real GDP growth (percent), 2007	3.3
Environmental Performance Index, 2008 (out of 149 countries)	1

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	24,652	5.3	1.8
Employment (1,000 jobs)	316	7.1	1.2
T&T economy, 2008 estimates			
GDP (US$ millions)	58,120	12.6	1.7
Employment (1,000 jobs)	712	16.0	1.0

Source: World Travel & Tourism Council, TSA Research 2008

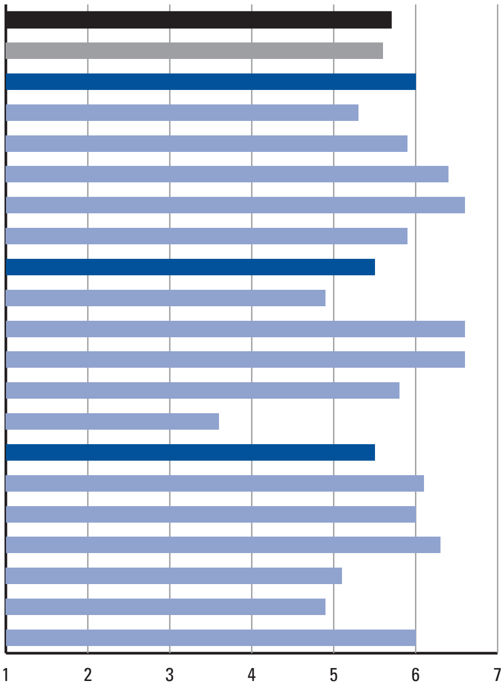
International tourist arrivals (thousands), 2007	8,448
International tourism receipts (US$ millions), 2007	12,182



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**1**	**5.7**
2008 Index	1	5.6
T&T regulatory framework	**1**	**6.0**
Policy rules and regulations	18	5.3
Environmental sustainability	2	5.9
Safety and security	8	6.4
Health and hygiene	13	6.6
Prioritization of Travel & Tourism	7	5.9
T&T business environment and infrastructure	**1**	**5.5**
Air transport infrastructure	17	4.9
Ground transport infrastructure	1	6.6
Tourism infrastructure	7	6.6
ICT infrastructure	3	5.8
Price competitiveness in the T&T industry	123	3.6
T&T human, cultural, and natural resources	**2**	**5.5**
Human resources	4	6.1
Education and training	8	6.0
Availability of qualified labor	3	6.3
Affinity for Travel & Tourism	34	5.1
Natural resources	15	4.9
Cultural resources	6	6.0



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Switzerland

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

1st pillar: Policy rules and regulations

	INDICATOR	RANK/133	
1.01	Prevalence of foreign ownership	32	⬜
1.02	Property rights	1	🟦
1.03	Business impact of rules on FDI	23	⬜
1.04	Visa requirements*	39	⬜
1.05	Openness of bilateral Air Service Agreements*	64	⬜
1.06	Transparency of government policymaking	7	🟦
1.07	Time required to start a business*	61	⬜
1.08	Cost to start a business*	20	⬜

2nd pillar: Environmental sustainability

2.01	Stringency of environmental regulation	8	🟦
2.02	Enforcement of environmental regulation	4	🟦
2.03	Sustainability of T&T industry development	15	⬜
2.04	Carbon dioxide emissions*	79	⬜
2.05	Particulate matter concentration*	39	⬜
2.06	Threatened species*	6	🟦
2.07	Environmental treaty ratification*	21	⬜

3rd pillar: Safety and security

3.01	Business costs of terrorism	37	⬜
3.02	Reliability of police services	3	🟦
3.03	Business costs of crime and violence	17	⬜
3.04	Road traffic accidents*	32	⬜

4th pillar: Health and hygiene

4.01	Physician density*	5	🟦
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	27	⬜

5th pillar: Prioritization of Travel & Tourism

5.01	Government prioritization of the T&T industry	36	⬜
5.02	T&T government expenditure*	18	⬜
5.03	Effectiveness of marketing and branding	15	⬜
5.04	T&T fair attendance*	14	⬜

6th pillar: Air transport infrastructure

6.01	Quality of air transport infrastructure	6	🟦
6.02	Available seat kilometers, domestic*	56	⬜
6.03	Available seat kilometers, international*	22	⬜
6.04	Departures per 1,000 population*	23	⬜
6.05	Airport density*	56	⬜
6.06	Number of operating airlines*	9	🟦
6.07	International air transport network	9	🟦

7th pillar: Ground transport infrastructure

7.01	Quality of roads	2	🟦
7.02	Quality of railroad infrastructure	1	🟦
7.03	Quality of port infrastructure	17	⬜
7.04	Quality of ground transport network	1	🟦
7.05	Road density*	13	⬜

8th pillar: Tourism infrastructure

	INDICATOR	RANK/133	
8.01	Hotel rooms*	10	🟦
8.02	Presence of major car rental companies*	23	⬜
8.03	ATMs accepting Visa cards*	5	🟦

9th pillar: ICT infrastructure

9.01	Extent of business Internet use	7	🟦
9.02	Internet users*	17	⬜
9.03	Telephone lines*	1	🟦
9.04	Broadband Internet subscribers*	5	🟦
9.05	Mobile telephone subscribers*	33	⬜

10th pillar: Price competitiveness in the T&T industry

10.01	Ticket taxes and airport charges*	94	⬜
10.02	Purchasing power parity*	129	⬜
10.03	Extent and effect of taxation	15	⬜
10.04	Fuel price levels*	120	⬜
10.05	Hotel price index*	100	⬜

11th pillar: Human resources

11.01	Primary education enrollment*	92	⬜
11.02	Secondary education enrollment*	52	⬜
11.03	Quality of the educational system	3	🟦
11.04	Local availability of research and training services	2	🟦
11.05	Extent of staff training	2	🟦
11.06	Hiring and firing practices	3	🟦
11.07	Ease of hiring foreign labor	19	⬜
11.08	HIV prevalence*	85	⬜
11.09	Business impact of HIV/AIDS	20	⬜
11.10	Life expectancy*	2	🟦

12th pillar: Affinity for Travel & Tourism

12.01	Tourism openness*	63	⬜
12.02	Attitude of population toward foreign visitors	33	⬜
12.03	Extension of business trips recommended	4	🟦

13th pillar: Natural resources

13.01	Number of World Heritage natural sites*	16	⬜
13.02	Protected areas*	16	⬜
13.03	Quality of the natural environment	9	🟦
13.04	Total known species*	98	⬜

14th pillar: Cultural resources

14.01	Number of World Heritage cultural sites*	33	⬜
14.02	Sports stadiums*	16	⬜
14.03	Number of international fairs and exhibitions*	14	⬜
14.04	Creative industries exports*	9	🟦

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Syria

Key indicators

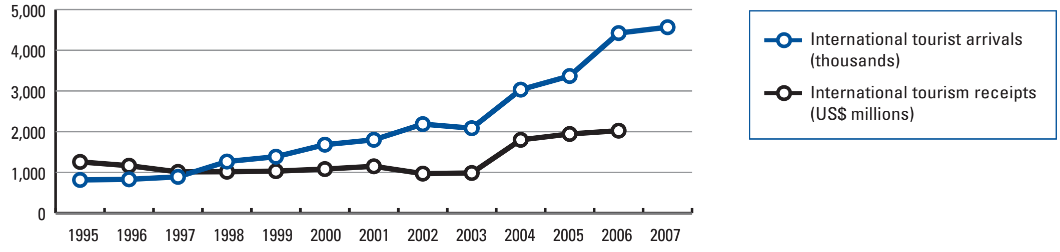
Population (millions), 2007	20.0
Surface area (1,000 square kilometers)	185.2
Gross domestic product (US$ billions), 2007	39.0
Gross domestic product (PPP, US$) per capita, 2007	4,491.8
Real GDP growth (percent), 2007	3.9
Environmental Performance Index, 2008 (out of 149 countries)	99

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	2,044	6.1	5.7
Employment (1,000 jobs)	512	6.9	6.4
T&T economy, 2008 estimates			
GDP (US$ millions)	4,885	14.5	4.7
Employment (1,000 jobs)	1,130	15.2	5.6

Source: World Travel & Tourism Council, TSA Research 2008

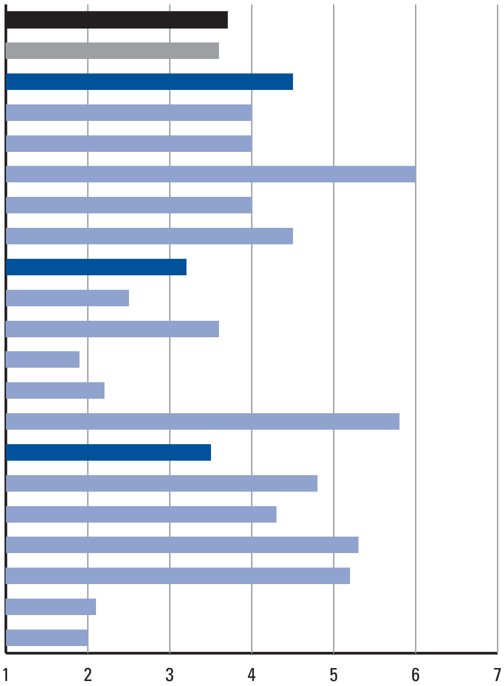
International tourist arrivals (thousands), 2007	4,566
International tourism receipts (US$ millions), 2006	2,025



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**85**	**3.7**
2008 Index	94	3.6
T&T regulatory framework	**68**	**4.5**
Policy rules and regulations	93	4.0
Environmental sustainability	111	4.0
Safety and security	23	6.0
Health and hygiene	89	4.0
Prioritization of Travel & Tourism	58	4.5
T&T business environment and infrastructure	**82**	**3.2**
Air transport infrastructure	98	2.5
Ground transport infrastructure	63	3.6
Tourism infrastructure	97	1.9
ICT infrastructure	94	2.2
Price competitiveness in the T&T industry	5	5.8
T&T human, cultural, and natural resources	**100**	**3.5**
Human resources	93	4.8
Education and training	89	4.3
Availability of qualified labor	90	5.3
Affinity for Travel & Tourism	32	5.2
Natural resources	128	2.1
Cultural resources	78	2.0



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Syria

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ▨ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	127	▨
1.02	Property rights	30	🟦
1.03	Business impact of rules on FDI	108	▨
1.04	Visa requirements*	132	▨
1.05	Openness of bilateral Air Service Agreements*	86	▨
1.06	Transparency of government policymaking	106	▨
1.07	Time required to start a business*	50	🟦
1.08	Cost to start a business*	79	▨
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	80	▨
2.02	Enforcement of environmental regulation	81	▨
2.03	Sustainability of T&T industry development	87	▨
2.04	Carbon dioxide emissions*	64	▨
2.05	Particulate matter concentration*	109	▨
2.06	Threatened species*	101	▨
2.07	Environmental treaty ratification*	81	▨
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	10	🟦
3.02	Reliability of police services	69	▨
3.03	Business costs of crime and violence	1	🟦
3.04	Road traffic accidents*	74	▨
	4th pillar: Health and hygiene		
4.01	Physician density*	99	▨
4.02	Access to improved sanitation*	55	▨
4.03	Access to improved drinking water*	81	▨
4.04	Hospital beds*	93	▨
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	56	▨
5.02	T&T government expenditure*	69	▨
5.03	Effectiveness of marketing and branding	86	▨
5.04	T&T fair attendance*	25	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	90	▨
6.02	Available seat kilometers, domestic*	64	▨
6.03	Available seat kilometers, international*	76	▨
6.04	Departures per 1,000 population*	95	▨
6.05	Airport density*	113	▨
6.06	Number of operating airlines*	51	▨
6.07	International air transport network	100	▨
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	65	▨
7.02	Quality of railroad infrastructure	49	🟦
7.03	Quality of port infrastructure	97	▨
7.04	Quality of ground transport network	28	🟦
7.05	Road density*	50	🟦

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	100	▨
8.02	Presence of major car rental companies*	73	▨
8.03	ATMs accepting Visa cards*	110	▨
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	123	▨
9.02	Internet users*	75	▨
9.03	Telephone lines*	71	▨
9.04	Broadband Internet subscribers*	110	▨
9.05	Mobile telephone subscribers*	105	▨
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	45	🟦
10.02	Purchasing power parity*	21	🟦
10.03	Extent and effect of taxation	29	🟦
10.04	Fuel price levels*	4	🟦
10.05	Hotel price index*	17	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	56	▨
11.02	Secondary education enrollment*	94	▨
11.03	Quality of the educational system	91	▨
11.04	Local availability of research and training services	95	▨
11.05	Extent of staff training	112	▨
11.06	Hiring and firing practices	105	▨
11.07	Ease of hiring foreign labor	112	▨
11.08	HIV prevalence*	1	🟦
11.09	Business impact of HIV/AIDS	4	🟦
11.10	Life expectancy*	66	▨
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	39	🟦
12.02	Attitude of population toward foreign visitors	29	🟦
12.03	Extension of business trips recommended	18	🟦
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	▨
13.02	Protected areas*	126	▨
13.03	Quality of the natural environment	83	▨
13.04	Total known species*	102	▨
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	45	🟦
14.02	Sports stadiums*	102	▨
14.03	Number of international fairs and exhibitions*	101	▨
14.04	Creative industries exports*	n/a	

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Taiwan, China

Key indicators

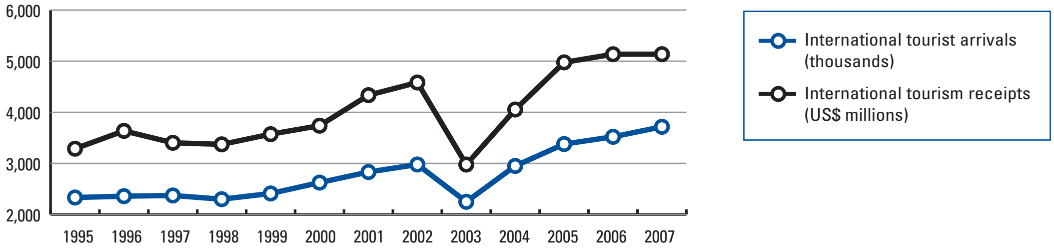
Population (millions), 2007	22.7
Surface area (1,000 square kilometers)	0.0
Gross domestic product (US$ billions), 2007	383.3
Gross domestic product (PPP, US$) per capita, 2007	30,321.7
Real GDP growth (percent), 2007	5.7
Environmental Performance Index, 2008 (out of 149 countries)	40

Travel & Tourism indicators

T&T industry, 2008 estimates		Percent of total	2009–2018 annual growth (%, forecast)
GDP (US$ millions)	4,776	1.1	1.5
Employment (1,000 jobs)	165	1.6	–1.1
T&T economy, 2008 estimates			
GDP (US$ millions)	19,727	4.7	3.0
Employment (1,000 jobs)	547	5.2	0.0

Source: World Travel & Tourism Council, TSA Research 2008

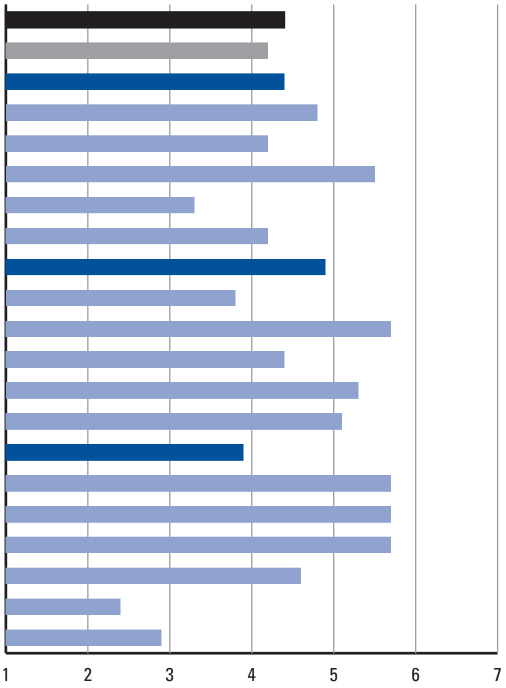
International tourist arrivals (thousands), 2007	3,716
International tourism receipts (US$ millions), 2007	5,137



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**43**	**4.4**
2008 Index	52	4.2
T&T regulatory framework	**75**	**4.4**
Policy rules and regulations	42	4.8
Environmental sustainability	92	4.2
Safety and security	51	5.5
Health and hygiene	101	3.3
Prioritization of Travel & Tourism	74	4.2
T&T business environment and infrastructure	**18**	**4.9**
Air transport infrastructure	45	3.8
Ground transport infrastructure	11	5.7
Tourism infrastructure	35	4.4
ICT infrastructure	12	5.3
Price competitiveness in the T&T industry	34	5.1
T&T human, cultural, and natural resources	**65**	**3.9**
Human resources	16	5.7
Education and training	19	5.7
Availability of qualified labor	23	5.7
Affinity for Travel & Tourism	77	4.6
Natural resources	110	2.4
Cultural resources	47	2.9



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Taiwan, China

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	62	⬜
1.02	Property rights	34	🟦
1.03	Business impact of rules on FDI	64	⬜
1.04	Visa requirements*	93	⬜
1.05	Openness of bilateral Air Service Agreements*	n/a	
1.06	Transparency of government policymaking	23	🟦
1.07	Time required to start a business*	105	⬜
1.08	Cost to start a business*	36	🟦
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	29	🟦
2.02	Enforcement of environmental regulation	31	🟦
2.03	Sustainability of T&T industry development	62	⬜
2.04	Carbon dioxide emissions*	n/a	
2.05	Particulate matter concentration*	104	⬜
2.06	Threatened species*	107	⬜
2.07	Environmental treaty ratification*	n/a	
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	60	⬜
3.02	Reliability of police services	40	🟦
3.03	Business costs of crime and violence	35	🟦
3.04	Road traffic accidents*	n/a	
	4th pillar: Health and hygiene		
4.01	Physician density*	66	⬜
4.02	Access to improved sanitation*	n/a	
4.03	Access to improved drinking water*	n/a	
4.04	Hospital beds*	n/a	
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	64	⬜
5.02	T&T government expenditure*	106	⬜
5.03	Effectiveness of marketing and branding	76	⬜
5.04	T&T fair attendance*	41	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	32	🟦
6.02	Available seat kilometers, domestic*	39	🟦
6.03	Available seat kilometers, international*	21	🟦
6.04	Departures per 1,000 population*	n/a	
6.05	Airport density*	57	⬜
6.06	Number of operating airlines*	57	⬜
6.07	International air transport network	50	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	20	🟦
7.02	Quality of railroad infrastructure	9	🟦
7.03	Quality of port infrastructure	18	🟦
7.04	Quality of ground transport network	11	🟦
7.05	Road density*	n/a	

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	50	⬜
8.02	Presence of major car rental companies*	73	⬜
8.03	ATMs accepting Visa cards*	12	🟦
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	12	🟦
9.02	Internet users*	15	🟦
9.03	Telephone lines*	3	🟦
9.04	Broadband Internet subscribers*	21	🟦
9.05	Mobile telephone subscribers*	36	🟦
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	14	🟦
10.02	Purchasing power parity*	63	⬜
10.03	Extent and effect of taxation	26	🟦
10.04	Fuel price levels*	46	⬜
10.05	Hotel price index*	80	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	9	🟦
11.02	Secondary education enrollment*	31	🟦
11.03	Quality of the educational system	25	🟦
11.04	Local availability of research and training services	19	🟦
11.05	Extent of staff training	16	🟦
11.06	Hiring and firing practices	25	🟦
11.07	Ease of hiring foreign labor	104	⬜
11.08	HIV prevalence*	48	⬜
11.09	Business impact of HIV/AIDS	47	⬜
11.10	Life expectancy*	36	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	87	⬜
12.02	Attitude of population toward foreign visitors	62	⬜
12.03	Extension of business trips recommended	76	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	88	⬜
13.03	Quality of the natural environment	96	⬜
13.04	Total known species*	66	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	116	⬜
14.02	Sports stadiums*	69	⬜
14.03	Number of international fairs and exhibitions*	34	🟦
14.04	Creative industries exports*	30	🟦

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Tajikistan

Key indicators

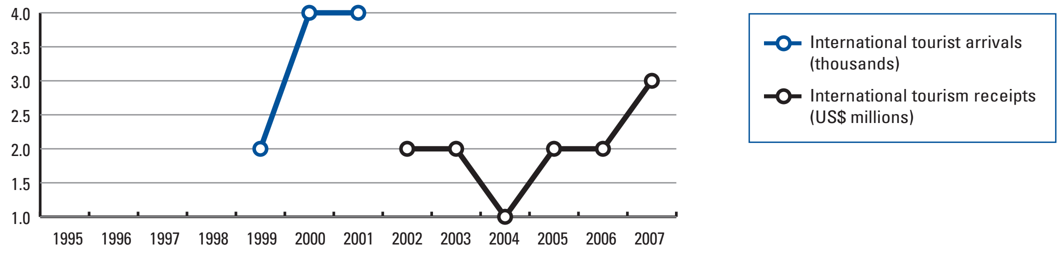
Population (millions), 2007	6.7
Surface area (1,000 square kilometers)	142.6
Gross domestic product (US$ billions), 2007	3.7
Gross domestic product (PPP, US$) per capita, 2007	1,842.7
Real GDP growth (percent), 2007	7.8
Environmental Performance Index, 2008 (out of 149 countries)	79

Travel & Tourism indicators

T&T industry, 2008 estimates		Percent of total	2009–2018 annual growth (%, forecast)
GDP (US$ millions)	n/a	n/a	n/a
Employment (1,000 jobs)	n/a	n/a	n/a
T&T economy, 2008 estimates			
GDP (US$ millions)	n/a	n/a	n/a
Employment (1,000 jobs)	n/a	n/a	n/a

Source: World Travel & Tourism Council, TSA Research 2008

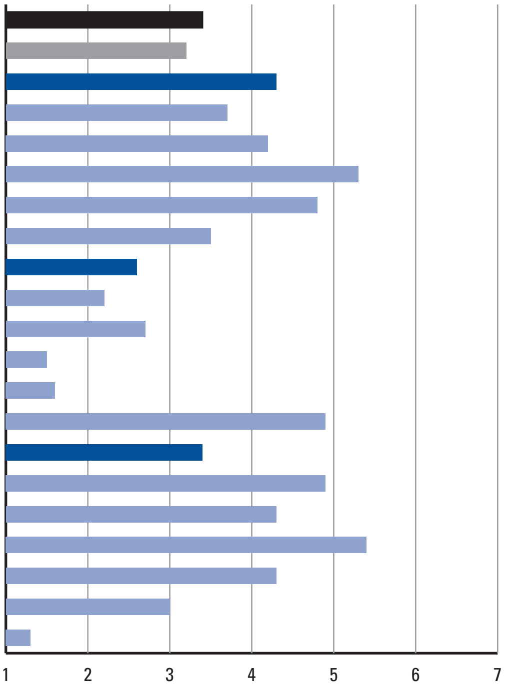
International tourist arrivals (thousands), 2001	4
International tourism receipts (US$ millions), 2007	3



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**109**	**3.4**
2008 Index	114	3.2
T&T regulatory framework	**84**	**4.3**
Policy rules and regulations	109	3.7
Environmental sustainability	97	4.2
Safety and security	54	5.3
Health and hygiene	61	4.8
Prioritization of Travel & Tourism	112	3.5
T&T business environment and infrastructure	**117**	**2.6**
Air transport infrastructure	117	2.2
Ground transport infrastructure	102	2.7
Tourism infrastructure	120	1.5
ICT infrastructure	121	1.6
Price competitiveness in the T&T industry	49	4.9
T&T human, cultural, and natural resources	**117**	**3.4**
Human resources	86	4.9
Education and training	86	4.3
Availability of qualified labor	70	5.4
Affinity for Travel & Tourism	113	4.3
Natural resources	78	3.0
Cultural resources	125	1.3



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Tajikistan

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	112	⬜
1.02	Property rights	88	⬜
1.03	Business impact of rules on FDI	110	⬜
1.04	Visa requirements*	117	⬜
1.05	Openness of bilateral Air Service Agreements*	n/a	
1.06	Transparency of government policymaking	102	⬜
1.07	Time required to start a business*	110	⬜
1.08	Cost to start a business*	92	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	101	⬜
2.02	Enforcement of environmental regulation	65	⬜
2.03	Sustainability of T&T industry development	72	⬜
2.04	Carbon dioxide emissions*	26	🟦
2.05	Particulate matter concentration*	87	⬜
2.06	Threatened species*	61	⬜
2.07	Environmental treaty ratification*	129	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	88	⬜
3.02	Reliability of police services	75	⬜
3.03	Business costs of crime and violence	60	⬜
3.04	Road traffic accidents*	20	🟦
	4th pillar: Health and hygiene		
4.01	Physician density*	53	⬜
4.02	Access to improved sanitation*	55	⬜
4.03	Access to improved drinking water*	114	⬜
4.04	Hospital beds*	24	🟦
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	88	⬜
5.02	T&T government expenditure*	n/a	
5.03	Effectiveness of marketing and branding	100	⬜
5.04	T&T fair attendance*	126	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	112	⬜
6.02	Available seat kilometers, domestic*	100	⬜
6.03	Available seat kilometers, international*	100	⬜
6.04	Departures per 1,000 population*	107	⬜
6.05	Airport density*	88	⬜
6.06	Number of operating airlines*	86	⬜
6.07	International air transport network	113	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	103	⬜
7.02	Quality of railroad infrastructure	42	🟦
7.03	Quality of port infrastructure	132	⬜
7.04	Quality of ground transport network	68	⬜
7.05	Road density*	81	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	124	⬜
8.02	Presence of major car rental companies*	95	⬜
8.03	ATMs accepting Visa cards*	104	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	93	⬜
9.02	Internet users*	133	⬜
9.03	Telephone lines*	106	⬜
9.04	Broadband Internet subscribers*	124	⬜
9.05	Mobile telephone subscribers*	131	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	109	⬜
10.02	Purchasing power parity*	2	🟦
10.03	Extent and effect of taxation	100	⬜
10.04	Fuel price levels*	49	🟦
10.05	Hotel price index*	n/a	
	11th pillar: Human resources		
11.01	Primary education enrollment*	29	🟦
11.02	Secondary education enrollment*	81	⬜
11.03	Quality of the educational system	96	⬜
11.04	Local availability of research and training services	132	⬜
11.05	Extent of staff training	105	⬜
11.06	Hiring and firing practices	13	🟦
11.07	Ease of hiring foreign labor	54	⬜
11.08	HIV prevalence*	67	⬜
11.09	Business impact of HIV/AIDS	84	⬜
11.10	Life expectancy*	100	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	133	⬜
12.02	Attitude of population toward foreign visitors	87	⬜
12.03	Extension of business trips recommended	54	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	54	⬜
13.03	Quality of the natural environment	37	🟦
13.04	Total known species*	97	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	97	⬜
14.02	Sports stadiums*	130	⬜
14.03	Number of international fairs and exhibitions*	n/a	
14.04	Creative industries exports*	n/a	

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Tanzania

Key indicators

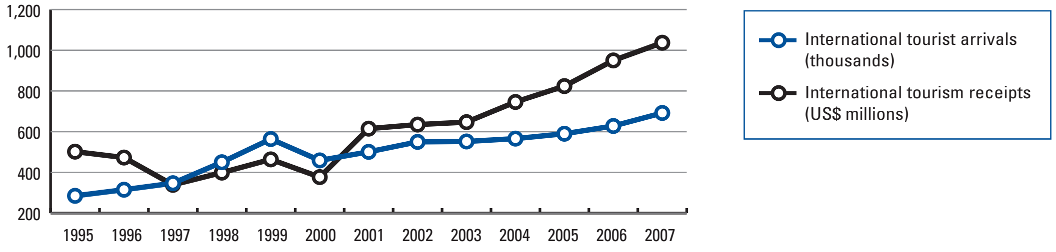
Population (millions), 2007	39.7
Surface area (1,000 square kilometers)	947.3
Gross domestic product (US$ billions), 2007	16.7
Gross domestic product (PPP, US$) per capita, 2007	1,255.6
Real GDP growth (percent), 2007	7.1
Environmental Performance Index, 2008 (out of 149 countries)	113

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	680	4.2	3.6
Employment (1,000 jobs)	308	3.3	1.2
T&T economy, 2008 estimates			
GDP (US$ millions)	1,552	9.7	3.9
Employment (1,000 jobs)	719	7.7	1.4

Source: World Travel & Tourism Council, TSA Research 2008

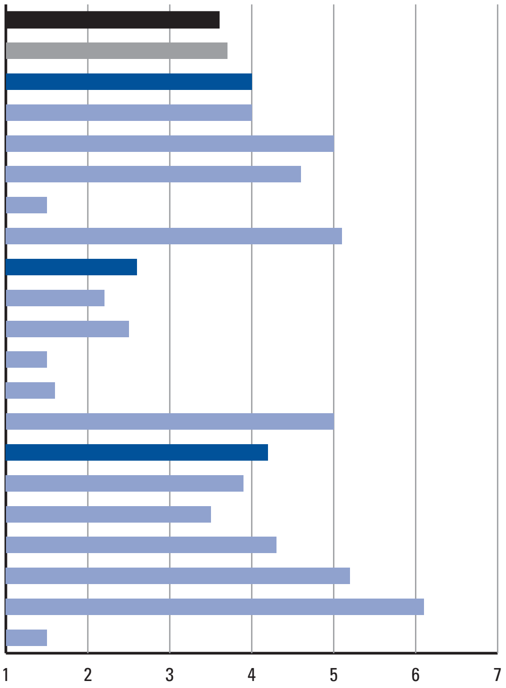
International tourist arrivals (thousands), 2007	692
International tourism receipts (US$ millions), 2007	1,037



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**98**	**3.6**
2008 Index	88	3.7
T&T regulatory framework	**102**	**4.0**
Policy rules and regulations	89	4.0
Environmental sustainability	32	5.0
Safety and security	98	4.6
Health and hygiene	127	1.5
Prioritization of Travel & Tourism	33	5.1
T&T business environment and infrastructure	**118**	**2.6**
Air transport infrastructure	113	2.2
Ground transport infrastructure	116	2.5
Tourism infrastructure	118	1.5
ICT infrastructure	120	1.6
Price competitiveness in the T&T industry	43	5.0
T&T human, cultural, and natural resources	**50**	**4.2**
Human resources	122	3.9
Education and training	115	3.5
Availability of qualified labor	125	4.3
Affinity for Travel & Tourism	33	5.2
Natural resources	3	6.1
Cultural resources	108	1.5



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Tanzania

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	68	⬜
1.02	Property rights	100	⬜
1.03	Business impact of rules on FDI	41	🟦
1.04	Visa requirements*	80	⬜
1.05	Openness of bilateral Air Service Agreements*	109	⬜
1.06	Transparency of government policymaking	74	⬜
1.07	Time required to start a business*	81	⬜
1.08	Cost to start a business*	102	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	69	⬜
2.02	Enforcement of environmental regulation	62	⬜
2.03	Sustainability of T&T industry development	47	🟦
2.04	Carbon dioxide emissions*	11	🟦
2.05	Particulate matter concentration*	37	🟦
2.06	Threatened species*	104	⬜
2.07	Environmental treaty ratification*	34	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	64	⬜
3.02	Reliability of police services	70	⬜
3.03	Business costs of crime and violence	86	⬜
3.04	Road traffic accidents*	112	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	131	⬜
4.02	Access to improved sanitation*	111	⬜
4.03	Access to improved drinking water*	122	⬜
4.04	Hospital beds*	101	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	39	🟦
5.02	T&T government expenditure*	28	🟦
5.03	Effectiveness of marketing and branding	65	⬜
5.04	T&T fair attendance*	25	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	111	⬜
6.02	Available seat kilometers, domestic*	49	🟦
6.03	Available seat kilometers, international*	90	⬜
6.04	Departures per 1,000 population*	115	⬜
6.05	Airport density*	101	⬜
6.06	Number of operating airlines*	80	⬜
6.07	International air transport network	98	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	109	⬜
7.02	Quality of railroad infrastructure	79	⬜
7.03	Quality of port infrastructure	113	⬜
7.04	Quality of ground transport network	102	⬜
7.05	Road density*	109	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	106	⬜
8.02	Presence of major car rental companies*	95	⬜
8.03	ATMs accepting Visa cards*	124	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	102	⬜
9.02	Internet users*	122	⬜
9.03	Telephone lines*	128	⬜
9.04	Broadband Internet subscribers*	127	⬜
9.05	Mobile telephone subscribers*	119	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	71	⬜
10.02	Purchasing power parity*	7	🟦
10.03	Extent and effect of taxation	71	⬜
10.04	Fuel price levels*	78	⬜
10.05	Hotel price index*	35	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	22	🟦
11.02	Secondary education enrollment*	133	⬜
11.03	Quality of the educational system	95	⬜
11.04	Local availability of research and training services	107	⬜
11.05	Extent of staff training	95	⬜
11.06	Hiring and firing practices	97	⬜
11.07	Ease of hiring foreign labor	120	⬜
11.08	HIV prevalence*	125	⬜
11.09	Business impact of HIV/AIDS	122	⬜
11.10	Life expectancy*	122	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	22	🟦
12.02	Attitude of population toward foreign visitors	63	⬜
12.03	Extension of business trips recommended	100	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	10	🟦
13.02	Protected areas*	5	🟦
13.03	Quality of the natural environment	54	⬜
13.04	Total known species*	12	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	65	⬜
14.02	Sports stadiums*	111	⬜
14.03	Number of international fairs and exhibitions*	83	⬜
14.04	Creative industries exports*	94	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Thailand

Key indicators

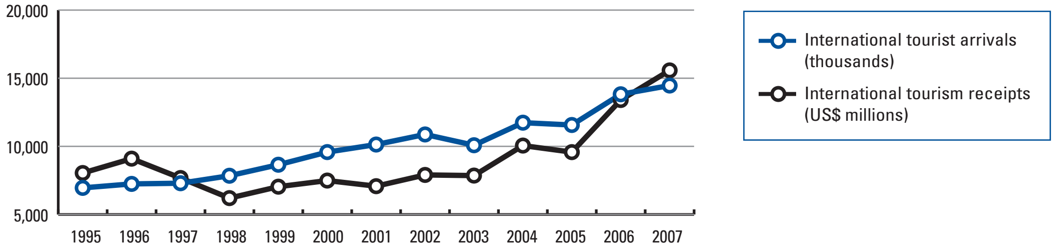
Population (millions), 2007	65.3
Surface area (1,000 square kilometers)	513.1
Gross domestic product (US$ billions), 2007	245.4
Gross domestic product (PPP, US$) per capita, 2007	7,906.7
Real GDP growth (percent), 2007	4.8
Environmental Performance Index, 2008 (out of 149 countries)	53

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	17,338	6.4	5.6
Employment (1,000 jobs)	1,858	5.0	1.9
T&T economy, 2008 estimates			
GDP (US$ millions)	38,340	14.1	5.9
Employment (1,000 jobs)	3,911	10.6	2.2

Source: World Travel & Tourism Council, TSA Research 2008

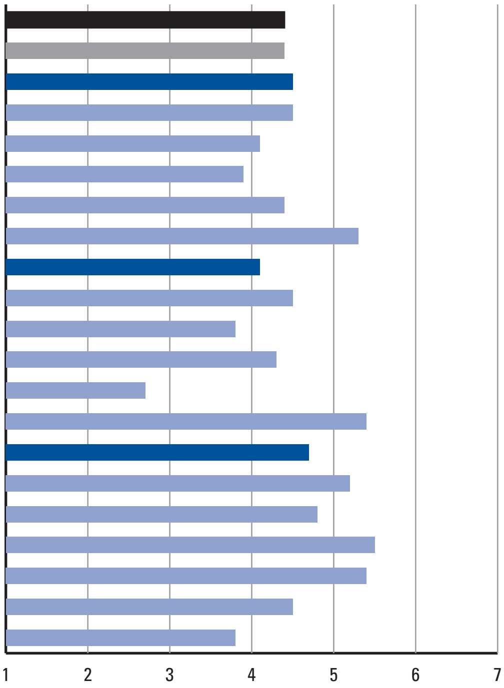
International tourist arrivals (thousands), 2007	14,464
International tourism receipts (US$ millions), 2007	15,573



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**39**	**4.4**
2008 Index	42	4.4
T&T regulatory framework	**70**	**4.5**
Policy rules and regulations	62	4.5
Environmental sustainability	99	4.1
Safety and security	118	3.9
Health and hygiene	71	4.4
Prioritization of Travel & Tourism	22	5.3
T&T business environment and infrastructure	**40**	**4.1**
Air transport infrastructure	25	4.5
Ground transport infrastructure	56	3.8
Tourism infrastructure	39	4.3
ICT infrastructure	71	2.7
Price competitiveness in the T&T industry	19	5.4
T&T human, cultural, and natural resources	**19**	**4.7**
Human resources	57	5.2
Education and training	60	4.8
Availability of qualified labor	56	5.5
Affinity for Travel & Tourism	22	5.4
Natural resources	24	4.5
Cultural resources	33	3.8



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Thailand

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	89	⬜
1.02	Property rights	61	⬜
1.03	Business impact of rules on FDI	68	⬜
1.04	Visa requirements*	75	⬜
1.05	Openness of bilateral Air Service Agreements*	60	⬜
1.06	Transparency of government policymaking	60	⬜
1.07	Time required to start a business*	90	⬜
1.08	Cost to start a business*	39	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	54	⬜
2.02	Enforcement of environmental regulation	53	⬜
2.03	Sustainability of T&T industry development	21	🟦
2.04	Carbon dioxide emissions*	72	⬜
2.05	Particulate matter concentration*	108	⬜
2.06	Threatened species*	103	⬜
2.07	Environmental treaty ratification*	104	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	107	⬜
3.02	Reliability of police services	71	⬜
3.03	Business costs of crime and violence	50	⬜
3.04	Road traffic accidents*	120	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	104	⬜
4.02	Access to improved sanitation*	44	⬜
4.03	Access to improved drinking water*	47	⬜
4.04	Hospital beds*	77	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	12	🟦
5.02	T&T government expenditure*	79	⬜
5.03	Effectiveness of marketing and branding	14	🟦
5.04	T&T fair attendance*	14	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	28	🟦
6.02	Available seat kilometers, domestic*	20	🟦
6.03	Available seat kilometers, international*	11	🟦
6.04	Departures per 1,000 population*	76	⬜
6.05	Airport density*	85	⬜
6.06	Number of operating airlines*	13	🟦
6.07	International air transport network	26	🟦
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	32	🟦
7.02	Quality of railroad infrastructure	48	⬜
7.03	Quality of port infrastructure	48	⬜
7.04	Quality of ground transport network	31	🟦
7.05	Road density*	98	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	48	⬜
8.02	Presence of major car rental companies*	23	🟦
8.03	ATMs accepting Visa cards*	34	🟦
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	56	⬜
9.02	Internet users*	68	⬜
9.03	Telephone lines*	87	⬜
9.04	Broadband Internet subscribers*	75	⬜
9.05	Mobile telephone subscribers*	66	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	29	🟦
10.02	Purchasing power parity*	39	⬜
10.03	Extent and effect of taxation	27	🟦
10.04	Fuel price levels*	39	⬜
10.05	Hotel price index*	27	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	61	⬜
11.02	Secondary education enrollment*	85	⬜
11.03	Quality of the educational system	53	⬜
11.04	Local availability of research and training services	58	⬜
11.05	Extent of staff training	51	⬜
11.06	Hiring and firing practices	39	⬜
11.07	Ease of hiring foreign labor	100	⬜
11.08	HIV prevalence*	107	⬜
11.09	Business impact of HIV/AIDS	97	⬜
11.10	Life expectancy*	66	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	31	🟦
12.02	Attitude of population toward foreign visitors	13	🟦
12.03	Extension of business trips recommended	11	🟦
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	23	🟦
13.02	Protected areas*	30	🟦
13.03	Quality of the natural environment	104	⬜
13.04	Total known species*	17	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	65	⬜
14.02	Sports stadiums*	110	⬜
14.03	Number of international fairs and exhibitions*	27	🟦
14.04	Creative industries exports*	15	🟦

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Trinidad and Tobago

Key indicators

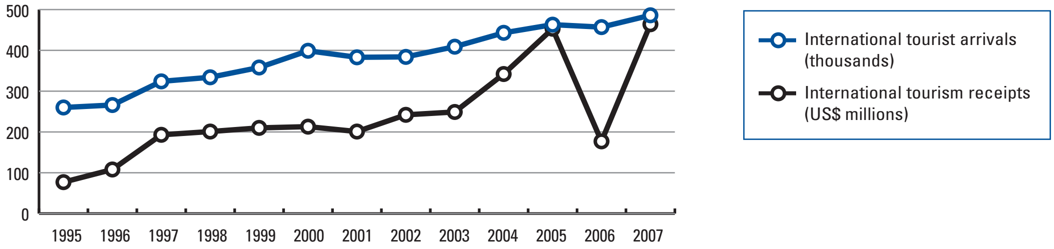
Population (millions), 2007	1.3
Surface area (1,000 square kilometers)	5.1
Gross domestic product (US$ billions), 2007	20.9
Gross domestic product (PPP, US$) per capita, 2007	18,384.9
Real GDP growth (percent), 2007	5.5
Environmental Performance Index, 2008 (out of 149 countries)	89

Travel & Tourism indicators

T&T industry, 2008 estimates		Percent of total	2009–2018 annual growth (%, forecast)
GDP (US$ millions)	1,116	4.4	5.4
Employment (1,000 jobs)	35	5.0	3.3
T&T economy, 2008 estimates			
GDP (US$ millions)	4,619	18.0	2.9
Employment (1,000 jobs)	146	20.9	0.9

Source: World Travel & Tourism Council, TSA Research 2008

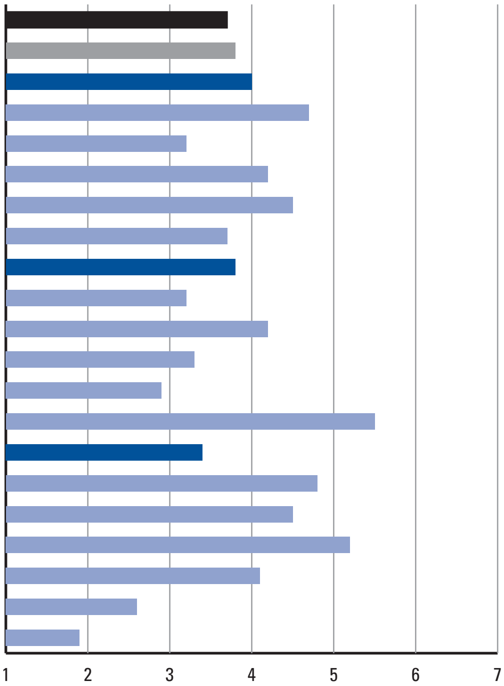
International tourist arrivals (thousands), 2007	486
International tourism receipts (US$ millions), 2007	464



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**84**	**3.7**
2008 Index	74	3.8
T&T regulatory framework	**100**	**4.0**
Policy rules and regulations	52	4.7
Environmental sustainability	132	3.2
Safety and security	110	4.2
Health and hygiene	70	4.5
Prioritization of Travel & Tourism	105	3.7
T&T business environment and infrastructure	**51**	**3.8**
Air transport infrastructure	61	3.2
Ground transport infrastructure	38	4.2
Tourism infrastructure	66	3.3
ICT infrastructure	62	2.9
Price competitiveness in the T&T industry	12	5.5
T&T human, cultural, and natural resources	**112**	**3.4**
Human resources	89	4.8
Education and training	80	4.5
Availability of qualified labor	95	5.2
Affinity for Travel & Tourism	122	4.1
Natural resources	100	2.6
Cultural resources	85	1.9



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Trinidad and Tobago

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	49	🟦
1.02	Property rights	68	⬜
1.03	Business impact of rules on FDI	26	🟦
1.04	Visa requirements*	25	🟦
1.05	Openness of bilateral Air Service Agreements*	43	🟦
1.06	Transparency of government policymaking	62	⬜
1.07	Time required to start a business*	106	⬜
1.08	Cost to start a business*	13	🟦
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	100	⬜
2.02	Enforcement of environmental regulation	117	⬜
2.03	Sustainability of T&T industry development	109	⬜
2.04	Carbon dioxide emissions*	125	⬜
2.05	Particulate matter concentration*	121	⬜
2.06	Threatened species*	21	🟦
2.07	Environmental treaty ratification*	67	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	97	⬜
3.02	Reliability of police services	124	⬜
3.03	Business costs of crime and violence	129	⬜
3.04	Road traffic accidents*	14	🟦
	4th pillar: Health and hygiene		
4.01	Physician density*	92	⬜
4.02	Access to improved sanitation*	55	⬜
4.03	Access to improved drinking water*	66	⬜
4.04	Hospital beds*	70	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	105	⬜
5.02	T&T government expenditure*	31	🟦
5.03	Effectiveness of marketing and branding	102	⬜
5.04	T&T fair attendance*	115	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	67	⬜
6.02	Available seat kilometers, domestic*	77	⬜
6.03	Available seat kilometers, international*	83	⬜
6.04	Departures per 1,000 population*	35	🟦
6.05	Airport density*	31	🟦
6.06	Number of operating airlines*	86	⬜
6.07	International air transport network	70	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	71	⬜
7.02	Quality of railroad infrastructure	n/a	
7.03	Quality of port infrastructure	89	⬜
7.04	Quality of ground transport network	125	⬜
7.05	Road density*	18	🟦

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	57	⬜
8.02	Presence of major car rental companies*	56	⬜
8.03	ATMs accepting Visa cards*	59	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	92	⬜
9.02	Internet users*	49	🟦
9.03	Telephone lines*	56	⬜
9.04	Broadband Internet subscribers*	78	⬜
9.05	Mobile telephone subscribers*	72	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	56	⬜
10.02	Purchasing power parity*	78	⬜
10.03	Extent and effect of taxation	23	🟦
10.04	Fuel price levels*	10	🟦
10.05	Hotel price index*	34	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	106	⬜
11.02	Secondary education enrollment*	90	⬜
11.03	Quality of the educational system	42	🟦
11.04	Local availability of research and training services	91	⬜
11.05	Extent of staff training	65	⬜
11.06	Hiring and firing practices	80	⬜
11.07	Ease of hiring foreign labor	63	⬜
11.08	HIV prevalence*	108	⬜
11.09	Business impact of HIV/AIDS	120	⬜
11.10	Life expectancy*	87	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	104	⬜
12.02	Attitude of population toward foreign visitors	113	⬜
12.03	Extension of business trips recommended	120	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	71	⬜
13.03	Quality of the natural environment	98	⬜
13.04	Total known species*	62	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	116	⬜
14.02	Sports stadiums*	25	🟦
14.03	Number of international fairs and exhibitions*	91	⬜
14.04	Creative industries exports*	91	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Tunisia

Key indicators

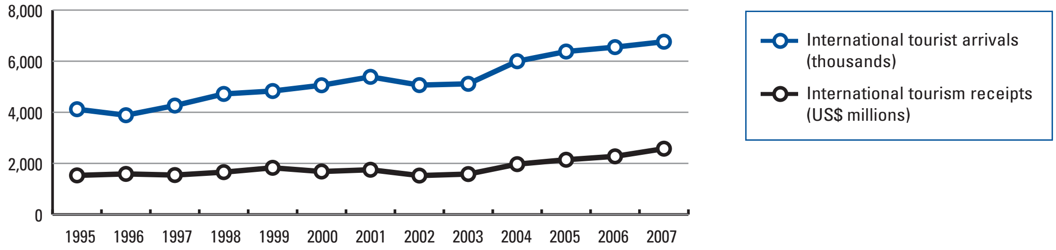
Population (millions), 2007	10.3
Surface area (1,000 square kilometers)	163.6
Gross domestic product (US$ billions), 2007	35.0
Gross domestic product (PPP, US$) per capita, 2007	7,534.6
Real GDP growth (percent), 2007	6.3
Environmental Performance Index, 2008 (out of 149 countries)	59

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	3,755	9.3	4.3
Employment (1,000 jobs)	287	9.1	1.8
T&T economy, 2008 estimates			
GDP (US$ millions)	7,132	17.7	4.3
Employment (1,000 jobs)	521	16.6	1.8

Source: World Travel & Tourism Council, TSA Research 2008

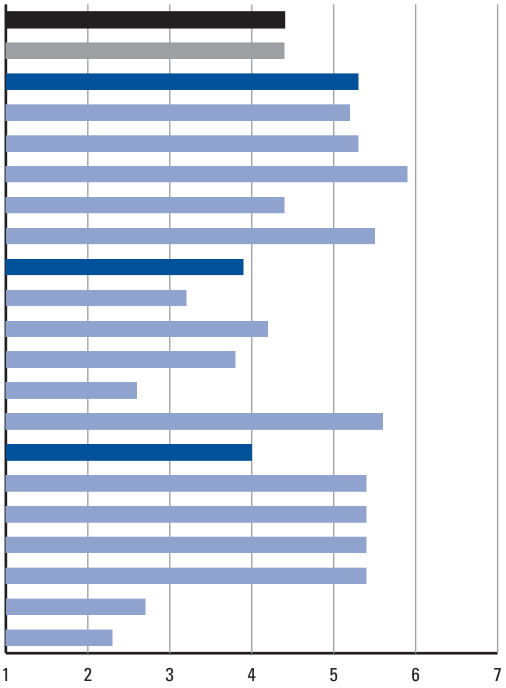
International tourist arrivals (thousands), 2007	6,762
International tourism receipts (US$ millions), 2007	2,575



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**44**	**4.4**
2008 Index	39	4.4
T&T regulatory framework	**31**	**5.3**
Policy rules and regulations	22	5.2
Environmental sustainability	17	5.3
Safety and security	31	5.9
Health and hygiene	75	4.4
Prioritization of Travel & Tourism	15	5.5
T&T business environment and infrastructure	**49**	**3.9**
Air transport infrastructure	62	3.2
Ground transport infrastructure	42	4.2
Tourism infrastructure	54	3.8
ICT infrastructure	77	2.6
Price competitiveness in the T&T industry	7	5.6
T&T human, cultural, and natural resources	**56**	**4.0**
Human resources	33	5.4
Education and training	26	5.4
Availability of qualified labor	73	5.4
Affinity for Travel & Tourism	26	5.4
Natural resources	95	2.7
Cultural resources	65	2.3



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Tunisia

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	60	⬜
1.02	Property rights	33	🟦
1.03	Business impact of rules on FDI	16	🟦
1.04	Visa requirements*	16	🟦
1.05	Openness of bilateral Air Service Agreements*	59	⬜
1.06	Transparency of government policymaking	15	🟦
1.07	Time required to start a business*	29	🟦
1.08	Cost to start a business*	54	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	30	🟦
2.02	Enforcement of environmental regulation	25	🟦
2.03	Sustainability of T&T industry development	4	🟦
2.04	Carbon dioxide emissions*	56	⬜
2.05	Particulate matter concentration*	53	⬜
2.06	Threatened species*	83	⬜
2.07	Environmental treaty ratification*	52	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	58	⬜
3.02	Reliability of police services	24	🟦
3.03	Business costs of crime and violence	30	🟦
3.04	Road traffic accidents*	82	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	74	⬜
4.02	Access to improved sanitation*	68	⬜
4.03	Access to improved drinking water*	66	⬜
4.04	Hospital beds*	83	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	6	🟦
5.02	T&T government expenditure*	17	🟦
5.03	Effectiveness of marketing and branding	21	🟦
5.04	T&T fair attendance*	41	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	29	🟦
6.02	Available seat kilometers, domestic*	72	⬜
6.03	Available seat kilometers, international*	69	⬜
6.04	Departures per 1,000 population*	72	⬜
6.05	Airport density*	58	⬜
6.06	Number of operating airlines*	53	⬜
6.07	International air transport network	40	🟦
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	39	🟦
7.02	Quality of railroad infrastructure	22	🟦
7.03	Quality of port infrastructure	38	🟦
7.04	Quality of ground transport network	23	🟦
7.05	Road density*	95	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	21	🟦
8.02	Presence of major car rental companies*	56	⬜
8.03	ATMs accepting Visa cards*	78	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	70	⬜
9.02	Internet users*	77	⬜
9.03	Telephone lines*	85	⬜
9.04	Broadband Internet subscribers*	79	⬜
9.05	Mobile telephone subscribers*	69	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	51	⬜
10.02	Purchasing power parity*	31	🟦
10.03	Extent and effect of taxation	21	🟦
10.04	Fuel price levels*	28	🟦
10.05	Hotel price index*	11	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	45	⬜
11.02	Secondary education enrollment*	74	⬜
11.03	Quality of the educational system	17	🟦
11.04	Local availability of research and training services	28	🟦
11.05	Extent of staff training	27	🟦
11.06	Hiring and firing practices	49	⬜
11.07	Ease of hiring foreign labor	118	⬜
11.08	HIV prevalence*	22	🟦
11.09	Business impact of HIV/AIDS	21	🟦
11.10	Life expectancy*	66	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	30	🟦
12.02	Attitude of population toward foreign visitors	20	🟦
12.03	Extension of business trips recommended	17	🟦
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	40	🟦
13.02	Protected areas*	120	⬜
13.03	Quality of the natural environment	28	🟦
13.04	Total known species*	93	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	26	🟦
14.02	Sports stadiums*	75	⬜
14.03	Number of international fairs and exhibitions*	71	⬜
14.04	Creative industries exports*	60	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Turkey

Key indicators

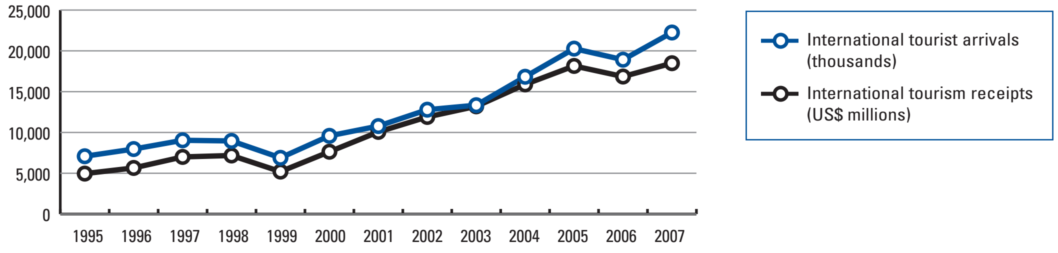
Population (millions), 2007	75.2
Surface area (1,000 square kilometers)	783.6
Gross domestic product (US$ billions), 2007	659.3
Gross domestic product (PPP, US$) per capita, 2007	12,858.4
Real GDP growth (percent), 2007	4.6
Environmental Performance Index, 2008 (out of 149 countries)	72

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	26,391	4.6	4.4
Employment (1,000 jobs)	679	2.9	0.2
T&T economy, 2008 estimates			
GDP (US$ millions)	65,684	11.3	4.8
Employment (1,000 jobs)	1,659	7.2	0.5

Source: World Travel & Tourism Council, TSA Research 2008

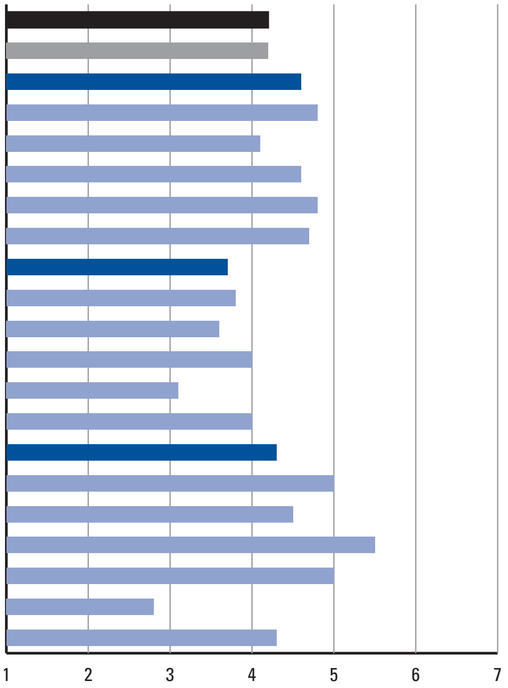
International tourist arrivals (thousands), 2007	22,248
International tourism receipts (US$ millions), 2007	18,487



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**56**	**4.2**
2008 Index	54	4.2
T&T regulatory framework	**63**	**4.6**
Policy rules and regulations	44	4.8
Environmental sustainability	104	4.1
Safety and security	92	4.6
Health and hygiene	62	4.8
Prioritization of Travel & Tourism	46	4.7
T&T business environment and infrastructure	**60**	**3.7**
Air transport infrastructure	44	3.8
Ground transport infrastructure	62	3.6
Tourism infrastructure	44	4.0
ICT infrastructure	57	3.1
Price competitiveness in the T&T industry	109	4.0
T&T human, cultural, and natural resources	**44**	**4.3**
Human resources	72	5.0
Education and training	79	4.5
Availability of qualified labor	49	5.5
Affinity for Travel & Tourism	47	5.0
Natural resources	89	2.8
Cultural resources	27	4.3



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Turkey

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	42	🟦
1.02	Property rights	83	⬜
1.03	Business impact of rules on FDI	50	🟦
1.04	Visa requirements*	21	🟦
1.05	Openness of bilateral Air Service Agreements*	43	🟦
1.06	Transparency of government policymaking	97	⬜
1.07	Time required to start a business*	9	🟦
1.08	Cost to start a business*	74	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	84	⬜
2.02	Enforcement of environmental regulation	86	⬜
2.03	Sustainability of T&T industry development	55	⬜
2.04	Carbon dioxide emissions*	61	⬜
2.05	Particulate matter concentration*	78	⬜
2.06	Threatened species*	98	⬜
2.07	Environmental treaty ratification*	125	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	117	⬜
3.02	Reliability of police services	83	⬜
3.03	Business costs of crime and violence	65	⬜
3.04	Road traffic accidents*	100	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	65	⬜
4.02	Access to improved sanitation*	63	⬜
4.03	Access to improved drinking water*	53	⬜
4.04	Hospital beds*	68	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	35	🟦
5.02	T&T government expenditure*	121	⬜
5.03	Effectiveness of marketing and branding	41	🟦
5.04	T&T fair attendance*	14	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	55	⬜
6.02	Available seat kilometers, domestic*	19	🟦
6.03	Available seat kilometers, international*	25	🟦
6.04	Departures per 1,000 population*	67	⬜
6.05	Airport density*	81	⬜
6.06	Number of operating airlines*	14	🟦
6.07	International air transport network	52	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	54	⬜
7.02	Quality of railroad infrastructure	69	⬜
7.03	Quality of port infrastructure	88	⬜
7.04	Quality of ground transport network	19	🟦
7.05	Road density*	47	🟦

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	64	⬜
8.02	Presence of major car rental companies*	1	🟦
8.03	ATMs accepting Visa cards*	52	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	46	🟦
9.02	Internet users*	74	⬜
9.03	Telephone lines*	55	⬜
9.04	Broadband Internet subscribers*	46	🟦
9.05	Mobile telephone subscribers*	62	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	22	🟦
10.02	Purchasing power parity*	96	⬜
10.03	Extent and effect of taxation	122	⬜
10.04	Fuel price levels*	127	⬜
10.05	Hotel price index*	57	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	77	⬜
11.02	Secondary education enrollment*	84	⬜
11.03	Quality of the educational system	77	⬜
11.04	Local availability of research and training services	68	⬜
11.05	Extent of staff training	90	⬜
11.06	Hiring and firing practices	51	⬜
11.07	Ease of hiring foreign labor	87	⬜
11.08	HIV prevalence*	1	🟦
11.09	Business impact of HIV/AIDS	37	🟦
11.10	Life expectancy*	55	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	96	⬜
12.02	Attitude of population toward foreign visitors	42	🟦
12.03	Extension of business trips recommended	3	🟦
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	23	🟦
13.02	Protected areas*	114	⬜
13.03	Quality of the natural environment	116	⬜
13.04	Total known species*	63	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	17	🟦
14.02	Sports stadiums*	79	⬜
14.03	Number of international fairs and exhibitions*	28	🟦
14.04	Creative industries exports*	31	🟦

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Uganda

Key indicators

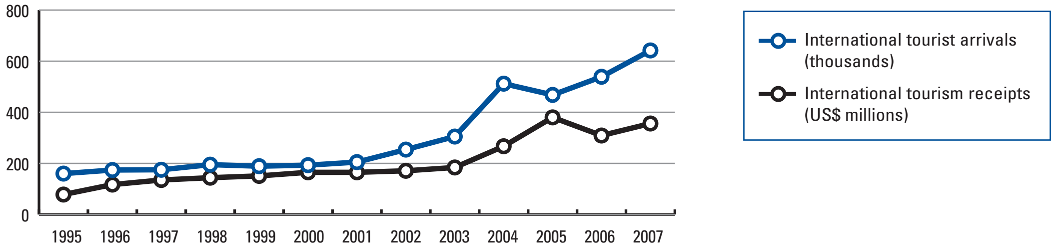
Population (millions), 2007	30.9
Surface area (1,000 square kilometers)	241.0
Gross domestic product (US$ billions), 2007	11.8
Gross domestic product (PPP, US$) per capita, 2007	1,059.5
Real GDP growth (percent), 2007	7.9
Environmental Performance Index, 2008 (out of 149 countries)	117

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	567	4.5	4.9
Employment (1,000 jobs)	203	3.6	2.9
T&T economy, 2008 estimates			
GDP (US$ millions)	1,161	9.2	5.1
Employment (1,000 jobs)	420	7.4	3.0

Source: World Travel & Tourism Council, TSA Research 2008

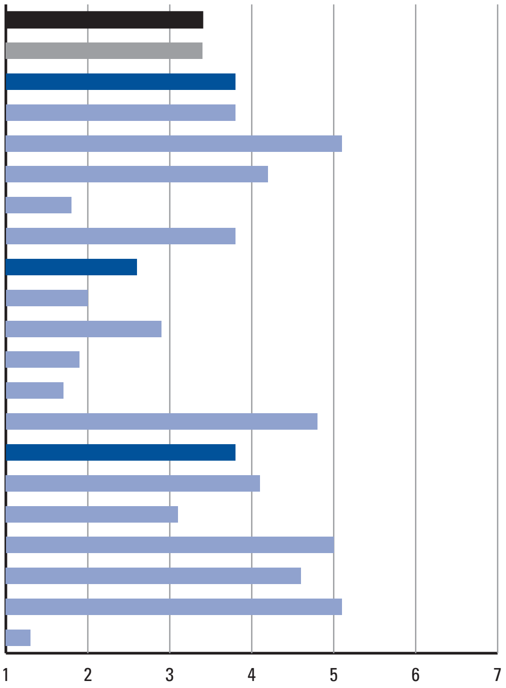
International tourist arrivals (thousands), 2007	642
International tourism receipts (US$ millions), 2007	356



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**111**	**3.4**
2008 Index	110	3.4
T&T regulatory framework	**115**	**3.8**
Policy rules and regulations	105	3.8
Environmental sustainability	28	5.1
Safety and security	109	4.2
Health and hygiene	123	1.8
Prioritization of Travel & Tourism	93	3.8
T&T business environment and infrastructure	**114**	**2.6**
Air transport infrastructure	125	2.0
Ground transport infrastructure	94	2.9
Tourism infrastructure	101	1.9
ICT infrastructure	119	1.7
Price competitiveness in the T&T industry	61	4.8
T&T human, cultural, and natural resources	**81**	**3.8**
Human resources	116	4.1
Education and training	123	3.1
Availability of qualified labor	105	5.0
Affinity for Travel & Tourism	79	4.6
Natural resources	11	5.1
Cultural resources	124	1.3



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Uganda

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	7	🟦
1.02	Property rights	112	⬜
1.03	Business impact of rules on FDI	10	🟦
1.04	Visa requirements*	94	⬜
1.05	Openness of bilateral Air Service Agreements*	102	⬜
1.06	Transparency of government policymaking	78	⬜
1.07	Time required to start a business*	70	⬜
1.08	Cost to start a business*	116	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	87	⬜
2.02	Enforcement of environmental regulation	73	⬜
2.03	Sustainability of T&T industry development	52	⬜
2.04	Carbon dioxide emissions*	5	🟦
2.05	Particulate matter concentration*	3	🟦
2.06	Threatened species*	45	🟦
2.07	Environmental treaty ratification*	81	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	121	⬜
3.02	Reliability of police services	92	⬜
3.03	Business costs of crime and violence	103	⬜
3.04	Road traffic accidents*	103	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	121	⬜
4.02	Access to improved sanitation*	111	⬜
4.03	Access to improved drinking water*	117	⬜
4.04	Hospital beds*	101	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	69	⬜
5.02	T&T government expenditure*	91	⬜
5.03	Effectiveness of marketing and branding	58	⬜
5.04	T&T fair attendance*	98	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	119	⬜
6.02	Available seat kilometers, domestic*	95	⬜
6.03	Available seat kilometers, international*	89	⬜
6.04	Departures per 1,000 population*	124	⬜
6.05	Airport density*	123	⬜
6.06	Number of operating airlines*	95	⬜
6.07	International air transport network	117	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	111	⬜
7.02	Quality of railroad infrastructure	102	⬜
7.03	Quality of port infrastructure	72	⬜
7.04	Quality of ground transport network	63	⬜
7.05	Road density*	65	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	111	⬜
8.02	Presence of major car rental companies*	73	⬜
8.03	ATMs accepting Visa cards*	108	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	105	⬜
9.02	Internet users*	102	⬜
9.03	Telephone lines*	129	⬜
9.04	Broadband Internet subscribers*	120	⬜
9.05	Mobile telephone subscribers*	123	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	74	⬜
10.02	Purchasing power parity*	17	🟦
10.03	Extent and effect of taxation	116	⬜
10.04	Fuel price levels*	80	⬜
10.05	Hotel price index*	25	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	n/a	
11.02	Secondary education enrollment*	128	⬜
11.03	Quality of the educational system	93	⬜
11.04	Local availability of research and training services	62	⬜
11.05	Extent of staff training	100	⬜
11.06	Hiring and firing practices	12	🟦
11.07	Ease of hiring foreign labor	15	🟦
11.08	HIV prevalence*	123	⬜
11.09	Business impact of HIV/AIDS	126	⬜
11.10	Life expectancy*	122	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	80	⬜
12.02	Attitude of population toward foreign visitors	24	🟦
12.03	Extension of business trips recommended	102	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	23	🟦
13.02	Protected areas*	18	🟦
13.03	Quality of the natural environment	88	⬜
13.04	Total known species*	16	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	82	⬜
14.02	Sports stadiums*	132	⬜
14.03	Number of international fairs and exhibitions*	79	⬜
14.04	Creative industries exports*	97	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Ukraine

Key indicators

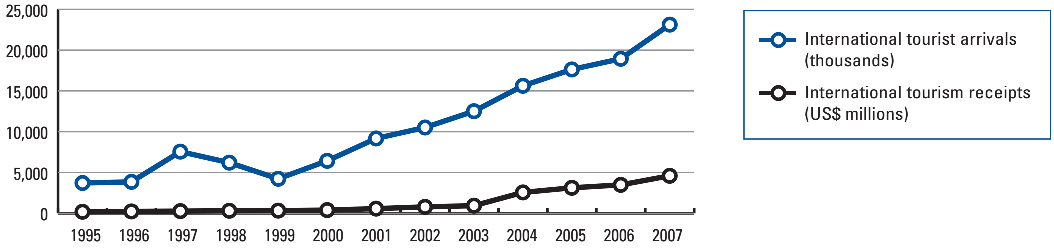
Population (millions), 2007	45.5
Surface area (1,000 square kilometers)	603.6
Gross domestic product (US$ billions), 2007	141.6
Gross domestic product (PPP, US$) per capita, 2007	6,968.2
Real GDP growth (percent), 2007	7.6
Environmental Performance Index, 2008 (out of 149 countries)	75

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	2,451	1.6	6.0
Employment (1,000 jobs)	270	1.3	1.2
T&T economy, 2008 estimates			
GDP (US$ millions)	13,661	9.0	5.3
Employment (1,000 jobs)	1,542	7.4	0.4

Source: World Travel & Tourism Council, TSA Research 2008

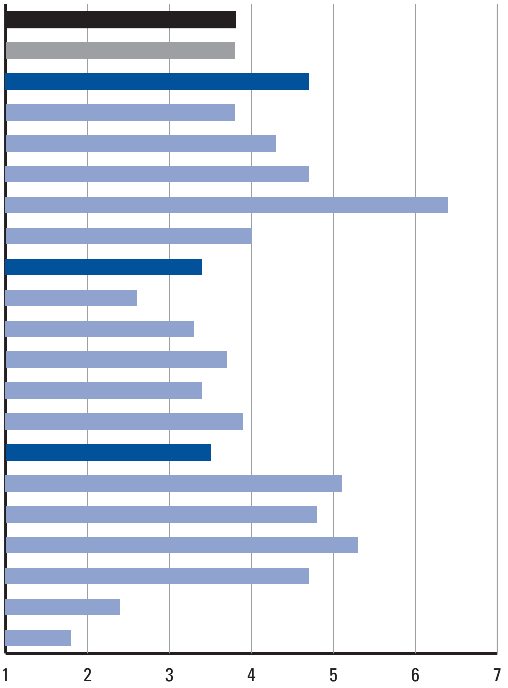
International tourist arrivals (thousands), 2007	23,122
International tourism receipts (US$ millions), 2007	4,597



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**77**	**3.8**
2008 Index	77	3.8
T&T regulatory framework	**62**	**4.7**
Policy rules and regulations	104	3.8
Environmental sustainability	79	4.3
Safety and security	86	4.7
Health and hygiene	18	6.4
Prioritization of Travel & Tourism	87	4.0
T&T business environment and infrastructure	**72**	**3.4**
Air transport infrastructure	94	2.6
Ground transport infrastructure	72	3.3
Tourism infrastructure	55	3.7
ICT infrastructure	51	3.4
Price competitiveness in the T&T industry	116	3.9
T&T human, cultural, and natural resources	**103**	**3.5**
Human resources	68	5.1
Education and training	59	4.8
Availability of qualified labor	85	5.3
Affinity for Travel & Tourism	66	4.7
Natural resources	112	2.4
Cultural resources	88	1.8



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Ukraine

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	122	⬜
1.02	Property rights	123	⬜
1.03	Business impact of rules on FDI	120	⬜
1.04	Visa requirements*	91	⬜
1.05	Openness of bilateral Air Service Agreements*	105	⬜
1.06	Transparency of government policymaking	114	⬜
1.07	Time required to start a business*	76	⬜
1.08	Cost to start a business*	44	🟦
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	124	⬜
2.02	Enforcement of environmental regulation	119	⬜
2.03	Sustainability of T&T industry development	115	⬜
2.04	Carbon dioxide emissions*	89	⬜
2.05	Particulate matter concentration*	33	🟦
2.06	Threatened species*	76	⬜
2.07	Environmental treaty ratification*	52	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	67	⬜
3.02	Reliability of police services	105	⬜
3.03	Business costs of crime and violence	61	⬜
3.04	Road traffic accidents*	101	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	29	🟦
4.02	Access to improved sanitation*	52	⬜
4.03	Access to improved drinking water*	53	⬜
4.04	Hospital beds*	3	🟦
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	125	⬜
5.02	T&T government expenditure*	36	🟦
5.03	Effectiveness of marketing and branding	113	⬜
5.04	T&T fair attendance*	41	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	105	⬜
6.02	Available seat kilometers, domestic*	42	🟦
6.03	Available seat kilometers, international*	59	⬜
6.04	Departures per 1,000 population*	93	⬜
6.05	Airport density*	98	⬜
6.06	Number of operating airlines*	31	🟦
6.07	International air transport network	120	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	120	⬜
7.02	Quality of railroad infrastructure	30	🟦
7.03	Quality of port infrastructure	87	⬜
7.04	Quality of ground transport network	42	🟦
7.05	Road density*	68	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	107	⬜
8.02	Presence of major car rental companies*	23	🟦
8.03	ATMs accepting Visa cards*	33	🟦
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	44	🟦
9.02	Internet users*	64	⬜
9.03	Telephone lines*	49	🟦
9.04	Broadband Internet subscribers*	70	⬜
9.05	Mobile telephone subscribers*	14	🟦
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	85	⬜
10.02	Purchasing power parity*	23	🟦
10.03	Extent and effect of taxation	126	⬜
10.04	Fuel price levels*	68	⬜
10.05	Hotel price index*	114	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	84	⬜
11.02	Secondary education enrollment*	50	🟦
11.03	Quality of the educational system	40	🟦
11.04	Local availability of research and training services	66	⬜
11.05	Extent of staff training	99	⬜
11.06	Hiring and firing practices	11	🟦
11.07	Ease of hiring foreign labor	106	⬜
11.08	HIV prevalence*	110	⬜
11.09	Business impact of HIV/AIDS	99	⬜
11.10	Life expectancy*	95	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	57	⬜
12.02	Attitude of population toward foreign visitors	119	⬜
12.03	Extension of business trips recommended	41	🟦
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	40	🟦
13.02	Protected areas*	103	⬜
13.03	Quality of the natural environment	123	⬜
13.04	Total known species*	78	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	65	⬜
14.02	Sports stadiums*	89	⬜
14.03	Number of international fairs and exhibitions*	68	⬜
14.04	Creative industries exports*	51	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

United Arab Emirates

Key indicators

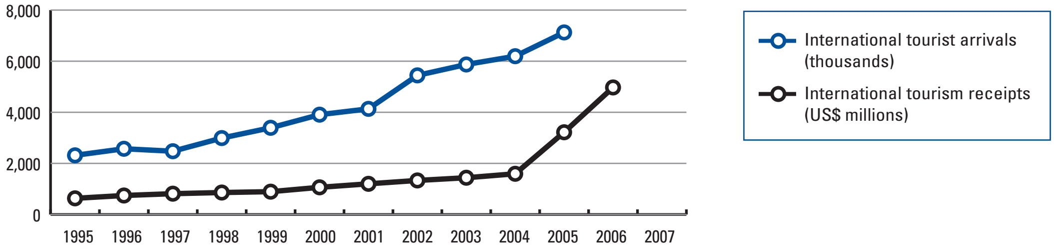
Population (millions), 2007	4.8
Surface area (1,000 square kilometers)	83.6
Gross domestic product (US$ billions), 2007	190.7
Gross domestic product (PPP, US$) per capita, 2007	37,941.2
Real GDP growth (percent), 2007	7.4
Environmental Performance Index, 2008 (out of 149 countries)	112

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	14,125	6.4	6.8
Employment (1,000 jobs)	160	4.5	4.7
T&T economy, 2008 estimates			
GDP (US$ millions)	49,603	22.6	4.1
Employment (1,000 jobs)	620	17.5	1.9

Source: World Travel & Tourism Council, TSA Research 2008

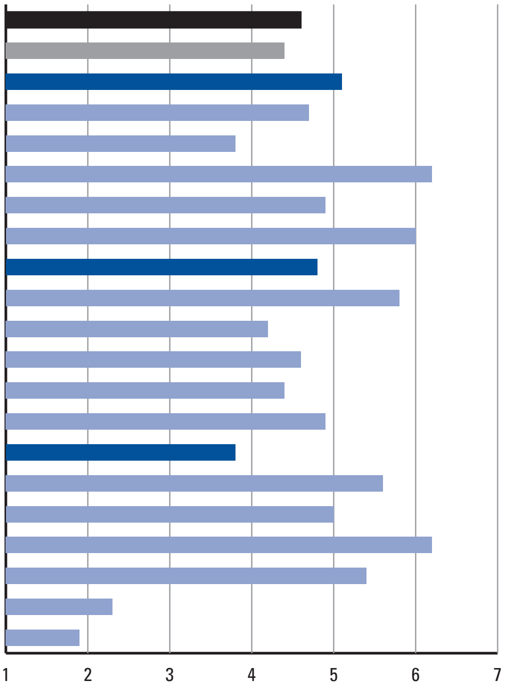
International tourist arrivals (thousands), 2005	7,126
International tourism receipts (US$ millions), 2006	4,972



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**33**	**4.6**
2008 Index	40	4.4
T&T regulatory framework	**39**	**5.1**
Policy rules and regulations	53	4.7
Environmental sustainability	120	3.8
Safety and security	14	6.2
Health and hygiene	57	4.9
Prioritization of Travel & Tourism	6	6.0
T&T business environment and infrastructure	**23**	**4.8**
Air transport infrastructure	4	5.8
Ground transport infrastructure	39	4.2
Tourism infrastructure	30	4.6
ICT infrastructure	30	4.4
Price competitiveness in the T&T industry	50	4.9
T&T human, cultural, and natural resources	**78**	**3.8**
Human resources	25	5.6
Education and training	42	5.0
Availability of qualified labor	6	6.2
Affinity for Travel & Tourism	19	5.4
Natural resources	117	2.3
Cultural resources	84	1.9



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

United Arab Emirates

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	79	⬜
1.02	Property rights	43	⬜
1.03	Business impact of rules on FDI	49	⬜
1.04	Visa requirements*	104	⬜
1.05	Openness of bilateral Air Service Agreements*	45	⬜
1.06	Transparency of government policymaking	17	🟦
1.07	Time required to start a business*	50	⬜
1.08	Cost to start a business*	71	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	34	⬜
2.02	Enforcement of environmental regulation	30	🟦
2.03	Sustainability of T&T industry development	1	🟦
2.04	Carbon dioxide emissions*	127	⬜
2.05	Particulate matter concentration*	127	⬜
2.06	Threatened species*	66	⬜
2.07	Environmental treaty ratification*	94	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	54	⬜
3.02	Reliability of police services	8	🟦
3.03	Business costs of crime and violence	16	🟦
3.04	Road traffic accidents*	60	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	62	⬜
4.02	Access to improved sanitation*	40	⬜
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	87	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	3	🟦
5.02	T&T government expenditure*	30	🟦
5.03	Effectiveness of marketing and branding	1	🟦
5.04	T&T fair attendance*	14	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	4	🟦
6.02	Available seat kilometers, domestic*	97	⬜
6.03	Available seat kilometers, international*	8	🟦
6.04	Departures per 1,000 population*	15	🟦
6.05	Airport density*	27	🟦
6.06	Number of operating airlines*	11	🟦
6.07	International air transport network	4	🟦
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	9	🟦
7.02	Quality of railroad infrastructure	65	⬜
7.03	Quality of port infrastructure	8	🟦
7.04	Quality of ground transport network	22	🟦
7.05	Road density*	117	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	30	🟦
8.02	Presence of major car rental companies*	23	🟦
8.03	ATMs accepting Visa cards*	37	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	37	⬜
9.02	Internet users*	26	🟦
9.03	Telephone lines*	39	⬜
9.04	Broadband Internet subscribers*	48	⬜
9.05	Mobile telephone subscribers*	1	🟦
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	8	🟦
10.02	Purchasing power parity*	113	⬜
10.03	Extent and effect of taxation	1	🟦
10.04	Fuel price levels*	23	🟦
10.05	Hotel price index*	104	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	100	⬜
11.02	Secondary education enrollment*	56	⬜
11.03	Quality of the educational system	38	⬜
11.04	Local availability of research and training services	44	⬜
11.05	Extent of staff training	37	⬜
11.06	Hiring and firing practices	17	🟦
11.07	Ease of hiring foreign labor	1	🟦
11.08	HIV prevalence*	49	⬜
11.09	Business impact of HIV/AIDS	45	⬜
11.10	Life expectancy*	29	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	32	🟦
12.02	Attitude of population toward foreign visitors	10	🟦
12.03	Extension of business trips recommended	7	🟦
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	130	⬜
13.03	Quality of the natural environment	30	🟦
13.04	Total known species*	114	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	116	⬜
14.02	Sports stadiums*	46	⬜
14.03	Number of international fairs and exhibitions*	56	⬜
14.04	Creative industries exports*	n/a	

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

United Kingdom

Key indicators

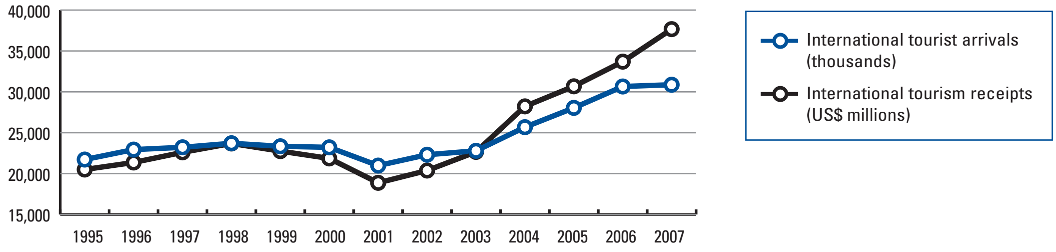
Population (millions), 2007	60.0
Surface area (1,000 square kilometers)	243.6
Gross domestic product (US$ billions), 2007	2,804.4
Gross domestic product (PPP, US$) per capita, 2007	35,634.3
Real GDP growth (percent), 2007	3.0
Environmental Performance Index, 2008 (out of 149 countries)	14

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	97,007	3.4	2.7
Employment (1,000 jobs)	998	3.2	0.6
T&T economy, 2008 estimates			
GDP (US$ millions)	262,343	9.2	2.9
Employment (1,000 jobs)	2,734	8.6	0.8

Source: World Travel & Tourism Council, TSA Research 2008

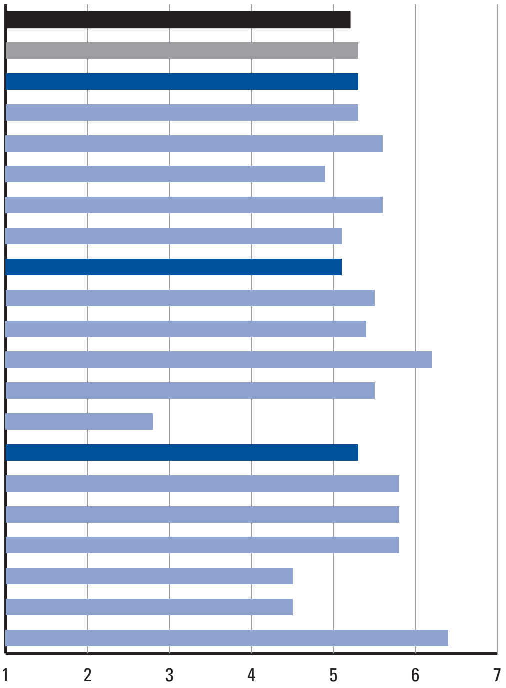
International tourist arrivals (thousands), 2007	30,871
International tourism receipts (US$ millions), 2007	37,669



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**11**	**5.2**
2008 Index	6	5.3
T&T regulatory framework	**28**	**5.3**
Policy rules and regulations	14	5.3
Environmental sustainability	10	5.6
Safety and security	78	4.9
Health and hygiene	46	5.6
Prioritization of Travel & Tourism	31	5.1
T&T business environment and infrastructure	**11**	**5.1**
Air transport infrastructure	6	5.5
Ground transport infrastructure	17	5.4
Tourism infrastructure	12	6.2
ICT infrastructure	7	5.5
Price competitiveness in the T&T industry	133	2.8
T&T human, cultural, and natural resources	**6**	**5.3**
Human resources	12	5.8
Education and training	17	5.8
Availability of qualified labor	14	5.8
Affinity for Travel & Tourism	99	4.5
Natural resources	26	4.5
Cultural resources	3	6.4



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

United Kingdom

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	16	⬜
1.02	Property rights	36	⬜
1.03	Business impact of rules on FDI	15	⬜
1.04	Visa requirements*	12	⬜
1.05	Openness of bilateral Air Service Agreements*	39	⬜
1.06	Transparency of government policymaking	38	⬜
1.07	Time required to start a business*	33	⬜
1.08	Cost to start a business*	10	🟦
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	18	⬜
2.02	Enforcement of environmental regulation	22	⬜
2.03	Sustainability of T&T industry development	64	⬜
2.04	Carbon dioxide emissions*	106	⬜
2.05	Particulate matter concentration*	11	⬜
2.06	Threatened species*	15	⬜
2.07	Environmental treaty ratification*	2	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	124	⬜
3.02	Reliability of police services	32	⬜
3.03	Business costs of crime and violence	91	⬜
3.04	Road traffic accidents*	87	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	48	⬜
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	45	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	77	⬜
5.02	T&T government expenditure*	78	⬜
5.03	Effectiveness of marketing and branding	37	⬜
5.04	T&T fair attendance*	3	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	27	⬜
6.02	Available seat kilometers, domestic*	14	⬜
6.03	Available seat kilometers, international*	2	🟦
6.04	Departures per 1,000 population*	21	⬜
6.05	Airport density*	46	⬜
6.06	Number of operating airlines*	2	🟦
6.07	International air transport network	14	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	24	⬜
7.02	Quality of railroad infrastructure	20	⬜
7.03	Quality of port infrastructure	30	⬜
7.04	Quality of ground transport network	43	⬜
7.05	Road density*	22	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	26	⬜
8.02	Presence of major car rental companies*	1	🟦
8.03	ATMs accepting Visa cards*	13	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	9	🟦
9.02	Internet users*	13	⬜
9.03	Telephone lines*	9	🟦
9.04	Broadband Internet subscribers*	12	⬜
9.05	Mobile telephone subscribers*	15	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	121	⬜
10.02	Purchasing power parity*	125	⬜
10.03	Extent and effect of taxation	80	⬜
10.04	Fuel price levels*	129	⬜
10.05	Hotel price index*	101	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	16	⬜
11.02	Secondary education enrollment*	34	⬜
11.03	Quality of the educational system	28	⬜
11.04	Local availability of research and training services	9	🟦
11.05	Extent of staff training	22	⬜
11.06	Hiring and firing practices	61	⬜
11.07	Ease of hiring foreign labor	18	⬜
11.08	HIV prevalence*	49	⬜
11.09	Business impact of HIV/AIDS	63	⬜
11.10	Life expectancy*	22	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	83	⬜
12.02	Attitude of population toward foreign visitors	86	⬜
12.03	Extension of business trips recommended	99	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	7	🟦
13.02	Protected areas*	43	⬜
13.03	Quality of the natural environment	48	⬜
13.04	Total known species*	110	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	8	🟦
14.02	Sports stadiums*	22	⬜
14.03	Number of international fairs and exhibitions*	3	🟦
14.04	Creative industries exports*	6	🟦

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

United States

Key indicators

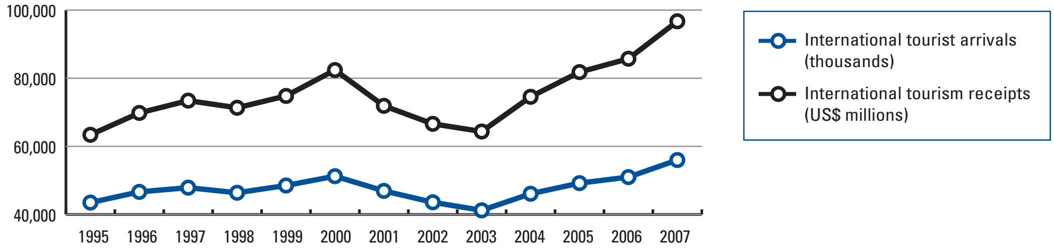
Population (millions), 2007	303.9
Surface area (1,000 square kilometers)	9,632.0
Gross domestic product (US$ billions), 2007	13,807.6
Gross domestic product (PPP, US$) per capita, 2007	45,725.4
Real GDP growth (percent), 2007	2.0
Environmental Performance Index, 2008 (out of 149 countries)	39

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	542,379	3.8	2.7
Employment (1,000 jobs)	5,665	3.9	0.3
T&T economy, 2008 estimates			
GDP (US$ millions)	1,442,810	10.0	3.3
Employment (1,000 jobs)	14,933	10.2	0.6

Source: World Travel & Tourism Council, TSA Research 2008

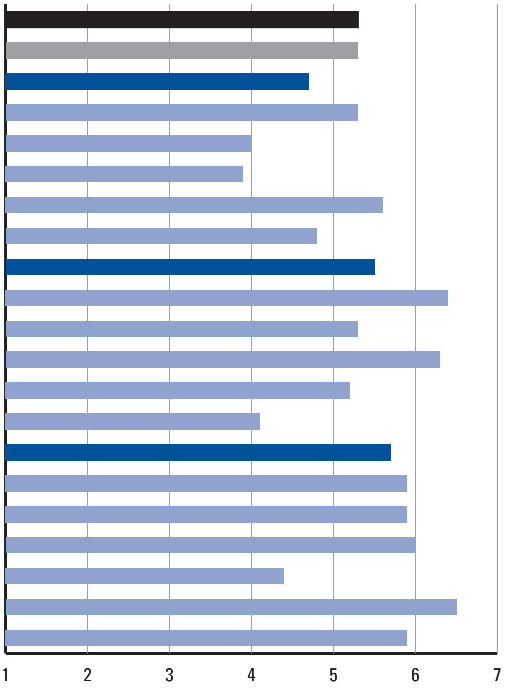
International tourist arrivals (thousands), 2007	55,986
International tourism receipts (US$ millions), 2007	96,712



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**8**	**5.3**
2008 Index	7	5.3
T&T regulatory framework	**57**	**4.7**
Policy rules and regulations	16	5.3
Environmental sustainability	106	4.0
Safety and security	122	3.9
Health and hygiene	47	5.6
Prioritization of Travel & Tourism	44	4.8
T&T business environment and infrastructure	**2**	**5.5**
Air transport infrastructure	2	6.4
Ground transport infrastructure	18	5.3
Tourism infrastructure	10	6.3
ICT infrastructure	15	5.2
Price competitiveness in the T&T industry	107	4.1
T&T human, cultural, and natural resources	**1**	**5.7**
Human resources	7	5.9
Education and training	15	5.9
Availability of qualified labor	9	6.0
Affinity for Travel & Tourism	106	4.4
Natural resources	1	6.5
Cultural resources	9	5.9



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

United States

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	47	⬜
1.02	Property rights	26	⬜
1.03	Business impact of rules on FDI	53	⬜
1.04	Visa requirements*	96	⬜
1.05	Openness of bilateral Air Service Agreements*	8	🟦
1.06	Transparency of government policymaking	28	⬜
1.07	Time required to start a business*	9	🟦
1.08	Cost to start a business*	8	🟦
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	24	⬜
2.02	Enforcement of environmental regulation	21	⬜
2.03	Sustainability of T&T industry development	51	⬜
2.04	Carbon dioxide emissions*	122	⬜
2.05	Particulate matter concentration*	30	⬜
2.06	Threatened species*	116	⬜
2.07	Environmental treaty ratification*	115	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	126	⬜
3.02	Reliability of police services	18	⬜
3.03	Business costs of crime and violence	83	⬜
3.04	Road traffic accidents*	125	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	39	⬜
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	38	⬜
4.04	Hospital beds*	54	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	80	⬜
5.02	T&T government expenditure*	33	⬜
5.03	Effectiveness of marketing and branding	32	⬜
5.04	T&T fair attendance*	41	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	12	⬜
6.02	Available seat kilometers, domestic*	1	🟦
6.03	Available seat kilometers, international*	1	🟦
6.04	Departures per 1,000 population*	10	🟦
6.05	Airport density*	19	⬜
6.06	Number of operating airlines*	1	🟦
6.07	International air transport network	7	🟦
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	8	🟦
7.02	Quality of railroad infrastructure	16	⬜
7.03	Quality of port infrastructure	11	⬜
7.04	Quality of ground transport network	15	⬜
7.05	Road density*	42	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	15	⬜
8.02	Presence of major car rental companies*	23	⬜
8.03	ATMs accepting Visa cards*	2	🟦
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	1	🟦
9.02	Internet users*	8	🟦
9.03	Telephone lines*	12	⬜
9.04	Broadband Internet subscribers*	20	⬜
9.05	Mobile telephone subscribers*	61	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	127	⬜
10.02	Purchasing power parity*	109	⬜
10.03	Extent and effect of taxation	56	⬜
10.04	Fuel price levels*	44	⬜
10.05	Hotel price index*	62	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	74	⬜
11.02	Secondary education enrollment*	48	⬜
11.03	Quality of the educational system	19	⬜
11.04	Local availability of research and training services	1	🟦
11.05	Extent of staff training	6	🟦
11.06	Hiring and firing practices	6	🟦
11.07	Ease of hiring foreign labor	47	⬜
11.08	HIV prevalence*	85	⬜
11.09	Business impact of HIV/AIDS	76	⬜
11.10	Life expectancy*	29	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	126	⬜
12.02	Attitude of population toward foreign visitors	91	⬜
12.03	Extension of business trips recommended	48	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	2	🟦
13.02	Protected areas*	11	⬜
13.03	Quality of the natural environment	49	⬜
13.04	Total known species*	11	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	22	⬜
14.02	Sports stadiums*	23	⬜
14.03	Number of international fairs and exhibitions*	1	🟦
14.04	Creative industries exports*	3	🟦

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Uruguay

Key indicators

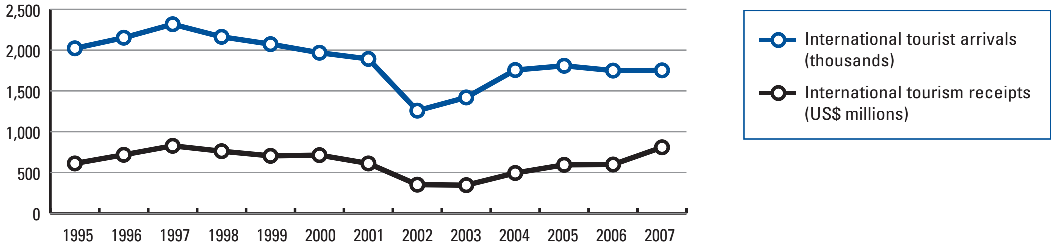
Population (millions), 2007	3.5
Surface area (1,000 square kilometers)	176.2
Gross domestic product (US$ billions), 2007	23.3
Gross domestic product (PPP, US$) per capita, 2007	11,674.1
Real GDP growth (percent), 2007	7.4
Environmental Performance Index, 2008 (out of 149 countries)	36

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	941	3.7	4.3
Employment (1,000 jobs)	70	4.5	1.9
T&T economy, 2008 estimates			
GDP (US$ millions)	2,300	9.1	4.1
Employment (1,000 jobs)	157	10.0	1.8

Source: World Travel & Tourism Council, TSA Research 2008

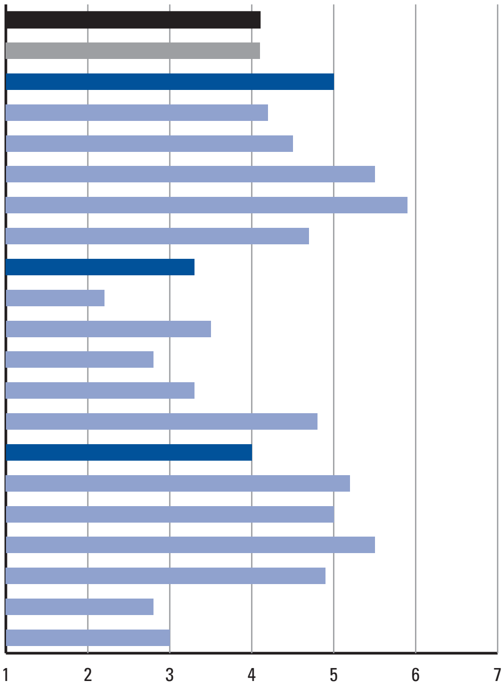
International tourist arrivals (thousands), 2007	1,752
International tourism receipts (US$ millions), 2007	809



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**63**	**4.1**
2008 Index	61	4.1
T&T regulatory framework	**45**	**5.0**
Policy rules and regulations	78	4.2
Environmental sustainability	68	4.5
Safety and security	50	5.5
Health and hygiene	34	5.9
Prioritization of Travel & Tourism	50	4.7
T&T business environment and infrastructure	**74**	**3.3**
Air transport infrastructure	115	2.2
Ground transport infrastructure	65	3.5
Tourism infrastructure	76	2.8
ICT infrastructure	54	3.3
Price competitiveness in the T&T industry	58	4.8
T&T human, cultural, and natural resources	**57**	**4.0**
Human resources	46	5.2
Education and training	47	5.0
Availability of qualified labor	63	5.5
Affinity for Travel & Tourism	57	4.9
Natural resources	93	2.8
Cultural resources	40	3.0



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Uruguay

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	39	🟦
1.02	Property rights	58	⬜
1.03	Business impact of rules on FDI	52	⬜
1.04	Visa requirements*	29	🟦
1.05	Openness of bilateral Air Service Agreements*	46	🟦
1.06	Transparency of government policymaking	69	⬜
1.07	Time required to start a business*	108	⬜
1.08	Cost to start a business*	103	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	37	🟦
2.02	Enforcement of environmental regulation	36	🟦
2.03	Sustainability of T&T industry development	50	🟦
2.04	Carbon dioxide emissions*	47	🟦
2.05	Particulate matter concentration*	129	⬜
2.06	Threatened species*	95	⬜
2.07	Environmental treaty ratification*	21	🟦
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	4	🟦
3.02	Reliability of police services	90	⬜
3.03	Business costs of crime and violence	72	⬜
3.04	Road traffic accidents*	27	🟦
	4th pillar: Health and hygiene		
4.01	Physician density*	17	🟦
4.02	Access to improved sanitation*	1	🟦
4.03	Access to improved drinking water*	1	🟦
4.04	Hospital beds*	64	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	45	🟦
5.02	T&T government expenditure*	34	🟦
5.03	Effectiveness of marketing and branding	50	🟦
5.04	T&T fair attendance*	62	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	116	⬜
6.02	Available seat kilometers, domestic*	100	⬜
6.03	Available seat kilometers, international*	92	⬜
6.04	Departures per 1,000 population*	66	⬜
6.05	Airport density*	74	⬜
6.06	Number of operating airlines*	105	⬜
6.07	International air transport network	116	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	49	🟦
7.02	Quality of railroad infrastructure	100	⬜
7.03	Quality of port infrastructure	50	🟦
7.04	Quality of ground transport network	36	🟦
7.05	Road density*	54	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	60	⬜
8.02	Presence of major car rental companies*	56	⬜
8.03	ATMs accepting Visa cards*	85	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	80	⬜
9.02	Internet users*	51	⬜
9.03	Telephone lines*	43	🟦
9.04	Broadband Internet subscribers*	51	⬜
9.05	Mobile telephone subscribers*	50	🟦
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	32	🟦
10.02	Purchasing power parity*	73	⬜
10.03	Extent and effect of taxation	118	⬜
10.04	Fuel price levels*	75	⬜
10.05	Hotel price index*	14	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	3	🟦
11.02	Secondary education enrollment*	24	🟦
11.03	Quality of the educational system	62	⬜
11.04	Local availability of research and training services	77	⬜
11.05	Extent of staff training	98	⬜
11.06	Hiring and firing practices	114	⬜
11.07	Ease of hiring foreign labor	27	🟦
11.08	HIV prevalence*	85	⬜
11.09	Business impact of HIV/AIDS	33	🟦
11.10	Life expectancy*	42	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	74	⬜
12.02	Attitude of population toward foreign visitors	58	⬜
12.03	Extension of business trips recommended	37	🟦
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	74	⬜
13.02	Protected areas*	129	⬜
13.03	Quality of the natural environment	8	🟦
13.04	Total known species*	64	⬜
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	97	⬜
14.02	Sports stadiums*	9	🟦
14.03	Number of international fairs and exhibitions*	41	🟦
14.04	Creative industries exports*	74	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Venezuela

Key indicators

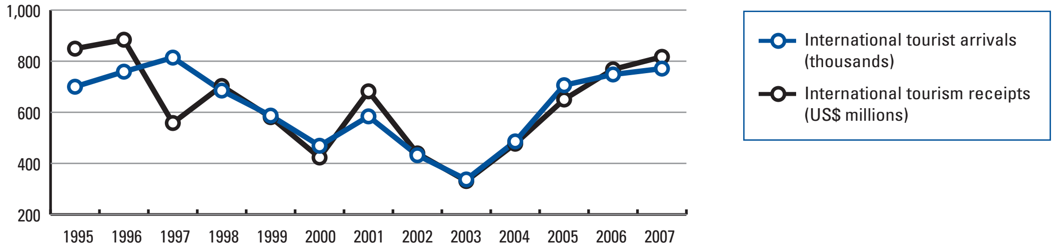
Population (millions), 2007	27.7
Surface area (1,000 square kilometers)	912.1
Gross domestic product (US$ billions), 2007	227.8
Gross domestic product (PPP, US$) per capita, 2007	12,176.4
Real GDP growth (percent), 2007	8.4
Environmental Performance Index, 2008 (out of 149 countries)	45

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	3,271	1.5	2.6
Employment (1,000 jobs)	176	1.5	1.1
T&T economy, 2008 estimates			
GDP (US$ millions)	17,155	7.6	4.3
Employment (1,000 jobs)	793	6.9	2.7

Source: World Travel & Tourism Council, TSA Research 2008

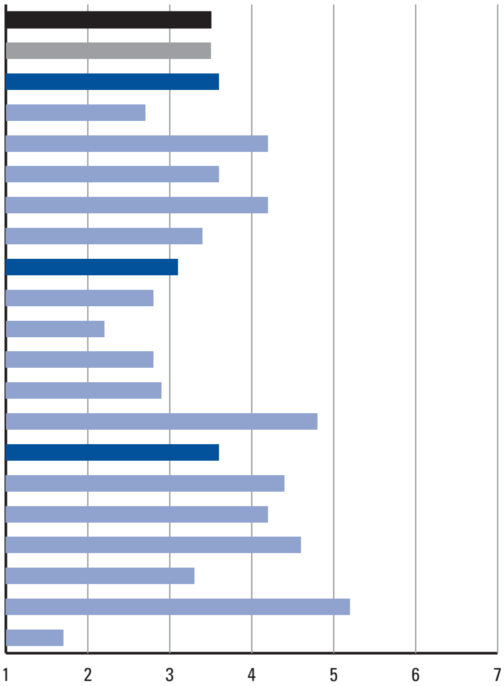
International tourist arrivals (thousands), 2007	771
International tourism receipts (US$ millions), 2007	817



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**104**	**3.5**
2008 Index	103	3.5
T&T regulatory framework	**122**	**3.6**
Policy rules and regulations	130	2.7
Environmental sustainability	91	4.2
Safety and security	127	3.6
Health and hygiene	79	4.2
Prioritization of Travel & Tourism	116	3.4
T&T business environment and infrastructure	**86**	**3.1**
Air transport infrastructure	75	2.8
Ground transport infrastructure	127	2.2
Tourism infrastructure	75	2.8
ICT infrastructure	64	2.9
Price competitiveness in the T&T industry	56	4.8
T&T human, cultural, and natural resources	**91**	**3.6**
Human resources	106	4.4
Education and training	96	4.2
Availability of qualified labor	123	4.6
Affinity for Travel & Tourism	133	3.3
Natural resources	10	5.2
Cultural resources	93	1.7



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Venezuela

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	130	⬜
1.02	Property rights	132	⬜
1.03	Business impact of rules on FDI	132	⬜
1.04	Visa requirements*	34	🟦
1.05	Openness of bilateral Air Service Agreements*	89	⬜
1.06	Transparency of government policymaking	133	⬜
1.07	Time required to start a business*	127	⬜
1.08	Cost to start a business*	91	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	90	⬜
2.02	Enforcement of environmental regulation	99	⬜
2.03	Sustainability of T&T industry development	132	⬜
2.04	Carbon dioxide emissions*	87	⬜
2.05	Particulate matter concentration*	1	🟦
2.06	Threatened species*	89	⬜
2.07	Environmental treaty ratification*	81	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	103	⬜
3.02	Reliability of police services	133	⬜
3.03	Business costs of crime and violence	126	⬜
3.04	Road traffic accidents*	104	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	57	⬜
4.02	Access to improved sanitation*	72	⬜
4.03	Access to improved drinking water*	81	⬜
4.04	Hospital beds*	107	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	132	⬜
5.02	T&T government expenditure*	63	⬜
5.03	Effectiveness of marketing and branding	131	⬜
5.04	T&T fair attendance*	41	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	108	⬜
6.02	Available seat kilometers, domestic*	35	🟦
6.03	Available seat kilometers, international*	54	⬜
6.04	Departures per 1,000 population*	49	🟦
6.05	Airport density*	50	🟦
6.06	Number of operating airlines*	47	🟦
6.07	International air transport network	101	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	86	⬜
7.02	Quality of railroad infrastructure	104	⬜
7.03	Quality of port infrastructure	126	⬜
7.04	Quality of ground transport network	129	⬜
7.05	Road density*	101	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	71	⬜
8.02	Presence of major car rental companies*	56	⬜
8.03	ATMs accepting Visa cards*	77	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	74	⬜
9.02	Internet users*	69	⬜
9.03	Telephone lines*	69	⬜
9.04	Broadband Internet subscribers*	57	⬜
9.05	Mobile telephone subscribers*	56	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	120	⬜
10.02	Purchasing power parity*	86	⬜
10.03	Extent and effect of taxation	105	⬜
10.04	Fuel price levels*	1	🟦
10.05	Hotel price index*	52	⬜
	11th pillar: Human resources		
11.01	Primary education enrollment*	80	⬜
11.02	Secondary education enrollment*	87	⬜
11.03	Quality of the educational system	111	⬜
11.04	Local availability of research and training services	100	⬜
11.05	Extent of staff training	94	⬜
11.06	Hiring and firing practices	132	⬜
11.07	Ease of hiring foreign labor	129	⬜
11.08	HIV prevalence*	91	⬜
11.09	Business impact of HIV/AIDS	96	⬜
11.10	Life expectancy*	50	🟦
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	129	⬜
12.02	Attitude of population toward foreign visitors	133	⬜
12.03	Extension of business trips recommended	133	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	40	🟦
13.02	Protected areas*	1	🟦
13.03	Quality of the natural environment	75	⬜
13.04	Total known species*	7	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	82	⬜
14.02	Sports stadiums*	68	⬜
14.03	Number of international fairs and exhibitions*	64	⬜
14.04	Creative industries exports*	82	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Vietnam

Key indicators

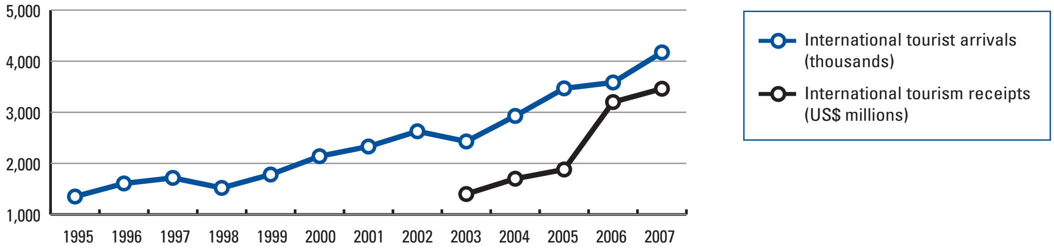
Population (millions), 2007	86.4
Surface area (1,000 square kilometers)	329.3
Gross domestic product (US$ billions), 2007	70.9
Gross domestic product (PPP, US$) per capita, 2007	2,589.2
Real GDP growth (percent), 2007	8.5
Environmental Performance Index, 2008 (out of 149 countries)	76

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	3,521	4.3	6.2
Employment (1,000 jobs)	1,509	3.3	1.6
T&T economy, 2008 estimates			
GDP (US$ millions)	11,008	13.6	7.5
Employment (1,000 jobs)	4,891	10.8	2.9

Source: World Travel & Tourism Council, TSA Research 2008

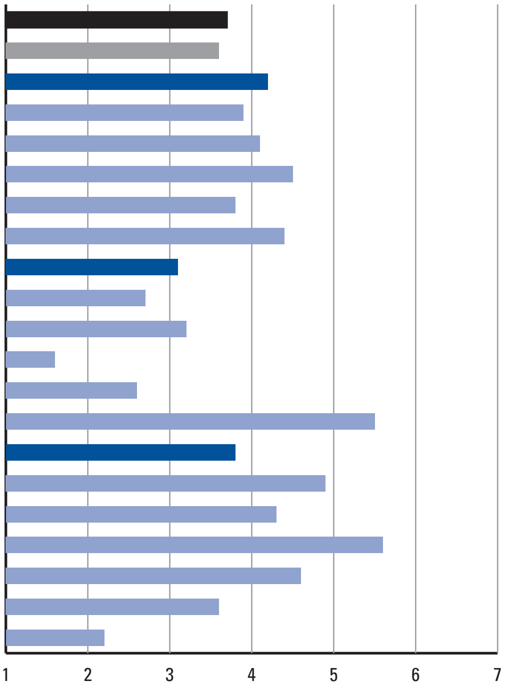
International tourist arrivals (thousands), 2007	4,172
International tourism receipts (US$ millions), 2007	3,461



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**89**	**3.7**
2008 Index	96	3.6
T&T regulatory framework	**92**	**4.2**
Policy rules and regulations	96	3.9
Environmental sustainability	100	4.1
Safety and security	100	4.5
Health and hygiene	95	3.8
Prioritization of Travel & Tourism	61	4.4
T&T business environment and infrastructure	**85**	**3.1**
Air transport infrastructure	84	2.7
Ground transport infrastructure	80	3.2
Tourism infrastructure	109	1.6
ICT infrastructure	79	2.6
Price competitiveness in the T&T industry	11	5.5
T&T human, cultural, and natural resources	**76**	**3.8**
Human resources	82	4.9
Education and training	93	4.3
Availability of qualified labor	45	5.6
Affinity for Travel & Tourism	81	4.6
Natural resources	52	3.6
Cultural resources	68	2.2



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Vietnam

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	]INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	104	⬜
1.02	Property rights	75	⬜
1.03	Business impact of rules on FDI	38	🟦
1.04	Visa requirements*	116	⬜
1.05	Openness of bilateral Air Service Agreements*	89	⬜
1.06	Transparency of government policymaking	58	⬜
1.07	Time required to start a business*	112	⬜
1.08	Cost to start a business*	77	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	106	⬜
2.02	Enforcement of environmental regulation	93	⬜
2.03	Sustainability of T&T industry development	37	🟦
2.04	Carbon dioxide emissions*	40	🟦
2.05	Particulate matter concentration*	92	⬜
2.06	Threatened species*	110	⬜
2.07	Environmental treaty ratification*	94	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	99	⬜
3.02	Reliability of police services	49	🟦
3.03	Business costs of crime and violence	58	⬜
3.04	Road traffic accidents*	116	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	97	⬜
4.02	Access to improved sanitation*	91	⬜
4.03	Access to improved drinking water*	74	⬜
4.04	Hospital beds*	70	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	41	🟦
5.02	T&T government expenditure*	109	⬜
5.03	Effectiveness of marketing and branding	63	⬜
5.04	T&T fair attendance*	25	🟦
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	92	⬜
6.02	Available seat kilometers, domestic*	26	🟦
6.03	Available seat kilometers, international*	45	🟦
6.04	Departures per 1,000 population*	100	⬜
6.05	Airport density*	114	⬜
6.06	Number of operating airlines*	39	🟦
6.07	International air transport network	91	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	102	⬜
7.02	Quality of railroad infrastructure	66	⬜
7.03	Quality of port infrastructure	112	⬜
7.04	Quality of ground transport network	58	⬜
7.05	Road density*	43	🟦

	]INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	82	⬜
8.02	Presence of major car rental companies*	95	⬜
8.03	ATMs accepting Visa cards*	103	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	96	⬜
9.02	Internet users*	70	⬜
9.03	Telephone lines*	36	🟦
9.04	Broadband Internet subscribers*	74	⬜
9.05	Mobile telephone subscribers*	112	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	20	🟦
10.02	Purchasing power parity*	5	🟦
10.03	Extent and effect of taxation	53	⬜
10.04	Fuel price levels*	23	🟦
10.05	Hotel price index*	31	🟦
	11th pillar: Human resources		
11.01	Primary education enrollment*	55	⬜
11.02	Secondary education enrollment*	100	⬜
11.03	Quality of the educational system	120	⬜
11.04	Local availability of research and training services	76	⬜
11.05	Extent of staff training	72	⬜
11.06	Hiring and firing practices	40	🟦
11.07	Ease of hiring foreign labor	57	⬜
11.08	HIV prevalence*	78	⬜
11.09	Business impact of HIV/AIDS	75	⬜
11.10	Life expectancy*	66	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	66	⬜
12.02	Attitude of population toward foreign visitors	92	⬜
12.03	Extension of business trips recommended	93	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	23	🟦
13.02	Protected areas*	101	⬜
13.03	Quality of the natural environment	122	⬜
13.04	Total known species*	21	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	45	🟦
14.02	Sports stadiums*	119	⬜
14.03	Number of international fairs and exhibitions*	47	🟦
14.04	Creative industries exports*	n/a	

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Zambia

Key indicators

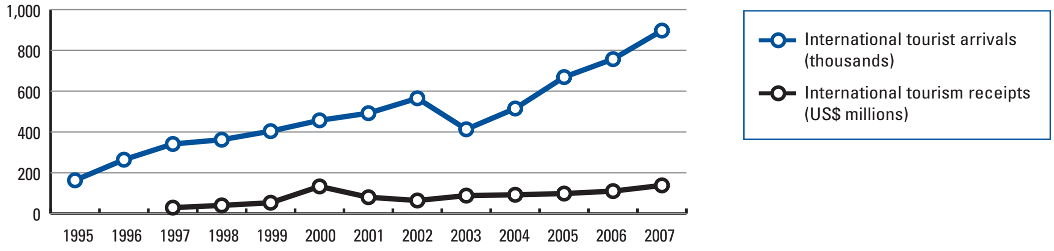
Population (millions), 2007	12.1
Surface area (1,000 square kilometers)	752.6
Gross domestic product (US$ billions), 2007	11.4
Gross domestic product (PPP, US$) per capita, 2007	1,323.1
Real GDP growth (percent), 2007	6.3
Environmental Performance Index, 2008 (out of 149 countries)	130

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	176	1.3	5.7
Employment (1,000 jobs)	21	1.2	1.8
T&T economy, 2008 estimates			
GDP (US$ millions)	677	5.1	6.0
Employment (1,000 jobs)	75	4.5	2.0

Source: World Travel & Tourism Council, TSA Research 2008

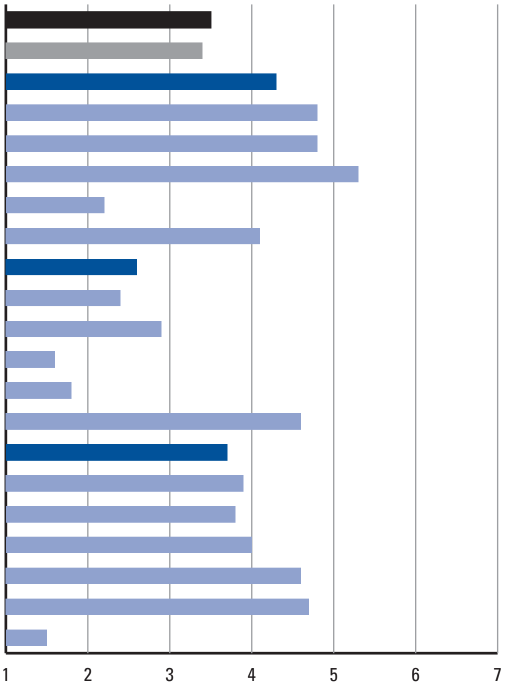
International tourist arrivals (thousands), 2007	897
International tourism receipts (US$ millions), 2007	138



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**100**	**3.5**
2008 Index	107	3.4
T&T regulatory framework	**87**	**4.3**
Policy rules and regulations	43	4.8
Environmental sustainability	45	4.8
Safety and security	58	5.3
Health and hygiene	116	2.2
Prioritization of Travel & Tourism	81	4.1
T&T business environment and infrastructure	**115**	**2.6**
Air transport infrastructure	107	2.4
Ground transport infrastructure	97	2.9
Tourism infrastructure	111	1.6
ICT infrastructure	112	1.8
Price competitiveness in the T&T industry	75	4.6
T&T human, cultural, and natural resources	**85**	**3.7**
Human resources	121	3.9
Education and training	107	3.8
Availability of qualified labor	127	4.0
Affinity for Travel & Tourism	75	4.6
Natural resources	16	4.7
Cultural resources	111	1.5



Note: For descriptions of variables and detailed sources, please refer to “How to the Read Country/Economy Profiles.”

Zambia

The Travel & Tourism Competitiveness Index in detail

■ Competitive **Advantage** □ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	13	■
1.02	Property rights	65	□
1.03	Business impact of rules on FDI	20	■
1.04	Visa requirements*	21	■
1.05	Openness of bilateral Air Service Agreements*	65	□
1.06	Transparency of government policymaking	35	■
1.07	Time required to start a business*	54	□
1.08	Cost to start a business*	93	□
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	77	□
2.02	Enforcement of environmental regulation	72	□
2.03	Sustainability of T&T industry development	26	■
2.04	Carbon dioxide emissions*	14	■
2.05	Particulate matter concentration*	79	□
2.06	Threatened species*	14	■
2.07	Environmental treaty ratification*	104	□
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	34	■
3.02	Reliability of police services	78	□
3.03	Business costs of crime and violence	92	□
3.04	Road traffic accidents*	59	□
	4th pillar: Health and hygiene		
4.01	Physician density*	117	□
4.02	Access to improved sanitation*	96	□
4.03	Access to improved drinking water*	120	□
4.04	Hospital beds*	78	□
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	30	■
5.02	T&T government expenditure*	97	□
5.03	Effectiveness of marketing and branding	44	■
5.04	T&T fair attendance*	81	□
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	99	□
6.02	Available seat kilometers, domestic*	71	□
6.03	Available seat kilometers, international*	104	□
6.04	Departures per 1,000 population*	105	□
6.05	Airport density*	70	□
6.06	Number of operating airlines*	99	□
6.07	International air transport network	77	□
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	107	□
7.02	Quality of railroad infrastructure	92	□
7.03	Quality of port infrastructure	71	□
7.04	Quality of ground transport network	49	■
7.05	Road density*	93	□

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	115	□
8.02	Presence of major car rental companies*	95	□
8.03	ATMs accepting Visa cards*	84	□
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	85	□
9.02	Internet users*	112	□
9.03	Telephone lines*	122	□
9.04	Broadband Internet subscribers*	115	□
9.05	Mobile telephone subscribers*	115	□
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	33	■
10.02	Purchasing power parity*	92	□
10.03	Extent and effect of taxation	112	□
10.04	Fuel price levels*	100	□
10.05	Hotel price index*	15	■
	11th pillar: Human resources		
11.01	Primary education enrollment*	72	□
11.02	Secondary education enrollment*	119	□
11.03	Quality of the educational system	69	□
11.04	Local availability of research and training services	97	□
11.05	Extent of staff training	106	□
11.06	Hiring and firing practices	28	■
11.07	Ease of hiring foreign labor	84	□
11.08	HIV prevalence*	128	□
11.09	Business impact of HIV/AIDS	128	□
11.10	Life expectancy*	131	□
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	120	□
12.02	Attitude of population toward foreign visitors	26	■
12.03	Extension of business trips recommended	39	■
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	40	■
13.02	Protected areas*	4	■
13.03	Quality of the natural environment	55	□
13.04	Total known species*	28	■
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	82	□
14.02	Sports stadiums*	86	□
14.03	Number of international fairs and exhibitions*	96	□
14.04	Creative industries exports*	95	□

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

Zimbabwe

Key indicators

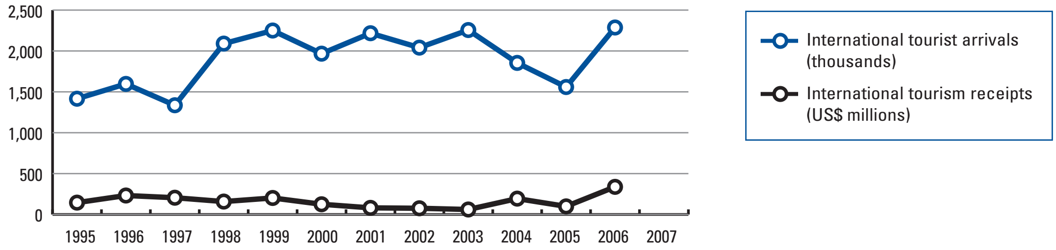
Population (millions), 2007	13.2
Surface area (1,000 square kilometers)	390.8
Gross domestic product (US$ billions), 2007	4.7
Gross domestic product (PPP, US$) per capita, 2007	188.4
Real GDP growth (percent), 2007	–6.1
Environmental Performance Index, 2008 (out of 149 countries)	95

Travel & Tourism indicators

		Percent of total	2009–2018 annual growth (%, forecast)
T&T industry, 2008 estimates			
GDP (US$ millions)	212	4.8	3.4
Employment (1,000 jobs)	43	4.4	0.3
T&T economy, 2008 estimates			
GDP (US$ millions)	435	9.8	3.8
Employment (1,000 jobs)	87	8.8	0.7

Source: World Travel & Tourism Council, TSA Research 2008

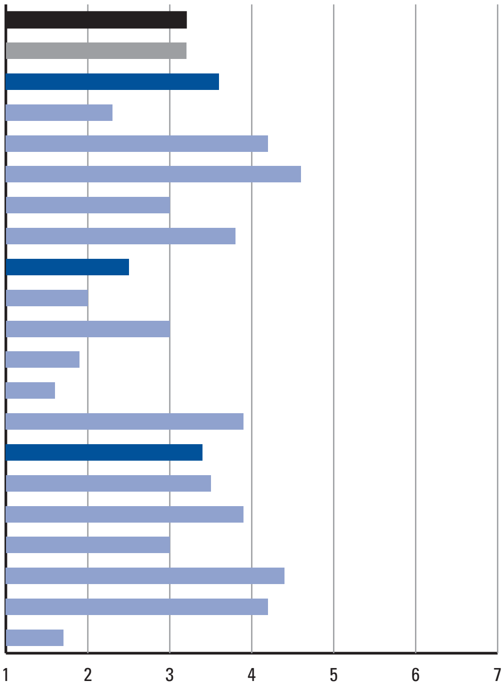
International tourist arrivals (thousands), 2006	2,287
International tourism receipts (US$ millions), 2006	338



Source: United Nations World Tourism Organization

Travel & Tourism Competitiveness Index

	Rank (out of 133)	Score (1–7 scale)
2009 Index	**121**	**3.2**
2008 Index	117	3.2
T&T regulatory framework	**125**	**3.6**
Policy rules and regulations	133	2.3
Environmental sustainability	94	4.2
Safety and security	94	4.6
Health and hygiene	106	3.0
Prioritization of Travel & Tourism	96	3.8
T&T business environment and infrastructure	**125**	**2.5**
Air transport infrastructure	123	2.0
Ground transport infrastructure	85	3.0
Tourism infrastructure	100	1.9
ICT infrastructure	123	1.6
Price competitiveness in the T&T industry	113	3.9
T&T human, cultural, and natural resources	**109**	**3.4**
Human resources	131	3.5
Education and training	103	3.9
Availability of qualified labor	133	3.0
Affinity for Travel & Tourism	109	4.4
Natural resources	35	4.2
Cultural resources	94	1.7



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

Zimbabwe

The Travel & Tourism Competitiveness Index in detail

🟦 Competitive **Advantage** ⬜ Competitive **Disadvantage**

	INDICATOR	RANK/133	
	1st pillar: Policy rules and regulations		
1.01	Prevalence of foreign ownership	132	⬜
1.02	Property rights	133	⬜
1.03	Business impact of rules on FDI	133	⬜
1.04	Visa requirements*	68	⬜
1.05	Openness of bilateral Air Service Agreements*	96	⬜
1.06	Transparency of government policymaking	107	⬜
1.07	Time required to start a business*	125	⬜
1.08	Cost to start a business*	129	⬜
	2nd pillar: Environmental sustainability		
2.01	Stringency of environmental regulation	112	⬜
2.02	Enforcement of environmental regulation	114	⬜
2.03	Sustainability of T&T industry development	120	⬜
2.04	Carbon dioxide emissions*	28	🟦
2.05	Particulate matter concentration*	43	🟦
2.06	Threatened species*	36	🟦
2.07	Environmental treaty ratification*	127	⬜
	3rd pillar: Safety and security		
3.01	Business costs of terrorism	53	⬜
3.02	Reliability of police services	130	⬜
3.03	Business costs of crime and violence	102	⬜
3.04	Road traffic accidents*	70	⬜
	4th pillar: Health and hygiene		
4.01	Physician density*	112	⬜
4.02	Access to improved sanitation*	103	⬜
4.03	Access to improved drinking water*	98	⬜
4.04	Hospital beds*	57	⬜
	5th pillar: Prioritization of Travel & Tourism		
5.01	Government prioritization of the T&T industry	102	⬜
5.02	T&T government expenditure*	88	⬜
5.03	Effectiveness of marketing and branding	99	⬜
5.04	T&T fair attendance*	62	⬜
	6th pillar: Air transport infrastructure		
6.01	Quality of air transport infrastructure	117	⬜
6.02	Available seat kilometers, domestic*	76	⬜
6.03	Available seat kilometers, international*	115	⬜
6.04	Departures per 1,000 population*	104	⬜
6.05	Airport density*	104	⬜
6.06	Number of operating airlines*	106	⬜
6.07	International air transport network	121	⬜
	7th pillar: Ground transport infrastructure		
7.01	Quality of roads	76	⬜
7.02	Quality of railroad infrastructure	56	⬜
7.03	Quality of port infrastructure	55	⬜
7.04	Quality of ground transport network	131	⬜
7.05	Road density*	71	⬜

	INDICATOR	RANK/133	
	8th pillar: Tourism infrastructure		
8.01	Hotel rooms*	114	⬜
8.02	Presence of major car rental companies*	73	⬜
8.03	ATMs accepting Visa cards*	105	⬜
	9th pillar: ICT infrastructure		
9.01	Extent of business Internet use	131	⬜
9.02	Internet users*	94	⬜
9.03	Telephone lines*	112	⬜
9.04	Broadband Internet subscribers*	100	⬜
9.05	Mobile telephone subscribers*	127	⬜
	10th pillar: Price competitiveness in the T&T industry		
10.01	Ticket taxes and airport charges*	63	⬜
10.02	Purchasing power parity*	122	⬜
10.03	Extent and effect of taxation	130	⬜
10.04	Fuel price levels*	38	🟦
10.05	Hotel price index*	n/a	
	11th pillar: Human resources		
11.01	Primary education enrollment*	102	⬜
11.02	Secondary education enrollment*	113	⬜
11.03	Quality of the educational system	43	🟦
11.04	Local availability of research and training services	121	⬜
11.05	Extent of staff training	67	⬜
11.06	Hiring and firing practices	127	⬜
11.07	Ease of hiring foreign labor	133	⬜
11.08	HIV prevalence*	129	⬜
11.09	Business impact of HIV/AIDS	130	⬜
11.10	Life expectancy*	131	⬜
	12th pillar: Affinity for Travel & Tourism		
12.01	Tourism openness*	73	⬜
12.02	Attitude of population toward foreign visitors	129	⬜
12.03	Extension of business trips recommended	80	⬜
	13th pillar: Natural resources		
13.01	Number of World Heritage natural sites*	23	🟦
13.02	Protected areas*	35	🟦
13.03	Quality of the natural environment	45	🟦
13.04	Total known species*	39	🟦
	14th pillar: Cultural resources		
14.01	Number of World Heritage cultural sites*	54	⬜
14.02	Sports stadiums*	94	⬜
14.03	Number of international fairs and exhibitions*	122	⬜
14.04	Creative industries exports*	67	⬜

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

2.2

Data Tables

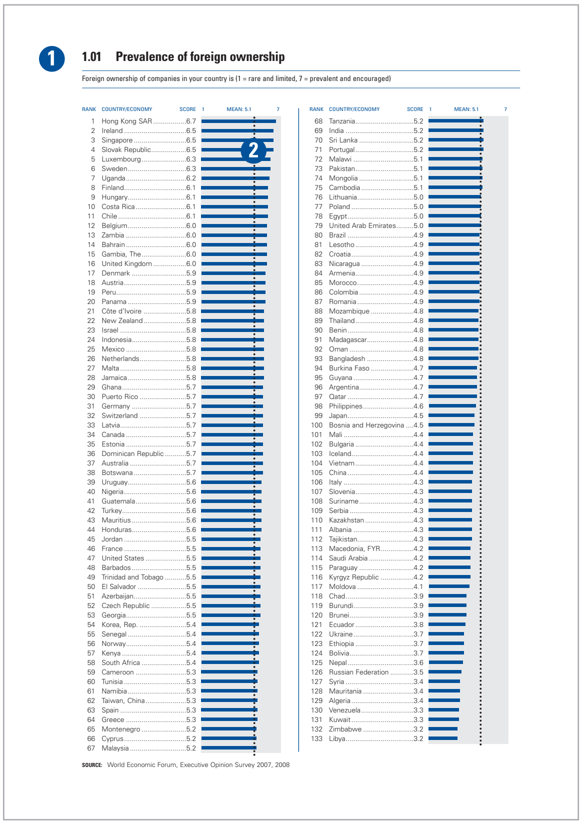
How to Read the Data Tables

The following pages present the data for all of the variables included in the Travel & Tourism Competitiveness Index 2009 (TTCI) for all 133 economies covered by the study.

The tables are organized in 14 sections, which correspond to the 14 pillars of the TTCI. The number preceding the title of each variable serves to identify the pillar to which the variable belongs.

Two types of data are used in the TTCI: Survey data and hard data.

- **Survey data:** average responses in each economy to questions included in the World Economic Forum's Executive Opinion Survey, conducted in the early months of 2007 and 2008.
- **Hard data:** indicators obtained from a variety of sources.



① **1.01 Prevalence of foreign ownership**

Foreign ownership of companies in your country is (1 = rare and limited, 7 = prevalent and encouraged)

RANK	COUNTRY/ECONOMY	SCORE
1	Hong Kong SAR	6.7
2	Ireland	6.5
3	Singapore	6.5
4	Slovak Republic	6.5
5	Luxembourg	6.3
6	Sweden	6.3
7	Uganda	6.2
8	Finland	6.1
9	Hungary	6.1
10	Costa Rica	6.1
11	Chile	6.1
12	Belgium	6.0
13	Zambia	6.0
14	Bahrain	6.0
15	Gambia, The	6.0
16	United Kingdom	6.0
17	Denmark	5.9
18	Austria	5.9
19	Peru	5.9
20	Panama	5.9
21	Côte d'Ivoire	5.8
22	New Zealand	5.8
23	Israel	5.8
24	Indonesia	5.8
25	Mexico	5.8
26	Netherlands	5.8
27	Malta	5.8
28	Jamaica	5.8
29	Ghana	5.7
30	Puerto Rico	5.7
31	Germany	5.7
32	Switzerland	5.7
33	Latvia	5.7
34	Canada	5.7
35	Estonia	5.7
36	Dominican Republic	5.7
37	Australia	5.7
38	Botswana	5.7
39	Uruguay	5.6
40	Nigeria	5.6
41	Guatemala	5.6
42	Turkey	5.6
43	Mauritius	5.6
44	Honduras	5.6
45	Jordan	5.5
46	France	5.5
47	United States	5.5
48	Barbados	5.5
49	Trinidad and Tobago	5.5
50	El Salvador	5.5
51	Azerbaijan	5.5
52	Czech Republic	5.5
53	Georgia	5.5
54	Korea, Rep.	5.4
55	Senegal	5.4
56	Norway	5.4
57	Kenya	5.4
58	South Africa	5.4
59	Cameroon	5.3
60	Tunisia	5.3
61	Namibia	5.3
62	Taiwan, China	5.3
63	Spain	5.3
64	Greece	5.3
65	Montenegro	5.2
66	Cyprus	5.2
67	Malaysia	5.2
68	Tanzania	5.2
69	India	5.2
70	Sri Lanka	5.2
71	Portugal	5.2
72	Malawi	5.1
73	Pakistan	5.1
74	Mongolia	5.1
75	Cambodia	5.1
76	Lithuania	5.0
77	Poland	5.0
78	Egypt	5.0
79	United Arab Emirates	5.0
80	Brazil	4.9
81	Lesotho	4.9
82	Croatia	4.9
83	Nicaragua	4.9
84	Armenia	4.9
85	Morocco	4.9
86	Colombia	4.9
87	Romania	4.9
88	Mozambique	4.8
89	Thailand	4.8
90	Benin	4.8
91	Madagascar	4.8
92	Oman	4.8
93	Bangladesh	4.8
94	Burkina Faso	4.7
95	Guyana	4.7
96	Argentina	4.7
97	Qatar	4.7
98	Philippines	4.6
99	Japan	4.5
100	Bosnia and Herzegovina	4.5
101	Mali	4.4
102	Bulgaria	4.4
103	Iceland	4.4
104	Vietnam	4.4
105	China	4.4
106	Italy	4.3
107	Slovenia	4.3
108	Suriname	4.3
109	Serbia	4.3
110	Kazakhstan	4.3
111	Albania	4.3
112	Tajikistan	4.3
113	Macedonia, FYR	4.2
114	Saudi Arabia	4.2
115	Paraguay	4.2
116	Kyrgyz Republic	4.2
117	Moldova	4.1
118	Chad	3.9
119	Burundi	3.9
120	Brunei	3.9
121	Ecuador	3.8
122	Ukraine	3.7
123	Ethiopia	3.7
124	Bolivia	3.7
125	Nepal	3.6
126	Russian Federation	3.5
127	Syria	3.4
128	Mauritania	3.4
129	Algeria	3.4
130	Venezuela	3.3
131	Kuwait	3.3
132	Zimbabwe	3.2
133	Libya	3.2

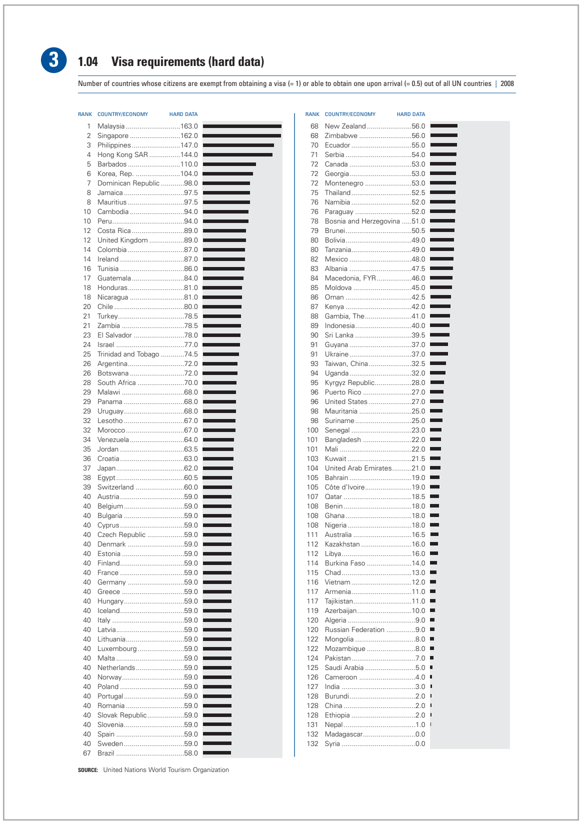
SOURCE: World Economic Forum, Executive Opinion Survey 2007, 2008

Survey data

① Data yielded from the World Economic Forum's Executive Opinion Survey are presented in blue-colored bar graphs. Questions from the Survey asked for responses on a scale of 1 to 7, where an answer of 1 corresponds to the lowest possible score and an answer of 7 corresponds to the highest possible score. For each Survey variable, the original question and the two extreme answers are shown.

We report the average score for each economy—that is, the arithmetic mean of responses from each economy. Variable 5.03, for example, asks about the effectiveness of marketing and branding to attract tourists in the respondent's economy. On this particular variable, United Arab Emirates with a score of 6.6 ranks first, and therefore appears at the top; it is followed by Mauritius, second with a score of 6.5. We report responses rounded to one decimal point, but use the exact figures to determine rankings. For example, for the variable 5.01, Ireland's average score is 6.4291, Austria's average score is 6.4255, and Portugal's average score is 6.4203. These economies are therefore ranked 14th, 15th, and 16th, respectively, although they are all listed with the same rounded score of 6.4.

② A dotted line on the graph indicates the mean score across the sample of 133 economies.



③ **1.04 Visa requirements (hard data)**

Number of countries whose citizens are exempt from obtaining a visa (= 1) or able to obtain one upon arrival (= 0.5) out of all UN countries | 2008

RANK	COUNTRY/ECONOMY	HARD DATA
1	Malaysia	163.0
2	Singapore	162.0
3	Philippines	147.0
4	Hong Kong SAR	144.0
5	Barbados	110.0
6	Korea, Rep.	104.0
7	Dominican Republic	98.0
8	Jamaica	97.5
8	Mauritius	97.5
10	Cambodia	94.0
10	Peru	94.0
12	Costa Rica	89.0
12	United Kingdom	89.0
14	Colombia	87.0
14	Ireland	87.0
16	Tunisia	86.0
17	Guatemala	84.0
18	Honduras	81.0
18	Nicaragua	81.0
20	Chile	80.0
21	Turkey	78.5
21	Zambia	78.5
23	El Salvador	78.0
24	Israel	77.0
25	Trinidad and Tobago	74.5
26	Argentina	72.0
26	Botswana	72.0
28	South Africa	70.0
29	Malawi	68.0
29	Panama	68.0
29	Uruguay	68.0
32	Lesotho	67.0
32	Morocco	67.0
34	Venezuela	64.0
35	Jordan	63.5
36	Croatia	63.0
37	Japan	62.0
38	Egypt	60.5
39	Switzerland	60.0
40	Austria	59.0
40	Belgium	59.0
40	Bulgaria	59.0
40	Cyprus	59.0
40	Czech Republic	59.0
40	Denmark	59.0
40	Estonia	59.0
40	Finland	59.0
40	France	59.0
40	Germany	59.0
40	Greece	59.0
40	Hungary	59.0
40	Iceland	59.0
40	Italy	59.0
40	Latvia	59.0
40	Lithuania	59.0
40	Luxembourg	59.0
40	Malta	59.0
40	Netherlands	59.0
40	Norway	59.0
40	Poland	59.0
40	Portugal	59.0
40	Romania	59.0
40	Slovak Republic	59.0
40	Slovenia	59.0
40	Spain	59.0
40	Sweden	59.0
67	Brazil	58.0
68	New Zealand	56.0
68	Zimbabwe	56.0
70	Ecuador	55.0
71	Serbia	54.0
72	Canada	53.0
72	Georgia	53.0
72	Montenegro	53.0
75	Thailand	52.5
76	Namibia	52.0
76	Paraguay	52.0
78	Bosnia and Herzegovina	51.0
79	Brunei	50.5
80	Bolivia	49.0
80	Tanzania	49.0
82	Mexico	48.0
83	Albania	47.5
84	Macedonia, FYR	46.0
85	Moldova	45.0
86	Oman	42.5
87	Kenya	42.0
88	Gambia, The	41.0
89	Indonesia	40.0
90	Sri Lanka	39.5
91	Guyana	37.0
91	Ukraine	37.0
93	Taiwan, China	32.5
94	Uganda	32.0
95	Kyrgyz Republic	28.0
96	Puerto Rico	27.0
96	United States	27.0
98	Mauritania	25.0
98	Suriname	25.0
100	Senegal	23.0
101	Bangladesh	22.0
101	Mali	22.0
103	Kuwait	21.5
104	United Arab Emirates	21.0
105	Bahrain	19.0
105	Côte d'Ivoire	19.0
107	Qatar	18.5
108	Benin	18.0
108	Ghana	18.0
108	Nigeria	18.0
111	Australia	16.5
112	Kazakhstan	16.0
112	Libya	16.0
114	Burkina Faso	14.0
115	Chad	13.0
116	Vietnam	12.0
117	Armenia	11.0
117	Tajikistan	11.0
119	Azerbaijan	10.0
120	Algeria	9.0
120	Russian Federation	9.0
122	Mongolia	8.0
122	Mozambique	8.0
124	Pakistan	7.0
125	Saudi Arabia	5.0
126	Cameroon	4.0
127	India	3.0
128	Burundi	2.0
128	China	2.0
128	Ethiopia	2.0
131	Nepal	1.0
132	Madagascar	0.0
132	Syria	0.0

SOURCE: United Nations World Tourism Organization

Hard data

③ While Survey data provide qualitative information, hard data provide objective quantitative measures (for example, surface of protected areas, number of airports, life expectancy, and so on). Several hard data indicators were computed or provided by partners to the project (Booz & Company, the International Air Transport Association, the United Nations World Tourism Organization, the International Union for Conservation of Nature, and the World Travel & Tourism Council). Other hard data indicators entering the TTCI were obtained from international organizations (for example, the International Monetary Fund, the World Bank, the International Telecommunication Union, the World Trade Organization, and so on) and, in some cases, from national sources. In the following pages, hard data variables are presented in black bar graphs. A detailed description and full source for each variable can be found in the Technical Notes and Sources section at the end of this *Report*.

When data are not available or are out of date, "n/a" is used in lieu of the rank and the value. In the case of hard data, true ties between two or more countries are possible. In such cases, shared rankings are indicated accordingly. For example, both Belgium and the India have 79 operating airlines on their territory. Therefore, these two countries share the 16th rank on variable 6.06.

Index of Data Tables

Subindex A **T&T regulatory framework**

Subindex B **T&T business environment and infrastructure**

(Cont'd.)

Subindex C **T&T human, cultural, and natural resources**

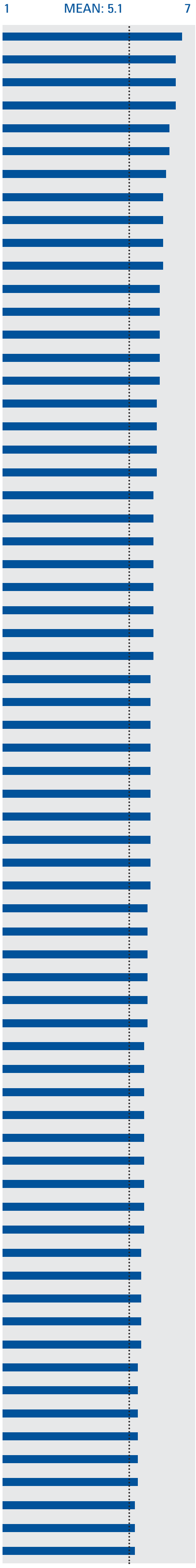
1st pillar

Policy rules and regulations

1.01 Prevalence of foreign ownership

Foreign ownership of companies in your country is (1 = rare and limited, 7 = prevalent and encouraged)

RANK	COUNTRY/ECONOMY	SCORE
1	Hong Kong SAR	6.7
2	Ireland	6.5
3	Singapore	6.5
4	Slovak Republic	6.5
5	Luxembourg	6.3
6	Sweden	6.3
7	Uganda	6.2
8	Finland	6.1
9	Hungary	6.1
10	Costa Rica	6.1
11	Chile	6.1
12	Belgium	6.0
13	Zambia	6.0
14	Bahrain	6.0
15	Gambia, The	6.0
16	United Kingdom	6.0
17	Denmark	5.9
18	Austria	5.9
19	Peru	5.9
20	Panama	5.9
21	Côte d'Ivoire	5.8
22	New Zealand	5.8
23	Israel	5.8
24	Indonesia	5.8
25	Mexico	5.8
26	Netherlands	5.8
27	Malta	5.8
28	Jamaica	5.8
29	Ghana	5.7
30	Puerto Rico	5.7
31	Germany	5.7
32	Switzerland	5.7
33	Latvia	5.7
34	Canada	5.7
35	Estonia	5.7
36	Dominican Republic	5.7
37	Australia	5.7
38	Botswana	5.7
39	Uruguay	5.6
40	Nigeria	5.6
41	Guatemala	5.6
42	Turkey	5.6
43	Mauritius	5.6
44	Honduras	5.6
45	Jordan	5.5
46	France	5.5
47	United States	5.5
48	Barbados	5.5
49	Trinidad and Tobago	5.5
50	El Salvador	5.5
51	Azerbaijan	5.5
52	Czech Republic	5.5
53	Georgia	5.5
54	Korea, Rep.	5.4
55	Senegal	5.4
56	Norway	5.4
57	Kenya	5.4
58	South Africa	5.4
59	Cameroon	5.3
60	Tunisia	5.3
61	Namibia	5.3
62	Taiwan, China	5.3
63	Spain	5.3
64	Greece	5.3
65	Montenegro	5.2
66	Cyprus	5.2
67	Malaysia	5.2
68	Tanzania	5.2
69	India	5.2
70	Sri Lanka	5.2
71	Portugal	5.2
72	Malawi	5.1
73	Pakistan	5.1
74	Mongolia	5.1
75	Cambodia	5.1
76	Lithuania	5.0
77	Poland	5.0
78	Egypt	5.0
79	United Arab Emirates	5.0
80	Brazil	4.9
81	Lesotho	4.9
82	Croatia	4.9
83	Nicaragua	4.9
84	Armenia	4.9
85	Morocco	4.9
86	Colombia	4.9
87	Romania	4.9
88	Mozambique	4.8
89	Thailand	4.8
90	Benin	4.8
91	Madagascar	4.8
92	Oman	4.8
93	Bangladesh	4.8
94	Burkina Faso	4.7
95	Guyana	4.7
96	Argentina	4.7
97	Qatar	4.7
98	Philippines	4.6
99	Japan	4.5
100	Bosnia and Herzegovina	4.5
101	Mali	4.4
102	Bulgaria	4.4
103	Iceland	4.4
104	Vietnam	4.4
105	China	4.4
106	Italy	4.3
107	Slovenia	4.3
108	Suriname	4.3
109	Serbia	4.3
110	Kazakhstan	4.3
111	Albania	4.3
112	Tajikistan	4.3
113	Macedonia, FYR	4.2
114	Saudi Arabia	4.2
115	Paraguay	4.2
116	Kyrgyz Republic	4.2
117	Moldova	4.1
118	Chad	3.9
119	Burundi	3.9
120	Brunei	3.9
121	Ecuador	3.8
122	Ukraine	3.7
123	Ethiopia	3.7
124	Bolivia	3.7
125	Nepal	3.6
126	Russian Federation	3.5
127	Syria	3.4
128	Mauritania	3.4
129	Algeria	3.4
130	Venezuela	3.3
131	Kuwait	3.3
132	Zimbabwe	3.2
133	Libya	3.2



SOURCE: World Economic Forum, Executive Opinion Survey 2007, 2008

1.02 Property rights

Property rights in your country, including over financial assets, are (1 = poorly defined and not protected by law, 7 = clearly defined and well protected by law)

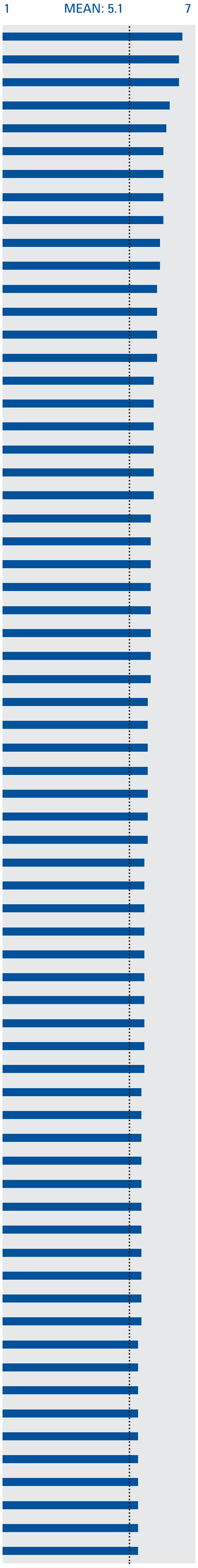
RANK	COUNTRY/ECONOMY	SCORE
1	Switzerland	6.7
2	Denmark	6.6
3	Austria	6.6
4	Singapore	6.5
5	Finland	6.5
6	Germany	6.5
7	Sweden	6.5
8	Canada	6.4
9	Norway	6.4
10	Iceland	6.4
11	Ireland	6.4
12	Hong Kong SAR	6.3
13	Australia	6.3
14	Netherlands	6.3
15	Japan	6.3
16	New Zealand	6.2
17	Luxembourg	6.1
18	France	6.1
19	Belgium	6.0
20	South Africa	6.0
21	Puerto Rico	6.0
22	Mauritius	5.9
23	Jordan	5.9
24	Barbados	5.8
25	Namibia	5.8
26	United States	5.8
27	Kuwait	5.8
28	Estonia	5.8
29	Cyprus	5.7
30	Syria	5.6
31	Qatar	5.6
32	Malta	5.6
33	Tunisia	5.6
34	Taiwan, China	5.6
35	Portugal	5.6
36	United Kingdom	5.5
37	Bahrain	5.5
38	Malaysia	5.5
39	Korea, Rep.	5.4
40	Chile	5.4
41	Oman	5.4
42	Spain	5.4
43	United Arab Emirates	5.4
44	Saudi Arabia	5.3
45	Latvia	5.3
46	Hungary	5.2
47	Panama	5.2
48	Botswana	5.2
49	Israel	5.2
50	Lithuania	5.1
51	Greece	5.1
52	India	5.0
53	Jamaica	5.0
54	China	5.0
55	Slovak Republic	4.9
56	Gambia, The	4.9
57	Slovenia	4.9
58	Uruguay	4.9
59	Italy	4.8
60	Sri Lanka	4.8
61	Thailand	4.7
62	Brunei	4.7
63	Czech Republic	4.7
64	Montenegro	4.7
65	Zambia	4.7
66	Morocco	4.7
67	Egypt	4.7
68	Trinidad and Tobago	4.7
69	Armenia	4.6
70	Brazil	4.6
71	Costa Rica	4.6
72	Burkina Faso	4.5
73	Colombia	4.4
74	Ghana	4.4
75	Vietnam	4.4
76	Senegal	4.4
77	Honduras	4.3
78	Ethiopia	4.3
79	Malawi	4.3
80	Azerbaijan	4.2
81	Kenya	4.2
82	El Salvador	4.2
83	Turkey	4.2
84	Croatia	4.2
85	Romania	4.2
86	Nigeria	4.2
87	Guatemala	4.2
88	Tajikistan	4.1
89	Mexico	4.1
90	Dominican Republic	4.1
91	Mali	4.1
92	Philippines	4.0
93	Pakistan	4.0
94	Poland	4.0
95	Kazakhstan	4.0
96	Macedonia, FYR	3.9
97	Bulgaria	3.9
98	Moldova	3.9
99	Mauritania	3.9
100	Tanzania	3.8
101	Mongolia	3.8
102	Peru	3.8
103	Libya	3.8
104	Guyana	3.7
105	Cameroon	3.7
106	Suriname	3.7
107	Madagascar	3.6
108	Serbia	3.6
109	Georgia	3.6
110	Benin	3.6
111	Nepal	3.6
112	Uganda	3.6
113	Côte d'Ivoire	3.6
114	Bangladesh	3.6
115	Algeria	3.6
116	Mozambique	3.5
117	Indonesia	3.5
118	Cambodia	3.5
119	Nicaragua	3.5
120	Lesotho	3.4
121	Bosnia and Herzegovina	3.3
122	Russian Federation	3.3
123	Ukraine	3.3
124	Kyrgyz Republic	3.3
125	Ecuador	3.2
126	Albania	3.2
127	Argentina	3.2
128	Burundi	3.2
129	Paraguay	3.1
130	Chad	2.7
131	Bolivia	2.6
132	Venezuela	2.2
133	Zimbabwe	2.1

1 MEAN: 4.7 7

SOURCE: World Economic Forum, Executive Opinion Survey 2007, 2008

1.03 Business impact of rules on FDI

In your country, rules governing foreign direct investment (1 = discourage foreign direct investment, 7 = encourage foreign direct investment)



RANK	COUNTRY/ECONOMY	SCORE
1	Ireland	6.7
2	Singapore	6.6
3	Hong Kong SAR	6.6
4	Luxembourg	6.3
5	Slovak Republic	6.2
6	Bahrain	6.1
7	Malta	6.1
8	Mauritius	6.1
9	Sweden	6.1
10	Uganda	6.0
11	Estonia	6.0
12	Netherlands	5.9
13	Gambia, The	5.9
14	Finland	5.9
15	United Kingdom	5.9
16	Tunisia	5.8
17	Costa Rica	5.8
18	Panama	5.8
19	Chile	5.8
20	Zambia	5.8
21	Belgium	5.8
22	Puerto Rico	5.7
23	Switzerland	5.7
24	Denmark	5.7
25	Czech Republic	5.7
26	Trinidad and Tobago	5.7
27	Sri Lanka	5.7
28	Barbados	5.7
29	Pakistan	5.7
30	Peru	5.6
31	Austria	5.6
32	Cyprus	5.6
33	Botswana	5.6
34	Portugal	5.6
35	Ghana	5.6
36	Jamaica	5.6
37	Montenegro	5.5
38	Vietnam	5.5
39	Côte d’Ivoire	5.5
40	Hungary	5.5
41	Tanzania	5.5
42	Indonesia	5.5
43	El Salvador	5.5
44	Jordan	5.5
45	Canada	5.5
46	Germany	5.5
47	Malaysia	5.4
48	Israel	5.4
49	United Arab Emirates	5.4
50	Turkey	5.4
51	Korea, Rep.	5.4
52	Uruguay	5.4
53	United States	5.4
54	Honduras	5.4
55	China	5.4
56	Bangladesh	5.4
57	Nigeria	5.4
58	Malawi	5.3
59	Australia	5.3
60	Georgia	5.3
61	India	5.3
62	Mexico	5.3
63	New Zealand	5.3
64	Taiwan, China	5.3
65	France	5.3
66	Senegal	5.3
67	Dominican Republic	5.3
68	Thailand	5.3
69	Latvia	5.2
70	Cambodia	5.2
71	Qatar	5.2
72	Namibia	5.1
73	Guatemala	5.1
74	Morocco	5.1
75	Norway	5.1
76	Spain	5.1
77	South Africa	5.0
78	Azerbaijan	5.0
79	Kenya	5.0
80	Colombia	5.0
81	Brunei	5.0
82	Brazil	5.0
83	Egypt	4.9
84	Oman	4.9
85	Mali	4.9
86	Guyana	4.9
87	Armenia	4.8
88	Nicaragua	4.8
89	Romania	4.8
90	Japan	4.8
91	Mozambique	4.8
92	Saudi Arabia	4.8
93	Burkina Faso	4.8
94	Moldova	4.7
95	Iceland	4.7
96	Mauritania	4.6
97	Philippines	4.6
98	Ethiopia	4.6
99	Poland	4.6
100	Lesotho	4.6
101	Kazakhstan	4.5
102	Lithuania	4.5
103	Madagascar	4.5
104	Cameroon	4.5
105	Benin	4.5
106	Macedonia, FYR	4.5
107	Greece	4.5
108	Syria	4.4
109	Libya	4.4
110	Tajikistan	4.4
111	Burundi	4.4
112	Serbia	4.4
113	Nepal	4.4
114	Slovenia	4.3
115	Algeria	4.3
116	Albania	4.3
117	Croatia	4.3
118	Bulgaria	4.3
119	Paraguay	4.1
120	Ukraine	4.0
121	Mongolia	4.0
122	Italy	3.9
123	Kyrgyz Republic	3.9
124	Chad	3.7
125	Argentina	3.7
126	Suriname	3.7
127	Bosnia and Herzegovina	3.7
128	Russian Federation	3.5
129	Kuwait	3.3
130	Ecuador	3.1
131	Bolivia	2.5
132	Venezuela	2.3
133	Zimbabwe	2.1

SOURCE: World Economic Forum, Executive Opinion Survey 2007, 2008

1.04 Visa requirements (hard data)

Number of countries whose citizens are exempt from obtaining a visa (= 1) or able to obtain one upon arrival (= 0.5) out of all UN countries | 2008

RANK	COUNTRY/ECONOMY	HARD DATA
1	Malaysia	163.0
2	Singapore	162.0
3	Philippines	147.0
4	Hong Kong SAR	144.0
5	Barbados	110.0
6	Korea, Rep.	104.0
7	Dominican Republic	98.0
8	Jamaica	97.5
8	Mauritius	97.5
10	Cambodia	94.0
10	Peru	94.0
12	Costa Rica	89.0
12	United Kingdom	89.0
14	Colombia	87.0
14	Ireland	87.0
16	Tunisia	86.0
17	Guatemala	84.0
18	Honduras	81.0
18	Nicaragua	81.0
20	Chile	80.0
21	Turkey	78.5
21	Zambia	78.5
23	El Salvador	78.0
24	Israel	77.0
25	Trinidad and Tobago	74.5
26	Argentina	72.0
26	Botswana	72.0
28	South Africa	70.0
29	Malawi	68.0
29	Panama	68.0
29	Uruguay	68.0
32	Lesotho	67.0
32	Morocco	67.0
34	Venezuela	64.0
35	Jordan	63.5
36	Croatia	63.0
37	Japan	62.0
38	Egypt	60.5
39	Switzerland	60.0
40	Austria	59.0
40	Belgium	59.0
40	Bulgaria	59.0
40	Cyprus	59.0
40	Czech Republic	59.0
40	Denmark	59.0
40	Estonia	59.0
40	Finland	59.0
40	France	59.0
40	Germany	59.0
40	Greece	59.0
40	Hungary	59.0
40	Iceland	59.0
40	Italy	59.0
40	Latvia	59.0
40	Lithuania	59.0
40	Luxembourg	59.0
40	Malta	59.0
40	Netherlands	59.0
40	Norway	59.0
40	Poland	59.0
40	Portugal	59.0
40	Romania	59.0
40	Slovak Republic	59.0
40	Slovenia	59.0
40	Spain	59.0
40	Sweden	59.0
67	Brazil	58.0
68	New Zealand	56.0
68	Zimbabwe	56.0
70	Ecuador	55.0
71	Serbia	54.0
72	Canada	53.0
72	Georgia	53.0
72	Montenegro	53.0
75	Thailand	52.5
76	Namibia	52.0
76	Paraguay	52.0
78	Bosnia and Herzegovina	51.0
79	Brunei	50.5
80	Bolivia	49.0
80	Tanzania	49.0
82	Mexico	48.0
83	Albania	47.5
84	Macedonia, FYR	46.0
85	Moldova	45.0
86	Oman	42.5
87	Kenya	42.0
88	Gambia, The	41.0
89	Indonesia	40.0
90	Sri Lanka	39.5
91	Guyana	37.0
91	Ukraine	37.0
93	Taiwan, China	32.5
94	Uganda	32.0
95	Kyrgyz Republic	28.0
96	Puerto Rico	27.0
96	United States	27.0
98	Mauritania	25.0
98	Suriname	25.0
100	Senegal	23.0
101	Bangladesh	22.0
101	Mali	22.0
103	Kuwait	21.5
104	United Arab Emirates	21.0
105	Bahrain	19.0
105	Côte d'Ivoire	19.0
107	Qatar	18.5
108	Benin	18.0
108	Ghana	18.0
108	Nigeria	18.0
111	Australia	16.5
112	Kazakhstan	16.0
112	Libya	16.0
114	Burkina Faso	14.0
115	Chad	13.0
116	Vietnam	12.0
117	Armenia	11.0
117	Tajikistan	11.0
119	Azerbaijan	10.0
120	Algeria	9.0
120	Russian Federation	9.0
122	Mongolia	8.0
122	Mozambique	8.0
124	Pakistan	7.0
125	Saudi Arabia	5.0
126	Cameroon	4.0
127	India	3.0
128	Burundi	2.0
128	China	2.0
128	Ethiopia	2.0
131	Nepal	1.0
132	Madagascar	0.0
132	Syria	0.0

SOURCE: United Nations World Tourism Organization

1.05 Openness of bilateral Air Service Agreements (hard data)

Index of openness of bilateral Air Service Agreements | 2005

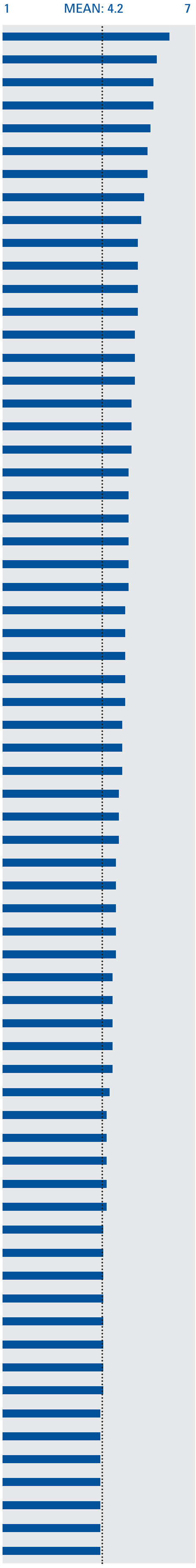
RANK	COUNTRY/ECONOMY	HARD DATA
1	El Salvador	33.7
2	Honduras	32.7
3	Guatemala	31.9
4	Dominican Republic	28.9
5	Nicaragua	26.5
6	Jamaica	24.7
7	Peru	22.7
8	United States	22.6
9	Costa Rica	22.0
10	Canada	20.2
11	Panama	19.2
12	Chile	18.9
12	Poland	18.9
14	Brunei	16.6
15	Luxembourg	16.5
16	Germany	16.4
17	Iceland	15.6
18	Denmark	15.3
19	Portugal	15.1
20	Japan	14.8
20	Netherlands	14.8
22	Mexico	14.6
23	Barbados	14.1
24	Suriname	13.6
25	Hong Kong SAR	13.5
26	New Zealand	13.4
27	Ireland	13.3
28	Philippines	13.1
29	Italy	13.0
29	Singapore	13.0
31	Indonesia	12.9
32	Czech Republic	12.8
33	Belgium	12.6
34	Ecuador	12.5
35	Finland	12.4
36	Paraguay	12.2
37	Brazil	12.1
37	Jordan	12.1
39	United Kingdom	12.0
40	Israel	11.9
41	Colombia	11.8
42	Korea, Rep.	11.7
43	Trinidad and Tobago	11.5
43	Turkey	11.5
45	United Arab Emirates	11.3
46	Croatia	11.2
46	Hungary	11.2
46	Uruguay	11.2
49	Azerbaijan	11.1
50	Namibia	10.9
51	Greece	10.8
52	Malaysia	10.7
52	Qatar	10.7
54	Austria	10.6
55	Morocco	10.5
56	Ethiopia	10.4
57	Libya	10.3
58	Bahrain	10.2
59	Tunisia	9.9
60	Thailand	9.9
61	South Africa	9.9
62	Cameroon	9.8
62	Ghana	9.8
64	Switzerland	9.8
65	Pakistan	9.6
65	Zambia	9.6
67	Bolivia	9.5
67	Egypt	9.5
69	Albania	9.5
70	Chad	9.4
71	Norway	9.4
72	France	9.4
73	Bosnia and Herzegovina	9.3
73	Malta	9.3
75	Saudi Arabia	9.2
76	Australia	9.0
76	Gambia, The	9.0
76	Sweden	9.0
79	Argentina	8.8
79	Mozambique	8.8
79	Slovak Republic	8.8
82	Sri Lanka	8.6
83	Romania	8.5
84	Spain	8.3
85	Mauritania	8.2
86	Cambodia	8.1
86	Senegal	8.1
86	Syria	8.1
89	Armenia	8.0
89	Lithuania	8.0
89	Venezuela	8.0
89	Vietnam	8.0
93	India	7.9
94	Malawi	7.8
95	Madagascar	7.7
96	Nigeria	7.5
96	Zimbabwe	7.5
98	Côte d'Ivoire	7.4
99	Oman	7.3
100	Bulgaria	7.0
101	Kazakhstan	6.9
102	Uganda	6.7
103	Botswana	6.5
104	Mauritius	6.2
105	Algeria	6.1
105	Mali	6.1
105	Ukraine	6.1
108	Guyana	6.0
109	Bangladesh	5.8
109	Tanzania	5.8
111	Mongolia	5.7
112	China	5.5
113	Burundi	5.4
113	Latvia	5.4
115	Kenya	5.2
116	Macedonia, FYR	5.1
117	Georgia	4.9
118	Cyprus	4.6
119	Kyrgyz Republic	4.5
120	Moldova	4.4
121	Russian Federation	4.2
122	Benin	3.9
122	Slovenia	3.9
124	Estonia	3.0
124	Nepal	3.0
126	Kuwait	2.3
127	Burkina Faso	1.9
128	Lesotho	0.1
n/a	Montenegro	n/a
n/a	Puerto Rico	n/a
n/a	Serbia	n/a
n/a	Taiwan, China	n/a
n/a	Tajikistan	n/a

SOURCE: World Trade Organization

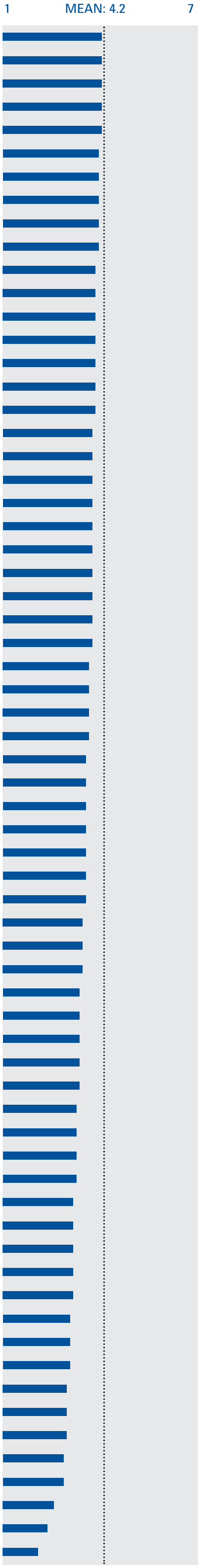
1.06 Transparency of government policymaking

Are firms in your country usually informed clearly by the government of changes in policies and regulations affecting your industry?
(1 = never informed, 7 = always informed)

RANK	COUNTRY/ECONOMY	SCORE
1	Singapore	6.3
2	Hong Kong SAR	5.9
3	Sweden	5.8
4	Denmark	5.8
5	Finland	5.7
6	Iceland	5.6
7	Switzerland	5.6
8	Norway	5.5
9	Australia	5.4
10	Barbados	5.3
11	New Zealand	5.3
12	Luxembourg	5.3
13	Netherlands	5.3
14	Ireland	5.2
15	Tunisia	5.2
16	Canada	5.2
17	United Arab Emirates	5.1
18	Oman	5.1
19	Japan	5.1
20	Malaysia	5.0
21	Qatar	5.0
22	Germany	5.0
23	Taiwan, China	5.0
24	Gambia, The	5.0
25	Austria	5.0
26	Chile	4.9
27	Estonia	4.9
28	United States	4.9
29	South Africa	4.9
30	Mauritius	4.9
31	Bahrain	4.8
32	Cyprus	4.8
33	France	4.8
34	Burkina Faso	4.7
35	Zambia	4.7
36	Brunei	4.7
37	Israel	4.6
38	United Kingdom	4.6
39	Botswana	4.6
40	Mali	4.6
41	Malawi	4.6
42	Malta	4.5
43	Slovenia	4.5
44	Korea, Rep.	4.5
45	Saudi Arabia	4.5
46	China	4.5
47	Morocco	4.4
48	Colombia	4.3
49	Jordan	4.3
50	Slovak Republic	4.3
51	Namibia	4.3
52	Costa Rica	4.3
53	Cameroon	4.2
54	Nigeria	4.2
55	India	4.2
56	Honduras	4.2
57	Belgium	4.2
58	Vietnam	4.2
59	Montenegro	4.2
60	Thailand	4.2
61	Guatemala	4.1
62	Trinidad and Tobago	4.1
63	Portugal	4.1
64	Lithuania	4.1
65	Panama	4.1
66	Côte d'Ivoire	4.1
67	Egypt	4.1



RANK	COUNTRY/ECONOMY	SCORE
68	Kenya	4.1
69	Uruguay	4.1
70	Kazakhstan	4.1
71	Puerto Rico	4.1
72	El Salvador	4.1
73	Madagascar	4.0
74	Tanzania	4.0
75	Benin	4.0
76	Cambodia	4.0
77	Jamaica	4.0
78	Uganda	3.9
79	Macedonia, FYR	3.9
80	Dominican Republic	3.9
81	Mauritania	3.9
82	Serbia	3.9
83	Azerbaijan	3.9
84	Ghana	3.9
85	Philippines	3.8
86	Georgia	3.8
87	Moldova	3.8
88	Sri Lanka	3.8
89	Spain	3.8
90	Croatia	3.8
91	Kuwait	3.8
92	Ethiopia	3.8
93	Mozambique	3.8
94	Mexico	3.8
95	Guyana	3.7
96	Peru	3.7
97	Turkey	3.7
98	Latvia	3.7
99	Greece	3.6
100	Libya	3.6
101	Brazil	3.6
102	Tajikistan	3.6
103	Armenia	3.6
104	Czech Republic	3.6
105	Lesotho	3.6
106	Syria	3.5
107	Zimbabwe	3.5
108	Bangladesh	3.5
109	Pakistan	3.4
110	Burundi	3.4
111	Italy	3.4
112	Algeria	3.4
113	Bulgaria	3.4
114	Ukraine	3.3
115	Nicaragua	3.3
116	Chad	3.3
117	Hungary	3.3
118	Senegal	3.2
119	Russian Federation	3.2
120	Nepal	3.2
121	Indonesia	3.2
122	Albania	3.2
123	Suriname	3.1
124	Romania	3.1
125	Kyrgyz Republic	3.1
126	Paraguay	3.0
127	Poland	3.0
128	Mongolia	3.0
129	Bosnia and Herzegovina	2.9
130	Ecuador	2.9
131	Argentina	2.6
132	Bolivia	2.4
133	Venezuela	2.1

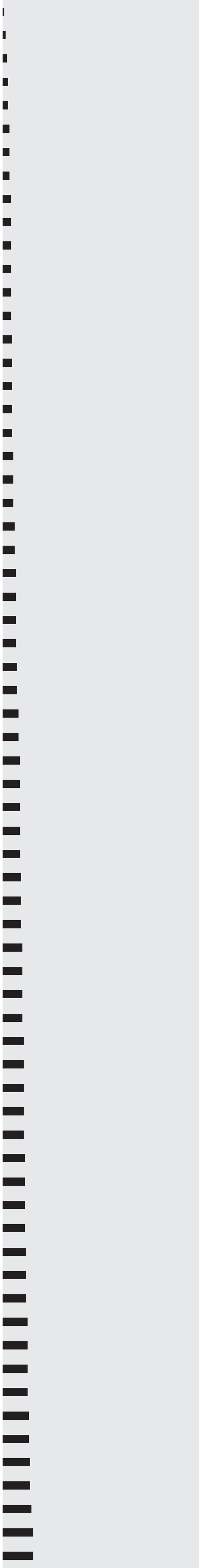


SOURCE: World Economic Forum, Executive Opinion Survey 2007, 2008

1.07 Time required to start a business (hard data)

Number of days required to start a business | 2008

RANK	COUNTRY/ECONOMY	HARD DATA
1	New Zealand	1.0
2	Australia	2.0
3	Georgia	3.0
4	Belgium	4.0
4	Singapore	4.0
6	Canada	5.0
6	Hungary	5.0
6	Iceland	5.0
9	Denmark	6.0
9	Mauritius	6.0
9	Portugal	6.0
9	Qatar	6.0
9	Turkey	6.0
9	United States	6.0
15	Egypt	7.0
15	Estonia	7.0
15	France	7.0
15	Madagascar	7.0
15	Puerto Rico	7.0
20	Albania	8.0
20	Jamaica	8.0
20	Senegal	8.0
23	Bahrain	9.0
23	Macedonia, FYR	9.0
25	Italy	10.0
25	Netherlands	10.0
25	Norway	10.0
25	Romania	10.0
29	Hong Kong SAR	11.0
29	Tunisia	11.0
31	Morocco	12.0
31	Saudi Arabia	12.0
33	Ireland	13.0
33	Malaysia	13.0
33	Mongolia	13.0
33	Panama	13.0
33	United Kingdom	13.0
38	Finland	14.0
38	Jordan	14.0
38	Oman	14.0
41	Czech Republic	15.0
41	Kyrgyz Republic	15.0
41	Moldova	15.0
41	Sweden	15.0
45	Azerbaijan	16.0
45	Burkina Faso	16.0
45	Ethiopia	16.0
45	Latvia	16.0
45	Slovak Republic	16.0
50	El Salvador	17.0
50	Korea, Rep.	17.0
50	Syria	17.0
50	United Arab Emirates	17.0
54	Armenia	18.0
54	Germany	18.0
54	Zambia	18.0
57	Dominican Republic	19.0
57	Greece	19.0
57	Mauritania	19.0
57	Slovenia	19.0
61	Honduras	20.0
61	Switzerland	20.0
63	Kazakhstan	21.0
63	Montenegro	21.0
65	South Africa	22.0
66	Japan	23.0
66	Serbia	23.0



RANK	COUNTRY/ECONOMY	HARD DATA
68	Algeria	24.0
68	Pakistan	24.0
70	Uganda	25.0
71	Guatemala	26.0
71	Lithuania	26.0
71	Luxembourg	26.0
71	Mali	26.0
71	Mozambique	26.0
76	Chile	27.0
76	Gambia, The	27.0
76	Ukraine	27.0
79	Austria	28.0
79	Mexico	28.0
81	Russian Federation	29.0
81	Tanzania	29.0
83	India	30.0
83	Kenya	30.0
85	Benin	31.0
85	Nepal	31.0
85	Nigeria	31.0
85	Poland	31.0
89	Argentina	32.0
90	Thailand	33.0
91	Ghana	34.0
91	Israel	34.0
93	Kuwait	35.0
93	Paraguay	35.0
95	Colombia	36.0
96	Cameroon	37.0
97	Sri Lanka	38.0
98	Malawi	39.0
98	Nicaragua	39.0
100	China	40.0
100	Côte d'Ivoire	40.0
100	Croatia	40.0
100	Guyana	40.0
100	Lesotho	40.0
105	Taiwan, China	42.0
106	Burundi	43.0
106	Trinidad and Tobago	43.0
108	Uruguay	44.0
109	Spain	47.0
110	Bulgaria	49.0
110	Tajikistan	49.0
112	Bolivia	50.0
112	Vietnam	50.0
114	Philippines	52.0
115	Bosnia and Herzegovina	60.0
115	Costa Rica	60.0
117	Ecuador	65.0
117	Peru	65.0
119	Namibia	66.0
120	Bangladesh	73.0
121	Chad	75.0
122	Indonesia	76.0
123	Botswana	78.0
124	Cambodia	85.0
125	Zimbabwe	96.0
126	Brunei	116.0
127	Venezuela	141.0
128	Brazil	152.0
129	Suriname	694.0
n/a	Barbados	n/a
n/a	Cyprus	n/a
n/a	Libya	n/a
n/a	Malta	n/a

SOURCE: The World Bank, *Doing Business 2009*

1.08 Cost to start a business (hard data)

Cost to start a business as a percentage of GNI per capita | 2008

RANK	COUNTRY/ECONOMY	HARD DATA
1	Denmark	0.0
2	Slovenia	0.1
3	Ireland	0.3
4	New Zealand	0.4
5	Canada	0.5
6	Bahrain	0.6
6	Sweden	0.6
8	Singapore	0.7
8	United States	0.7
10	Australia	0.8
10	Puerto Rico	0.8
10	United Kingdom	0.8
13	Trinidad and Tobago	0.9
14	Finland	1.0
14	France	1.0
16	Kuwait	1.3
17	Estonia	1.7
18	Bulgaria	2.0
18	Hong Kong SAR	2.0
20	Norway	2.1
20	Switzerland	2.1
22	Botswana	2.3
22	Latvia	2.3
24	Iceland	2.6
24	Russian Federation	2.6
26	Lithuania	2.7
27	Portugal	2.9
28	Azerbaijan	3.2
29	Slovak Republic	3.3
30	Armenia	3.6
30	Oman	3.6
30	Romania	3.6
33	Macedonia, FYR	3.8
34	Georgia	4.0
34	Mongolia	4.0
36	Taiwan, China	4.1
37	Israel	4.4
37	Montenegro	4.4
39	Thailand	4.9
40	Mauritius	5.0
41	Austria	5.1
42	Belgium	5.2
42	Kazakhstan	5.2
44	Ukraine	5.5
45	Germany	5.6
46	Netherlands	5.9
47	South Africa	6.0
48	Luxembourg	6.5
49	Sri Lanka	7.1
50	Kyrgyz Republic	7.4
51	Chile	7.5
51	Japan	7.5
53	Serbia	7.6
54	Jamaica	7.9
54	Tunisia	7.9
56	Brazil	8.2
57	China	8.4
57	Hungary	8.4
59	Moldova	8.9
60	Argentina	9.0
61	Qatar	9.1
62	Brunei	9.2
63	Czech Republic	9.6
64	Greece	10.2
64	Morocco	10.2
66	Algeria	10.8
67	Madagascar	11.0
68	Croatia	11.5
69	Mexico	12.5
70	Pakistan	12.6
71	United Arab Emirates	13.4
72	Colombia	14.1
73	Malaysia	14.7
74	Saudi Arabia	14.9
74	Spain	14.9
74	Turkey	14.9
77	Vietnam	16.8
78	Korea, Rep.	16.9
79	Syria	18.2
80	Egypt	18.3
81	Italy	18.5
82	Poland	18.8
83	Dominican Republic	19.4
84	Panama	19.6
85	Costa Rica	20.5
86	Namibia	22.1
87	Mozambique	22.9
88	Bangladesh	25.7
88	Peru	25.7
90	Albania	25.8
91	Venezuela	26.8
92	Tajikistan	27.6
93	Zambia	28.6
94	Ethiopia	29.8
94	Philippines	29.8
96	Bosnia and Herzegovina	30.8
97	Ghana	32.7
98	Mauritania	33.9
99	Lesotho	37.8
100	Ecuador	38.5
101	Kenya	39.7
102	Tanzania	41.5
103	Uruguay	43.5
104	El Salvador	49.6
105	Guatemala	50.6
106	Honduras	52.6
107	Nepal	60.2
108	Jordan	60.4
109	Burkina Faso	62.3
110	Paraguay	67.9
111	Guyana	68.4
112	India	70.1
113	Senegal	72.7
114	Indonesia	77.9
115	Nigeria	90.1
116	Uganda	100.7
117	Bolivia	112.4
118	Nicaragua	121.0
119	Mali	121.5
120	Suriname	125.2
121	Malawi	125.9
122	Côte d'Ivoire	135.1
123	Cameroon	137.1
124	Cambodia	151.7
125	Chad	175.0
126	Benin	196.0
127	Burundi	215.0
128	Gambia, The	254.9
129	Zimbabwe	432.7
n/a	Barbados	n/a
n/a	Cyprus	n/a
n/a	Libya	n/a
n/a	Malta	n/a

SOURCE: The World Bank, *Doing Business 2009*

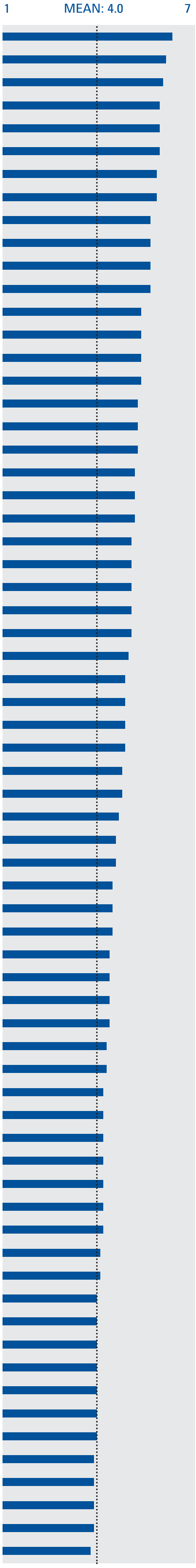
2nd pillar

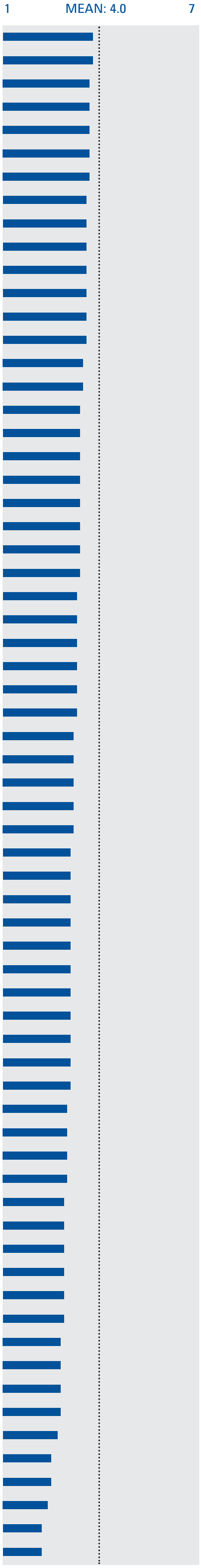
Environmental sustainability

2.01 Stringency of environmental regulation

How stringent is your country's environmental regulation? (1 = lax compared with most countries, among the world's most stringent)

RANK	COUNTRY/ECONOMY	SCORE
1	Sweden	6.4
2	Denmark	6.2
3	Netherlands	6.1
4	Finland	6.0
5	Germany	6.0
6	Norway	6.0
7	Luxembourg	5.9
8	Switzerland	5.9
9	Belgium	5.7
10	New Zealand	5.7
11	Japan	5.7
12	Singapore	5.7
13	Austria	5.4
14	France	5.4
15	Czech Republic	5.4
16	Australia	5.4
17	Iceland	5.3
18	United Kingdom	5.3
19	Oman	5.3
20	Canada	5.2
21	Ireland	5.2
22	Puerto Rico	5.2
23	Qatar	5.1
24	United States	5.1
25	Slovenia	5.1
26	Estonia	5.1
27	Slovak Republic	5.1
28	Malaysia	5.0
29	Taiwan, China	4.9
30	Tunisia	4.9
31	Korea, Rep.	4.9
32	Costa Rica	4.9
33	Portugal	4.8
34	United Arab Emirates	4.8
35	Hungary	4.7
36	Spain	4.6
37	Uruguay	4.6
38	Lithuania	4.5
39	Chile	4.5
40	Brazil	4.5
41	Italy	4.4
42	Israel	4.4
43	Latvia	4.4
44	Namibia	4.4
45	Gambia, The	4.3
46	Brunei	4.3
47	South Africa	4.2
48	Cyprus	4.2
49	Bahrain	4.2
50	India	4.2
51	Sri Lanka	4.2
52	Jordan	4.2
53	Croatia	4.2
54	Thailand	4.1
55	Barbados	4.1
56	Kenya	4.0
57	Saudi Arabia	4.0
58	Hong Kong SAR	4.0
59	Botswana	4.0
60	Romania	4.0
61	Mauritius	4.0
62	Honduras	4.0
63	Azerbaijan	3.9
64	Madagascar	3.9
65	Philippines	3.9
66	Colombia	3.9
67	Greece	3.8
68	Montenegro	3.8
69	Tanzania	3.8
70	Georgia	3.7
71	China	3.7
72	Poland	3.7
73	Nicaragua	3.7
74	Mexico	3.7
75	Panama	3.6
76	Malawi	3.6
77	Zambia	3.6
78	Jamaica	3.6
79	Mali	3.6
80	Syria	3.6
81	Burkina Faso	3.6
82	Guyana	3.5
83	Malta	3.5
84	Turkey	3.4
85	Guatemala	3.4
86	Nigeria	3.4
87	Uganda	3.4
88	Libya	3.4
89	Russian Federation	3.4
90	Venezuela	3.4
91	Pakistan	3.4
92	Morocco	3.3
93	Ethiopia	3.3
94	Benin	3.3
95	Peru	3.3
96	Senegal	3.3
97	Ghana	3.3
98	El Salvador	3.2
99	Lesotho	3.2
100	Trinidad and Tobago	3.2
101	Tajikistan	3.2
102	Mozambique	3.2
103	Egypt	3.1
104	Cambodia	3.1
105	Kuwait	3.1
106	Vietnam	3.1
107	Bulgaria	3.1
108	Kazakhstan	3.1
109	Ecuador	3.1
110	Dominican Republic	3.1
111	Paraguay	3.1
112	Zimbabwe	3.1
113	Mauritania	3.1
114	Algeria	3.0
115	Cameroon	3.0
116	Burundi	3.0
117	Nepal	3.0
118	Armenia	2.9
119	Macedonia, FYR	2.9
120	Bolivia	2.9
121	Argentina	2.9
122	Indonesia	2.9
123	Kyrgyz Republic	2.9
124	Ukraine	2.8
125	Bangladesh	2.8
126	Serbia	2.8
127	Suriname	2.8
128	Moldova	2.7
129	Albania	2.5
130	Bosnia and Herzegovina	2.5
131	Mongolia	2.4
132	Côte d'Ivoire	2.2
133	Chad	2.2



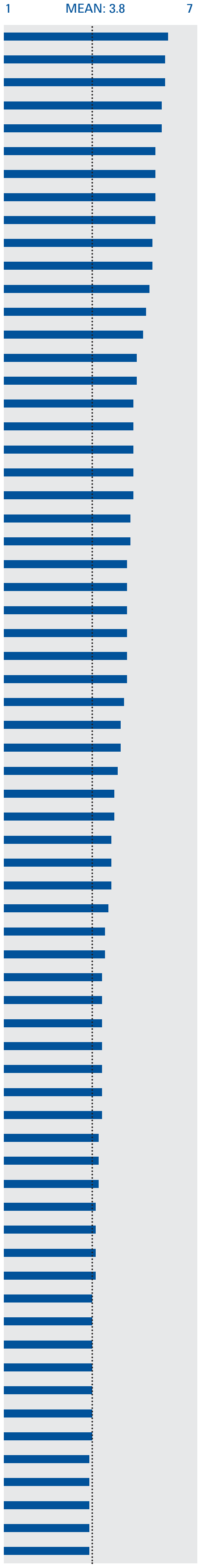


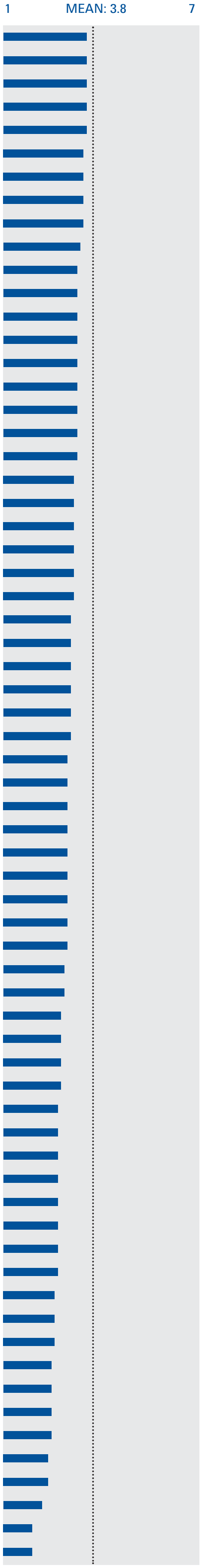
SOURCE: World Economic Forum, Executive Opinion Survey 2007, 2008

2.02 Enforcement of environmental regulation

Enforcement of environmental regulation in your country is (1 = lax, 7 = rigorous)

RANK	COUNTRY/ECONOMY	SCORE
1	Germany	6.2
2	Sweden	6.1
3	Denmark	6.1
4	Switzerland	6.0
5	Austria	6.0
6	Finland	5.8
7	Singapore	5.8
8	Norway	5.8
9	Netherlands	5.8
10	Luxembourg	5.7
11	New Zealand	5.7
12	Australia	5.6
13	Belgium	5.5
14	Japan	5.4
15	Iceland	5.2
16	Oman	5.2
17	Canada	5.1
18	Qatar	5.1
19	France	5.1
20	Puerto Rico	5.1
21	United States	5.1
22	United Kingdom	5.0
23	Slovenia	5.0
24	Chile	4.9
25	Tunisia	4.9
26	Korea, Rep.	4.9
27	Ireland	4.9
28	Czech Republic	4.9
29	Estonia	4.9
30	United Arab Emirates	4.8
31	Taiwan, China	4.7
32	Malaysia	4.7
33	Portugal	4.6
34	Costa Rica	4.5
35	Slovak Republic	4.5
36	Uruguay	4.4
37	Spain	4.4
38	Latvia	4.4
39	Lithuania	4.3
40	Hong Kong SAR	4.2
41	Israel	4.2
42	Jordan	4.1
43	Gambia, The	4.1
44	Cyprus	4.1
45	Brunei	4.1
46	Saudi Arabia	4.1
47	Sri Lanka	4.1
48	Namibia	4.1
49	Azerbaijan	4.0
50	Mauritius	4.0
51	Brazil	4.0
52	Madagascar	3.9
53	Thailand	3.9
54	Bahrain	3.9
55	Barbados	3.9
56	Honduras	3.8
57	South Africa	3.8
58	Kenya	3.8
59	Hungary	3.8
60	India	3.8
61	Croatia	3.8
62	Tanzania	3.8
63	China	3.7
64	Italy	3.7
65	Tajikistan	3.7
66	Georgia	3.7
67	Romania	3.7
68	Botswana	3.6
69	Malawi	3.6
70	Mali	3.6
71	Burkina Faso	3.6
72	Zambia	3.6
73	Uganda	3.5
74	Greece	3.5
75	Panama	3.5
76	Colombia	3.5
77	Mexico	3.4
78	Guyana	3.3
79	Poland	3.3
80	Libya	3.3
81	Syria	3.3
82	Morocco	3.3
83	Nicaragua	3.3
84	Jamaica	3.3
85	Benin	3.3
86	Turkey	3.3
87	Senegal	3.2
88	Montenegro	3.2
89	Guatemala	3.2
90	Kazakhstan	3.2
91	Ethiopia	3.2
92	Bulgaria	3.2
93	Vietnam	3.1
94	Nigeria	3.1
95	Russian Federation	3.1
96	Malta	3.1
97	Philippines	3.1
98	Lesotho	3.1
99	Venezuela	3.0
100	Algeria	3.0
101	Ghana	3.0
102	Peru	3.0
103	Pakistan	3.0
104	Moldova	3.0
105	Mauritania	3.0
106	El Salvador	3.0
107	Kuwait	3.0
108	Burundi	2.9
109	Ecuador	2.9
110	Nepal	2.8
111	Bangladesh	2.8
112	Cameroon	2.8
113	Kyrgyz Republic	2.8
114	Zimbabwe	2.7
115	Cambodia	2.7
116	Indonesia	2.7
117	Trinidad and Tobago	2.7
118	Macedonia, FYR	2.7
119	Ukraine	2.7
120	Egypt	2.7
121	Dominican Republic	2.7
122	Mozambique	2.6
123	Argentina	2.6
124	Suriname	2.6
125	Albania	2.5
126	Paraguay	2.5
127	Bosnia and Herzegovina	2.5
128	Armenia	2.5
129	Chad	2.4
130	Serbia	2.4
131	Bolivia	2.2
132	Côte d'Ivoire	1.9
133	Mongolia	1.9



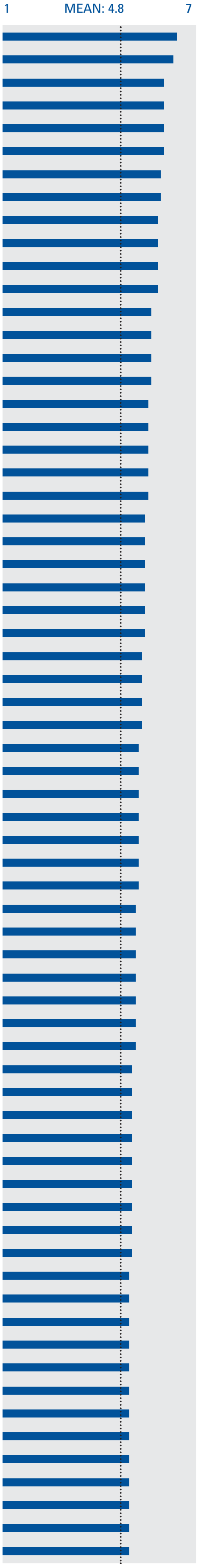


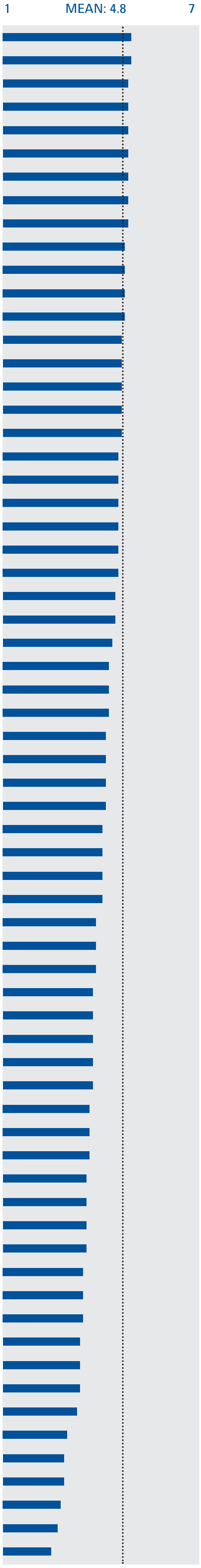
SOURCE: World Economic Forum, Executive Opinion Survey 2007, 2008

2.03 Sustainability of T&T industry development

Is your country's government taking the necessary steps to ensure that the Travel & Tourism sector is being developed in a sustainable way? (1 = no, development of the sector does not take into account issues related to environmental protection and sustainable development, 7 = yes, issues related to environmental protection and sustainable development are at the core of the government's strategy)

RANK	COUNTRY/ECONOMY	SCORE
1	United Arab Emirates	6.5
2	Singapore	6.4
3	Gambia, The	6.1
4	Tunisia	6.1
5	Austria	6.1
6	Barbados	6.1
7	Mali	6.0
8	New Zealand	6.0
9	Kenya	5.9
10	Hong Kong SAR	5.9
11	Malaysia	5.9
12	Morocco	5.9
13	Mauritius	5.7
14	Botswana	5.7
15	Switzerland	5.7
16	South Africa	5.7
17	Australia	5.6
18	Namibia	5.6
19	France	5.6
20	Qatar	5.6
21	Thailand	5.6
22	Oman	5.5
23	Puerto Rico	5.5
24	Costa Rica	5.5
25	Portugal	5.5
26	Zambia	5.5
27	Ireland	5.5
28	Indonesia	5.4
29	Sweden	5.4
30	Iceland	5.4
31	Canada	5.4
32	Montenegro	5.3
33	Denmark	5.3
34	Luxembourg	5.3
35	Spain	5.3
36	Netherlands	5.3
37	Vietnam	5.3
38	Egypt	5.3
39	Madagascar	5.2
40	Panama	5.2
41	Jordan	5.2
42	Burkina Faso	5.2
43	Norway	5.2
44	Sri Lanka	5.2
45	Cyprus	5.2
46	Jamaica	5.1
47	Tanzania	5.1
48	Mexico	5.1
49	Finland	5.1
50	Uruguay	5.1
51	United States	5.1
52	Uganda	5.1
53	Colombia	5.1
54	Brunei	5.1
55	Turkey	5.0
56	Dominican Republic	5.0
57	Estonia	5.0
58	Honduras	5.0
59	China	5.0
60	Belgium	5.0
61	Senegal	5.0
62	Taiwan, China	5.0
63	Guatemala	5.0
64	United Kingdom	5.0
65	Saudi Arabia	5.0
66	Malta	5.0
67	El Salvador	5.0
68	Cambodia	5.0
69	Greece	5.0
70	Peru	4.9
71	Azerbaijan	4.9
72	Tajikistan	4.9
73	Germany	4.9
74	Bahrain	4.9
75	Nigeria	4.9
76	Malawi	4.9
77	Korea, Rep.	4.8
78	India	4.8
79	Georgia	4.8
80	Mozambique	4.8
81	Czech Republic	4.7
82	Croatia	4.7
83	Benin	4.7
84	Philippines	4.7
85	Mauritania	4.7
86	Israel	4.6
87	Syria	4.6
88	Ghana	4.6
89	Japan	4.6
90	Guyana	4.6
91	Ethiopia	4.6
92	Slovenia	4.5
93	Nepal	4.5
94	Lesotho	4.4
95	Chile	4.3
96	Armenia	4.3
97	Kazakhstan	4.3
98	Nicaragua	4.2
99	Lithuania	4.2
100	Algeria	4.2
101	Latvia	4.2
102	Hungary	4.1
103	Bulgaria	4.1
104	Brazil	4.1
105	Argentina	4.1
106	Serbia	3.9
107	Chad	3.9
108	Cameroon	3.9
109	Trinidad and Tobago	3.8
110	Ecuador	3.8
111	Suriname	3.8
112	Libya	3.8
113	Kyrgyz Republic	3.8
114	Albania	3.7
115	Ukraine	3.7
116	Macedonia, FYR	3.7
117	Pakistan	3.6
118	Poland	3.6
119	Italy	3.6
120	Zimbabwe	3.6
121	Romania	3.5
122	Slovak Republic	3.5
123	Russian Federation	3.5
124	Moldova	3.4
125	Burundi	3.4
126	Bangladesh	3.4
127	Mongolia	3.3
128	Paraguay	3.0
129	Bosnia and Herzegovina	2.9
130	Côte d'Ivoire	2.9
131	Kuwait	2.8
132	Venezuela	2.7
133	Bolivia	2.5





SOURCE: World Economic Forum, Executive Opinion Survey 2007, 2008

2.04 Carbon dioxide emissions (hard data)

Carbon dioxide emissions per capita in metric tons | 2004

RANK	COUNTRY/ECONOMY	HARD DATA
1	Chad	0.0
2	Burundi	0.0
3	Cambodia	0.0
4	Mali	0.1
5	Uganda	0.1
6	Malawi	0.1
7	Burkina Faso	0.1
8	Mozambique	0.1
9	Ethiopia	0.1
10	Nepal	0.1
11	Tanzania	0.1
12	Madagascar	0.2
13	Gambia, The	0.2
14	Zambia	0.2
15	Cameroon	0.2
16	Bangladesh	0.2
17	Côte d'Ivoire	0.3
18	Benin	0.3
19	Kenya	0.3
20	Ghana	0.3
21	Senegal	0.4
22	Puerto Rico[1]	0.5
23	Sri Lanka	0.6
24	Paraguay	0.7
25	Nicaragua	0.7
26	Tajikistan	0.8
27	Bolivia	0.8
28	Zimbabwe	0.8
29	Nigeria	0.8
30	Pakistan	0.8
31	Georgia	0.9
32	Mauritania	0.9
33	El Salvador	0.9
34	Philippines	1.0
35	Guatemala	1.0
36	Kyrgyz Republic	1.1
37	Honduras	1.1
38	Peru	1.2
39	Albania	1.2
40	Vietnam	1.2
41	Armenia	1.2
42	Colombia	1.2
43	Namibia	1.2
44	India	1.2
45	Morocco	1.4
46	Costa Rica	1.5
47	Uruguay	1.7
48	Indonesia	1.7
49	Panama	1.8
50	Brazil	1.8
51	Guyana	2.0
52	Moldova	2.0
53	Dominican Republic	2.1
54	Egypt	2.2
55	Ecuador	2.3
56	Tunisia	2.3
57	Botswana	2.4
58	Mauritius	2.6
59	Latvia	3.1
60	Jordan	3.1
61	Turkey	3.2
62	Mongolia	3.4
63	Argentina	3.7
64	Syria	3.7
65	Azerbaijan	3.8
66	China	3.9
67	Chile	3.9
68	Lithuania	3.9
69	Jamaica	4.0
70	Bosnia and Herzegovina	4.1
71	Romania	4.2
72	Thailand	4.3
73	Mexico	4.3
74	Barbados	4.4
75	Suriname	5.1
76	Macedonia, FYR	5.1
77	Croatia	5.3
78	Bulgaria	5.5
79	Switzerland	5.5
80	Hong Kong SAR	5.5
81	Portugal	5.6
82	Hungary	5.7
83	Sweden	5.9
84	Algeria	6.0
85	Malta	6.1
86	France	6.2
87	Venezuela	6.6
88	Slovak Republic	6.7
89	Ukraine	6.9
90	Malaysia	7.0
91	Iceland	7.6
92	New Zealand	7.7
93	Italy	7.7
94	Spain	7.7
95	Poland	8.0
96	Slovenia	8.1
97	Austria	8.5
98	Netherlands	8.7
99	Greece	8.7
100	Cyprus	9.1
101	South Africa	9.4
102	Belgium	9.7
103	Korea, Rep.	9.7
104	Germany	9.8
105	Denmark	9.8
106	United Kingdom	9.8
107	Japan	9.8
108	Libya	10.3
109	Ireland	10.4
110	Israel	10.5
111	Russian Federation	10.6
112	Czech Republic	11.5
113	Oman	12.5
114	Singapore	12.5
115	Finland	12.6
116	Kazakhstan	13.3
117	Saudi Arabia	13.7
118	Estonia	14.0
119	Australia	16.2
120	Norway	19.1
121	Canada	20.0
122	United States	20.6
123	Bahrain	23.8
124	Brunei	24.1
125	Trinidad and Tobago	24.7
126	Luxembourg	24.9
127	United Arab Emirates	37.8
128	Kuwait	40.4
129	Qatar	69.2
n/a	Lesotho	n/a
n/a	Montenegro	n/a
n/a	Serbia	n/a
n/a	Taiwan, China	n/a

SOURCE: The World Bank, *World Development Indicators 2008*

[1] 2003

2.05 Particulate matter concentration (hard data)

Urban population–weighted PM10 micrograms per cubic meter | 2005

RANK	COUNTRY/ECONOMY	HARD DATA
1	Venezuela	11.2
2	Sweden	12.0
3	Uganda	12.4
4	Estonia	13.9
5	France	13.9
6	Romania	14.5
7	New Zealand	14.6
8	Luxembourg	15.0
9	Latvia	15.2
10	Australia	15.3
11	United Kingdom	15.6
12	Slovak Republic	16.1
13	Iceland	16.5
14	Mauritius	16.7
15	Ireland	17.2
16	Hungary	18.0
17	Finland	18.2
18	Canada	18.5
19	Denmark	18.7
20	Bosnia and Herzegovina	18.9
21	Russian Federation	18.9
22	Germany	19.1
23	Lithuania	19.2
24	Kazakhstan	19.3
25	Norway	20.0
26	Macedonia, FYR	20.5
27	Puerto Rico	21.5
28	South Africa	21.8
29	Morocco	22.0
30	United States	22.2
31	Czech Republic	22.4
32	Colombia	22.7
33	Ukraine	23.0
34	Dominican Republic	23.1
35	Belgium	23.3
36	Kyrgyz Republic	24.1
37	Tanzania	24.4
38	Malaysia	24.8
39	Switzerland	25.5
40	Ecuador	25.5
41	Brazil	25.7
42	Philippines	25.8
43	Zimbabwe	26.6
44	Italy	27.6
45	Portugal	27.6
46	Mozambique	28.3
47	Nicaragua	29.6
48	Burundi	29.9
49	Slovenia	30.7
50	Croatia	31.0
51	Japan	31.1
52	Israel	31.1
53	Tunisia	32.1
54	Suriname	32.4
55	Barbados	33.7
56	Spain	33.8
57	Austria	33.8
58	Ghana	34.0
59	Malawi	34.2
60	El Salvador	34.7
61	Madagascar	34.9
62	Netherlands	34.9
63	Panama	35.4
64	Guyana	35.5
65	Nepal	36.1
66	Greece	36.3
67	Korea, Rep.	36.9
68	Costa Rica	37.0
69	Poland	37.3
70	Kenya	37.6
71	Jamaica	37.8
72	Moldova	38.2
73	Mexico	40.4
74	Singapore	40.5
75	Benin	41.5
76	Namibia	41.5
77	Lesotho	42.1
78	Turkey	43.3
79	Zambia	43.6
80	Honduras	45.8
81	Brunei	46.0
82	Cyprus[1]	47.1
83	Côte d'Ivoire	47.9
84	Albania	50.5
85	Georgia	51.2
86	Jordan	51.8
87	Tajikistan	51.9
88	Chile	53.1
89	Qatar	53.7
90	Azerbaijan	59.2
91	Bulgaria	59.6
92	Vietnam	60.7
93	Peru	61.0
94	Cambodia	61.6
95	Guatemala	62.2
96	Nigeria	62.2
97	Mongolia	63.6
98	Cameroon	65.0
99	Armenia	68.1
100	Botswana	68.2
101	India	68.4
102	Algeria	70.5
103	Ethiopia	74.4
104	China	75.1
104	Hong Kong SAR	75.1
104	Taiwan, China	75.1
107	Argentina	76.1
108	Thailand	77.3
109	Syria	78.6
110	Paraguay	84.3
111	Bahrain	87.9
112	Sri Lanka	94.0
113	Burkina Faso	94.1
114	Libya	94.5
115	Senegal	94.8
116	Gambia, The	95.2
117	Indonesia	96.2
118	Bolivia	96.8
119	Kuwait	100.8
120	Mauritania	104.4
121	Trinidad and Tobago	107.2
122	Pakistan	119.7
123	Saudi Arabia	120.1
124	Chad	122.6
125	Egypt	128.0
126	Oman	131.9
127	United Arab Emirates	135.5
128	Bangladesh	140.1
129	Uruguay	160.9
130	Mali	170.6
n/a	Malta	n/a
n/a	Montenegro	n/a
n/a	Serbia	n/a

SOURCE: The World Bank, *World Development Indicators 2008*

[1] 2004

2.06 Threatened species (hard data)

Threatened species as a percentage of total species (mammals, birds, amphibians) | 2008

RANK	COUNTRY/ECONOMY	HARD DATA
1	Luxembourg	0.0
2	Suriname	0.8
3	Sweden	1.1
4	Denmark	1.1
5	Estonia	1.2
6	Switzerland	1.3
7	Belgium	1.4
8	Latvia	1.4
9	Finland	1.5
10	Guyana	1.6
11	Barbados	1.6
12	Netherlands	1.6
13	Botswana	1.8
14	Zambia	2.0
15	United Kingdom	2.0
16	Czech Republic	2.1
17	Benin	2.1
18	Lesotho	2.1
19	Burkina Faso	2.2
20	Lithuania	2.2
21	Trinidad and Tobago	2.3
22	Ireland	2.3
23	Gambia, The	2.3
24	Mali	2.4
25	Slovak Republic	2.5
26	Slovenia	2.5
27	Qatar	2.5
28	Malawi	2.6
29	Nicaragua	2.6
30	Malta	2.6
31	El Salvador	2.6
32	Norway	2.6
33	Germany	2.8
34	Poland	2.8
35	Albania	2.8
36	Zimbabwe	2.8
37	Hungary	2.9
38	Chad	2.9
39	Bosnia and Herzegovina	2.9
40	Bahrain	3.0
41	Senegal	3.0
42	Austria	3.1
43	Burundi	3.1
44	Cyprus	3.2
45	Uganda	3.3
46	France	3.3
47	Ghana	3.5
48	Macedonia, FYR	3.6
49	Mozambique	3.6
50	Canada	3.7
51	Iceland	3.8
52	Paraguay	3.8
53	Mauritania	3.8
54	Namibia	3.9
55	Kenya	4.1
56	Moldova	4.1
57	Nigeria	4.2
58	Serbia	4.2
59	Bulgaria	4.3
60	Montenegro	4.3
61	Tajikistan	4.3
62	Romania	4.3
63	Bolivia	4.3
64	Oman	4.4
65	Kyrgyz Republic	4.5
66	United Arab Emirates	4.5
67	Libya	4.5
68	Italy	4.6
69	Croatia	4.7
70	Azerbaijan	4.8
71	Portugal	4.8
72	Kuwait	4.9
73	Saudi Arabia	5.0
74	Côte d'Ivoire	5.0
75	Jordan	5.1
76	Ukraine	5.1
77	Georgia	5.3
78	Armenia	5.4
79	Ethiopia	5.4
80	Egypt	5.5
81	Greece	5.5
82	Singapore	5.7
83	Tunisia	5.8
84	Israel	5.8
85	Panama	5.9
86	Pakistan	6.1
87	Morocco	6.2
88	Kazakhstan	6.3
89	Venezuela	6.4
90	Nepal	6.4
91	Algeria	6.5
92	Mongolia	6.6
93	Costa Rica	6.6
94	South Africa	6.7
95	Uruguay	6.9
96	Spain	6.9
97	Honduras	7.0
98	Turkey	7.4
99	Argentina	7.4
100	Brazil	7.5
101	Syria	7.6
102	Puerto Rico	7.6
103	Thailand	7.7
104	Tanzania	7.8
105	Cameroon	7.8
106	Bangladesh	8.2
107	Taiwan, China	8.2
108	Hong Kong SAR	8.4
109	Russian Federation	8.4
110	Vietnam	8.7
111	Korea, Rep.	8.9
112	Peru	9.0
113	Cambodia	9.0
114	Brunei	9.8
115	Guatemala	10.0
116	United States	10.4
117	Chile	11.5
118	Ecuador	11.7
119	China	11.7
120	Colombia	11.9
121	Australia	12.1
122	Jamaica	12.5
123	Malaysia	12.7
124	Indonesia	12.8
125	India	12.9
126	Japan	13.3
127	Dominican Republic	14.9
128	Sri Lanka	16.7
129	Philippines	17.9
130	Mexico	18.6
131	Mauritius	20.2
132	Madagascar	22.5
133	New Zealand	30.0

SOURCE: The International Union for Conservation of Nature (IUCN), Red List of Threatened Species 2008

2.07 Environmental treaty ratification (hard data)

Total number of ratified environmental treaties | 2008

RANK	COUNTRY/ECONOMY	HARD DATA
1	Sweden	24.0
2	Australia	23.0
2	France	23.0
2	Greece	23.0
2	Netherlands	23.0
2	New Zealand	23.0
2	Norway	23.0
2	Spain	23.0
2	United Kingdom	23.0
10	Belgium	22.0
10	Denmark	22.0
10	Finland	22.0
10	Germany	22.0
10	India	22.0
10	Ireland	22.0
10	Japan	22.0
10	Kenya	22.0
10	Portugal	22.0
10	Senegal	22.0
10	Slovenia	22.0
21	Austria	21.0
21	Brazil	21.0
21	Bulgaria	21.0
21	Chile	21.0
21	Cyprus	21.0
21	Hungary	21.0
21	Italy	21.0
21	Jordan	21.0
21	Luxembourg	21.0
21	Panama	21.0
21	Poland	21.0
21	Switzerland	21.0
21	Uruguay	21.0
34	Côte d'Ivoire	20.0
34	Croatia	20.0
34	Czech Republic	20.0
34	Ecuador	20.0
34	Egypt	20.0
34	Korea, Rep.	20.0
34	Latvia	20.0
34	Libya	20.0
34	Lithuania	20.0
34	Madagascar	20.0
34	Mauritania	20.0
34	Mauritius	20.0
34	Nigeria	20.0
34	Philippines	20.0
34	Romania	20.0
34	Slovak Republic	20.0
34	South Africa	20.0
34	Tanzania	20.0
52	Argentina	19.0
52	Bangladesh	19.0
52	Benin	19.0
52	Canada	19.0
52	China	19.0
52	Costa Rica	19.0
52	Iceland	19.0
52	Mexico	19.0
52	Namibia	19.0
52	Oman	19.0
52	Pakistan	19.0
52	Peru	19.0
52	Sri Lanka	19.0
52	Tunisia	19.0
52	Ukraine	19.0
67	Algeria	18.0
67	Bolivia	18.0
67	Estonia	18.0
67	Georgia	18.0
67	Ghana	18.0
67	Guatemala	18.0
67	Jamaica	18.0
67	Malaysia	18.0
67	Malta	18.0
67	Mongolia	18.0
67	Morocco	18.0
67	Nicaragua	18.0
67	Qatar	18.0
67	Trinidad and Tobago	18.0
81	Albania	17.0
81	Barbados	17.0
81	Burkina Faso	17.0
81	Cameroon	17.0
81	Gambia, The	17.0
81	Honduras	17.0
81	Mali	17.0
81	Moldova	17.0
81	Paraguay	17.0
81	Saudi Arabia	17.0
81	Syria	17.0
81	Uganda	17.0
81	Venezuela	17.0
94	Dominican Republic	16.0
94	Guyana	16.0
94	Kuwait	16.0
94	Lesotho	16.0
94	Mozambique	16.0
94	Russian Federation	16.0
94	Serbia	16.0
94	Suriname	16.0
94	United Arab Emirates	16.0
94	Vietnam	16.0
104	Armenia	15.0
104	Azerbaijan	15.0
104	Botswana	15.0
104	Cambodia	15.0
104	El Salvador	15.0
104	Indonesia	15.0
104	Macedonia, FYR	15.0
104	Montenegro	15.0
104	Singapore	15.0
104	Thailand	15.0
104	Zambia	15.0
115	Burundi	14.0
115	Chad	14.0
115	Israel	14.0
115	Kazakhstan	14.0
115	Nepal	14.0
115	United States	14.0
121	Bahrain	13.0
121	Colombia	13.0
121	Ethiopia	13.0
121	Kyrgyz Republic	13.0
125	Malawi	12.0
125	Turkey	12.0
127	Bosnia and Herzegovina	11.0
127	Zimbabwe	11.0
129	Brunei	10.0
129	Tajikistan	10.0
n/a	Hong Kong SAR	n/a
n/a	Puerto Rico	n/a
n/a	Taiwan, China	n/a

SOURCE: The International Union for Conservation of Nature (IUCN) Environmental Law Centre *ELIS Treaty Database*

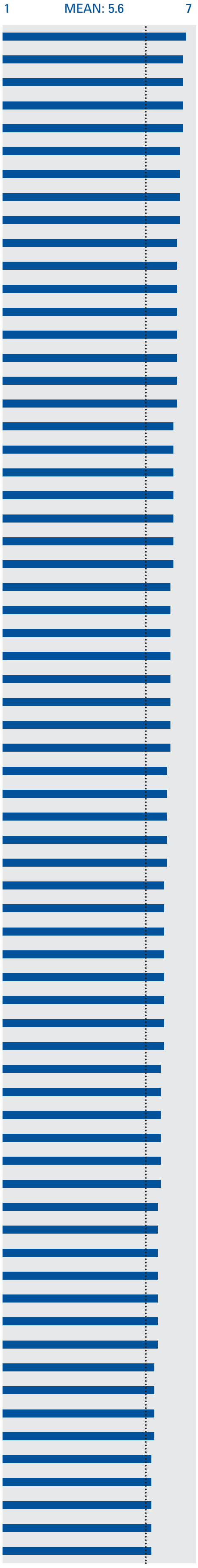
3rd pillar

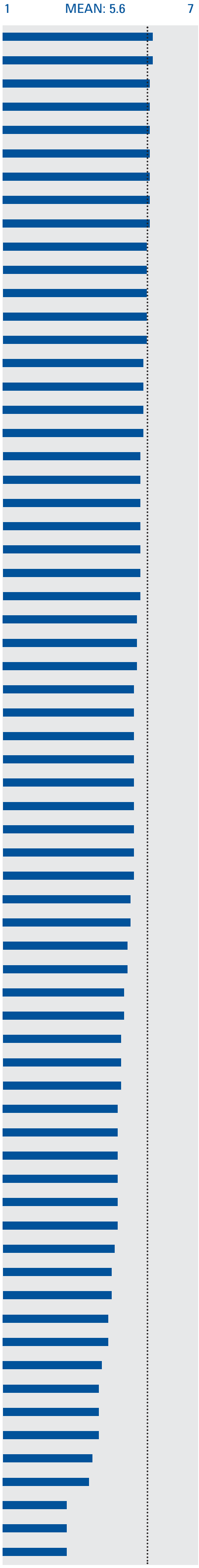
Safety and security

3.01 Business costs of terrorism

The threat of terrorism in your country (1 = imposes significant costs on businesses, 7 = does not impose significant costs on businesses)

RANK	COUNTRY/ECONOMY	SCORE
1	Finland	6.8
2	Iceland	6.7
3	Norway	6.7
4	Uruguay	6.7
5	Mauritius	6.7
6	Hong Kong SAR	6.6
7	Slovak Republic	6.6
8	Austria	6.6
9	Lithuania	6.6
10	Syria	6.5
11	Malta	6.5
12	Brazil	6.5
13	Czech Republic	6.5
14	Montenegro	6.5
15	Malawi	6.5
16	Libya	6.5
17	Ireland	6.5
18	Ghana	6.4
19	Estonia	6.4
20	Portugal	6.4
21	Hungary	6.4
22	Brunei	6.4
23	Bosnia and Herzegovina	6.4
24	Latvia	6.4
25	Slovenia	6.3
26	Cyprus	6.3
27	Chile	6.3
28	Luxembourg	6.3
29	New Zealand	6.3
30	Namibia	6.3
31	Moldova	6.3
32	Senegal	6.3
33	Armenia	6.2
34	Zambia	6.2
35	Puerto Rico	6.2
36	South Africa	6.2
37	Switzerland	6.2
38	Argentina	6.1
39	Croatia	6.1
40	Sweden	6.1
41	Denmark	6.1
42	Gambia, The	6.1
43	Azerbaijan	6.1
44	Barbados	6.1
45	Mongolia	6.1
46	Botswana	6.0
47	Belgium	6.0
48	Jamaica	6.0
49	Dominican Republic	6.0
50	Georgia	6.0
51	Oman	6.0
52	Jordan	5.9
53	Zimbabwe	5.9
54	United Arab Emirates	5.9
55	Qatar	5.9
56	Greece	5.9
57	Romania	5.9
58	Tunisia	5.9
59	Costa Rica	5.8
60	Taiwan, China	5.8
61	Kuwait	5.8
62	Germany	5.8
63	Cameroon	5.7
64	Tanzania	5.7
65	Korea, Rep.	5.7
66	Paraguay	5.7
67	Ukraine	5.7
68	Ecuador	5.7
69	France	5.7
70	Panama	5.6
71	Mexico	5.6
72	Egypt	5.6
73	Canada	5.6
74	Australia	5.6
75	Bahrain	5.6
76	Singapore	5.6
77	Suriname	5.5
78	Nicaragua	5.5
79	Italy	5.5
80	Honduras	5.5
81	Indonesia	5.5
82	Malaysia	5.4
83	Netherlands	5.4
84	Kazakhstan	5.4
85	Poland	5.4
86	Burkina Faso	5.3
87	Albania	5.3
88	Tajikistan	5.3
89	China	5.3
90	Serbia	5.3
91	Ethiopia	5.3
92	Mali	5.3
93	Mozambique	5.2
94	Bolivia	5.2
95	Benin	5.2
96	Macedonia, FYR	5.1
97	Trinidad and Tobago	5.1
98	Cambodia	5.1
99	Vietnam	5.1
100	Russian Federation	5.1
101	Guatemala	5.1
102	Peru	5.1
103	Venezuela	5.1
104	Bulgaria	5.1
105	Madagascar	5.0
106	India	5.0
107	Thailand	4.9
108	Spain	4.9
109	Mauritania	4.8
110	Kyrgyz Republic	4.8
111	Côte d'Ivoire	4.7
112	Japan	4.7
113	Morocco	4.7
114	Bangladesh	4.6
115	Saudi Arabia	4.6
116	El Salvador	4.6
117	Turkey	4.6
118	Nigeria	4.6
119	Lesotho	4.6
120	Guyana	4.5
121	Uganda	4.4
122	Chad	4.4
123	Algeria	4.3
124	United Kingdom	4.3
125	Philippines	4.1
126	United States	4.0
127	Burundi	4.0
128	Kenya	4.0
129	Israel	3.8
130	Pakistan	3.7
131	Nepal	3.0
132	Sri Lanka	3.0
133	Colombia	3.0



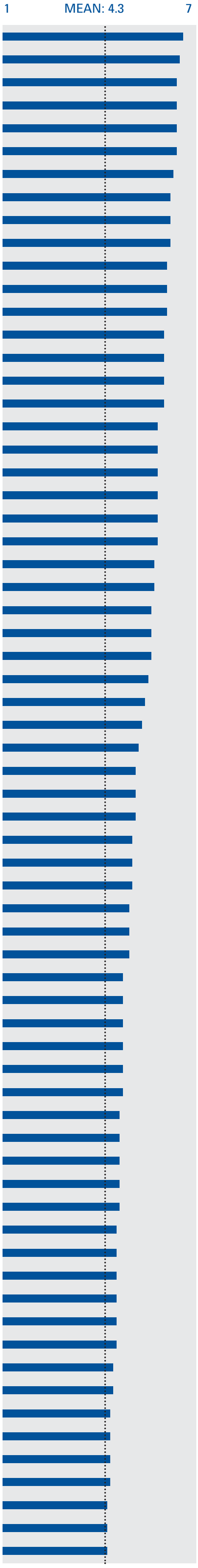


SOURCE: World Economic Forum, Executive Opinion Survey 2007, 2008

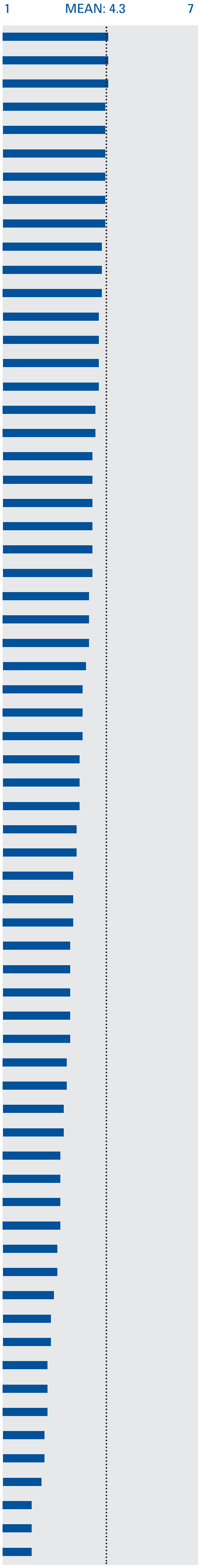
3.02 Reliability of police services

Police services in your country (1 = cannot be relied upon to enforce law and order, 7 = can be relied upon to enforce law and order)

RANK	COUNTRY/ECONOMY	SCORE
1	Finland	6.7
2	Denmark	6.6
3	Switzerland	6.5
4	Germany	6.5
5	Iceland	6.5
6	Singapore	6.5
7	Hong Kong SAR	6.4
8	United Arab Emirates	6.3
9	Canada	6.3
10	Norway	6.3
11	Netherlands	6.2
12	Sweden	6.2
13	Austria	6.2
14	Australia	6.1
15	Qatar	6.1
16	Chile	6.1
17	Luxembourg	6.1
18	United States	5.9
19	France	5.9
20	Jordan	5.9
21	Barbados	5.9
22	Japan	5.9
23	New Zealand	5.9
24	Tunisia	5.8
25	Ireland	5.8
26	Spain	5.7
27	Oman	5.7
28	Belgium	5.7
29	Malta	5.6
30	Cyprus	5.5
31	Korea, Rep.	5.4
32	United Kingdom	5.3
33	Bahrain	5.2
34	Portugal	5.2
35	Estonia	5.2
36	Senegal	5.1
37	Malaysia	5.1
38	Gambia, The	5.1
39	Georgia	5.0
40	Taiwan, China	5.0
41	Kuwait	5.0
42	Brunei	4.8
43	Puerto Rico	4.8
44	Benin	4.8
45	Saudi Arabia	4.8
46	Hungary	4.8
47	Morocco	4.8
48	Botswana	4.7
49	Vietnam	4.7
50	China	4.7
51	Burkina Faso	4.7
52	Egypt	4.7
53	Croatia	4.6
54	Italy	4.6
55	Suriname	4.6
56	Nicaragua	4.6
57	Slovenia	4.6
58	Montenegro	4.6
59	Azerbaijan	4.5
60	Mali	4.5
61	Malawi	4.4
62	India	4.4
63	Greece	4.4
64	Latvia	4.4
65	Lithuania	4.3
66	Mauritius	4.3
67	Serbia	4.3



RANK	COUNTRY/ECONOMY	SCORE
68	Cameroon	4.3
69	Syria	4.3
70	Tanzania	4.3
71	Thailand	4.2
72	Algeria	4.2
73	Madagascar	4.2
74	Romania	4.2
75	Tajikistan	4.2
76	Israel	4.2
77	Colombia	4.1
78	Zambia	4.1
79	Macedonia, FYR	4.1
80	Namibia	4.0
81	Albania	4.0
82	Ethiopia	4.0
83	Turkey	4.0
84	Costa Rica	3.9
85	Indonesia	3.9
86	Poland	3.8
87	Mauritania	3.8
88	Kenya	3.8
89	Ghana	3.8
90	Uruguay	3.8
91	Czech Republic	3.8
92	Uganda	3.7
93	Sri Lanka	3.7
94	Libya	3.7
95	Armenia	3.6
96	El Salvador	3.5
97	Kazakhstan	3.5
98	Philippines	3.5
99	Panama	3.4
100	Lesotho	3.4
101	Slovak Republic	3.4
102	Jamaica	3.3
103	Honduras	3.3
104	Russian Federation	3.2
105	Ukraine	3.2
106	Pakistan	3.2
107	Burundi	3.1
108	South Africa	3.1
109	Nepal	3.1
110	Bosnia and Herzegovina	3.1
111	Bulgaria	3.1
112	Moldova	3.0
113	Kyrgyz Republic	3.0
114	Cambodia	2.9
115	Mongolia	2.9
116	Brazil	2.8
117	Mozambique	2.8
118	Guyana	2.8
119	Nigeria	2.8
120	Côte d'Ivoire	2.7
121	Bangladesh	2.7
122	Peru	2.6
123	Mexico	2.5
124	Trinidad and Tobago	2.5
125	Ecuador	2.4
126	Chad	2.4
127	Guatemala	2.4
128	Dominican Republic	2.3
129	Argentina	2.3
130	Zimbabwe	2.2
131	Bolivia	1.9
132	Paraguay	1.9
133	Venezuela	1.9

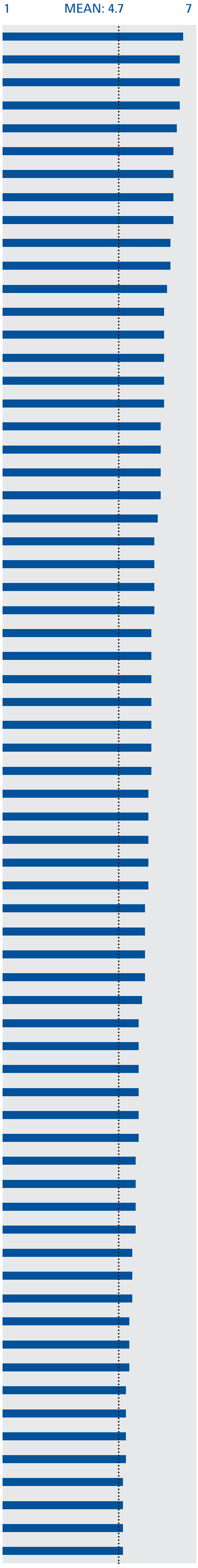


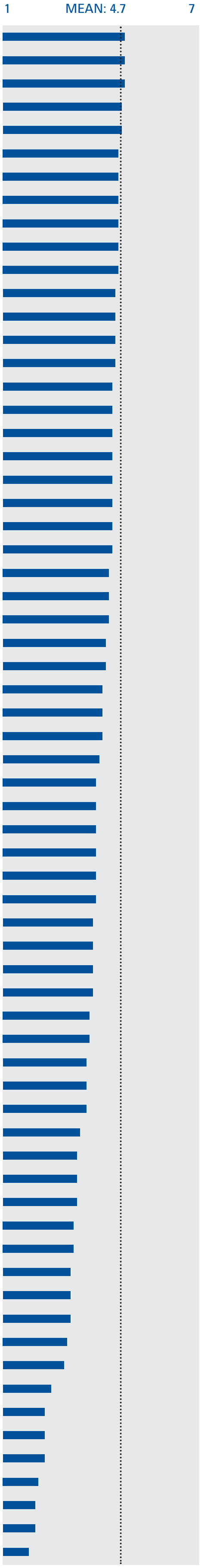
SOURCE: World Economic Forum, Executive Opinion Survey 2007, 2008

3.03 Business costs of crime and violence

The incidence of common crime and violence in your country (1 = imposes significant costs on businesses, 7 = does not impose significant costs on businesses)

RANK	COUNTRY/ECONOMY	SCORE
1	Syria	6.7
2	Iceland	6.6
3	Finland	6.6
4	Norway	6.6
5	Qatar	6.5
6	Libya	6.4
7	Hong Kong SAR	6.4
8	Denmark	6.4
9	Singapore	6.4
10	Luxembourg	6.3
11	Austria	6.3
12	Cyprus	6.2
13	Malta	6.1
14	Jordan	6.1
15	Brunei	6.1
16	United Arab Emirates	6.1
17	Switzerland	6.1
18	Kuwait	6.0
19	Germany	6.0
20	Oman	6.0
21	Portugal	6.0
22	Slovenia	5.9
23	Egypt	5.8
24	Azerbaijan	5.8
25	New Zealand	5.8
26	Sweden	5.8
27	Belgium	5.7
28	Bahrain	5.7
29	Latvia	5.7
30	Tunisia	5.7
31	Greece	5.7
32	Armenia	5.7
33	Gambia, The	5.7
34	Lithuania	5.6
35	Taiwan, China	5.6
36	Czech Republic	5.6
37	Estonia	5.6
38	Australia	5.6
39	Georgia	5.5
40	Montenegro	5.5
41	Canada	5.5
42	Korea, Rep.	5.5
43	Israel	5.4
44	Slovak Republic	5.3
45	Hungary	5.3
46	Moldova	5.3
47	Indonesia	5.3
48	Ireland	5.3
49	Croatia	5.3
50	Thailand	5.2
51	Senegal	5.2
52	France	5.2
53	India	5.2
54	Ethiopia	5.1
55	Mauritius	5.1
56	China	5.1
57	Japan	5.0
58	Vietnam	5.0
59	Spain	5.0
60	Tajikistan	4.9
61	Ukraine	4.9
62	Netherlands	4.9
63	Ghana	4.9
64	Serbia	4.8
65	Turkey	4.8
66	Morocco	4.8
67	Saudi Arabia	4.8
68	Barbados	4.8
69	Romania	4.8
70	Bosnia and Herzegovina	4.8
71	Kazakhstan	4.7
72	Uruguay	4.7
73	Italy	4.6
74	Malaysia	4.6
75	Mauritania	4.6
76	Macedonia, FYR	4.6
77	Albania	4.6
78	Mongolia	4.6
79	Cambodia	4.5
80	Russian Federation	4.5
81	Panama	4.5
82	Puerto Rico	4.5
83	United States	4.4
84	Chile	4.4
85	Algeria	4.4
86	Tanzania	4.4
87	Malawi	4.4
88	Botswana	4.4
89	Mali	4.4
90	Nicaragua	4.4
91	United Kingdom	4.3
92	Zambia	4.3
93	Philippines	4.3
94	Sri Lanka	4.2
95	Poland	4.2
96	Benin	4.1
97	Kyrgyz Republic	4.1
98	Cameroon	4.1
99	Bulgaria	4.0
100	Suriname	3.9
101	Bolivia	3.9
102	Zimbabwe	3.9
103	Uganda	3.9
104	Bangladesh	3.9
105	Namibia	3.9
106	Burundi	3.8
107	Burkina Faso	3.8
108	Costa Rica	3.8
109	Madagascar	3.8
110	Pakistan	3.7
111	Argentina	3.7
112	Ecuador	3.6
113	Peru	3.6
114	Lesotho	3.6
115	Mozambique	3.4
116	Dominican Republic	3.3
117	Honduras	3.3
118	Colombia	3.3
119	Chad	3.2
120	Nepal	3.2
121	Paraguay	3.1
122	Brazil	3.1
123	Nigeria	3.1
124	Mexico	3.0
125	Kenya	2.9
126	Venezuela	2.5
127	Guyana	2.3
128	Côte d'Ivoire	2.3
129	Trinidad and Tobago	2.3
130	Guatemala	2.1
131	Jamaica	2.0
132	El Salvador	2.0
133	South Africa	1.8





SOURCE: World Economic Forum, Executive Opinion Survey 2007, 2008

3.04 Road traffic accidents (hard data)

Estimated deaths per 100,000 population due to road traffic accidents | 2002

RANK	COUNTRY/ECONOMY	HARD DATA
1	Malta	0.0
2	Barbados	0.0
3	Iceland	0.0
4	Jamaica	0.1
5	Brunei	0.1
6	Slovak Republic	0.1
7	Luxembourg	0.1
8	Albania	0.1
9	Guyana	0.1
10	Bahrain	0.1
11	Suriname	0.1
12	Macedonia, FYR	0.1
13	Qatar	0.1
14	Trinidad and Tobago	0.2
15	Bosnia and Herzegovina	0.2
16	Mauritius	0.2
17	Estonia	0.2
18	Cyprus	0.2
19	Singapore	0.2
20	Tajikistan	0.3
21	Slovenia	0.3
22	Botswana	0.3
23	Georgia	0.3
24	Armenia	0.3
25	Norway	0.3
26	Oman	0.3
27	Uruguay	0.4
28	Kuwait	0.4
29	Ireland	0.4
30	Gambia, The	0.4
31	Lesotho	0.4
32	Switzerland	0.4
33	Panama	0.4
34	Finland	0.4
35	Azerbaijan	0.4
36	Namibia	0.4
37	Denmark	0.5
38	New Zealand	0.5
39	Israel	0.5
40	Paraguay	0.5
41	Sweden	0.6
42	Croatia	0.6
43	Latvia	0.6
44	Kyrgyz Republic	0.6
45	Moldova	0.7
46	Lithuania	0.7
47	Costa Rica	0.7
48	Guatemala	0.8
49	Austria	0.8
50	Nicaragua	0.9
51	Libya	1.0
52	Bulgaria	1.0
53	Honduras	1.0
54	Czech Republic	1.0
55	Netherlands	1.0
56	Mauritania	1.1
57	Mongolia	1.1
58	Belgium	1.4
59	Zambia	1.4
60	United Arab Emirates	1.5
61	Jordan	1.5
62	Bolivia	1.5
63	Hungary	1.6
64	Sri Lanka	1.6
65	Australia	1.7
66	Portugal	1.7
67	Burundi	1.8
68	Ecuador	1.9
69	El Salvador	1.9
70	Zimbabwe	1.9
71	Benin	2.1
72	Dominican Republic	2.1
73	Greece	2.2
74	Syria	2.3
75	Chile	2.3
76	Kazakhstan	2.5
77	Mozambique	2.6
78	Canada	2.7
79	Cambodia	2.8
80	Romania	2.8
81	Chad	2.9
82	Tunisia	3.0
83	Senegal	3.1
84	Malawi	3.2
85	Malaysia	3.5
86	Nepal	3.8
87	United Kingdom	3.9
88	Peru	4.2
89	Argentina	4.4
90	Mali	4.9
91	Burkina Faso	5.1
92	Madagascar	5.1
93	Cameroon	5.2
94	Algeria	5.4
95	Ghana	5.4
96	Saudi Arabia	5.6
97	Morocco	5.7
98	Poland	6.0
99	Côte d'Ivoire	6.2
100	Turkey	6.2
101	Ukraine	6.3
102	Spain	6.5
103	Uganda	6.9
104	Venezuela	6.9
105	Kenya	7.1
106	Germany	7.1
107	Italy	7.6
108	Philippines	7.9
109	Colombia	8.1
110	France	8.3
111	Egypt	8.7
112	Tanzania	10.1
113	Korea, Rep.	10.6
114	Japan	11.1
115	Mexico	12.3
116	Vietnam	12.4
117	South Africa	13.6
118	Pakistan	17.7
119	Ethiopia	18.0
120	Thailand	18.7
121	Bangladesh	19.3
122	Nigeria	32.3
123	Brazil	34.9
124	Russian Federation	44.6
125	United States	45.1
126	Indonesia	51.9
127	India	189.0
128	China	250.0
n/a	Hong Kong SAR	n/a
n/a	Montenegro	n/a
n/a	Puerto Rico	n/a
n/a	Serbia	n/a
n/a	Taiwan, China	n/a

SOURCE: World Health Organization, *World Health Statistics 2007*

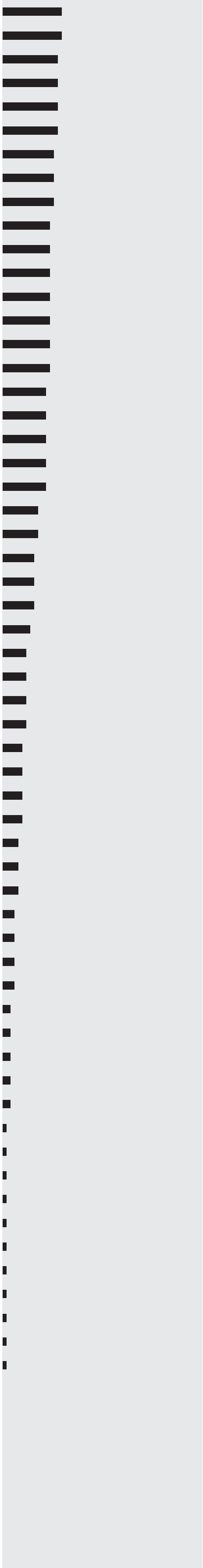
4th pillar

Health and hygiene

4.01 Physician density (hard data)

Physician density per 1,000 people | 2006 or most recent year available

RANK	COUNTRY/ECONOMY	HARD DATA
1	Greece	5.0
2	Georgia	4.7
3	Russian Federation	4.3
4	Belgium	4.2
5	Switzerland	4.0
6	Lithuania	4.0
7	Kazakhstan	3.9
7	Malta	3.9
9	Iceland	3.8
9	Norway	3.8
11	Netherlands	3.7
12	Armenia	3.7
12	Italy	3.7
14	Israel	3.7
15	Austria	3.7
15	Bulgaria	3.7
17	Uruguay	3.7
18	Azerbaijan	3.6
19	Denmark	3.6
20	Czech Republic	3.6
21	Germany	3.4
21	Portugal	3.4
23	France	3.4
24	Estonia	3.3
25	Finland	3.3
25	Spain	3.3
27	Sweden	3.3
28	Latvia	3.1
29	Ukraine	3.1
30	Slovak Republic	3.1
31	Hungary	3.0
32	Argentina	3.0
33	Ireland	2.9
34	Luxembourg	2.7
35	Bahrain	2.7
36	Moldova	2.7
37	Qatar	2.6
38	Mongolia	2.6
39	United States	2.6
40	Macedonia, FYR	2.6
41	Australia	2.5
41	Croatia	2.5
43	Egypt	2.4
44	Slovenia	2.4
45	Kyrgyz Republic	2.4
46	Jordan	2.4
47	Cyprus	2.3
48	Puerto Rico	2.2
48	United Kingdom	2.2
50	New Zealand	2.1
51	Japan	2.1
52	Montenegro	2.0
53	Tajikistan	2.0
54	Serbia	2.0
55	Mexico	2.0
56	Poland	2.0
57	Venezuela	1.9
58	Romania	1.9
59	Canada	1.9
60	Dominican Republic	1.9
61	Kuwait	1.8
62	United Arab Emirates	1.7
63	Oman	1.7
64	Korea, Rep.	1.6
65	Turkey	1.6
66	Taiwan, China	1.5
67	Panama	1.5
67	Singapore	1.5
69	Ecuador	1.5
70	Bosnia and Herzegovina	1.4
70	China	1.4
72	Saudi Arabia	1.4
73	Colombia	1.4
74	Tunisia	1.3
75	Costa Rica	1.3
76	Libya	1.3
77	El Salvador	1.2
78	Bolivia	1.2
79	Barbados	1.2
80	Peru	1.2
81	Albania	1.2
81	Brazil	1.2
81	Philippines	1.2
84	Brunei	1.1
85	Algeria	1.1
86	Paraguay	1.1
87	Chile	1.1
88	Mauritius	1.1
89	Guatemala	0.9
90	Jamaica	0.9
91	Pakistan	0.8
92	Trinidad and Tobago	0.8
93	South Africa	0.8
94	Malaysia	0.7
95	India	0.6
96	Honduras	0.6
97	Vietnam	0.6
98	Sri Lanka	0.6
99	Syria	0.5
100	Morocco	0.5
101	Guyana	0.5
102	Suriname	0.5
103	Botswana	0.4
104	Nicaragua	0.4
104	Thailand	0.4
106	Bangladesh	0.3
106	Namibia	0.3
108	Madagascar	0.3
109	Nigeria	0.3
110	Nepal	0.2
111	Cameroon	0.2
112	Cambodia	0.2
112	Zimbabwe	0.2
114	Ghana	0.2
115	Kenya	0.1
116	Indonesia	0.1
117	Côte d'Ivoire	0.1
117	Zambia	0.1
119	Gambia, The	0.1
119	Mauritania	0.1
121	Mali	0.1
121	Uganda	0.1
123	Senegal	0.1
124	Burkina Faso	0.1
124	Lesotho	0.1
126	Benin	0.0
126	Chad	0.0
128	Burundi	0.0
128	Ethiopia	0.0
128	Mozambique	0.0
131	Malawi	0.0
131	Tanzania	0.0
n/a	Hong Kong SAR	n/a

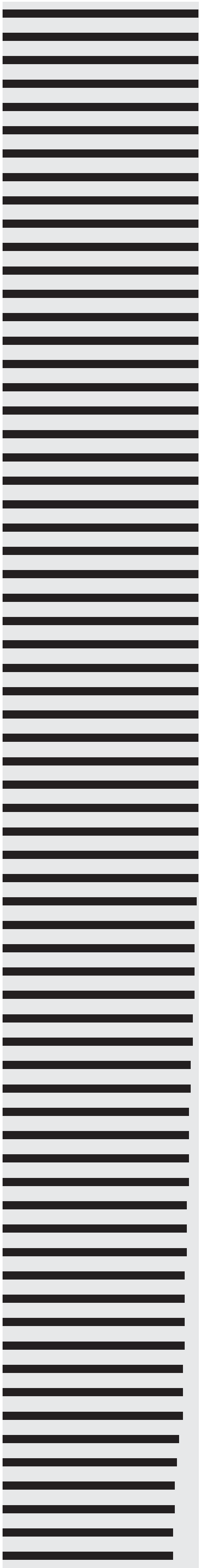


SOURCE: World Health Organization, *Global Atlas of the Health Workforce* (March 2008 update); The World Bank, *World Development Indicators 2008*; national sources

4.02 Access to improved sanitation (hard data)

Access to adequate sanitation as a percentage of total population | 2006

RANK	COUNTRY/ECONOMY	HARD DATA
1	Australia	100.0
1	Austria	100.0
1	Bahrain	100.0
1	Belgium	100.0
1	Canada	100.0
1	Cyprus	100.0
1	Denmark	100.0
1	Finland	100.0
1	France	100.0
1	Germany	100.0
1	Hong Kong SAR	100.0
1	Hungary	100.0
1	Iceland	100.0
1	Ireland	100.0
1	Israel	100.0
1	Italy	100.0
1	Japan	100.0
1	Korea, Rep.	100.0
1	Kuwait	100.0
1	Luxembourg	100.0
1	Netherlands	100.0
1	New Zealand	100.0
1	Norway	100.0
1	Qatar	100.0
1	Singapore	100.0
1	Slovak Republic	100.0
1	Slovenia	100.0
1	Spain	100.0
1	Sweden	100.0
1	Switzerland	100.0
1	United Kingdom	100.0
1	United States	100.0
1	Uruguay	100.0
34	Barbados	99.0
34	Bulgaria	99.0
34	Croatia	99.0
34	Czech Republic	99.0
34	Portugal	99.0
39	Greece	98.0
40	Albania	97.0
40	Kazakhstan	97.0
40	Libya	97.0
40	United Arab Emirates	97.0
44	Costa Rica	96.0
44	Thailand	96.0
46	Bosnia and Herzegovina	95.0
46	Estonia	95.0
48	Algeria	94.0
48	Chile	94.0
48	Malaysia	94.0
48	Mauritius	94.0
52	Georgia	93.0
52	Kyrgyz Republic	93.0
52	Ukraine	93.0
55	Serbia	92.0
55	Syria	92.0
55	Tajikistan	92.0
55	Trinidad and Tobago	92.0
59	Argentina	91.0
59	Armenia	91.0
59	Montenegro	91.0
62	Macedonia, FYR	89.0
63	Turkey	88.0
64	Oman[2]	87.0
64	Russian Federation	87.0
66	El Salvador	86.0
66	Sri Lanka	86.0
68	Jordan	85.0
68	Tunisia	85.0
70	Ecuador	84.0
70	Guatemala	84.0
72	Jamaica	83.0
72	Venezuela[1]	83.0
74	Suriname	82.0
75	Guyana	81.0
75	Mexico	81.0
77	Azerbaijan	80.0
78	Dominican Republic	79.0
78	Moldova	79.0
80	Colombia	78.0
80	Latvia	78.0
80	Philippines	78.0
83	Brazil	77.0
84	Panama	74.0
85	Morocco	72.0
85	Peru	72.0
85	Romania	72.0
88	Paraguay	70.0
89	Egypt	66.0
89	Honduras	66.0
91	China	65.0
91	Vietnam	65.0
93	Malawi	60.0
94	South Africa	59.0
95	Pakistan	58.0
96	Gambia, The	52.0
96	Indonesia	52.0
96	Zambia	52.0
99	Cameroon	51.0
100	Mongolia	50.0
101	Nicaragua	48.0
102	Botswana	47.0
103	Zimbabwe	46.0
104	Mali	45.0
105	Bolivia	43.0
106	Kenya	42.0
107	Burundi	41.0
108	Bangladesh	36.0
108	Lesotho	36.0
110	Namibia	35.0
111	Tanzania	33.0
111	Uganda	33.0
113	Mozambique	31.0
114	Benin	30.0
114	Nigeria	30.0
116	Cambodia	28.0
116	India	28.0
116	Senegal	28.0
119	Nepal	27.0
120	Côte d'Ivoire	24.0
120	Mauritania	24.0
122	Burkina Faso	13.0
123	Madagascar	12.0
124	Ethiopia	11.0
125	Ghana	10.0
126	Chad	9.0
n/a	Brunei	n/a
n/a	Lithuania	n/a
n/a	Malta	n/a
n/a	Poland	n/a
n/a	Puerto Rico	n/a
n/a	Saudi Arabia	n/a
n/a	Taiwan, China	n/a



SOURCE: World Health Organization, *World Health Statistics 2008*

[1] 1990 [2] 2000

4.03 Access to improved drinking water (hard data)

Access to safe drinking water as a percentage of total population | 2006

RANK	COUNTRY/ECONOMY	HARD DATA
1	Australia	100.0
1	Austria	100.0
1	Barbados	100.0
1	Belgium	100.0
1	Canada	100.0
1	Cyprus	100.0
1	Czech Republic	100.0
1	Denmark	100.0
1	Estonia	100.0
1	Finland	100.0
1	France	100.0
1	Germany	100.0
1	Greece	100.0
1	Hong Kong SAR	100.0
1	Hungary	100.0
1	Iceland	100.0
1	Ireland	100.0
1	Israel	100.0
1	Italy	100.0
1	Japan	100.0
1	Luxembourg	100.0
1	Macedonia, FYR	100.0
1	Malta	100.0
1	Mauritius	100.0
1	Netherlands	100.0
1	New Zealand	100.0
1	Norway	100.0
1	Qatar	100.0
1	Singapore	100.0
1	Slovak Republic	100.0
1	Slovenia	100.0
1	Spain	100.0
1	Sweden	100.0
1	Switzerland	100.0
1	United Arab Emirates	100.0
1	United Kingdom	100.0
1	Uruguay	100.0
38	Bosnia and Herzegovina	99.0
38	Bulgaria	99.0
38	Croatia	99.0
38	Georgia	99.0
38	Latvia	99.0
38	Malaysia	99.0
38	Portugal	99.0
38	Serbia	99.0
38	United States	99.0
47	Armenia	98.0
47	Costa Rica	98.0
47	Egypt	98.0
47	Jordan	98.0
47	Montenegro	98.0
47	Thailand	98.0
53	Albania	97.0
53	Puerto Rico[3]	97.0
53	Russian Federation	97.0
53	Turkey	97.0
53	Ukraine	97.0
58	Argentina	96.0
58	Botswana	96.0
58	Guatemala	96.0
58	Kazakhstan	96.0
62	Chile	95.0
62	Dominican Republic	95.0
62	Ecuador	95.0
62	Mexico	95.0
66	Trinidad and Tobago	94.0
66	Tunisia	94.0
68	Colombia	93.0
68	Guyana	93.0
68	Jamaica	93.0
68	Namibia	93.0
68	Philippines	93.0
68	South Africa	93.0
74	Korea, Rep.[2]	92.0
74	Panama	92.0
74	Suriname	92.0
74	Vietnam	92.0
78	Brazil	91.0
79	Moldova	90.0
79	Pakistan	90.0
81	India	89.0
81	Kyrgyz Republic	89.0
81	Nepal	89.0
81	Saudi Arabia[1]	89.0
81	Syria	89.0
81	Venezuela[1]	89.0
87	China	88.0
87	Romania	88.0
89	Bolivia	86.0
89	Gambia, The	86.0
91	Algeria	85.0
92	El Salvador	84.0
92	Honduras	84.0
92	Peru	84.0
95	Morocco	83.0
96	Oman[2]	82.0
96	Sri Lanka	82.0
98	Côte d'Ivoire	81.0
98	Zimbabwe	81.0
100	Bangladesh	80.0
100	Ghana	80.0
100	Indonesia	80.0
103	Nicaragua	79.0
104	Azerbaijan	78.0
104	Lesotho	78.0
106	Paraguay	77.0
106	Senegal	77.0
108	Malawi	76.0
109	Burkina Faso	72.0
109	Mongolia	72.0
111	Burundi	71.0
111	Libya[2]	71.0
113	Cameroon	70.0
114	Tajikistan	67.0
115	Benin	65.0
115	Cambodia	65.0
117	Uganda	64.0
118	Mali	60.0
118	Mauritania	60.0
120	Zambia	58.0
121	Kenya	57.0
122	Tanzania	55.0
123	Chad	48.0
124	Madagascar	47.0
124	Nigeria	47.0
126	Ethiopia	42.0
126	Mozambique	42.0
n/a	Bahrain	n/a
n/a	Brunei	n/a
n/a	Kuwait	n/a
n/a	Lithuania	n/a
n/a	Poland	n/a
n/a	Taiwan, China	n/a

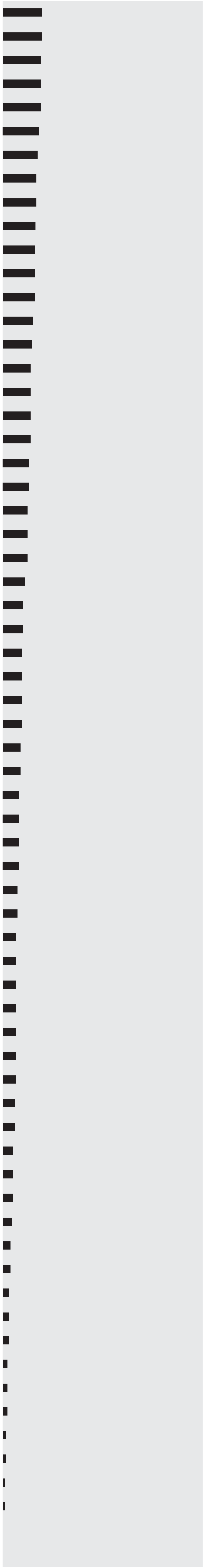
SOURCE: World Health Organization, *World Health Statistics 2008*

[1] 1990 [2] 2000 [3] 2007

4.04 Hospital beds (hard data)

Hospital beds per 10,000 population | 2006

RANK	COUNTRY/ECONOMY	HARD DATA
1	Japan	141.0
2	Russian Federation	97.0
3	Ukraine	87.0
4	Korea, Rep.	86.0
5	Czech Republic	84.0
6	Germany	83.0
7	Azerbaijan	81.0
8	Lithuania	80.0
9	Hungary	79.0
10	Kazakhstan	78.0
11	Austria	76.0
11	Latvia	76.0
11	Malta	76.0
14	Iceland	75.0
15	France	73.0
16	Finland	70.0
17	Slovak Republic	68.0
18	Barbados	67.0
19	Romania	65.0
20	Mongolia	64.0
21	Luxembourg	63.0
21	Moldova	63.0
23	Bulgaria	62.0
24	Tajikistan	61.0
25	Israel	60.0
25	New Zealand	60.0
27	Switzerland	57.0
28	Estonia	56.0
28	Ireland	56.0
30	Croatia	55.0
31	Serbia	54.0
32	Belgium	53.0
33	Poland	52.0
34	Kyrgyz Republic	51.0
35	Netherlands	50.0
36	Slovenia	48.0
37	Greece	47.0
38	Macedonia, FYR	46.0
39	Armenia	44.0
40	Montenegro	42.0
41	Argentina	41.0
41	Norway	41.0
43	Australia	40.0
43	Italy	40.0
45	United Kingdom	39.0
46	Cyprus	38.0
46	Denmark	38.0
48	Georgia	37.0
48	Libya	37.0
48	Portugal	37.0
51	Canada	34.0
51	Spain	34.0
53	Namibia	33.0
54	Singapore	32.0
54	United States	32.0
56	Suriname	31.0
57	Albania	30.0
57	Bosnia and Herzegovina	30.0
57	Brunei	30.0
57	Mauritius	30.0
57	Sweden	30.0
57	Zimbabwe	30.0
63	Puerto Rico	29.3
64	Sri Lanka	29.0
64	Uruguay	29.0
66	Guyana	28.0
66	South Africa	28.0
68	Bahrain	27.0
68	Turkey	27.0
70	Brazil	26.0
70	Trinidad and Tobago	26.0
70	Vietnam	26.0
73	Qatar	25.0
74	Botswana	24.0
75	Chile	23.0
75	Saudi Arabia	23.0
77	Thailand	22.3
78	China	22.0
78	Egypt	22.0
78	Zambia	22.0
81	Oman	21.0
82	Dominican Republic	20.0
83	Jordan	19.0
83	Kuwait	19.0
83	Malaysia	19.0
83	Tunisia	19.0
87	Panama	18.0
87	United Arab Emirates	18.0
89	Algeria	17.0
89	Ecuador	17.0
89	Jamaica	17.0
92	Cameroon	15.0
93	Kenya	14.0
93	Syria	14.0
95	Costa Rica	13.0
95	Lesotho	13.0
95	Paraguay	13.0
95	Philippines	13.0
99	Colombia	12.0
99	Pakistan	12.0
101	Bolivia	11.0
101	Malawi	11.0
101	Tanzania	11.0
101	Uganda	11.0
105	Honduras	10.0
105	Mexico	10.0
107	Burkina Faso	9.0
107	El Salvador	9.0
107	Ghana	9.0
107	Morocco	9.0
107	Nicaragua	9.0
107	Peru	9.0
107	Venezuela	9.0
114	Gambia, The	8.0
114	Mozambique	8.0
116	Burundi	7.0
116	Guatemala	7.0
118	India	6.9
119	Indonesia	6.0
120	Benin	5.0
120	Nigeria	5.0
122	Chad	4.0
122	Côte d'Ivoire	4.0
122	Mauritania	4.0
125	Bangladesh	3.0
125	Madagascar	3.0
125	Mali	3.0
128	Ethiopia	2.0
128	Nepal	2.0
130	Cambodia	1.0
130	Senegal	1.0
n/a	Hong Kong SAR	n/a
n/a	Taiwan, China	n/a



SOURCE: World Health Organization, *WHO Statistical Information System (WHOSIS)* (May 2008); national sources

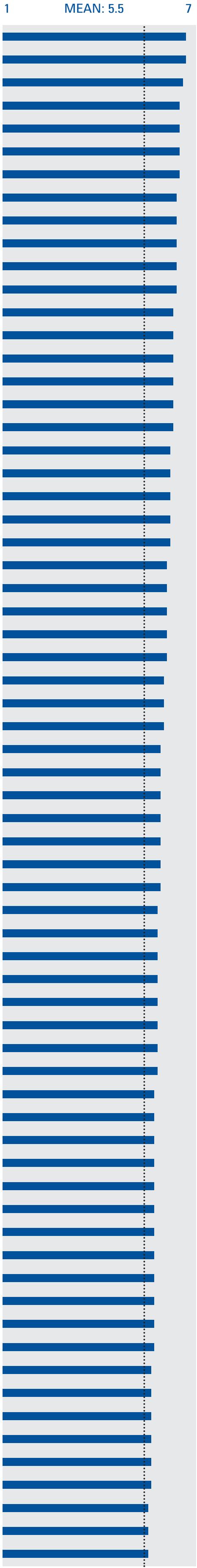
5th pillar

Prioritization of Travel & Tourism

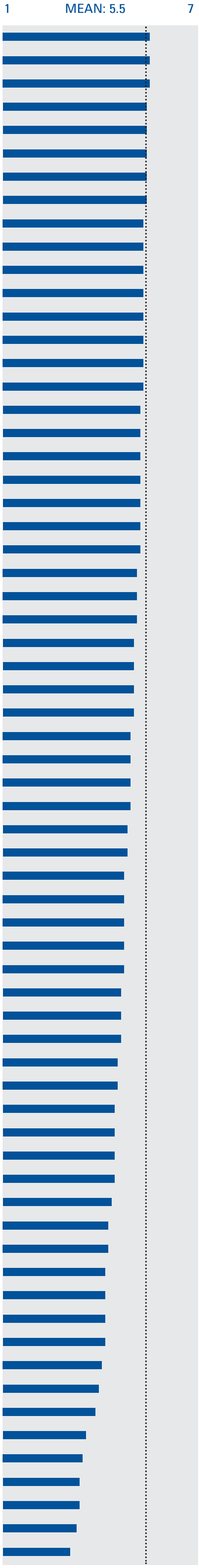
5.01 Government prioritization of the T&T industry

The development of the Travel & Tourism industry is a priority for the government of your country (1 = strongly disagree, 7 = strongly agree)

RANK	COUNTRY/ECONOMY	SCORE
1	Mauritius	6.8
2	Barbados	6.8
3	United Arab Emirates	6.7
4	Singapore	6.6
5	Malta	6.6
6	Tunisia	6.6
7	New Zealand	6.6
8	Hong Kong SAR	6.5
9	Jamaica	6.5
10	Costa Rica	6.5
11	Gambia, The	6.5
12	Thailand	6.5
13	Spain	6.4
14	Ireland	6.4
15	Austria	6.4
16	Portugal	6.4
17	Kenya	6.4
18	South Africa	6.4
19	Australia	6.3
20	Greece	6.3
21	Mali	6.3
22	Cyprus	6.3
23	Malaysia	6.3
24	Puerto Rico	6.2
25	Namibia	6.2
26	Botswana	6.2
27	Morocco	6.2
28	Dominican Republic	6.2
29	Montenegro	6.1
30	Zambia	6.1
31	France	6.1
32	El Salvador	6.0
33	Egypt	6.0
34	Georgia	6.0
35	Turkey	6.0
36	Switzerland	6.0
37	Canada	6.0
38	Mexico	6.0
39	Tanzania	5.9
40	Sri Lanka	5.9
41	Vietnam	5.9
42	Panama	5.9
43	Indonesia	5.9
44	Croatia	5.9
45	Uruguay	5.9
46	Mozambique	5.9
47	Iceland	5.8
48	Nepal	5.8
49	Honduras	5.8
50	Jordan	5.8
51	Guatemala	5.8
52	Oman	5.8
53	Qatar	5.8
54	Madagascar	5.8
55	Philippines	5.8
56	Syria	5.8
57	Senegal	5.8
58	India	5.8
59	Peru	5.7
60	Ghana	5.7
61	Bahrain	5.7
62	Denmark	5.7
63	Azerbaijan	5.7
64	Taiwan, China	5.7
65	Norway	5.6
66	Burkina Faso	5.6
67	Colombia	5.6



RANK	COUNTRY/ECONOMY	SCORE
68	Sweden	5.6
69	Uganda	5.6
70	Estonia	5.6
71	Hungary	5.5
72	Israel	5.5
73	Malawi	5.5
74	China	5.5
75	Czech Republic	5.5
76	Brunei	5.4
77	United Kingdom	5.4
78	Kyrgyz Republic	5.4
79	Mauritania	5.4
80	United States	5.4
81	Belgium	5.4
82	Netherlands	5.4
83	Japan	5.4
84	Luxembourg	5.3
85	Armenia	5.3
86	Cambodia	5.3
87	Saudi Arabia	5.3
88	Tajikistan	5.3
89	Albania	5.3
90	Finland	5.3
91	Benin	5.2
92	Argentina	5.2
93	Guyana	5.2
94	Slovenia	5.1
95	Korea, Rep.	5.1
96	Lesotho	5.1
97	Nicaragua	5.1
98	Ethiopia	5.0
99	Mongolia	5.0
100	Serbia	5.0
101	Bulgaria	5.0
102	Zimbabwe	4.9
103	Nigeria	4.9
104	Kazakhstan	4.8
105	Trinidad and Tobago	4.8
106	Germany	4.8
107	Italy	4.8
108	Latvia	4.8
109	Chile	4.7
110	Macedonia, FYR	4.7
111	Bosnia and Herzegovina	4.7
112	Lithuania	4.6
113	Brazil	4.6
114	Pakistan	4.5
115	Slovak Republic	4.5
116	Libya	4.5
117	Moldova	4.5
118	Ecuador	4.4
119	Suriname	4.3
120	Chad	4.3
121	Romania	4.2
122	Cameroon	4.2
123	Algeria	4.2
124	Bangladesh	4.2
125	Ukraine	4.1
126	Poland	4.0
127	Russian Federation	3.9
128	Burundi	3.6
129	Bolivia	3.5
130	Paraguay	3.4
131	Côte d'Ivoire	3.4
132	Venezuela	3.3
133	Kuwait	3.1



SOURCE: World Economic Forum, Executive Opinion Survey 2007, 2008

5.02 T&T government expenditure (hard data)

T&T government expenditure as a percentage of total budget | 2008

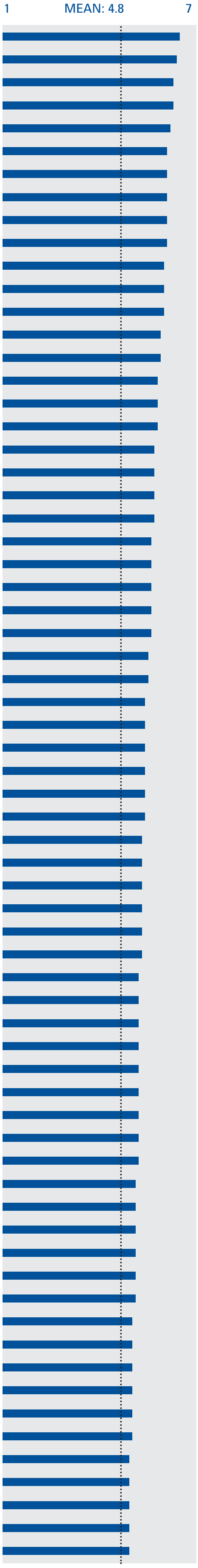
RANK	COUNTRY/ECONOMY	HARD DATA
1	Dominican Republic	21.2
2	Jamaica	16.8
3	Mauritius	16.1
4	Barbados	15.8
5	Iceland	11.4
6	Malta	11.2
7	Jordan	10.4
8	Singapore	10.2
9	Gambia, The	9.5
10	Cambodia	9.2
11	Cyprus	9.2
12	Indonesia	9.0
13	Greece	8.1
14	Estonia	8.1
15	Paraguay	7.9
16	Hong Kong SAR	7.5
17	Tunisia	7.3
18	Switzerland	7.1
19	Kenya	6.9
20	Egypt	6.7
21	Spain	6.4
22	Costa Rica	6.2
23	Botswana	6.1
24	Guyana	6.0
25	Portugal	5.9
26	Norway	5.6
27	Madagascar	5.6
28	Tanzania	5.6
29	Qatar	5.5
30	United Arab Emirates	5.4
31	Trinidad and Tobago	5.3
32	Hungary	5.1
33	United States	5.1
34	Uruguay	5.1
35	Nepal	5.1
36	Ukraine	5.0
37	Panama	4.9
38	Mexico	4.8
39	Austria	4.7
40	Guatemala	4.6
41	Sri Lanka	4.4
42	Romania	4.4
43	Slovenia	4.2
44	Puerto Rico	4.2
45	Japan	4.1
46	Chile	4.1
47	Canada	4.1
48	Honduras	4.0
49	Bahrain	3.9
50	China	3.9
51	Chad	3.8
52	Albania	3.8
53	Ecuador	3.8
54	Ireland	3.7
55	Armenia	3.7
56	Australia	3.7
57	Senegal	3.7
58	Czech Republic	3.6
59	Philippines	3.6
60	Morocco	3.6
61	Italy	3.5
62	Montenegro	3.5
63	Venezuela	3.5
64	New Zealand	3.3
65	Ghana	3.3
66	Bulgaria	3.2
67	Belgium	3.1
68	Namibia	3.1
69	Syria	3.1
70	Bolivia	3.1
71	Azerbaijan	3.1
72	Benin	3.1
73	Latvia	3.0
74	Lithuania	3.0
75	France	3.0
76	Finland	3.0
77	Brazil	2.8
78	United Kingdom	2.7
79	Thailand	2.7
80	Libya	2.7
81	Peru	2.7
82	Poland	2.7
83	Russian Federation	2.7
84	Luxembourg	2.6
85	El Salvador	2.6
86	Korea, Rep.	2.5
87	Argentina	2.4
88	Zimbabwe	2.4
89	Denmark	2.4
90	Ethiopia	2.4
91	Uganda	2.3
92	Sweden	2.2
93	Netherlands	2.1
94	Slovak Republic	2.1
95	Bangladesh	2.1
96	Nicaragua	2.1
97	Zambia	2.1
98	Israel	2.1
99	Colombia	2.0
100	Germany	2.0
101	Pakistan	2.0
102	Burkina Faso	1.9
103	Cameroon	1.8
104	Malaysia	1.7
105	Suriname	1.7
106	Taiwan, China	1.7
107	Mali	1.7
108	Côte d'Ivoire	1.4
109	Vietnam	1.4
110	Croatia	1.4
111	Malawi	1.3
112	Macedonia, FYR	1.2
113	Oman	1.2
114	Lesotho	1.2
115	Kuwait	1.2
116	Algeria	1.1
117	Bosnia and Herzegovina	1.1
118	India	1.0
119	Saudi Arabia	0.9
120	Serbia	0.8
121	Turkey	0.7
122	Burundi	0.7
123	Brunei	0.7
124	South Africa	0.5
125	Nigeria	0.3
n/a	Georgia	n/a
n/a	Kazakhstan	n/a
n/a	Kyrgyz Republic	n/a
n/a	Mauritania	n/a
n/a	Moldova	n/a
n/a	Mongolia	n/a
n/a	Mozambique	n/a
n/a	Tajikistan	n/a

SOURCE: World Travel & Tourism Council, Tourism Satellite Accounting Research 2008

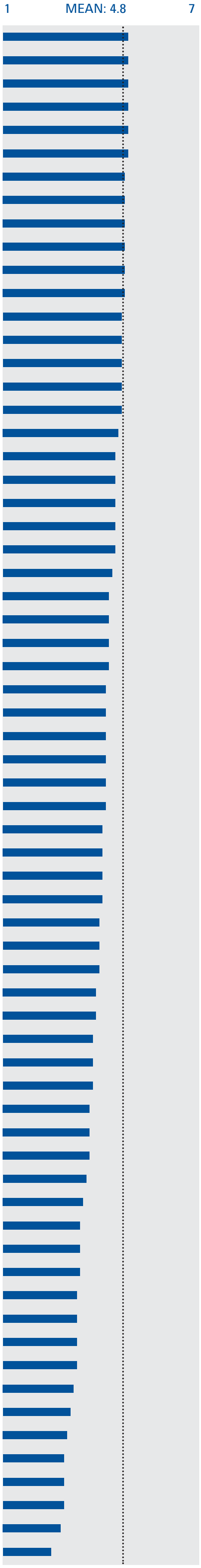
5.03 Effectiveness of marketing and branding to attract tourists

Does your country carry out effective marketing and branding to attract tourists? (1 = no, tourism marketing is nonexistent or completely ineffective, 7 = yes, tourism marketing is excellent, and is very effective in attracting tourists)

RANK	COUNTRY/ECONOMY	SCORE
1	United Arab Emirates	6.6
2	Mauritius	6.5
3	Singapore	6.4
4	Austria	6.4
5	Hong Kong SAR	6.3
6	Barbados	6.2
7	New Zealand	6.2
8	Ireland	6.2
9	Kenya	6.2
10	Mali	6.2
11	Gambia, The	6.1
12	Malaysia	6.1
13	Jamaica	6.1
14	Thailand	6.0
15	Switzerland	6.0
16	Spain	5.9
17	South Africa	5.9
18	Australia	5.9
19	Costa Rica	5.8
20	France	5.8
21	Tunisia	5.8
22	Iceland	5.8
23	Montenegro	5.7
24	Morocco	5.7
25	Dominican Republic	5.7
26	Puerto Rico	5.7
27	Namibia	5.7
28	Cyprus	5.6
29	Portugal	5.6
30	Canada	5.5
31	Indonesia	5.5
32	United States	5.5
33	Panama	5.5
34	Botswana	5.5
35	El Salvador	5.5
36	Denmark	5.4
37	United Kingdom	5.4
38	Burkina Faso	5.4
39	Greece	5.4
40	Mexico	5.4
41	Turkey	5.4
42	Netherlands	5.3
43	Peru	5.3
44	Zambia	5.3
45	Norway	5.3
46	Jordan	5.3
47	Malta	5.3
48	Qatar	5.3
49	Egypt	5.3
50	Uruguay	5.3
51	Sweden	5.2
52	Senegal	5.2
53	India	5.2
54	Colombia	5.2
55	Estonia	5.2
56	Sri Lanka	5.2
57	Luxembourg	5.1
58	Uganda	5.1
59	Oman	5.1
60	China	5.1
61	Madagascar	5.1
62	Guatemala	5.1
63	Vietnam	5.0
64	Belgium	5.0
65	Tanzania	5.0
66	Honduras	5.0
67	Finland	5.0



RANK	COUNTRY/ECONOMY	SCORE
68	Nigeria	4.9
69	Cambodia	4.9
70	Philippines	4.9
71	Korea, Rep.	4.9
72	Czech Republic	4.9
73	Croatia	4.9
74	Georgia	4.8
75	Bahrain	4.8
76	Taiwan, China	4.8
77	Germany	4.8
78	Israel	4.8
79	Argentina	4.8
80	Benin	4.7
81	Nepal	4.7
82	Brunei	4.7
83	Lesotho	4.7
84	Saudi Arabia	4.7
85	Mozambique	4.6
86	Syria	4.5
87	Nicaragua	4.5
88	Bulgaria	4.5
89	Japan	4.5
90	Azerbaijan	4.5
91	Ethiopia	4.4
92	Slovenia	4.3
93	Malawi	4.3
94	Guyana	4.3
95	Brazil	4.3
96	Kyrgyz Republic	4.2
97	Latvia	4.2
98	Chile	4.2
99	Zimbabwe	4.2
100	Tajikistan	4.2
101	Mauritania	4.2
102	Trinidad and Tobago	4.1
103	Lithuania	4.1
104	Ghana	4.1
105	Kazakhstan	4.1
106	Ecuador	4.0
107	Hungary	4.0
108	Italy	4.0
109	Armenia	3.9
110	Serbia	3.9
111	Libya	3.8
112	Suriname	3.8
113	Ukraine	3.8
114	Poland	3.7
115	Macedonia, FYR	3.7
116	Albania	3.7
117	Pakistan	3.6
118	Cameroon	3.5
119	Romania	3.4
120	Algeria	3.4
121	Mongolia	3.4
122	Russian Federation	3.3
123	Chad	3.3
124	Bangladesh	3.3
125	Bosnia and Herzegovina	3.3
126	Slovak Republic	3.2
127	Moldova	3.1
128	Burundi	3.0
129	Paraguay	2.9
130	Côte d'Ivoire	2.9
131	Venezuela	2.9
132	Kuwait	2.8
133	Bolivia	2.5



SOURCE: World Economic Forum, Executive Opinion Survey 2007, 2008

5.04 T&T fair attendance (hard data)

Index of country presence at 13 major T&T fairs, 2007–2008

RANK	COUNTRY/ECONOMY	HARD DATA
1	India	11.0
1	Malaysia	11.0
3	Canada	10.0
3	China	10.0
3	Czech Republic	10.0
3	Egypt	10.0
3	France	10.0
3	Greece	10.0
3	Israel	10.0
3	Italy	10.0
3	Russian Federation	10.0
3	Spain	10.0
3	United Kingdom	10.0
14	Korea, Rep.	9.0
14	Poland	9.0
14	Switzerland	9.0
14	Thailand	9.0
14	Turkey	9.0
14	United Arab Emirates	9.0
20	Austria	8.0
20	Finland	8.0
20	Germany	8.0
20	Japan	8.0
20	Morocco	8.0
25	Brazil	7.0
25	Cambodia	7.0
25	Croatia	7.0
25	Hong Kong SAR	7.0
25	Indonesia	7.0
25	Ireland	7.0
25	Kenya	7.0
25	Mauritius	7.0
25	Mexico	7.0
25	Nepal	7.0
25	Peru	7.0
25	Singapore	7.0
25	Slovak Republic	7.0
25	Syria	7.0
25	Tanzania	7.0
25	Vietnam	7.0
41	Argentina	6.0
41	Australia	6.0
41	Azerbaijan	6.0
41	Bulgaria	6.0
41	Chile	6.0
41	Colombia	6.0
41	Cyprus	6.0
41	El Salvador	6.0
41	Jamaica	6.0
41	Latvia	6.0
41	New Zealand	6.0
41	Norway	6.0
41	Philippines	6.0
41	Portugal	6.0
41	South Africa	6.0
41	Sri Lanka	6.0
41	Taiwan, China	6.0
41	Tunisia	6.0
41	Ukraine	6.0
41	United States	6.0
41	Venezuela	6.0
62	Bahrain	5.0
62	Bangladesh	5.0
62	Brunei	5.0
62	Costa Rica	5.0
62	Dominican Republic	5.0
62	Estonia	5.0
62	Georgia	5.0
62	Guatemala	5.0
62	Hungary	5.0
62	Lithuania	5.0
62	Oman	5.0
62	Pakistan	5.0
62	Panama	5.0
62	Qatar	5.0
62	Romania	5.0
62	Slovenia	5.0
62	Sweden	5.0
62	Uruguay	5.0
62	Zimbabwe	5.0
81	Algeria	4.0
81	Bolivia	4.0
81	Botswana	4.0
81	Ecuador	4.0
81	Guyana	4.0
81	Iceland	4.0
81	Jordan	4.0
81	Luxembourg	4.0
81	Madagascar	4.0
81	Malta	4.0
81	Mongolia	4.0
81	Namibia	4.0
81	Netherlands	4.0
81	Paraguay	4.0
81	Senegal	4.0
81	Serbia	4.0
81	Zambia	4.0
98	Albania	3.0
98	Armenia	3.0
98	Belgium	3.0
98	Bosnia and Herzegovina	3.0
98	Cameroon	3.0
98	Denmark	3.0
98	Ethiopia	3.0
98	Honduras	3.0
98	Kazakhstan	3.0
98	Kuwait	3.0
98	Lesotho	3.0
98	Libya	3.0
98	Mali	3.0
98	Moldova	3.0
98	Montenegro	3.0
98	Nicaragua	3.0
98	Uganda	3.0
115	Barbados	2.0
115	Gambia, The	2.0
115	Ghana	2.0
115	Kyrgyz Republic	2.0
115	Macedonia, FYR	2.0
115	Mauritania	2.0
115	Mozambique	2.0
115	Nigeria	2.0
115	Puerto Rico	2.0
115	Saudi Arabia	2.0
115	Trinidad and Tobago	2.0
126	Benin	1.0
126	Burkina Faso	1.0
126	Burundi	1.0
126	Chad	1.0
126	Côte d'Ivoire	1.0
126	Malawi	1.0
126	Suriname	1.0
126	Tajikistan	1.0

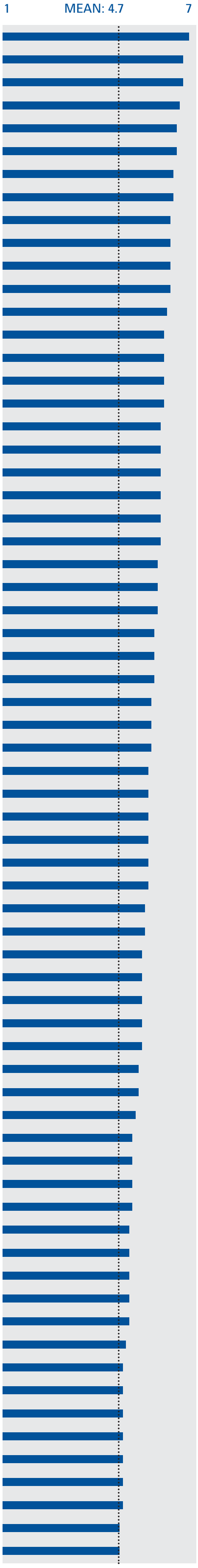
SOURCE: Booz & Company

6th pillar

Air transport infrastructure

6.01 Quality of air transport infrastructure

Passenger air transport in your country is (1 = underdeveloped, 7 = extensive and efficient by international standards)

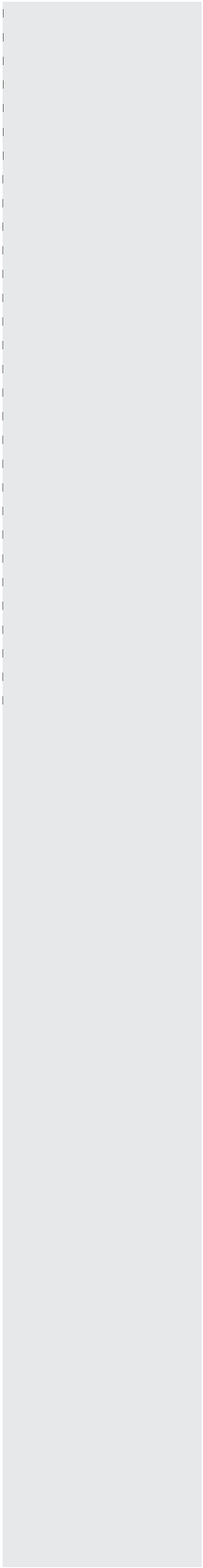


RANK	COUNTRY/ECONOMY	SCORE
1	Singapore	6.9
2	Hong Kong SAR	6.7
3	Germany	6.7
4	United Arab Emirates	6.6
5	France	6.5
6	Switzerland	6.5
7	Denmark	6.4
8	Finland	6.4
9	Netherlands	6.3
10	Norway	6.3
11	Iceland	6.3
12	United States	6.3
13	Austria	6.2
14	Puerto Rico	6.1
15	Belgium	6.1
16	Barbados	6.1
17	Canada	6.1
18	Sweden	6.0
19	Australia	6.0
20	Malaysia	6.0
21	Bahrain	6.0
22	Qatar	6.0
23	New Zealand	6.0
24	Chile	5.9
25	South Africa	5.9
26	Korea, Rep.	5.9
27	United Kingdom	5.8
28	Thailand	5.8
29	Tunisia	5.8
30	Panama	5.7
31	Jordan	5.7
32	Taiwan, China	5.7
33	El Salvador	5.6
34	Spain	5.6
35	Malta	5.6
36	Latvia	5.6
37	Dominican Republic	5.6
38	Brunei	5.6
39	Israel	5.5
40	Greece	5.5
41	Jamaica	5.4
42	Mauritius	5.4
43	Portugal	5.4
44	Cyprus	5.4
45	Czech Republic	5.4
46	Ireland	5.3
47	Saudi Arabia	5.3
48	Azerbaijan	5.2
49	Japan	5.1
50	Namibia	5.1
51	Estonia	5.1
52	Egypt	5.1
53	Guatemala	5.0
54	Luxembourg	5.0
55	Turkey	5.0
56	Mexico	5.0
57	Oman	5.0
58	Costa Rica	4.9
59	Senegal	4.8
60	Ethiopia	4.8
61	Morocco	4.8
62	Kuwait	4.8
63	Slovenia	4.8
64	Colombia	4.8
65	Sri Lanka	4.8
66	India	4.7
67	Trinidad and Tobago	4.7
68	Kenya	4.7
69	Honduras	4.7
70	Hungary	4.7
71	Gambia, The	4.6
72	Lithuania	4.6
73	Montenegro	4.5
74	China	4.4
75	Indonesia	4.4
76	Albania	4.4
77	Ecuador	4.3
78	Italy	4.3
79	Nicaragua	4.3
80	Madagascar	4.3
81	Croatia	4.3
82	Côte d'Ivoire	4.3
83	Pakistan	4.2
84	Nigeria	4.2
85	Armenia	4.2
86	Georgia	4.2
87	Cambodia	4.2
88	Russian Federation	4.2
89	Philippines	4.1
90	Syria	4.1
91	Ghana	4.1
92	Vietnam	3.9
93	Moldova	3.9
94	Peru	3.9
95	Mali	3.9
96	Romania	3.9
97	Botswana	3.8
98	Serbia	3.8
99	Zambia	3.7
100	Benin	3.7
101	Brazil	3.7
102	Kazakhstan	3.7
103	Poland	3.7
104	Bulgaria	3.6
105	Ukraine	3.6
106	Algeria	3.5
107	Burkina Faso	3.5
108	Venezuela	3.5
109	Slovak Republic	3.5
110	Burundi	3.5
111	Tanzania	3.5
112	Tajikistan	3.5
113	Mozambique	3.5
114	Nepal	3.5
115	Guyana	3.5
116	Uruguay	3.4
117	Zimbabwe	3.4
118	Bangladesh	3.4
119	Uganda	3.3
120	Kyrgyz Republic	3.1
121	Macedonia, FYR	3.1
122	Bolivia	3.1
123	Argentina	3.1
124	Suriname	3.1
125	Cameroon	3.0
126	Libya	2.9
127	Malawi	2.9
128	Mauritania	2.9
129	Chad	2.8
130	Mongolia	2.7
131	Bosnia and Herzegovina	2.6
132	Lesotho	2.3
133	Paraguay	2.2

SOURCE: World Economic Forum, Executive Opinion Survey 2007, 2008

6.02 Available seat kilometers, domestic (hard data)

Scheduled available seat kilometers per week originating in country (in millions) | January to July 2008 average



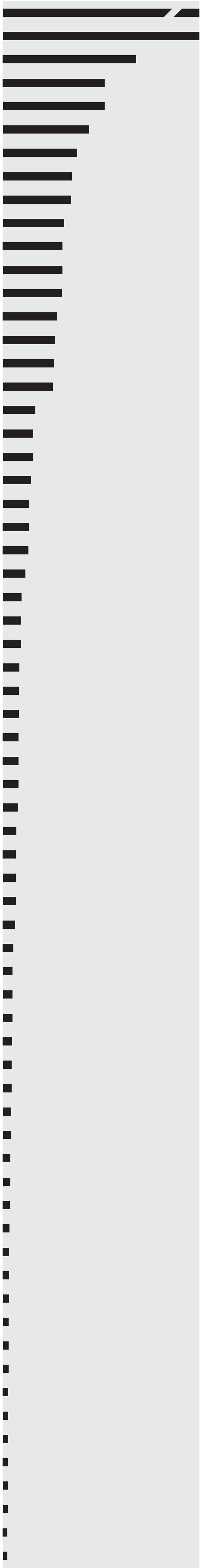
RANK	COUNTRY/ECONOMY	HARD DATA
1	United States	22,888.7
2	China	4,909.4
3	Japan	1,954.0
4	Russian Federation	1,477.2
5	Australia	1,388.0
6	Brazil	1,354.1
7	Canada	1,160.3
8	India	1,129.9
9	Mexico	823.3
10	Spain	748.8
11	Indonesia	628.3
12	Italy	464.4
13	France	356.7
14	United Kingdom	305.9
15	Germany	305.1
16	South Africa	289.1
17	Malaysia	257.3
18	Saudi Arabia	237.2
19	Turkey	222.1
20	Thailand	205.9
21	Argentina	168.9
22	Norway	159.3
23	Philippines	158.4
24	Korea, Rep.	148.7
25	Chile	132.6
26	Vietnam	128.4
27	Colombia	127.3
28	New Zealand	122.1
29	Pakistan	77.9
30	Sweden	71.3
31	Portugal	68.0
32	Kazakhstan	62.6
33	Peru	61.0
34	Greece	59.6
35	Venezuela	46.3
36	Nigeria	45.2
37	Ecuador	40.5
38	Finland	34.5
39	Taiwan, China	34.0
40	Egypt	29.5
41	Algeria	22.0
42	Ukraine	20.2
43	Libya	18.9
44	Denmark	17.9
45	Bolivia	16.4
46	Mozambique	13.6
47	Morocco	12.4
48	Kenya	10.5
49	Tanzania	10.0
50	Poland	8.8
51	Ireland	8.2
52	Romania	6.7
53	Austria	6.5
54	Oman	6.0
55	Madagascar	6.0
56	Switzerland	5.2
57	Croatia	4.7
58	Bangladesh	4.4
59	Ethiopia	4.1
60	Iceland	3.3
61	Mongolia	3.1
62	Nepal	2.4
63	Israel	2.4
64	Syria	2.3
65	Mauritius	2.1
66	Panama	2.1
67	Honduras	2.0
68	Slovak Republic	1.8
69	Costa Rica	1.7
70	Guatemala	1.6
71	Zambia	1.6
72	Tunisia	1.6
73	Cambodia	1.6
74	Bulgaria	1.5
75	Czech Republic	1.4
76	Zimbabwe	1.4
77	Trinidad and Tobago	1.1
78	Jamaica	1.1
79	Botswana	1.1
80	Jordan	1.0
81	Paraguay	1.0
82	Kyrgyz Republic	0.6
83	Namibia	0.5
84	Malawi	0.4
85	Netherlands	0.4
86	Latvia	0.4
87	Senegal	0.4
88	Dominican Republic	0.3
89	Cameroon	0.3
90	Cyprus	0.3
91	Nicaragua	0.3
92	Ghana	0.2
93	Estonia	0.2
94	Burkina Faso	0.1
95	Uganda	0.1
96	Belgium	0.1
97	United Arab Emirates	0.1
98	Azerbaijan	0.0
99	Malta	0.0
100	Albania	0.0
100	Armenia	0.0
100	Bahrain	0.0
100	Barbados	0.0
100	Benin	0.0
100	Bosnia and Herzegovina	0.0
100	Brunei	0.0
100	Burundi	0.0
100	Chad	0.0
100	Côte d'Ivoire	0.0
100	El Salvador	0.0
100	Gambia, The	0.0
100	Georgia	0.0
100	Guyana	0.0
100	Hong Kong SAR	0.0
100	Hungary	0.0
100	Kuwait	0.0
100	Lesotho	0.0
100	Lithuania	0.0
100	Luxembourg	0.0
100	Macedonia, FYR	0.0
100	Mali	0.0
100	Mauritania	0.0
100	Moldova	0.0
100	Montenegro	0.0
100	Qatar	0.0
100	Serbia	0.0
100	Singapore	0.0
100	Slovenia	0.0
100	Sri Lanka	0.0
100	Suriname	0.0
100	Tajikistan	0.0
100	Uruguay	0.0
n/a	Puerto Rico	n/a

SOURCE: International Air Transport Association, SRS Analyser; national sources

6.03 Available seat kilometers, international (hard data)

Scheduled available seat kilometers per week originating in country (in millions) | January to July 2008 average

RANK	COUNTRY/ECONOMY	HARD DATA
1	United States	10,565.5
2	United Kingdom	6,240.8
3	Germany	4,146.1
4	France	3,168.2
5	Japan	3,162.5
6	Spain	2,679.4
7	China	2,305.7
8	United Arab Emirates	2,138.7
9	Hong Kong SAR	2,115.6
10	Singapore	1,898.4
11	Thailand	1,852.7
12	Australia	1,845.9
13	Canada	1,835.6
14	Italy	1,690.3
15	Netherlands	1,610.8
16	India	1,594.9
17	Korea, Rep.	1,552.6
18	Brazil	999.8
19	Russian Federation	938.4
20	Mexico	917.0
21	Taiwan, China	862.9
22	Switzerland	809.3
23	Malaysia	806.0
24	South Africa	792.5
25	Turkey	694.2
26	Egypt	568.5
27	Portugal	562.7
28	New Zealand	560.4
29	Philippines	508.4
30	Belgium	495.4
31	Argentina	487.6
32	Greece	487.1
33	Saudi Arabia	484.6
34	Ireland	480.3
35	Qatar	464.5
36	Austria	412.8
37	Israel	406.0
38	Indonesia	401.9
39	Denmark	399.8
40	Sweden	376.3
41	Finland	322.3
42	Chile	294.5
43	Poland	292.0
44	Morocco	288.0
45	Vietnam	283.3
46	Dominican Republic	267.5
47	Peru	264.4
48	Pakistan	249.0
49	Norway	235.7
50	Bahrain	232.3
51	Colombia	223.4
52	Kuwait	217.3
53	Kenya	202.0
54	Venezuela	189.0
55	Czech Republic	188.2
56	Mauritius	179.8
57	Sri Lanka	168.2
58	Nigeria	167.9
59	Ukraine	166.5
60	Cyprus	163.4
61	Bangladesh	155.3
62	Panama	153.9
63	Jordan	150.0
64	Romania	146.2
65	Hungary	145.6
66	Senegal	136.9
67	Costa Rica	130.6
68	Jamaica	129.4
69	Tunisia	115.2
70	Ethiopia	112.3
71	Ecuador	105.5
72	Algeria	104.2
73	Kazakhstan	99.5
74	Barbados	91.9
75	Oman	90.0
76	Syria	77.8
77	Bulgaria	76.2
78	Iceland	73.5
79	El Salvador	72.3
80	Ghana	71.2
81	Libya	68.7
82	Latvia	58.3
83	Trinidad and Tobago	57.0
84	Nepal	56.0
85	Brunei	55.9
86	Malta	54.4
87	Guatemala	52.5
88	Cambodia	51.1
89	Uganda	49.0
90	Tanzania	44.9
91	Croatia	44.8
92	Uruguay	44.3
93	Serbia	43.0
94	Azerbaijan	40.2
95	Lithuania	39.2
96	Armenia	38.6
97	Bolivia	37.1
98	Madagascar	36.2
99	Cameroon	35.0
100	Tajikistan	34.5
101	Slovak Republic	31.9
102	Côte d'Ivoire	31.1
103	Namibia	28.7
104	Zambia	28.2
105	Suriname	25.7
106	Mali	23.9
107	Honduras	23.9
108	Georgia	21.7
109	Luxembourg	21.1
110	Estonia	20.9
111	Nicaragua	20.6
112	Kyrgyz Republic	18.5
113	Slovenia	18.2
114	Albania	17.1
115	Zimbabwe	15.8
116	Paraguay	14.9
117	Mongolia	13.4
118	Mozambique	12.7
119	Benin	11.9
120	Moldova	11.0
121	Montenegro	8.8
122	Burkina Faso	8.8
123	Malawi	7.7
124	Macedonia, FYR	7.7
125	Chad	7.2
126	Guyana	7.0
127	Mauritania	6.8
128	Gambia, The	5.5
129	Bosnia and Herzegovina	5.1
130	Burundi	1.8
131	Botswana	1.6
132	Lesotho	0.3
n/a	Puerto Rico	n/a



SOURCE: International Air Transport Association, SRS Analyser; national sources

6.04 Departures per 1,000 population (hard data)

Number of departures per 1,000 population | 2006

RANK	COUNTRY/ECONOMY	HARD DATA
1	Luxembourg	93.6
2	Ireland	82.2
3	Qatar	64.9
4	Norway[5]	55.3
5	New Zealand	52.8
6	Bahrain[4]	45.7
7	Iceland	42.1
8	Malta	37.8
9	Puerto Rico	35.7
10	United States	32.5
11	Brunei	32.4
12	Canada	31.9
13	Denmark[5]	29.6
14	Cyprus	22.7
15	United Arab Emirates[4]	22.1
16	Finland	21.8
17	Sweden[4]	21.2
18	Singapore	19.3
19	Hong Kong SAR	19.0
20	Austria	18.1
21	United Kingdom	17.1
22	Australia	17.0
23	Switzerland	16.7
24	Netherlands	15.3
25	Belgium	15.0
26	Spain	13.7
27	Germany	13.2
28	France	13.1
29	Oman[5]	12.9
30	Latvia	12.7
31	Greece	12.0
32	Portugal	11.3
33	Mauritius	10.9
34	Suriname	10.8
35	Trinidad and Tobago	10.4
36	Panama	10.0
37	Slovenia	9.7
38	Montenegro[5]	9.1
39	Costa Rica	8.2
40	Kuwait	8.0
41	Jamaica	7.9
42	Italy	7.6
43	Czech Republic	7.3
44	Malaysia	6.3
45	Estonia	6.1
46	Chile	5.8
47	Saudi Arabia	5.6
48	Japan	5.2
49	Venezuela	5.2
50	Israel	5.1
51	Croatia	4.9
52	Jordan	4.8
53	Korea, Rep.	4.6
54	Hungary	4.5
55	Colombia	3.8
56	Botswana	3.7
57	El Salvador	3.7
58	Lithuania	3.3
59	Namibia	3.2
60	South Africa	3.1
61	Mexico	3.0
62	Brazil	3.0
63	Russian Federation	3.0
64	Slovak Republic	2.7
65	Serbia	2.7
66	Uruguay	2.6
67	Turkey	2.4
68	Mongolia	2.4
69	Bolivia	2.3
70	Ecuador	2.3
71	Poland	2.2
72	Tunisia	2.1
73	Libya	2.1
74	Armenia	2.1
75	Peru	2.0
76	Thailand	2.0
77	Romania	2.0
78	Argentina	1.9
79	Morocco	1.8
80	Paraguay	1.6
81	Bulgaria	1.6
82	Indonesia	1.6
83	Azerbaijan	1.5
84	Albania	1.4
85	Algeria	1.3
86	Kazakhstan	1.3
87	Bosnia and Herzegovina[3]	1.2
88	China	1.2
89	Macedonia, FYR	1.2
90	Moldova	1.1
91	Georgia	1.1
92	Sri Lanka	1.1
93	Ukraine	1.0
94	Kyrgyz Republic	0.9
95	Syria	0.9
96	Kenya	0.8
97	Madagascar	0.7
98	Philippines	0.7
99	Egypt	0.6
100	Vietnam	0.6
101	Cameroon	0.6
102	Mauritania	0.6
103	Senegal[5]	0.5
104	Zimbabwe	0.5
105	Zambia	0.5
106	Mozambique	0.5
107	Tajikistan	0.4
108	Ethiopia	0.4
109	India	0.4
110	Malawi	0.4
111	Guyana[2]	0.4
112	Pakistan	0.3
113	Cambodia	0.3
114	Nepal	0.3
115	Tanzania	0.1
116	Nigeria	0.1
117	Burkina Faso	0.1
118	Benin[2]	0.1
119	Nicaragua[1]	0.1
120	Chad[2]	0.1
121	Mali[2]	0.1
122	Ghana[4]	0.1
123	Bangladesh	0.1
124	Uganda	0.0
n/a	Barbados	n/a
n/a	Burundi	n/a
n/a	Côte d'Ivoire	n/a
n/a	Dominican Republic	n/a
n/a	Gambia, The	n/a
n/a	Guatemala	n/a
n/a	Honduras	n/a
n/a	Lesotho	n/a
n/a	Taiwan, China	n/a

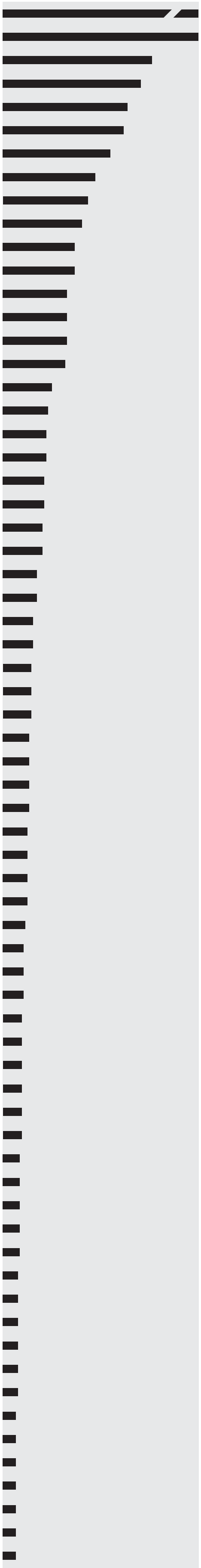
SOURCE: Booz & Company; national sources

[1] 2000 [2] 2001 [3] 2003 [4] 2004 [5] 2005

6.05 Airport density (hard data)

Number of airports per million population | 2007

RANK	COUNTRY/ECONOMY	HARD DATA
1	Iceland	28.9
2	Norway	10.6
3	Canada	7.9
4	Australia	7.3
5	Panama	6.6
6	New Zealand	6.4
7	Mongolia	5.7
8	Malta	4.9
9	Sweden	4.5
10	Finland	4.2
11	Cyprus	3.8
12	Costa Rica	3.8
13	Barbados	3.4
14	Greece	3.4
15	Namibia	3.4
16	Montenegro	3.3
17	Brunei	2.6
18	Qatar	2.4
19	United States	2.3
20	Ireland	2.3
21	Estonia	2.2
22	Suriname	2.2
23	Botswana	2.1
24	Luxembourg	2.1
25	Denmark	1.8
26	Croatia	1.8
27	United Arab Emirates	1.6
28	Mauritius	1.6
29	Puerto Rico	1.5
30	Portugal	1.5
31	Trinidad and Tobago	1.5
32	Madagascar	1.4
33	Malaysia	1.4
34	Bolivia	1.4
35	Guyana	1.4
36	Bahrain	1.3
37	Argentina	1.3
38	Libya	1.3
39	Honduras	1.3
40	Oman	1.2
41	Colombia	1.1
42	Chile	1.1
43	Saudi Arabia	1.1
44	Ecuador	1.0
45	Kazakhstan	1.0
46	United Kingdom	1.0
47	Slovenia	1.0
48	Macedonia, FYR	1.0
49	France	1.0
50	Venezuela	0.9
51	Slovak Republic	0.9
52	Spain	0.9
53	Lithuania	0.9
54	Latvia	0.9
55	Algeria	0.8
56	Switzerland	0.8
57	Taiwan, China[1]	0.8
58	Tunisia	0.8
59	Bosnia and Herzegovina	0.8
60	Russian Federation	0.8
61	Nepal	0.7
62	Jamaica	0.7
63	Austria	0.7
64	Dominican Republic	0.7
65	Nicaragua	0.7
66	Mozambique	0.7
67	Romania	0.7
68	Georgia	0.7
69	Italy	0.7
70	Zambia	0.7
71	Armenia	0.7
72	Mauritania	0.6
73	Peru	0.6
74	Uruguay	0.6
75	Mexico	0.6
76	Gambia, The	0.6
77	Czech Republic	0.6
78	Brazil	0.6
79	Japan	0.6
80	Israel	0.6
81	Turkey	0.6
82	Morocco	0.6
83	Lesotho	0.5
84	Belgium	0.5
85	Thailand	0.5
86	Philippines	0.5
87	Germany	0.5
88	Tajikistan	0.4
89	Singapore	0.4
90	South Africa	0.4
91	Serbia	0.4
92	Senegal	0.4
93	Bulgaria	0.4
94	Kyrgyz Republic	0.4
95	Kuwait	0.4
96	Azerbaijan	0.4
97	Jordan	0.3
98	Ukraine	0.3
99	Korea, Rep.	0.3
100	Paraguay	0.3
101	Tanzania	0.3
102	Albania	0.3
103	Netherlands	0.3
104	Zimbabwe	0.3
105	Hungary	0.3
106	Kenya	0.3
107	Ethiopia	0.3
108	Poland	0.3
109	Hong Kong SAR	0.3
110	Indonesia	0.3
111	Cambodia	0.3
112	Moldova	0.3
113	Syria	0.3
114	Vietnam	0.2
115	Cameroon	0.2
116	Malawi	0.2
117	Egypt	0.2
118	Ghana	0.2
119	Pakistan	0.2
120	Guatemala	0.1
121	El Salvador	0.1
122	Burkina Faso	0.1
123	Uganda	0.1
124	Burundi	0.1
125	China	0.1
126	Benin	0.1
127	Nigeria	0.1
128	Chad	0.1
129	Mali	0.1
130	India	0.1
131	Côte d'Ivoire	0.1
132	Bangladesh	0.1
133	Sri Lanka	0.1



SOURCE: International Air Transport Association, SRS Analyser

[1] 2006

6.06 Number of operating airlines (hard data)

Number of airlines with scheduled flights originating in country | January 2008 and July 2008 average

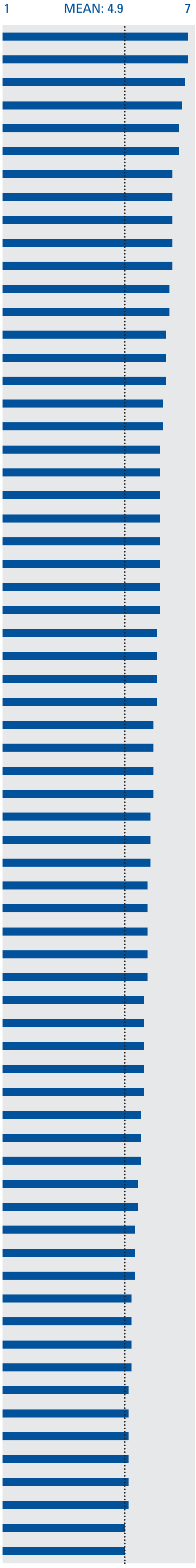
RANK	COUNTRY/ECONOMY	HARD DATA
1	United States	188.0
2	United Kingdom	185.0
3	France	184.0
4	Germany	166.5
5	Italy	158.0
6	Spain	134.5
7	Canada	112.5
8	Russian Federation	112.0
9	Switzerland	103.5
10	China	95.5
11	United Arab Emirates	93.0
12	Netherlands	92.5
13	Thailand	92.0
14	Turkey	88.0
15	Austria	82.0
16	Belgium	79.0
16	India	79.0
18	Japan	77.5
19	Greece	76.5
20	Egypt	71.5
21	Denmark	69.0
22	Sweden	68.5
23	Mexico	63.5
24	Hong Kong SAR	62.0
25	Portugal	61.5
26	Australia	60.0
27	Malaysia	57.5
28	Singapore	56.0
29	Czech Republic	54.5
30	South Africa	54.0
31	Ukraine	50.5
32	Brazil	50.0
32	Korea, Rep.	50.0
32	Poland	50.0
35	Norway	48.0
36	Cyprus	47.0
37	Indonesia	45.5
38	Hungary	45.0
39	Dominican Republic	42.5
39	Ireland	42.5
39	Romania	42.5
39	Saudi Arabia	42.5
39	Vietnam	42.5
44	Bulgaria	42.0
45	Morocco	41.5
46	Israel	41.0
47	Venezuela	37.0
48	Kuwait	35.0
48	Philippines	35.0
50	Finland	34.5
51	Argentina	34.0
51	Syria	34.0
53	Tunisia	32.0
54	Kenya	31.0
55	Croatia	29.5
55	Jamaica	29.5
57	Nigeria	29.0
57	Taiwan, China	29.0
59	Pakistan	28.5
59	Serbia	28.5
61	Bahrain	28.0
62	Jordan	27.5
63	Oman	27.0
64	Armenia	26.5
64	Kazakhstan	26.5
66	Azerbaijan	26.0
66	Qatar	26.0
68	Colombia	25.5
69	Bangladesh	23.0
70	Chile	22.5
70	Ghana	22.5
70	Libya	22.5
73	Senegal	22.0
74	Nepal	21.0
75	Cambodia	20.5
75	Costa Rica	20.5
75	New Zealand	20.5
78	Peru	20.0
78	Sri Lanka	20.0
80	Tanzania	19.0
81	Ecuador	18.5
81	Malta	18.5
83	Georgia	18.0
84	Algeria	17.5
84	Latvia	17.5
86	Côte d'Ivoire	17.0
86	Tajikistan	17.0
86	Trinidad and Tobago	17.0
89	Mauritius	16.0
89	Panama	16.0
89	Puerto Rico	16.0
92	Albania	15.0
92	Estonia	15.0
92	Lithuania	15.0
95	Barbados	14.0
95	Guatemala	14.0
95	Mali	14.0
95	Uganda	14.0
99	Cameroon	13.5
99	Zambia	13.5
101	Honduras	13.0
101	Macedonia, FYR	13.0
103	Kyrgyz Republic	12.5
103	Slovenia	12.5
105	Uruguay	12.0
106	Bolivia	11.5
106	Zimbabwe	11.5
108	Benin	11.0
108	Ethiopia	11.0
108	Luxembourg	11.0
108	Nicaragua	11.0
112	Montenegro	10.5
113	Bosnia and Herzegovina	10.0
114	Mozambique	9.5
115	El Salvador	9.0
116	Iceland	8.5
117	Moldova	8.0
118	Burkina Faso	7.5
118	Madagascar	7.5
118	Slovak Republic	7.5
121	Brunei	6.5
121	Gambia, The	6.5
123	Mongolia	6.0
124	Burundi	5.5
124	Mauritania	5.5
126	Malawi	5.0
126	Namibia	5.0
126	Suriname	5.0
129	Paraguay	4.5
130	Chad	4.0
130	Guyana	4.0
132	Botswana	3.0
133	Lesotho	1.0

SOURCE: International Air Transport Association, SRS Analyser; national sources

6.07 International air transport network

Does the air transport network in your country provide good connections to the overseas markets offering the greatest potential to your business? (1 = no, not at all, 7 = yes, to all of my key business markets)

RANK	COUNTRY/ECONOMY	SCORE
1	Germany	6.9
2	Singapore	6.9
3	Hong Kong SAR	6.8
4	United Arab Emirates	6.7
5	Netherlands	6.6
6	France	6.6
7	United States	6.4
8	Canada	6.4
9	Switzerland	6.4
10	Denmark	6.4
11	Finland	6.4
12	South Africa	6.3
13	Qatar	6.3
14	United Kingdom	6.2
15	Austria	6.2
16	Bahrain	6.2
17	Japan	6.1
18	Iceland	6.1
19	New Zealand	6.0
20	Chile	6.0
21	Norway	6.0
22	Sweden	6.0
23	Australia	6.0
24	Panama	6.0
25	Barbados	6.0
26	Thailand	6.0
27	Israel	5.9
28	Jamaica	5.9
29	Belgium	5.9
30	Jordan	5.9
31	Puerto Rico	5.8
32	Dominican Republic	5.8
33	Malaysia	5.8
34	Mauritius	5.8
35	Czech Republic	5.7
36	El Salvador	5.7
37	Latvia	5.7
38	Korea, Rep.	5.6
39	Portugal	5.6
40	Tunisia	5.6
41	Spain	5.6
42	Mexico	5.6
43	Brunei	5.5
44	Greece	5.5
45	Costa Rica	5.5
46	Guatemala	5.5
47	India	5.5
48	Ireland	5.4
49	Sri Lanka	5.4
50	Taiwan, China	5.4
51	Senegal	5.3
52	Turkey	5.3
53	Cyprus	5.2
54	Saudi Arabia	5.2
55	Namibia	5.2
56	Malta	5.1
57	Indonesia	5.1
58	Ghana	5.1
59	Kenya	5.1
60	Estonia	5.0
61	Hungary	5.0
62	Morocco	5.0
63	Lithuania	5.0
64	Azerbaijan	5.0
65	Kuwait	5.0
66	Honduras	4.9
67	Côte d'Ivoire	4.9
68	Brazil	4.9
69	Ethiopia	4.9
70	Trinidad and Tobago	4.9
71	Oman	4.9
72	Colombia	4.9
73	Egypt	4.8
74	China	4.8
75	Luxembourg	4.8
76	Philippines	4.7
77	Zambia	4.7
78	Nigeria	4.7
79	Russian Federation	4.7
80	Gambia, The	4.6
81	Slovenia	4.6
82	Nicaragua	4.5
83	Albania	4.5
84	Bangladesh	4.5
85	Georgia	4.5
86	Cambodia	4.5
87	Madagascar	4.5
88	Bulgaria	4.4
89	Italy	4.4
90	Peru	4.4
91	Vietnam	4.4
92	Poland	4.3
93	Ecuador	4.3
94	Romania	4.3
95	Botswana	4.3
96	Kazakhstan	4.3
97	Argentina	4.3
98	Tanzania	4.2
99	Croatia	4.2
100	Syria	4.2
101	Venezuela	4.2
102	Benin	4.2
103	Slovak Republic	4.2
104	Mali	4.2
105	Montenegro	4.1
106	Burkina Faso	4.1
107	Mozambique	4.1
108	Pakistan	4.0
109	Armenia	4.0
110	Libya	4.0
111	Malawi	4.0
112	Nepal	3.9
113	Tajikistan	3.8
114	Cameroon	3.8
115	Guyana	3.8
116	Uruguay	3.8
117	Uganda	3.8
118	Serbia	3.7
119	Burundi	3.7
120	Ukraine	3.7
121	Zimbabwe	3.7
122	Mauritania	3.7
123	Moldova	3.7
124	Kyrgyz Republic	3.5
125	Algeria	3.5
126	Macedonia, FYR	3.4
127	Mongolia	3.2
128	Chad	3.1
129	Bolivia	3.0
130	Bosnia and Herzegovina	2.7
131	Suriname	2.7
132	Paraguay	2.6
133	Lesotho	2.3



SOURCE: World Economic Forum, Executive Opinion Survey 2007, 2008

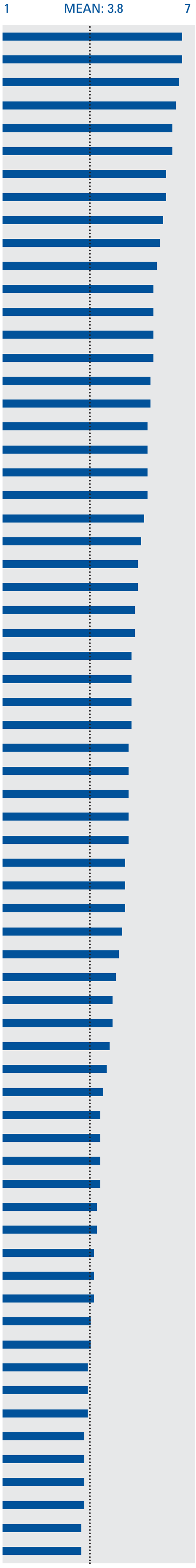
7th pillar

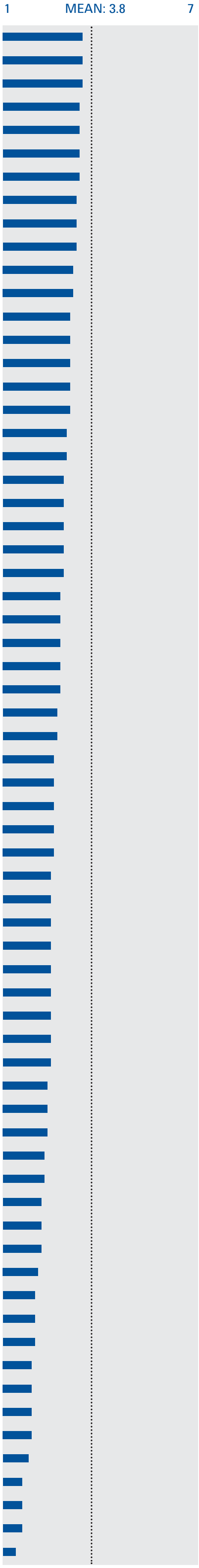
Ground transport infrastructure

7.01 Quality of roads

Roads in your country are (1 = underdeveloped, 7 = extensive and efficient by international standards)

RANK	COUNTRY/ECONOMY	SCORE
1	France	6.7
2	Switzerland	6.7
3	Singapore	6.6
4	Germany	6.5
5	Hong Kong SAR	6.4
6	Austria	6.4
7	Denmark	6.2
8	United States	6.2
9	United Arab Emirates	6.1
10	Canada	6.0
11	Belgium	5.9
12	Finland	5.8
13	Korea, Rep.	5.8
14	Portugal	5.8
15	Cyprus	5.8
16	Luxembourg	5.7
17	Malaysia	5.7
18	Sweden	5.6
19	Japan	5.6
20	Taiwan, China	5.6
21	Oman	5.6
22	Chile	5.5
23	Namibia	5.4
24	United Kingdom	5.3
25	Netherlands	5.3
26	Bahrain	5.2
27	Lithuania	5.2
28	Brunei	5.1
29	Puerto Rico	5.1
30	Spain	5.1
31	Australia	5.1
32	Thailand	5.0
33	Barbados	5.0
34	Croatia	5.0
35	Kuwait	5.0
36	El Salvador	5.0
37	Saudi Arabia	4.9
38	Jordan	4.9
39	Tunisia	4.9
40	South Africa	4.8
41	Slovenia	4.7
42	Iceland	4.6
43	Mauritius	4.5
44	Botswana	4.5
45	Israel	4.4
46	Qatar	4.3
47	Greece	4.2
48	Norway	4.1
49	Uruguay	4.1
50	New Zealand	4.1
51	China	4.1
52	Guatemala	4.0
53	Estonia	4.0
54	Turkey	3.9
55	Italy	3.9
56	Gambia, The	3.9
57	Panama	3.8
58	Côte d'Ivoire	3.8
59	Azerbaijan	3.7
60	Jamaica	3.7
61	Honduras	3.7
62	Morocco	3.6
63	Sri Lanka	3.6
64	Dominican Republic	3.6
65	Syria	3.6
66	Mexico	3.5
67	Hungary	3.5
68	Georgia	3.5
69	Pakistan	3.5
70	Ireland	3.5
71	Trinidad and Tobago	3.4
72	Guyana	3.4
73	Ghana	3.4
74	Egypt	3.4
75	Malta	3.3
76	Zimbabwe	3.3
77	Algeria	3.3
78	Senegal	3.2
79	Armenia	3.2
80	Cambodia	3.1
81	Czech Republic	3.1
82	Slovak Republic	3.1
83	Macedonia, FYR	3.1
84	Suriname	3.1
85	Libya	3.0
86	Venezuela	3.0
87	India	2.9
88	Madagascar	2.9
89	Argentina	2.9
90	Latvia	2.9
91	Colombia	2.9
92	Ethiopia	2.8
93	Bangladesh	2.8
94	Philippines	2.8
95	Kenya	2.8
96	Mali	2.8
97	Benin	2.7
98	Burkina Faso	2.7
99	Peru	2.6
100	Ecuador	2.6
101	Kyrgyz Republic	2.6
102	Vietnam	2.6
103	Tajikistan	2.6
104	Russian Federation	2.5
105	Indonesia	2.5
106	Malawi	2.5
107	Zambia	2.5
108	Kazakhstan	2.5
109	Tanzania	2.5
110	Brazil	2.5
111	Uganda	2.5
112	Nicaragua	2.5
113	Cameroon	2.4
114	Albania	2.4
115	Serbia	2.4
116	Nigeria	2.3
117	Bulgaria	2.3
118	Costa Rica	2.2
119	Montenegro	2.2
120	Ukraine	2.2
121	Mauritania	2.1
122	Mozambique	2.0
123	Burundi	2.0
124	Lesotho	2.0
125	Nepal	1.9
126	Romania	1.9
127	Poland	1.9
128	Bolivia	1.9
129	Paraguay	1.8
130	Bosnia and Herzegovina	1.6
131	Chad	1.6
132	Moldova	1.6
133	Mongolia	1.4



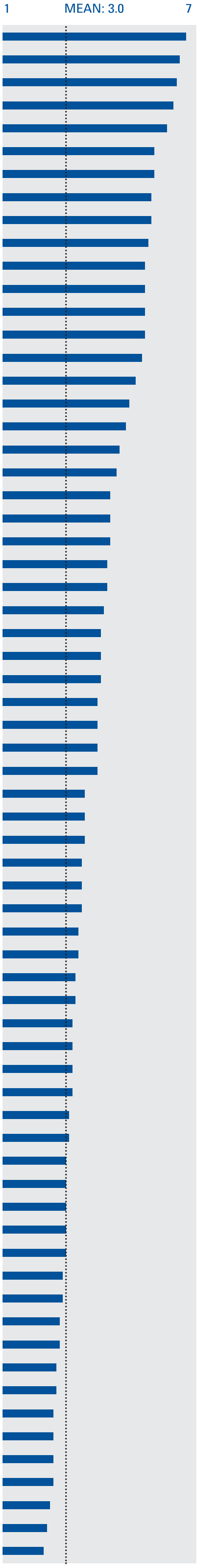


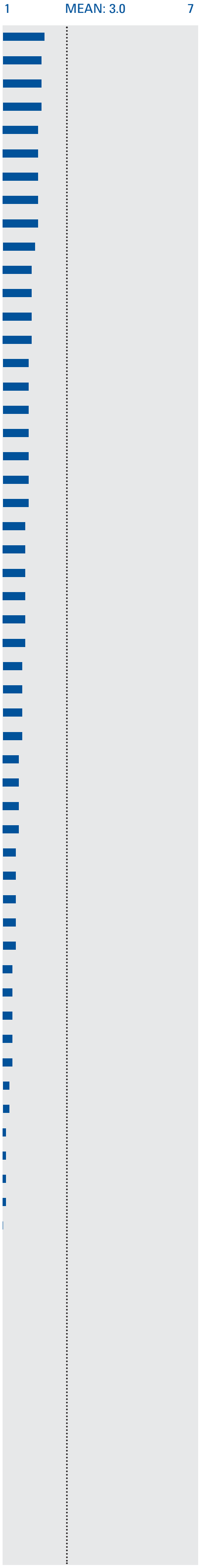
SOURCE: World Economic Forum, Executive Opinion Survey 2007, 2008

7.02 Quality of railroad infrastructure

Railroads in your country are (1 = underdeveloped, 7 = extensive and efficient by international standards)

RANK	COUNTRY/ECONOMY	SCORE
1	Switzerland	6.8
2	France	6.6
3	Japan	6.5
4	Germany	6.4
5	Hong Kong SAR	6.2
6	Finland	5.8
7	Korea, Rep.	5.8
8	Belgium	5.7
9	Taiwan, China	5.7
10	Singapore	5.6
11	Sweden	5.5
12	Austria	5.5
13	Netherlands	5.5
14	Denmark	5.5
15	Canada	5.4
16	United States	5.2
17	Malaysia	5.0
18	Luxembourg	4.9
19	Spain	4.7
20	United Kingdom	4.6
21	India	4.4
22	Tunisia	4.4
23	Czech Republic	4.4
24	Namibia	4.3
25	Portugal	4.3
26	Australia	4.2
27	Lithuania	4.1
28	China	4.1
29	Slovak Republic	4.1
30	Ukraine	4.0
31	Norway	4.0
32	Russian Federation	4.0
33	Azerbaijan	4.0
34	Kazakhstan	3.6
35	Latvia	3.6
36	Botswana	3.6
37	South Africa	3.5
38	Georgia	3.5
39	Estonia	3.5
40	Israel	3.4
41	Hungary	3.4
42	Tajikistan	3.3
43	Slovenia	3.3
44	New Zealand	3.2
45	Croatia	3.2
46	Sri Lanka	3.2
47	Morocco	3.2
48	Thailand	3.1
49	Syria	3.1
50	Greece	3.0
51	Ireland	3.0
52	Italy	3.0
53	Pakistan	3.0
54	Egypt	3.0
55	Bulgaria	2.9
56	Zimbabwe	2.9
57	Saudi Arabia	2.8
58	Indonesia	2.8
59	Romania	2.7
60	Kyrgyz Republic	2.7
61	Poland	2.6
62	Moldova	2.6
63	Algeria	2.6
64	Panama	2.6
65	United Arab Emirates	2.5
66	Vietnam	2.4
67	Bangladesh	2.3
68	Kenya	2.3
69	Turkey	2.2
70	Macedonia, FYR	2.2
71	Cameroon	2.2
72	Mexico	2.1
73	Chile	2.1
74	Mongolia	2.1
75	Burkina Faso	2.1
76	Argentina	2.1
77	Puerto Rico	2.0
78	Montenegro	1.9
79	Tanzania	1.9
80	Côte d'Ivoire	1.9
81	Lesotho	1.9
82	Mozambique	1.8
83	Armenia	1.8
84	Malawi	1.8
85	Philippines	1.8
86	Brazil	1.8
87	Benin	1.8
88	Serbia	1.8
89	Mali	1.7
90	Peru	1.7
91	Jordan	1.7
92	Zambia	1.7
93	Senegal	1.7
94	Madagascar	1.7
95	Bolivia	1.6
96	Cambodia	1.6
97	Mauritania	1.6
98	Ethiopia	1.6
99	Colombia	1.5
100	Uruguay	1.5
101	Honduras	1.5
102	Uganda	1.5
103	Bosnia and Herzegovina	1.4
104	Venezuela	1.4
105	Suriname	1.4
106	Guyana	1.4
107	Nigeria	1.4
108	Albania	1.3
109	Dominican Republic	1.3
110	Ghana	1.3
111	Nepal	1.3
112	El Salvador	1.3
113	Costa Rica	1.2
114	Guatemala	1.2
115	Libya	1.1
116	Ecuador	1.1
117	Nicaragua	1.1
118	Jamaica	1.1
119	Paraguay	1.0
n/a	Bahrain	n/a
n/a	Barbados	n/a
n/a	Brunei	n/a
n/a	Burundi	n/a
n/a	Chad	n/a
n/a	Cyprus	n/a
n/a	Gambia, The	n/a
n/a	Iceland	n/a
n/a	Kuwait	n/a
n/a	Malta	n/a
n/a	Mauritius	n/a
n/a	Oman	n/a
n/a	Qatar	n/a
n/a	Trinidad and Tobago	n/a





SOURCE: World Economic Forum, Executive Opinion Survey 2007, 2008

7.03 Quality of port infrastructure

Port facilities and inland waterways in your country are (1 = underdeveloped, 7 = extensive and efficient by international standards)*

RANK	COUNTRY/ECONOMY	SCORE
1	Singapore	6.8
2	Hong Kong SAR	6.6
3	Netherlands	6.6
4	Germany	6.4
5	Denmark	6.4
6	Finland	6.3
7	Belgium	6.3
8	United Arab Emirates	6.1
9	Iceland	6.0
10	France	5.9
11	United States	5.9
12	Norway	5.8
13	Sweden	5.8
14	Canada	5.8
15	Panama	5.7
16	Malaysia	5.7
17	Switzerland[1]	5.6
18	Taiwan, China	5.5
19	Barbados	5.5
20	Estonia	5.5
21	Luxembourg[1]	5.4
22	Bahrain	5.4
23	New Zealand	5.3
24	Namibia	5.3
25	Japan	5.2
26	Cyprus	5.2
27	Puerto Rico	5.2
28	Malta	5.2
29	Korea, Rep.	5.2
30	United Kingdom	5.1
31	Oman	5.1
32	Jamaica	5.1
33	Spain	5.0
34	Austria[1]	5.0
35	Brunei	5.0
36	Honduras	4.9
37	Chile	4.9
38	Tunisia	4.8
39	Slovenia	4.8
40	Côte d'Ivoire	4.8
41	Australia	4.8
42	Portugal	4.7
43	Lithuania	4.6
44	Sri Lanka	4.5
45	Saudi Arabia	4.5
46	Jordan	4.4
47	Mauritius	4.4
48	Thailand	4.4
49	South Africa	4.4
50	Uruguay	4.4
51	Qatar	4.4
52	Latvia	4.4
53	Israel	4.4
54	China	4.3
55	Zimbabwe[1]	4.3
56	Slovak Republic[1]	4.3
57	Greece	4.2
58	Azerbaijan[1]	4.2
59	Morocco	4.2
60	Botswana[1]	4.2
61	Czech Republic[1]	4.1
62	Gambia, The	4.1
63	Guatemala	4.0
64	Ireland	4.0
65	Kuwait	4.0
66	Burkina Faso[1]	3.9
67	Georgia	3.9
68	Paraguay[1]	3.9
69	Egypt	3.9
70	Hungary[1]	3.9
71	Zambia[1]	3.8
72	Uganda[1]	3.8
73	Senegal	3.8
74	Dominican Republic	3.8
75	Montenegro	3.8
76	Russian Federation	3.7
77	Mali[1]	3.7
78	Pakistan	3.7
79	Bulgaria	3.7
80	Ethiopia[1]	3.6
81	El Salvador	3.6
82	Malawi[1]	3.5
83	Kenya	3.5
84	Serbia[1]	3.5
85	Macedonia, FYR[1]	3.5
86	Ghana	3.5
87	Ukraine	3.5
88	Turkey	3.4
89	Trinidad and Tobago	3.4
90	Croatia	3.4
91	Cambodia	3.4
92	Argentina	3.3
93	India	3.3
94	Mexico	3.3
95	Italy	3.3
96	Benin	3.2
97	Syria	3.2
98	Bolivia[1]	3.2
99	Burundi[1]	3.2
100	Philippines	3.2
101	Kazakhstan[1]	3.2
102	Romania	3.1
103	Algeria	3.1
104	Indonesia	3.0
105	Guyana	3.0
106	Suriname	2.9
107	Nepal[1]	2.9
108	Colombia	2.9
109	Ecuador	2.9
110	Libya	2.8
111	Mozambique	2.8
112	Vietnam	2.8
113	Tanzania	2.8
114	Cameroon	2.7
115	Armenia[1]	2.7
116	Mauritania	2.7
117	Chad[1]	2.7
118	Madagascar	2.6
119	Poland	2.6
120	Nigeria	2.6
121	Bangladesh	2.6
122	Lesotho[1]	2.6
123	Brazil	2.5
124	Albania	2.4
125	Mongolia[1]	2.4
126	Venezuela	2.4
127	Peru	2.3
128	Costa Rica	2.3
129	Nicaragua	2.2
130	Moldova[1]	2.2
131	Kyrgyz Republic[1]	1.8
132	Tajikistan[1]	1.6
133	Bosnia and Herzegovina	1.5

1 MEAN: 4.1 7

SOURCE: World Economic Forum, Executive Opinion Survey 2007, 2008

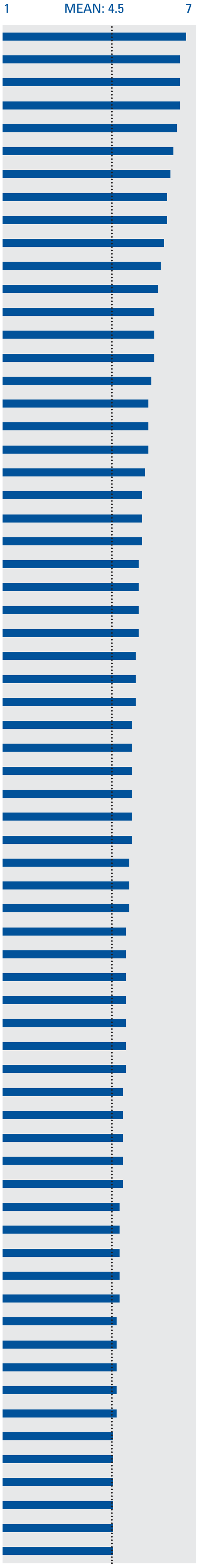
*For landlocked countries, this measures the ease of access to port facilities and inland waterways.

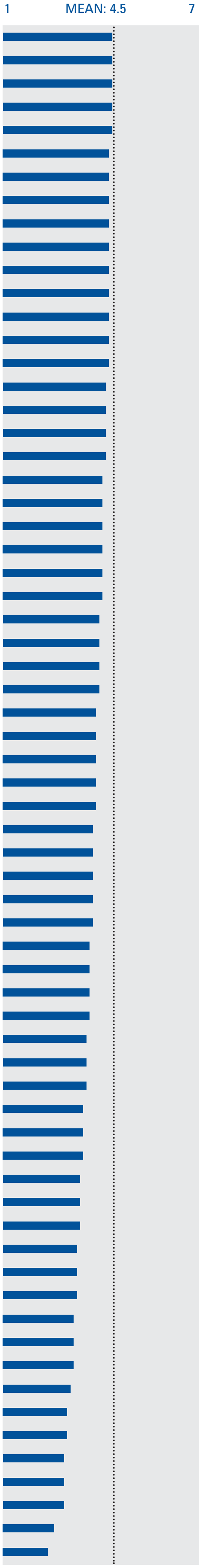
[1] landlocked

7.04 Quality of ground transport network

Your country's national ground transport network (buses, trains, taxis, etc.) offers efficient, accessible transportation to a wide range of travelers to key business centers and tourist attractions within your country. (1 = strongly disagree, 7 = totally agree)

RANK	COUNTRY/ECONOMY	SCORE
1	Switzerland	6.8
2	Germany	6.6
3	Hong Kong SAR	6.6
4	Singapore	6.6
5	France	6.5
6	Finland	6.4
7	Denmark	6.3
8	Sweden	6.2
9	Austria	6.2
10	Japan	6.1
11	Taiwan, China	6.0
12	Canada	5.9
13	Korea, Rep.	5.8
14	Netherlands	5.8
15	United States	5.8
16	Czech Republic	5.7
17	Belgium	5.6
18	Iceland	5.6
19	Turkey	5.6
20	Spain	5.5
21	Malaysia	5.4
22	United Arab Emirates	5.4
23	Tunisia	5.4
24	Norway	5.3
25	Portugal	5.3
26	Lithuania	5.3
27	Israel	5.3
28	Syria	5.2
29	Estonia	5.2
30	Barbados	5.2
31	Thailand	5.1
32	Luxembourg	5.1
33	China	5.1
34	Azerbaijan	5.1
35	Chile	5.1
36	Uruguay	5.1
37	Jordan	5.0
38	Gambia, The	5.0
39	Australia	5.0
40	Slovenia	4.9
41	Greece	4.9
42	Ukraine	4.9
43	United Kingdom	4.9
44	Croatia	4.9
45	Qatar	4.9
46	Saudi Arabia	4.9
47	Mali	4.8
48	Burkina Faso	4.8
49	Zambia	4.8
50	Bulgaria	4.8
51	Indonesia	4.8
52	India	4.7
53	Kuwait	4.7
54	Mexico	4.7
55	Kazakhstan	4.7
56	Latvia	4.7
57	New Zealand	4.6
58	Vietnam	4.6
59	Mauritius	4.6
60	Armenia	4.6
61	Sri Lanka	4.6
62	Colombia	4.5
63	Uganda	4.5
64	Honduras	4.5
65	Russian Federation	4.5
66	Senegal	4.5
67	Egypt	4.5
68	Tajikistan	4.4
69	Brazil	4.4
70	Slovak Republic	4.4
71	Georgia	4.4
72	Oman	4.4
73	Bahrain	4.3
74	Hungary	4.3
75	Kyrgyz Republic	4.3
76	Côte d'Ivoire	4.3
77	Macedonia, FYR	4.3
78	Morocco	4.3
79	Costa Rica	4.3
80	Burundi	4.3
81	Ghana	4.3
82	Kenya	4.3
83	Cyprus	4.2
84	Puerto Rico	4.2
85	Guyana	4.2
86	Benin	4.2
87	Moldova	4.1
88	Malawi	4.1
89	Pakistan	4.1
90	Poland	4.1
91	Montenegro	4.1
92	Jamaica	4.1
93	Serbia	4.0
94	Botswana	4.0
95	Argentina	4.0
96	Bosnia and Herzegovina	4.0
97	Cameroon	3.9
98	Nigeria	3.9
99	Italy	3.9
100	Bangladesh	3.9
101	Madagascar	3.9
102	Tanzania	3.8
103	Nepal	3.8
104	Malta	3.8
105	Guatemala	3.8
106	Namibia	3.8
107	Brunei	3.7
108	Ireland	3.7
109	Ecuador	3.7
110	Romania	3.7
111	Algeria	3.6
112	Mongolia	3.6
113	Lesotho	3.6
114	Dominican Republic	3.5
115	Philippines	3.5
116	Cambodia	3.5
117	Mauritania	3.4
118	El Salvador	3.4
119	Bolivia	3.4
120	Peru	3.3
121	Libya	3.3
122	Ethiopia	3.3
123	Albania	3.2
124	Suriname	3.2
125	Trinidad and Tobago	3.2
126	South Africa	3.1
127	Nicaragua	3.0
128	Chad	3.0
129	Venezuela	2.9
130	Mozambique	2.9
131	Zimbabwe	2.9
132	Panama	2.6
133	Paraguay	2.4



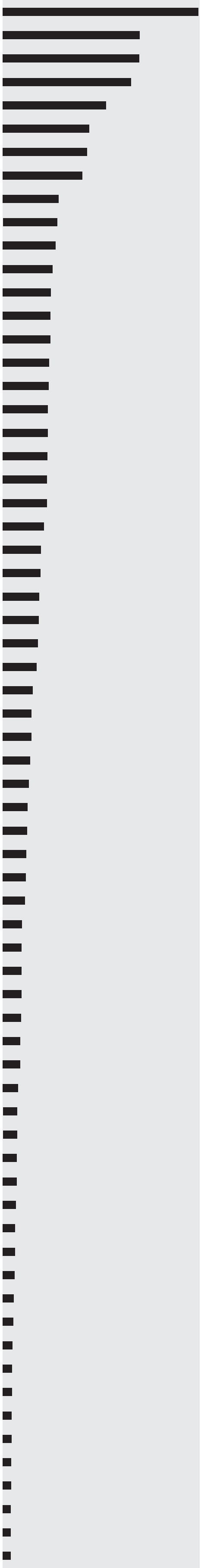


SOURCE: World Economic Forum, Executive Opinion Survey 2007, 2008

7.05 Road density (hard data)

Kilometers of road per 100 square kilometers of land | 2005 or most recent year available

RANK	COUNTRY/ECONOMY	HARD DATA
1	Malta	704.4
2	Belgium	493.2
3	Bahrain	492.7
4	Singapore	462.7
5	Barbados	372.1
6	Japan	311.5
7	Netherlands	303.6
8	Puerto Rico	286.5
9	Luxembourg	201.8
10	Jamaica	195.9
11	Slovenia	189.9
12	Hong Kong SAR	179.0
13	Switzerland	172.7
14	France	172.4
15	Hungary	171.5
16	Denmark	167.7
17	Bangladesh	166.1
18	Trinidad and Tobago	162.2
19	Czech Republic	162.0
20	Italy	160.8
21	Austria	159.7
22	United Kingdom	159.3
23	Sri Lanka	148.3
24	Ireland	137.5
25	Poland	135.6
26	Spain	131.8
27	Cyprus	130.4
28	Estonia	126.1
29	Lithuania	121.7
30	Latvia	108.1
31	Korea, Rep.	103.1
32	India	102.9
33	Mauritius	98.8
34	Sweden	94.5
35	Greece	89.1
36	Slovak Republic	87.7
37	Portugal	85.2
38	Romania	83.4
39	Israel	79.7
40	Costa Rica	69.1
41	Azerbaijan	68.3
42	United States	67.9
43	Vietnam	67.5
44	Philippines	66.7
45	Brunei	63.3
46	Albania	62.6
47	Turkey	54.5
48	Macedonia, FYR	51.3
49	Serbia	51.3
50	Syria	51.2
51	Croatia	50.4
52	El Salvador	47.7
53	Burundi	44.3
54	Uruguay	44.1
55	Bosnia and Herzegovina	42.7
56	Bulgaria	39.7
57	Moldova	37.6
58	New Zealand	34.9
59	Burkina Faso	33.8
60	Gambia, The	33.1
61	Pakistan	32.5
62	Kuwait	32.3
63	Malaysia	29.9
64	South Africa	29.9
65	Uganda	29.4
66	Georgia	29.0
67	Norway	28.7



RANK	COUNTRY/ECONOMY	HARD DATA
68	Ukraine	28.1
69	Dominican Republic	25.9
70	Armenia	25.2
71	Zimbabwe	24.9
72	Côte d'Ivoire	24.8
73	Ghana	24.2
74	Finland	23.3
75	Cambodia	21.1
76	Nigeria	20.9
77	Brazil	20.6
78	China	20.1
79	Indonesia	19.6
80	Lesotho	19.6
81	Tajikistan	19.5
82	Mexico	18.1
83	Benin	16.9
84	Panama	15.4
85	Ecuador	15.2
86	Colombia	14.4
87	Nicaragua	14.4
88	Canada	14.1
89	Malawi	13.0
90	Guatemala	12.9
91	Morocco	12.9
92	Iceland	12.6
93	Zambia	12.1
94	Honduras	12.1
95	Tunisia	11.8
96	Nepal	11.7
97	Oman	11.3
98	Thailand	11.2
99	Qatar	11.2
100	Kenya	10.9
101	Venezuela	10.5
102	Chile	10.5
103	Cameroon	10.5
104	Australia	10.5
105	Kyrgyz Republic	9.3
106	Egypt	9.2
107	Jordan	8.6
108	Madagascar	8.5
109	Tanzania	8.3
110	Argentina	8.3
111	Saudi Arabia	7.6
112	Paraguay	7.3
113	Senegal	6.9
114	Peru	6.1
115	Bolivia	5.7
116	Namibia	5.1
117	United Arab Emirates	4.8
118	Libya	4.7
119	Algeria	4.5
120	Botswana	4.2
121	Mozambique	3.8
122	Guyana	3.7
123	Ethiopia	3.4
124	Kazakhstan	3.3
125	Mongolia	3.1
126	Russian Federation	3.1
127	Suriname	2.6
128	Chad	2.6
129	Mali	1.5
130	Mauritania	0.7
n/a	Germany	n/a
n/a	Montenegro	n/a
n/a	Taiwan, China	n/a

SOURCE: The World Bank, *World Development Indicators 2008*

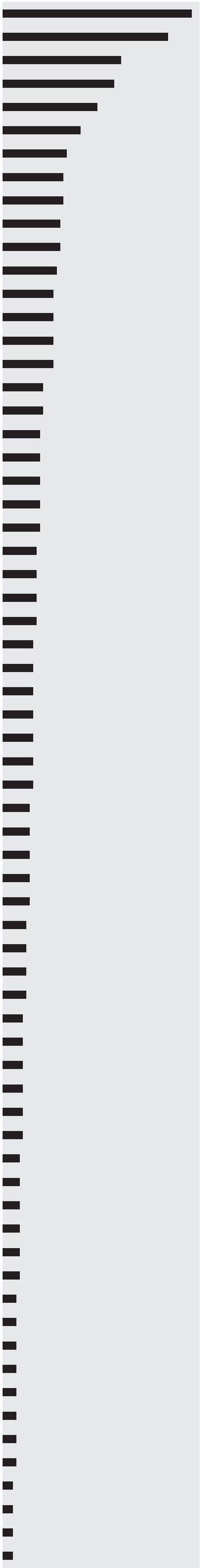
8th pillar

Tourism infrastructure

8.01 Hotel rooms (hard data)

Number of hotel rooms per 100 population | 2007 or most recent year available

RANK	COUNTRY/ECONOMY	HARD DATA
1	Cyprus	5.6
2	Malta	4.9
3	Austria	3.5
4	Greece	3.3
5	Iceland	2.8
6	Barbados	2.3
7	Spain	1.9
8	Italy	1.8
9	Bulgaria	1.8
10	Switzerland	1.7
11	Croatia	1.7
12	Luxembourg	1.6
13	Norway	1.5
14	Ireland	1.5
15	United States	1.5
16	Estonia	1.5
17	Japan	1.2
18	Canada	1.2
19	Australia	1.1
20	Sweden	1.1
21	Tunisia	1.1
22	Portugal	1.1
23	Germany	1.1
24	Czech Republic	1.0
25	Finland	1.0
26	United Kingdom	1.0
27	France	1.0
28	Bahrain	0.9
29	Costa Rica	0.9
30	United Arab Emirates	0.9
31	Suriname	0.9
32	Slovenia	0.9
33	Jamaica	0.9
34	Singapore	0.9
35	Mauritius	0.8
36	Denmark	0.8
37	Hong Kong SAR	0.8
38	Slovak Republic	0.8
39	Saudi Arabia	0.8
40	Dominican Republic	0.7
41	Israel	0.7
42	Brunei	0.7
43	Hungary	0.7
44	Belgium	0.6
45	Malaysia	0.6
46	Netherlands	0.6
47	Qatar	0.6
48	Thailand	0.6
49	New Zealand	0.6
50	Taiwan, China	0.5
51	Mexico	0.5
52	Argentina	0.5
53	Romania	0.5
54	Peru	0.5
55	Panama	0.5
56	Latvia	0.4
57	Trinidad and Tobago	0.4
58	Chile	0.4
59	Ecuador	0.4
60	Uruguay	0.4
61	Jordan	0.4
62	Oman	0.4
63	Macedonia, FYR	0.4
64	Turkey	0.3
65	Puerto Rico	0.3
66	Guatemala	0.3
67	Lithuania	0.3
68	Serbia	0.3
69	Gambia, The	0.3
70	Bosnia and Herzegovina	0.3
71	Venezuela	0.3
72	Botswana	0.3
73	Honduras	0.3
74	Egypt	0.2
75	Poland	0.2
76	Kuwait	0.2
77	Bolivia	0.2
78	Libya	0.2
79	Cambodia	0.2
80	Morocco	0.2
81	Georgia	0.2
82	Vietnam	0.2
83	Colombia	0.2
84	Malawi	0.2
85	Russian Federation	0.2
86	Namibia	0.1
87	Azerbaijan	0.1
88	Cameroon	0.1
89	Senegal	0.1
90	Kazakhstan	0.1
91	South Africa	0.1
92	Indonesia	0.1
93	Korea, Rep.	0.1
94	Algeria	0.1
95	Albania	0.1
96	Lesotho	0.1
97	Benin	0.1
98	China	0.1
99	Nicaragua	0.1
100	Syria	0.1
101	Armenia	0.1
102	El Salvador	0.1
103	Ghana	0.1
104	Sri Lanka	0.1
105	Paraguay	0.1
106	Tanzania	0.1
107	Ukraine	0.1
108	Madagascar	0.1
109	Kenya	0.1
110	Moldova	0.1
111	Uganda	0.1
112	Mozambique	0.0
113	Mali	0.0
114	Zimbabwe	0.0
115	Zambia	0.0
116	Nepal	0.0
117	Kyrgyz Republic	0.0
118	Philippines	0.0
119	Pakistan	0.0
120	Ethiopia	0.0
121	Nigeria	0.0
122	Chad	0.0
123	India	0.0
124	Tajikistan	0.0
125	Bangladesh	0.0
126	Burundi	0.0
n/a	Brazil	n/a
n/a	Burkina Faso	n/a
n/a	Côte d'Ivoire	n/a
n/a	Guyana	n/a
n/a	Mauritania	n/a
n/a	Mongolia	n/a
n/a	Montenegro	n/a



SOURCE: United Nations World Tourism Organization

8.02 Presence of major car rental companies (hard data)

Index of presence of major car rental companies | 2008

RANK	COUNTRY/ECONOMY	HARD DATA
1	Australia	7.0
1	Austria	7.0
1	Bosnia and Herzegovina	7.0
1	Croatia	7.0
1	Czech Republic	7.0
1	France	7.0
1	Germany	7.0
1	Greece	7.0
1	Hungary	7.0
1	India	7.0
1	Ireland	7.0
1	Israel	7.0
1	Italy	7.0
1	Kuwait	7.0
1	Netherlands	7.0
1	Portugal	7.0
1	Romania	7.0
1	Slovenia	7.0
1	South Africa	7.0
1	Spain	7.0
1	Turkey	7.0
1	United Kingdom	7.0
23	Argentina	6.0
23	Belgium	6.0
23	Brazil	6.0
23	Bulgaria	6.0
23	Canada	6.0
23	Costa Rica	6.0
23	Cyprus	6.0
23	Denmark	6.0
23	Dominican Republic	6.0
23	Egypt	6.0
23	Estonia	6.0
23	Jordan	6.0
23	Latvia	6.0
23	Macedonia, FYR	6.0
23	Malta	6.0
23	Mexico	6.0
23	Morocco	6.0
23	New Zealand	6.0
23	Norway	6.0
23	Oman	6.0
23	Poland	6.0
23	Puerto Rico	6.0
23	Qatar	6.0
23	Russian Federation	6.0
23	Saudi Arabia	6.0
23	Serbia	6.0
23	Slovak Republic	6.0
23	Sweden	6.0
23	Switzerland	6.0
23	Thailand	6.0
23	Ukraine	6.0
23	United Arab Emirates	6.0
23	United States	6.0
56	Bahrain	5.0
56	Chile	5.0
56	China	5.0
56	Finland	5.0
56	Iceland	5.0
56	Japan	5.0
56	Lithuania	5.0
56	Madagascar	5.0
56	Mauritius	5.0
56	Montenegro	5.0
56	Nicaragua	5.0
56	Singapore	5.0
56	Suriname	5.0
56	Trinidad and Tobago	5.0
56	Tunisia	5.0
56	Uruguay	5.0
56	Venezuela	5.0
73	Albania	4.0
73	Algeria	4.0
73	Botswana	4.0
73	El Salvador	4.0
73	Guatemala	4.0
73	Indonesia	4.0
73	Jamaica	4.0
73	Kenya	4.0
73	Korea, Rep.	4.0
73	Luxembourg	4.0
73	Moldova	4.0
73	Namibia	4.0
73	Pakistan	4.0
73	Panama	4.0
73	Peru	4.0
73	Philippines	4.0
73	Senegal	4.0
73	Sri Lanka	4.0
73	Syria	4.0
73	Taiwan, China	4.0
73	Uganda	4.0
73	Zimbabwe	4.0
95	Armenia	3.0
95	Azerbaijan	3.0
95	Barbados	3.0
95	Benin	3.0
95	Bolivia	3.0
95	Burkina Faso	3.0
95	Burundi	3.0
95	Cameroon	3.0
95	Colombia	3.0
95	Ecuador	3.0
95	Ethiopia	3.0
95	Ghana	3.0
95	Honduras	3.0
95	Hong Kong SAR	3.0
95	Kazakhstan	3.0
95	Lesotho	3.0
95	Libya	3.0
95	Malaysia	3.0
95	Mali	3.0
95	Mauritania	3.0
95	Mongolia	3.0
95	Mozambique	3.0
95	Nigeria	3.0
95	Tajikistan	3.0
95	Tanzania	3.0
95	Vietnam	3.0
95	Zambia	3.0
122	Bangladesh	2.0
122	Brunei	2.0
122	Cambodia	2.0
122	Chad	2.0
122	Côte d'Ivoire	2.0
122	Gambia, The	2.0
122	Georgia	2.0
122	Guyana	2.0
122	Kyrgyz Republic	2.0
122	Malawi	2.0
122	Nepal	2.0
122	Paraguay	2.0

SOURCE: Individual rental car websites

8.03 ATMs accepting Visa cards (hard data)

Number of automated teller machines (ATMs) accepting Visa credit cards per million population | 2007

RANK	COUNTRY/ECONOMY	HARD DATA
1	Spain	1,355.6
2	United States	1,314.6
3	Portugal	1,101.5
4	Austria	1,063.3
5	Switzerland	929.5
6	Luxembourg	880.0
7	Slovenia	826.5
8	Iceland	816.7
9	France	793.6
10	Australia	792.4
11	Ireland	771.6
12	Taiwan, China	727.8
13	United Kingdom	721.8
14	Cyprus	683.8
15	Italy	656.9
16	Estonia	613.1
17	Canada	607.1
18	Germany	598.8
19	Croatia	591.5
20	Greece	584.3
21	Denmark	581.1
22	Qatar	545.6
23	New Zealand	497.3
24	Norway	478.1
25	Netherlands	452.6
26	Panama	446.7
27	Latvia	445.7
28	Bulgaria	432.4
29	Korea, Rep.	429.1
30	Singapore	406.4
31	Hungary	389.0
32	Slovak Republic	380.4
33	Ukraine	358.5
34	Thailand	343.7
35	Malta	340.0
36	Sweden	334.7
37	United Arab Emirates	334.0
38	Puerto Rico	327.8
39	Lithuania	320.3
40	Finland	314.5
41	Hong Kong SAR	309.2
42	Czech Republic	305.8
43	Romania	296.7
44	Belgium	287.4
45	South Africa	283.5
46	Costa Rica	278.9
47	Barbados	266.7
48	Russian Federation	254.3
49	Israel	245.3
50	Mexico	239.5
51	Saudi Arabia	225.3
52	Turkey	219.3
53	Poland	217.3
54	Bahrain	217.1
55	Malaysia	216.0
56	Mauritius	214.6
57	Japan	213.9
58	Argentina	210.9
59	Trinidad and Tobago	209.2
60	Kuwait	203.6
61	Serbia	194.7
62	Chile	194.4
63	Kazakhstan	174.7
64	Oman	169.6
65	Colombia	155.2
66	Macedonia, FYR	148.5
67	Dominican Republic	143.0
68	Brazil	140.5
69	Jamaica	139.3
70	Botswana	136.1
71	Montenegro	133.3
72	Namibia	125.2
73	Azerbaijan	123.8
74	Bosnia and Herzegovina	119.5
75	Jordan	116.7
76	Georgia	111.8
77	Venezuela	104.5
78	Tunisia	88.5
79	Ecuador	86.8
80	Morocco	83.8
81	Moldova	81.2
82	Albania	79.7
83	El Salvador	63.5
84	Zambia	57.5
85	Uruguay	55.7
86	Guatemala	53.7
87	Armenia	53.7
88	Indonesia	53.5
89	Sri Lanka	47.2
90	China	45.9
91	Honduras	40.9
92	Peru	39.7
93	Philippines	35.1
94	Nicaragua	33.0
95	Bolivia	31.9
96	Egypt	29.4
97	Paraguay	24.7
98	Kenya	21.3
99	India	20.9
100	Lesotho	19.4
101	Guyana	18.6
102	Mozambique	18.4
103	Vietnam	17.8
104	Tajikistan	17.0
105	Zimbabwe	16.0
106	Senegal	14.8
107	Mongolia	14.8
108	Uganda	7.0
109	Malawi	6.1
110	Syria	5.6
111	Pakistan	5.1
112	Cambodia	4.7
113	Kyrgyz Republic	4.5
114	Burkina Faso	3.9
115	Libya	3.3
116	Nepal	3.2
117	Benin	2.3
118	Madagascar	1.7
119	Mali	1.7
120	Bangladesh	1.5
121	Cameroon	1.4
122	Nigeria	0.2
123	Ethiopia	0.1
124	Algeria	0.0
124	Burundi	0.0
124	Chad	0.0
124	Gambia, The	0.0
124	Mauritania	0.0
124	Suriname	0.0
124	Tanzania	0.0
n/a	Brunei	n/a
n/a	Côte d'Ivoire	n/a
n/a	Ghana	n/a

SOURCE: Visa International

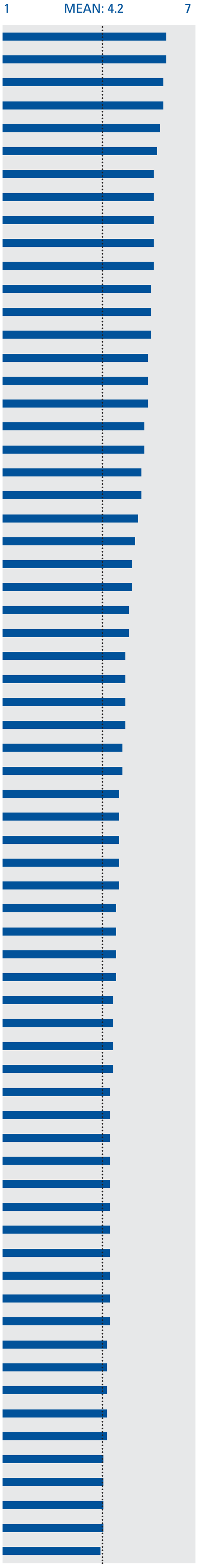
9th pillar

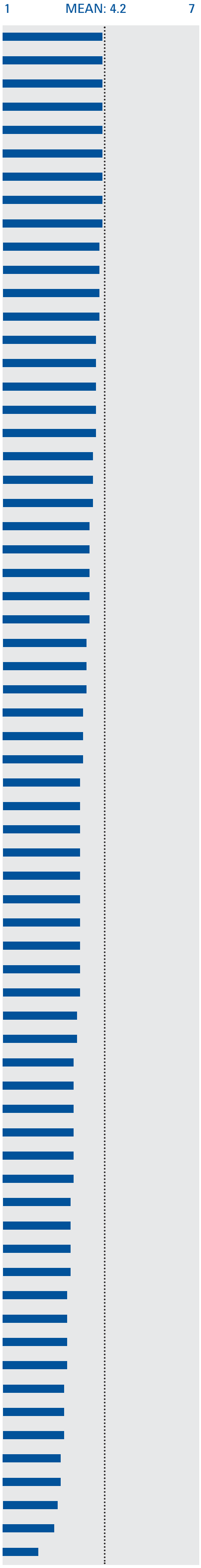
ICT infrastructure

9.01 Extent of business Internet use

Companies within your country use the Internet extensively for buying and selling goods, and for interacting with customers and suppliers (1 = strongly disagree, 7 = strongly agree)

RANK	COUNTRY/ECONOMY	SCORE
1	United States	6.2
2	Sweden	6.2
3	Korea, Rep.	6.1
4	Estonia	6.1
5	Denmark	6.0
6	Germany	5.9
7	Switzerland	5.8
8	Canada	5.8
9	United Kingdom	5.8
10	Finland	5.8
11	Japan	5.8
12	Taiwan, China	5.7
13	Austria	5.7
14	Norway	5.7
15	Netherlands	5.6
16	Iceland	5.6
17	Israel	5.6
18	Singapore	5.5
19	Czech Republic	5.5
20	Hong Kong SAR	5.4
21	Australia	5.4
22	Puerto Rico	5.3
23	France	5.2
24	Belgium	5.1
25	Luxembourg	5.1
26	New Zealand	5.0
27	Chile	5.0
28	Brazil	4.9
29	Malaysia	4.9
30	Poland	4.9
31	Ireland	4.9
32	Guatemala	4.8
33	Lithuania	4.8
34	Malta	4.7
35	Slovenia	4.7
36	Egypt	4.7
37	United Arab Emirates	4.7
38	Portugal	4.7
39	Jordan	4.6
40	Jamaica	4.6
41	India	4.6
42	Cyprus	4.6
43	Senegal	4.5
44	Ukraine	4.5
45	Latvia	4.5
46	Turkey	4.5
47	South Africa	4.4
48	Saudi Arabia	4.4
49	Honduras	4.4
50	Sri Lanka	4.4
51	Brunei	4.4
52	Russian Federation	4.4
53	Qatar	4.4
54	China	4.4
55	Barbados	4.4
56	Thailand	4.4
57	Panama	4.4
58	Slovak Republic	4.3
59	Hungary	4.3
60	Bahrain	4.3
61	Colombia	4.3
62	Spain	4.3
63	Kuwait	4.2
64	Nigeria	4.2
65	Mauritius	4.2
66	Croatia	4.2
67	Oman	4.1
68	Azerbaijan	4.1
69	Romania	4.1
70	Tunisia	4.1
71	Argentina	4.1
72	Costa Rica	4.1
73	Indonesia	4.1
74	Venezuela	4.1
75	Philippines	4.1
76	Dominican Republic	4.1
77	El Salvador	4.0
78	Gambia, The	4.0
79	Mexico	4.0
80	Uruguay	4.0
81	Bulgaria	3.9
82	Guyana	3.9
83	Italy	3.9
84	Moldova	3.9
85	Zambia	3.9
86	Mali	3.8
87	Kazakhstan	3.8
88	Kenya	3.8
89	Pakistan	3.7
90	Peru	3.7
91	Bosnia and Herzegovina	3.7
92	Trinidad and Tobago	3.7
93	Tajikistan	3.7
94	Mongolia	3.6
95	Namibia	3.6
96	Vietnam	3.6
97	Greece	3.5
98	Georgia	3.5
99	Benin	3.5
100	Ghana	3.4
101	Kyrgyz Republic	3.4
102	Tanzania	3.4
103	Botswana	3.4
104	Côte d'Ivoire	3.4
105	Uganda	3.4
106	Nicaragua	3.4
107	Malawi	3.4
108	Cambodia	3.4
109	Serbia	3.4
110	Morocco	3.3
111	Suriname	3.3
112	Lesotho	3.2
113	Mauritania	3.2
114	Albania	3.2
115	Burundi	3.2
116	Armenia	3.2
117	Ethiopia	3.2
118	Ecuador	3.1
119	Madagascar	3.1
120	Burkina Faso	3.1
121	Nepal	3.1
122	Bangladesh	3.0
123	Syria	3.0
124	Montenegro	3.0
125	Libya	3.0
126	Mozambique	2.9
127	Paraguay	2.9
128	Bolivia	2.9
129	Macedonia, FYR	2.8
130	Cameroon	2.8
131	Zimbabwe	2.7
132	Chad	2.6
133	Algeria	2.1





SOURCE: World Economic Forum, Executive Opinion Survey 2007, 2008

9.02 Internet users (hard data)

Internet users per 100 population | 2007 or most recent year available

RANK	COUNTRY/ECONOMY	HARD DATA
1	Netherlands	91.4
2	Norway	80.9
3	New Zealand	80.4
4	Canada	76.8
5	Sweden	76.8
6	Luxembourg	73.9
7	Korea, Rep.	73.8
8	United States	71.9
9	Singapore	70.0
10	Japan	68.9
11	Finland	68.2
12	Iceland	67.2
13	United Kingdom	66.2
14	Slovenia	65.0
15	Taiwan, China	64.4
16	Denmark	64.3
17	Switzerland	61.6
18	Malaysia	59.7
19	Barbados	59.5
20	Estonia	58.4
21	Romania	56.0
22	Jamaica	55.3
23	Hong Kong SAR	55.0
24	Italy	54.4
25	Australia	54.2
26	United Arab Emirates	52.5
27	Latvia	51.7
28	Germany	51.5
29	Austria	51.2
30	Belgium	49.9
31	France	49.6
32	Montenegro	46.8
33	Spain	44.5
34	Cyprus	44.5
35	Croatia	43.8
36	Slovak Republic	43.6
37	Czech Republic	43.2
38	Poland	42.0
39	Hungary	41.9
40	Qatar	41.8
41	Brunei	41.7
42	Ireland	39.7
43	Lithuania	39.3
44	Malta	38.9
45	Costa Rica	33.6
46	Chile	33.5
47	Portugal	33.4
48	Bahrain	33.2
49	Trinidad and Tobago	32.3
50	Kuwait	31.6
51	Uruguay	29.0
52	Israel	28.9
53	Peru	27.4
54	Mauritius	26.9
55	Bosnia and Herzegovina	26.8
56	Colombia	26.2
57	Brazil	26.1
58	Guyana	25.7
59	Saudi Arabia	25.1
60	Puerto Rico	25.1
61	Bulgaria	24.9
62	Argentina	23.5
63	Greece	22.8
64	Ukraine	21.6
65	Mexico	21.4
66	Morocco	21.1
67	Russian Federation	21.1
68	Thailand	21.0
69	Venezuela	20.7
70	Vietnam	20.5
71	Macedonia, FYR	20.4
72	Jordan	19.0
73	Moldova	18.5
74	Turkey	17.7
75	Syria	17.4
76	Dominican Republic	17.2
77	Tunisia	16.7
78	China	15.8
79	Panama	15.7
80	Serbia	15.2
81	Albania	15.0
82	Kyrgyz Republic	14.1
83	Oman	13.1
84	Kazakhstan	12.3
85	Azerbaijan	12.2
86	Mongolia	11.6
87	Ecuador	11.5
88	Egypt	11.4
89	El Salvador	11.1
90	Pakistan	10.7
91	Bolivia	10.5
92	Algeria	10.3
93	Guatemala	10.2
94	Zimbabwe	10.1
95	Suriname	9.6
96	Georgia	8.2
97	South Africa	8.2
98	Kenya	8.0
99	India	6.9
100	Nigeria	6.8
101	Senegal	6.6
102	Uganda	6.5
103	Philippines	6.0
104	Gambia, The	5.9
105	Armenia	5.7
106	Indonesia	5.6
107	Namibia	4.9
108	Honduras	4.7
109	Paraguay	4.6
110	Libya	4.4
111	Botswana	4.3
112	Zambia	4.2
113	Sri Lanka	4.0
114	Lesotho	3.5
115	Ghana	2.8
116	Nicaragua	2.8
117	Cameroon	2.2
118	Benin	1.7
119	Côte d'Ivoire	1.6
120	Nepal	1.2
121	Malawi	1.0
122	Tanzania	1.0
123	Mauritania	1.0
124	Mozambique	0.9
125	Mali	0.8
126	Burundi	0.8
127	Chad	0.6
128	Burkina Faso	0.6
129	Madagascar	0.6
130	Cambodia	0.5
131	Ethiopia	0.4
132	Bangladesh	0.3
133	Tajikistan	0.3

SOURCE: International Telecommunication Union, *World Telecommunication Indicators 2008*

9.03 Telephone lines (hard data)

Telephone lines per 100 population | 2007 or most recent year available

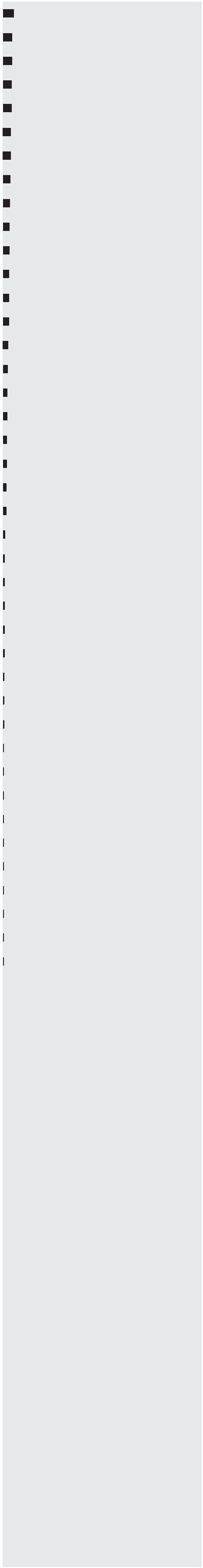
RANK	COUNTRY/ECONOMY	HARD DATA
1	Switzerland	66.8
2	Germany	65.1
3	Taiwan, China	62.5
4	Iceland	62.0
5	Sweden	60.4
6	Montenegro	58.9
7	France	56.5
8	Canada	55.5
9	United Kingdom	55.4
10	Greece	55.0
11	Hong Kong SAR	53.8
12	United States	53.4
13	Luxembourg	53.2
14	Denmark	51.9
15	Barbados	50.1
16	Korea, Rep.	49.6
17	Ireland	49.1
18	Malta	48.7
19	Australia	47.1
20	Italy	46.3
21	Cyprus	44.9
22	Netherlands	44.7
23	Belgium	44.6
24	Israel	43.9
25	Slovenia	42.8
26	Norway	42.3
27	Spain	42.0
28	Singapore	41.9
29	New Zealand	40.8
30	Austria	40.4
31	Croatia	40.1
32	Japan	40.0
33	Portugal	39.0
34	Estonia	37.1
35	Finland	33.0
36	Vietnam	32.7
37	Hungary	32.4
38	Costa Rica	32.2
39	United Arab Emirates	31.6
40	Russian Federation	31.0
41	Serbia	30.4
42	Bulgaria	30.1
43	Uruguay	28.9
44	Moldova	28.5
45	Mauritius	28.5
46	Latvia	28.3
47	Czech Republic	28.3
48	Qatar	28.2
49	Ukraine	27.8
50	China	27.5
51	Poland	27.1
52	Bosnia and Herzegovina	27.1
53	Bahrain	26.3
54	Puerto Rico	26.2
55	Turkey	24.6
56	Trinidad and Tobago	24.3
57	Argentina	24.0
58	Lithuania	23.6
59	Macedonia, FYR	22.7
60	Slovak Republic	21.3
61	Brunei	21.0
62	Kazakhstan	21.0
63	Brazil	20.5
64	Chile	20.3
65	Romania	20.1
66	Armenia	19.7
67	Kuwait	18.7
68	Mexico	18.5
69	Venezuela	18.4
70	Suriname	18.0
71	Syria	17.3
72	Colombia	17.2
73	Malaysia	16.4
74	Saudi Arabia	16.2
75	El Salvador	15.8
76	Egypt	14.9
77	Azerbaijan	14.8
78	Panama	14.7
79	Guyana	14.7
80	Libya	14.6
81	Sri Lanka	14.2
82	Ecuador	13.5
83	Jamaica	12.8
84	Georgia	12.5
85	Tunisia	12.3
86	Albania	11.3
87	Thailand	11.0
88	Guatemala	10.5
89	Oman	10.3
90	Jordan	9.9
91	Honduras	9.7
92	Peru	9.6
93	South Africa	9.6
94	Dominican Republic	9.3
95	Kyrgyz Republic	9.1
96	Algeria	9.1
97	Indonesia	7.7
98	Morocco	7.7
99	Paraguay	7.4
100	Botswana	7.3
101	Bolivia	7.1
102	Namibia	6.7
103	Mongolia	5.9
104	Gambia, The	4.5
105	Nicaragua	4.4
106	Tajikistan	4.3
107	Philippines	4.3
108	India	3.4
109	Pakistan	3.0
110	Lesotho	3.0
111	Nepal	2.7
112	Zimbabwe	2.6
113	Senegal	2.2
114	Ghana	1.6
115	Côte d'Ivoire	1.4
116	Malawi	1.3
117	Benin	1.2
118	Mauritania	1.1
119	Nigeria	1.1
120	Ethiopia	1.1
121	Cameroon	0.8
122	Zambia	0.8
123	Bangladesh	0.7
124	Kenya	0.7
125	Burkina Faso	0.7
126	Madagascar	0.7
127	Mali	0.6
128	Tanzania	0.6
129	Uganda	0.5
130	Burundi	0.4
131	Mozambique	0.3
132	Cambodia	0.3
133	Chad	0.1

SOURCE: International Telecommunication Union, *World Telecommunication Indicators 2008*

9.04 Broadband Internet subscribers (hard data)

Broadband Internet subscribers per 100 population | 2007 or most recent year available

RANK	COUNTRY/ECONOMY	HARD DATA
1	Denmark	36.3
2	Iceland	34.8
3	Sweden	34.3
4	Netherlands	33.5
5	Switzerland	32.1
6	Finland	30.6
7	Norway	30.6
8	Korea, Rep.	29.4
9	Canada	27.6
10	Hong Kong SAR	26.1
11	Belgium	26.0
12	United Kingdom	25.6
13	France	25.2
14	Luxembourg	24.2
15	Germany	24.0
16	Australia	23.3
17	New Zealand	22.5
18	Japan	22.5
19	Israel	22.1
20	United States	21.5
21	Taiwan, China	20.9
22	Estonia	20.8
23	Barbados	20.5
24	Singapore	19.9
25	Austria	18.9
26	Italy	18.4
27	Spain	17.9
28	Slovenia	17.2
29	Ireland	16.4
30	Czech Republic	16.0
31	Portugal	15.1
32	Malta	15.1
33	Hungary	15.1
34	Lithuania	15.0
35	Cyprus	11.7
36	Romania	9.9
37	Greece	9.1
38	Croatia	8.4
39	Qatar	8.4
40	Slovak Republic	8.2
41	Poland	7.6
42	Bulgaria	7.4
43	Chile	7.2
44	Argentina	6.6
45	Latvia	6.4
46	Turkey	5.8
47	Bahrain	5.2
48	United Arab Emirates	5.2
49	Malaysia	5.2
50	China	5.0
51	Uruguay	4.9
52	Macedonia, FYR	4.9
53	Montenegro	4.3
54	Mexico	4.3
55	Brazil	4.2
56	Serbia	3.3
57	Venezuela	3.1
58	Puerto Rico	3.0
59	Jamaica	3.0
60	Costa Rica	2.9
61	Brunei	2.9
62	Russian Federation	2.8
63	Colombia	2.6
64	Kazakhstan	2.5
65	Saudi Arabia	2.4
66	Ecuador	2.4
67	Bosnia and Herzegovina	2.2
68	Peru	2.0
69	Mauritius	1.7
70	Ukraine	1.7
71	Dominican Republic	1.6
72	Jordan	1.6
73	Morocco	1.5
74	Vietnam	1.5
75	Thailand	1.4
76	El Salvador	1.3
77	Moldova	1.2
78	Trinidad and Tobago	1.2
79	Tunisia	1.1
80	Philippines	1.1
81	Georgia	1.1
82	Panama	1.0
83	Kuwait	0.9
84	Algeria	0.8
85	Paraguay	0.8
86	Oman	0.7
87	South Africa	0.7
88	Suriname	0.6
89	Egypt	0.6
90	Bolivia	0.4
91	Nicaragua	0.3
92	Sri Lanka	0.3
93	Senegal	0.3
94	India	0.3
95	Guyana	0.3
96	Guatemala	0.2
97	Botswana	0.2
98	Libya	0.2
99	Mongolia	0.1
100	Zimbabwe	0.1
101	Indonesia	0.1
102	Pakistan	0.1
103	Armenia	0.1
104	Ghana	0.1
105	Cambodia	0.1
106	Kyrgyz Republic	0.1
107	Côte d'Ivoire	0.1
108	Kenya	0.1
109	Nepal	0.0
110	Syria	0.0
111	Mauritania	0.0
112	Azerbaijan	0.0
113	Mali	0.0
114	Benin	0.0
115	Zambia	0.0
116	Burkina Faso	0.0
117	Namibia	0.0
118	Malawi	0.0
119	Albania	0.0
120	Uganda	0.0
121	Gambia, The	0.0
122	Cameroon	0.0
123	Lesotho	0.0
124	Tajikistan	0.0
125	Nigeria	0.0
126	Ethiopia	0.0
127	Bangladesh	0.0
127	Burundi	0.0
127	Chad	0.0
127	Honduras	0.0
127	Madagascar	0.0
127	Mozambique	0.0
127	Tanzania	0.0

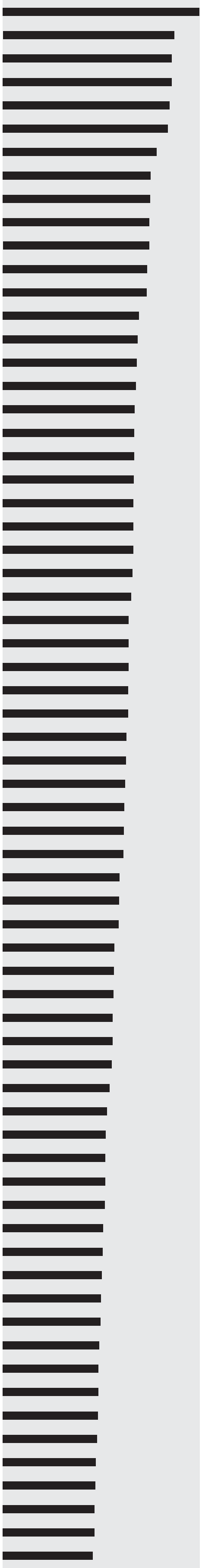


SOURCE: International Telecommunication Union, *World Telecommunication Indicators 2008*

9.05 Mobile telephone subscribers (hard data)

Mobile telephone subscribers per 100 population | 2007 or most recent year available

RANK	COUNTRY/ECONOMY	HARD DATA
1	United Arab Emirates	173.4
2	Qatar	150.4
3	Estonia	148.4
4	Bahrain	148.3
5	Hong Kong SAR	146.4
6	Lithuania	144.9
7	Italy	135.1
8	Bulgaria	129.6
9	Luxembourg	129.5
10	Israel	128.5
11	Czech Republic	128.4
12	Singapore	126.7
13	Portugal	126.3
14	Ukraine	119.6
15	United Kingdom	118.5
16	Germany	117.6
17	Austria	116.8
18	Cyprus	115.6
19	Iceland	115.4
20	Finland	115.2
21	Ireland	114.9
22	Saudi Arabia	114.7
23	Denmark	114.7
24	Russian Federation	114.6
25	Sweden	113.7
26	Slovak Republic	112.6
27	Croatia	110.5
28	Norway	110.5
29	Greece	110.3
30	Spain	110.2
31	Hungary	110.0
32	Poland	108.7
33	Switzerland	108.2
34	Montenegro	107.3
35	Romania	106.7
36	Taiwan, China	106.1
37	Netherlands	105.9
38	Australia	102.5
39	Argentina	102.2
40	New Zealand	101.6
41	Belgium	97.8
42	Latvia	97.4
43	Kuwait	97.3
44	Slovenia	96.3
45	Oman	96.3
46	Macedonia, FYR	95.5
47	Jamaica	93.7
48	Malta	91.4
49	Korea, Rep.	90.2
50	Uruguay	90.0
51	France	89.8
52	El Salvador	89.5
53	Malaysia	87.9
54	Barbados	87.8
55	South Africa	87.1
56	Venezuela	86.1
57	Serbia	85.7
58	Puerto Rico	84.8
59	Chile	83.9
60	Japan	83.9
61	United States	83.5
62	Turkey	82.8
63	Kazakhstan	81.6
64	Algeria	81.4
65	Jordan	80.5
66	Thailand	80.4
67	Brunei	78.9
68	Guatemala	76.0
69	Tunisia	75.9
70	Botswana	75.8
71	Ecuador	75.6
72	Trinidad and Tobago	75.6
73	Mauritius	74.2
74	Colombia	73.5
75	Libya	73.0
76	Albania	72.1
77	Panama	71.5
78	Suriname	70.8
79	Paraguay	70.7
80	Morocco	64.1
81	Mexico	64.1
82	Brazil	63.1
83	Bosnia and Herzegovina	62.3
84	Canada	61.7
85	Philippines	58.9
86	Dominican Republic	56.5
87	Peru	55.3
88	Azerbaijan	50.8
89	Moldova	49.6
90	Pakistan	48.1
91	Gambia, The	46.6
92	Mauritania	41.6
93	Sri Lanka	41.4
94	China	41.2
95	Kyrgyz Republic	40.5
96	Egypt	39.8
97	Namibia	38.6
98	Georgia	38.4
99	Nicaragua	37.9
100	Guyana	37.5
101	Côte d'Ivoire	36.6
102	Indonesia	35.3
103	Bolivia	34.2
104	Costa Rica	33.8
105	Syria	33.6
106	Senegal	33.3
107	Ghana	32.4
108	Kenya	30.5
109	Honduras	30.4
110	Mongolia	28.9
111	Nigeria	27.3
112	Vietnam	27.2
113	Cameroon	24.5
114	Lesotho	22.7
115	Zambia	22.1
116	Bangladesh	21.7
117	Benin	21.0
118	Mali	20.5
119	Tanzania	20.4
120	India	20.0
121	Cambodia	17.9
122	Mozambique	15.4
123	Uganda	13.6
124	Madagascar	11.3
125	Burkina Faso	10.9
126	Armenia	10.5
127	Zimbabwe	9.2
128	Chad	8.5
129	Malawi	7.5
130	Nepal	4.2
131	Tajikistan	4.1
132	Burundi	2.9
133	Ethiopia	1.5



SOURCE: International Telecommunication Union, *World Telecommunication Indicators 2008*

10th pillar

Price competitiveness in the T&T industry

10.01 Ticket taxes and airport charges (hard data)

Index of relative cost of access (ticket taxes and airport charges) to international air transport services | (0 = highest cost, 100 = lowest cost) | 2008

RANK	COUNTRY/ECONOMY	HARD DATA
1	Libya	100.0
2	Lesotho	97.3
3	Brunei	97.2
4	Kuwait	97.2
5	Puerto Rico	97.0
6	Luxembourg	96.8
7	Bahrain	96.8
8	United Arab Emirates	96.8
9	India	95.8
10	Qatar	95.3
11	Oman	94.6
12	Indonesia	94.4
13	Malaysia	93.8
14	Taiwan, China	93.6
15	Botswana	93.4
16	Saudi Arabia	92.2
17	Philippines	91.2
18	Panama	90.8
19	Norway	90.4
20	Vietnam	90.3
21	China	89.9
22	Turkey	89.3
23	Mozambique	89.1
24	Guyana	89.0
25	Ethiopia	87.9
26	Sweden	87.4
27	Germany	87.3
28	Mongolia	87.1
29	Thailand	87.0
30	Spain	86.9
31	Korea, Rep.	86.9
32	Uruguay	86.3
33	Zambia	86.2
34	Egypt	85.7
35	Hong Kong SAR	85.7
36	Singapore	85.6
37	Italy	85.2
38	Estonia	84.7
39	Guatemala	84.5
40	Nepal	84.3
41	Barbados	84.2
42	Malawi	84.0
43	Ireland	83.9
44	Finland	83.9
45	Syria[1]	83.7
46	Iceland	83.6
47	Latvia	83.5
48	Chile	83.5
49	Bulgaria	83.4
50	Burundi	83.4
51	Tunisia	82.9
52	Japan	82.6
53	Paraguay	82.6
54	Hungary	82.6
55	Cyprus	82.3
56	Trinidad and Tobago	81.7
57	Belgium	81.5
58	Israel	81.5
59	Costa Rica	81.1
60	Algeria	81.0
61	Nicaragua	80.9
62	Argentina	80.9
63	Zimbabwe	80.8
64	Honduras	80.5
65	Armenia	80.3
66	New Zealand	80.2
67	Russian Federation	80.0
68	Cambodia	80.0
69	Portugal	79.4
70	South Africa	79.3
71	Tanzania	79.2
72	Serbia	79.1
73	Nigeria	78.4
74	Uganda	78.0
75	Croatia	78.0
76	Kyrgyz Republic	77.9
77	Pakistan	77.9
78	Poland	77.7
79	Jamaica	77.2
80	Czech Republic	76.9
81	Austria	76.9
82	Macedonia, FYR	76.8
83	Mauritius	76.4
84	Morocco	76.1
85	Ukraine	75.8
86	Peru	75.7
87	Bangladesh	74.9
88	Brazil	74.9
89	Malta	74.4
90	Namibia	74.3
91	Netherlands	74.3
92	Madagascar	74.3
93	Bolivia	74.0
94	Switzerland	74.0
95	Georgia	73.6
96	Denmark	73.4
97	Romania	72.7
98	Canada	71.5
99	Greece	71.2
100	Gambia, The	71.1
101	Ghana	71.1
102	Lithuania	70.6
103	Slovenia	70.6
104	Jordan	69.7
105	Suriname[1]	69.4
106	Slovak Republic	68.9
107	El Salvador	68.7
108	Moldova	68.4
109	Tajikistan	67.7
110	Bosnia and Herzegovina	67.6
111	Kenya	67.4
112	Benin	66.4
113	Mauritania	66.3
114	France	65.5
115	Azerbaijan	63.7
116	Albania	63.2
117	Colombia	60.9
118	Sri Lanka	59.7
119	Australia	58.0
120	Venezuela	57.0
121	United Kingdom	53.5
122	Dominican Republic	52.8
123	Ecuador	51.9
124	Cameroon	51.8
125	Burkina Faso	51.7
126	Mexico	50.9
127	United States	47.7
128	Mali	46.5
129	Côte d'Ivoire	29.9
130	Senegal	24.8
131	Chad	0.0
n/a	Kazakhstan	n/a
n/a	Montenegro	n/a

SOURCE: International Air Transport Association, SRS Analyser

[1] 2007

10.02 Purchasing power parity (hard data)

Ratio of purchasing power parity (PPP) conversion factor to official exchange rate | 2007

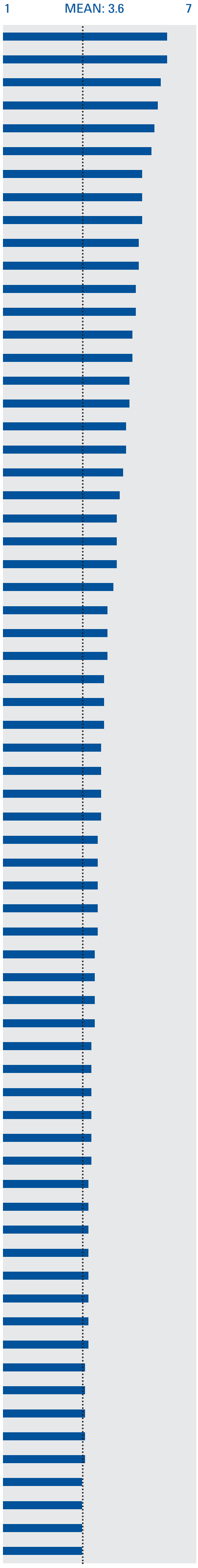
RANK	COUNTRY/ECONOMY	HARD DATA
1	Gambia, The	0.3
2	Tajikistan	0.3
3	Ethiopia	0.3
4	Egypt	0.3
5	Vietnam	0.3
6	Bolivia	0.3
7	Tanzania	0.3
8	Cambodia	0.3
9	Burundi	0.3
10	Kyrgyz Republic	0.3
11	Malawi	0.3
12	Bangladesh	0.3
13	Pakistan	0.4
14	Nepal	0.4
15	India	0.4
16	Sri Lanka	0.4
17	Uganda	0.4
18	Nicaragua	0.4
19	Madagascar	0.4
20	Burkina Faso	0.4
21	Syria	0.4
22	Macedonia, FYR	0.4
23	Ukraine	0.4
24	Mauritania	0.4
25	Chad	0.4
26	Mauritius	0.4
27	Ecuador	0.4
28	Paraguay	0.5
29	Moldova	0.5
30	Honduras	0.5
31	Tunisia	0.5
32	Mozambique	0.5
33	Bulgaria	0.5
34	Benin	0.5
35	Mongolia	0.5
36	China	0.5
37	Botswana	0.5
38	Guyana	0.5
39	Thailand	0.5
40	Philippines	0.5
41	Ghana	0.5
42	Azerbaijan	0.5
43	Georgia	0.5
44	Peru	0.5
45	Argentina	0.5
46	Malaysia	0.5
47	El Salvador	0.5
48	Kenya	0.5
49	Mali	0.5
50	Indonesia	0.5
51	Algeria	0.5
52	Lesotho	0.5
53	Panama	0.5
54	Albania	0.5
55	Cameroon	0.5
56	Costa Rica	0.5
57	Armenia	0.5
58	Colombia	0.5
59	Bosnia and Herzegovina	0.5
60	Senegal	0.5
61	Serbia	0.5
62	Guatemala	0.5
63	Taiwan, China	0.6
64	Dominican Republic	0.6
65	Jordan	0.6
66	Nigeria	0.6
67	Montenegro	0.6
68	Morocco	0.6
69	South Africa	0.6
70	Jamaica	0.6
71	Côte d'Ivoire	0.6
72	Russian Federation	0.6
73	Uruguay	0.6
74	Kazakhstan	0.6
75	Suriname	0.6
76	Brunei	0.6
77	Namibia	0.6
78	Trinidad and Tobago	0.6
79	Lithuania	0.6
80	Oman	0.7
81	Libya	0.7
82	Mexico	0.7
83	Barbados	0.7
84	Romania	0.7
85	Latvia	0.7
86	Venezuela	0.7
87	Slovak Republic	0.7
88	Saudi Arabia	0.7
89	Poland	0.7
90	Singapore	0.7
91	Czech Republic	0.7
92	Zambia	0.7
93	Hong Kong SAR	0.7
94	Bahrain	0.7
95	Chile	0.7
96	Turkey	0.7
97	Brazil	0.7
98	Hungary	0.7
99	Croatia	0.7
100	Estonia	0.7
101	Korea, Rep.	0.8
102	Slovenia	0.8
103	Kuwait	0.8
104	Israel	0.9
105	Qatar	0.9
106	Portugal	1.0
107	Greece	1.0
108	Cyprus	1.0
109	Puerto Rico	1.0
109	United States	1.0
111	Spain	1.0
112	Japan	1.0
113	United Arab Emirates	1.1
114	Australia	1.1
115	Canada	1.1
116	New Zealand	1.2
117	Italy	1.2
118	Austria	1.2
119	Germany	1.2
120	Netherlands	1.2
121	Belgium	1.2
122	Zimbabwe	1.2
123	France	1.2
124	Luxembourg	1.3
125	United Kingdom	1.3
126	Sweden	1.3
127	Finland	1.4
128	Ireland	1.4
129	Switzerland	1.4
130	Norway	1.5
131	Denmark	1.6
132	Iceland	1.7
133	Malta	1.8

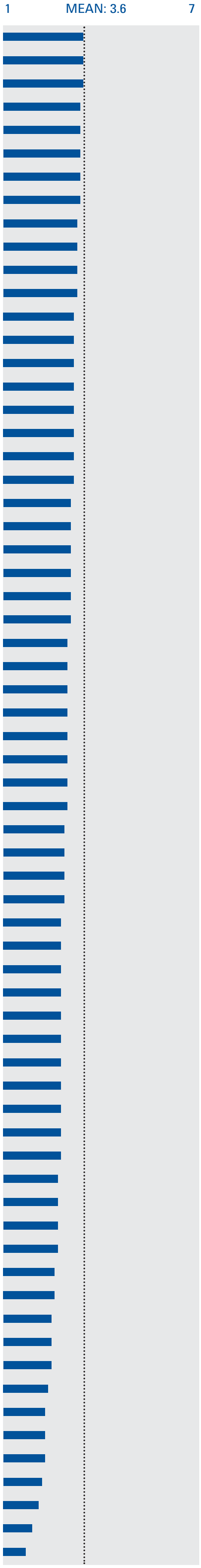
SOURCE: The World Bank, *World Development Indicators 2008*; International Monetary Fund, *International Financial Statistics* (October 2008) and *World Economic Outlook* (October 2008); Federal Reserve Bank of New York, *Federal Reserve Statistical Release* (January 2008); national sources; authors' calculations

10.03 Extent and effect of taxation

The level of taxes in your country (1 = significantly limits the incentives to work or invest, 7 = has little impact on the incentives to work or invest)

RANK	COUNTRY/ECONOMY	SCORE
1	United Arab Emirates	6.2
2	Bahrain	6.2
3	Hong Kong SAR	6.0
4	Qatar	5.9
5	Singapore	5.8
6	Kuwait	5.7
7	Oman	5.4
8	Mauritius	5.4
9	Saudi Arabia	5.4
10	Brunei	5.3
11	Iceland	5.3
12	Luxembourg	5.2
13	Estonia	5.2
14	Cyprus	5.1
15	Switzerland	5.1
16	Indonesia	5.0
17	Slovak Republic	5.0
18	Ireland	4.9
19	Botswana	4.9
20	Malaysia	4.8
21	Tunisia	4.7
22	Paraguay	4.6
23	Trinidad and Tobago	4.6
24	Georgia	4.6
25	South Africa	4.5
26	Taiwan, China	4.3
27	Thailand	4.3
28	India	4.3
29	Syria	4.2
30	Montenegro	4.2
31	Korea, Rep.	4.2
32	El Salvador	4.1
33	Barbados	4.1
34	Egypt	4.1
35	Gambia, The	4.1
36	China	4.0
37	Libya	4.0
38	Azerbaijan	4.0
39	Nigeria	4.0
40	Guatemala	4.0
41	Honduras	3.9
42	Pakistan	3.9
43	Mauritania	3.9
44	Cambodia	3.9
45	Chile	3.8
46	Costa Rica	3.8
47	Macedonia, FYR	3.8
48	Malta	3.8
49	Nepal	3.8
50	Bangladesh	3.8
51	Ghana	3.7
52	Namibia	3.7
53	Vietnam	3.7
54	Ethiopia	3.7
55	Norway	3.7
56	United States	3.7
57	Mali	3.7
58	Algeria	3.7
59	Sri Lanka	3.6
60	Netherlands	3.6
61	Czech Republic	3.6
62	Australia	3.6
63	Lithuania	3.6
64	Mongolia	3.5
65	Philippines	3.5
66	Morocco	3.5
67	Austria	3.5
68	Albania	3.5
69	Latvia	3.5
70	Madagascar	3.5
71	Tanzania	3.4
72	Greece	3.4
73	Serbia	3.4
74	Peru	3.4
75	Spain	3.4
76	Panama	3.3
77	Israel	3.3
78	Bulgaria	3.3
79	Jordan	3.3
80	United Kingdom	3.2
81	Burkina Faso	3.2
82	Kazakhstan	3.2
83	Armenia	3.2
84	Côte d'Ivoire	3.2
85	Nicaragua	3.2
86	Senegal	3.2
87	Canada	3.2
88	Mexico	3.1
89	New Zealand	3.1
90	Mozambique	3.1
91	Ecuador	3.1
92	Japan	3.1
93	Russian Federation	3.1
94	Portugal	3.0
95	Slovenia	3.0
96	Croatia	3.0
97	Malawi	3.0
98	France	3.0
99	Moldova	3.0
100	Tajikistan	3.0
101	Lesotho	3.0
102	Puerto Rico	2.9
103	Colombia	2.9
104	Germany	2.9
105	Venezuela	2.9
106	Kyrgyz Republic	2.8
107	Suriname	2.8
108	Bolivia	2.8
109	Romania	2.8
110	Kenya	2.8
111	Bosnia and Herzegovina	2.8
112	Zambia	2.8
113	Finland	2.8
114	Burundi	2.8
115	Cameroon	2.8
116	Uganda	2.8
117	Chad	2.7
118	Uruguay	2.7
119	Benin	2.7
120	Jamaica	2.7
121	Guyana	2.6
122	Turkey	2.6
123	Denmark	2.5
124	Dominican Republic	2.5
125	Sweden	2.5
126	Ukraine	2.4
127	Poland	2.3
128	Italy	2.3
129	Argentina	2.3
130	Zimbabwe	2.2
131	Belgium	2.1
132	Hungary	1.9
133	Brazil	1.7





SOURCE: World Economic Forum, Executive Opinion Survey 2007, 2008

10.04 Fuel price levels (hard data)

Retail diesel fuel prices (US cents per liter) | 2006

RANK	COUNTRY/ECONOMY	HARD DATA
1	Venezuela	2.0
2	Saudi Arabia	7.0
3	Egypt	12.0
4	Bahrain	13.0
4	Libya	13.0
4	Syria	13.0
7	Algeria	19.0
7	Qatar	19.0
9	Kuwait	21.0
10	Trinidad and Tobago	24.0
11	Moldova	31.0
12	Ecuador	39.0
12	Oman	39.0
14	Malaysia	40.0
15	Azerbaijan	41.0
16	Indonesia	44.0
17	Bangladesh	45.0
17	Jordan	45.0
17	Kazakhstan	45.0
20	Bolivia	47.0
21	Argentina	48.0
22	Mexico	52.0
23	United Arab Emirates	53.0
23	Vietnam	53.0
25	Kyrgyz Republic	54.0
26	Sri Lanka	55.0
27	Mauritius[1]	56.0
28	Colombia	57.0
28	Tunisia	57.0
30	Nicaragua	58.0
31	Panama	60.0
32	China	61.0
32	Guyana	61.0
34	Ethiopia	62.0
35	Singapore	63.0
36	Guatemala	64.0
36	Pakistan	64.0
38	Zimbabwe[1]	65.0
39	Thailand	65.0
40	Nigeria	66.0
40	Russian Federation	66.0
42	Costa Rica	67.0
42	Philippines	67.0
44	United States	69.0
45	New Zealand	70.0
46	Taiwan, China	71.0
47	Honduras	73.0
47	Nepal	73.0
49	Botswana	74.0
49	Tajikistan	74.0
51	Dominican Republic	75.0
51	India	75.0
51	Jamaica	75.0
54	Armenia	77.0
54	Paraguay	77.0
56	Cambodia	78.0
56	Canada	78.0
56	Puerto Rico	78.0
59	Barbados	79.0
60	El Salvador	80.0
61	Benin	81.0
62	Brazil	84.0
62	Ghana	84.0
62	Mauritania	84.0
62	South Africa	84.0
66	Chile	86.0
66	Peru	86.0
68	Mongolia	87.0
68	Morocco	87.0
68	Namibia	87.0
68	Ukraine	87.0
72	Lesotho	88.0
73	Georgia	89.0
74	Japan	90.0
75	Australia	94.0
75	Uruguay	94.0
77	Kenya	98.0
78	Tanzania	99.0
79	Madagascar	100.0
80	Gambia, The	101.0
80	Uganda	101.0
82	Mali	104.0
83	Côte d'Ivoire	106.0
83	Hong Kong SAR	106.0
83	Mozambique	106.0
86	Cameroon	107.0
87	Bulgaria	108.0
88	Lithuania	109.0
88	Macedonia, FYR	109.0
88	Senegal	109.0
91	Portugal	110.0
91	Spain	110.0
93	Burkina Faso	112.0
93	Malawi	112.0
95	Latvia	115.0
96	Greece	119.0
97	Chad	120.0
97	Cyprus	120.0
99	Slovenia	121.0
100	Burundi	122.0
100	Croatia	122.0
100	Estonia	122.0
100	Zambia	122.0
104	Bosnia and Herzegovina	124.0
104	Romania	124.0
106	Austria	126.0
106	Finland	126.0
106	Malta	126.0
109	Israel	127.0
109	Montenegro	127.0
111	Albania	129.0
111	Czech Republic	129.0
113	Poland	130.0
114	Hungary	131.0
115	Netherlands	132.0
116	France	133.0
116	Korea, Rep.	133.0
118	Belgium	134.0
119	Ireland	135.0
120	Luxembourg	136.0
120	Switzerland	136.0
122	Germany	138.0
123	Slovak Republic	143.0
124	Sweden	144.0
125	Denmark	145.0
126	Italy	149.0
127	Turkey	162.0
128	Norway	166.0
129	United Kingdom	173.0
130	Iceland	178.0
n/a	Brunei	n/a
n/a	Serbia	n/a
n/a	Suriname	n/a

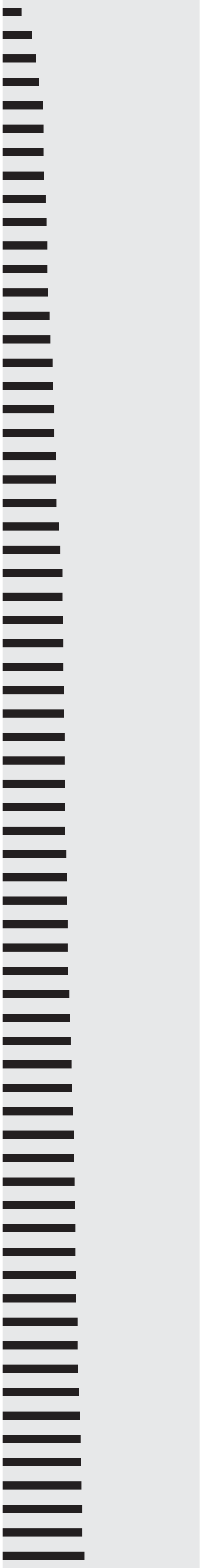
SOURCE: The World Bank, *World Development Indicators 2008*

[1] 2004

10.05 Hotel price index (hard data)

Average room rates calculated for first-class branded hotels for calendar year in US$ | 2007

RANK	COUNTRY/ECONOMY	HARD DATA
1	Gambia, The[1]	34.2
2	Nepal	52.7
3	Bolivia[1]	60.8
4	Egypt	65.4
5	Sri Lanka[1]	73.3
6	Malaysia	74.2
7	Indonesia	74.3
8	El Salvador[1]	74.8
9	Ghana[1]	77.8
10	Moldova[1]	79.1
11	Tunisia	80.8
12	Philippines	81.0
13	Ecuador	82.8
14	Uruguay	85.2
15	Zambia[1]	86.8
16	Kenya[1]	90.2
17	Syria	91.0
18	Peru	93.5
19	Cambodia	93.7
20	Guatemala	96.6
21	Dominican Republic	96.8
22	Honduras	97.6
23	Nicaragua[1]	101.9
24	Slovenia[1]	104.8
25	Uganda[1]	108.0
26	Chile	108.1
27	Thailand	108.8
28	Bangladesh	109.6
29	Jordan	110.2
30	Mozambique[1]	111.0
31	Vietnam	111.7
32	Lithuania	112.0
33	Colombia	112.5
34	Trinidad and Tobago[1]	113.2
35	Tanzania[1]	113.3
36	Madagascar[1]	113.3
37	Ethiopia	115.6
38	South Africa	115.8
39	New Zealand	116.2
40	Malta	118.1
41	China	118.1
42	Jamaica[1]	118.5
43	Mexico	120.6
44	Paraguay[1]	122.5
45	Latvia	123.6
46	Guyana[1]	124.5
47	Poland	125.6
48	Albania[1]	127.0
49	Brazil	129.1
50	Argentina	129.1
51	Japan	130.2
52	Venezuela	131.2
53	Portugal	131.6
54	Germany	131.8
55	Estonia	132.5
56	Panama	132.7
57	Turkey	135.6
58	Chad[1]	135.7
59	Senegal[1]	136.3
60	Canada	137.9
61	Israel	139.5
62	United States	141.0
63	Spain	142.1
64	Armenia[1]	142.6
65	Cameroon[1]	144.2
66	Finland	144.5
67	Cyprus	148.2



RANK	COUNTRY/ECONOMY	HARD DATA
68	Hungary	149.4
69	Austria	149.7
70	Ireland	150.2
71	Australia	153.0
72	Hong Kong SAR	153.0
73	Singapore	153.4
74	Luxembourg	154.6
75	Croatia[1]	154.8
76	Pakistan[1]	155.0
77	Sweden	156.4
78	Belgium	157.1
79	Denmark	157.3
80	Taiwan, China	161.0
81	Saudi Arabia	161.7
82	Bulgaria	162.3
83	Greece	162.4
84	Czech Republic	164.7
85	Slovak Republic	167.4
86	Morocco	170.1
87	Mauritius	171.2
88	Norway	171.8
89	Costa Rica	173.1
90	Romania	174.7
91	Oman	174.9
92	Algeria	175.4
93	Netherlands	178.9
94	Iceland	179.7
95	Bahrain	184.9
96	Azerbaijan	194.3
97	Korea, Rep.	194.6
98	Kyrgyz Republic[1]	194.9
99	Nigeria[1]	196.2
100	Switzerland	200.2
101	United Kingdom	202.0
102	Italy	203.4
103	Puerto Rico	203.7
104	United Arab Emirates	203.8
105	Kuwait	206.8
106	Georgia[1]	211.2
107	India	215.5
108	Kazakhstan	217.8
109	Barbados	233.8
110	Qatar	241.4
111	Serbia[1]	243.1
112	Libya[1]	256.4
113	France	277.3
114	Ukraine	286.5
115	Russian Federation	333.3
n/a	Benin	n/a
n/a	Bosnia and Herzegovina	n/a
n/a	Botswana	n/a
n/a	Brunei	n/a
n/a	Burkina Faso	n/a
n/a	Burundi	n/a
n/a	Côte d'Ivoire	n/a
n/a	Lesotho	n/a
n/a	Macedonia, FYR	n/a
n/a	Malawi	n/a
n/a	Mali	n/a
n/a	Mauritania	n/a
n/a	Mongolia	n/a
n/a	Montenegro	n/a
n/a	Namibia	n/a
n/a	Suriname	n/a
n/a	Tajikistan	n/a
n/a	Zimbabwe	n/a

SOURCE: Deloitte

[1] 2006

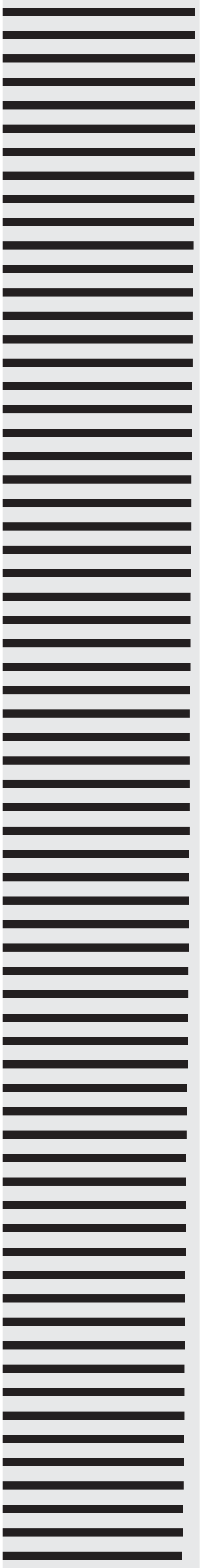
11th pillar

Human resources

11.01 Primary education enrollment (hard data)

Net primary education enrollment rate | 2006 or most recent year available

RANK	COUNTRY/ECONOMY	HARD DATA
1	Malaysia	99.9
2	Japan	99.8
3	Uruguay	99.7
4	Spain	99.7
5	China	99.5
6	Canada	99.5
7	Greece	99.5
8	New Zealand	99.3
9	Taiwan, China	99.3
10	Cyprus	99.2
11	Costa Rica	98.8
12	Italy	98.7
13	France	98.6
14	Argentina	98.5
15	Panama	98.5
16	United Kingdom	98.4
17	Germany	98.3
18	Bahrain	98.2
19	Norway	98.1
20	Netherlands	98.1
21	Portugal	97.9
22	Tanzania	97.8
23	Mexico	97.7
24	Korea, Rep.	97.6
25	Iceland	97.5
26	Puerto Rico	97.4
27	Austria	97.4
28	Belgium	97.4
29	Tajikistan	97.3
30	Montenegro	97.2
31	Guyana	97.0
32	Luxembourg	97.0
33	Israel	96.9
34	Serbia	96.9
35	Finland	96.8
36	Ecuador	96.8
37	Sri Lanka	96.7
38	Singapore	96.6
39	Australia	96.4
40	Suriname	96.4
41	Honduras	96.4
42	Peru	96.3
43	Barbados	96.2
44	Poland	96.1
45	Tunisia	96.1
46	Madagascar	95.9
47	Denmark	95.6
48	Indonesia	95.5
49	Slovenia	95.4
50	Algeria	95.2
51	Mauritius	95.0
52	Sweden	94.9
53	Bolivia	94.9
54	Ireland	94.9
55	Vietnam	94.5
56	Syria	94.5
57	Guatemala	94.4
58	Brazil	94.4
59	Paraguay	94.3
60	Estonia	94.2
61	Thailand	94.2
62	El Salvador	94.0
63	Egypt	93.9
64	Brunei	93.8
65	Albania	93.6
66	Qatar	93.5
67	Romania	92.8
68	Saudi Arabia	92.8
69	Czech Republic	92.5
70	Bulgaria	92.3
71	Slovak Republic	92.0
72	Zambia	92.0
73	Macedonia, FYR	91.8
74	United States	91.6
75	Mongolia	91.4
76	Philippines	91.4
77	Turkey	91.4
78	Malta	91.2
79	Malawi	91.1
80	Venezuela	91.1
81	Russian Federation	90.9
82	Croatia	90.4
83	Jamaica	90.3
84	Ukraine	90.2
85	Kazakhstan	90.1
86	Latvia	90.1
87	Cambodia	89.9
88	Nicaragua	89.8
89	Jordan	89.6
90	Lithuania	89.4
91	Georgia	89.1
92	Switzerland	89.0
93	Bangladesh	88.9
94	India	88.7
95	Colombia	88.5
96	Hungary	88.4
97	South Africa	88.3
98	Morocco	88.1
99	Chile	88.0
100	United Arab Emirates	88.0
101	Hong Kong SAR	87.9
102	Zimbabwe	87.8
103	Moldova	87.8
104	Kyrgyz Republic	85.9
105	Azerbaijan	84.8
106	Trinidad and Tobago	84.6
107	Botswana	84.0
108	Kuwait	83.5
109	Armenia	82.2
110	Benin	80.2
111	Mauritania	79.5
112	Nepal	79.2
113	Dominican Republic	77.5
114	Namibia	76.4
115	Mozambique	76.0
116	Kenya	75.5
117	Burundi	74.6
118	Oman	74.1
119	Lesotho	72.4
120	Senegal	70.7
121	Pakistan	65.6
122	Ethiopia	65.2
123	Ghana	63.6
124	Nigeria	63.4
125	Gambia, The	61.8
126	Mali	60.5
127	Chad	60.2
128	Côte d'Ivoire	54.9
129	Burkina Faso	46.9
n/a	Bosnia and Herzegovina	n/a
n/a	Cameroon	n/a
n/a	Libya	n/a
n/a	Uganda	n/a



SOURCE: UNESCO, Institute for Statistics (June 2008); The World Bank, *World Development Indicators 2008*; national sources

11.02 Secondary education enrollment (hard data)

Gross secondary education enrollment rate | 2006 or most recent year available

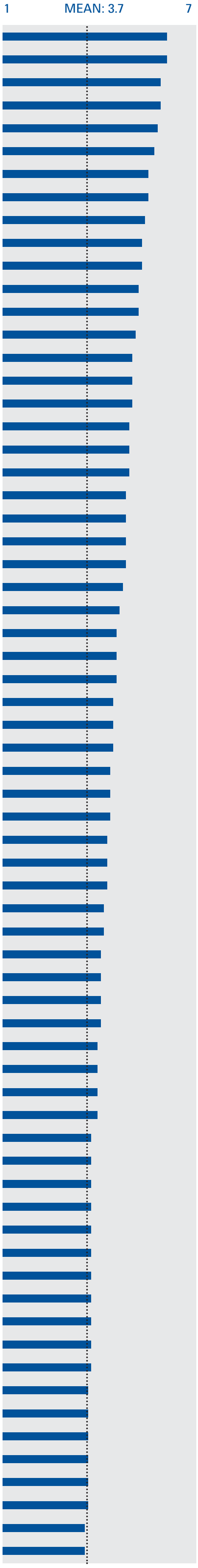
RANK	COUNTRY/ECONOMY	HARD DATA
1	Australia	150.3
2	New Zealand	119.6
3	Denmark	119.5
4	Spain	118.7
5	Netherlands	118.2
6	Canada	117.3
7	France	113.9
8	Norway	112.8
9	Finland	111.6
10	Ireland	111.6
11	Iceland	109.9
12	Belgium	109.7
13	Bulgaria	106.1
14	Brazil	105.5
15	Guyana	104.6
16	Sweden	103.2
17	Greece	103.1
18	Barbados	102.2
19	Bahrain	102.1
20	Austria	101.9
21	Singapore	101.7
22	Japan	101.4
23	Qatar	101.2
24	Uruguay	101.0
25	Germany	100.7
26	Italy	100.3
27	Estonia	99.9
28	Poland	99.6
29	Malta	99.5
30	Lithuania	98.8
31	Taiwan, China	98.7
32	Latvia	98.5
33	Brunei	98.2
34	United Kingdom	97.9
35	Korea, Rep.	97.5
36	Portugal	97.5
37	Cyprus	96.6
38	Luxembourg	96.3
39	Montenegro	96.3
39	Saudi Arabia	96.3
41	Czech Republic	96.2
42	Hungary	95.5
43	Slovenia	95.5
44	South Africa	94.7
45	Puerto Rico	94.7
46	Peru	94.5
47	Slovak Republic	94.3
48	United States	93.9
49	Libya	93.5
50	Ukraine	93.4
51	Kazakhstan	92.8
52	Switzerland	92.7
53	Israel	92.2
54	Chile	91.2
55	Croatia	91.1
56	United Arab Emirates	90.0
57	Armenia	89.5
58	Mongolia	89.5
59	Moldova	89.3
60	Kuwait	88.7
61	Jordan	88.7
62	Oman	88.6
63	Mauritius	88.4
64	Serbia	87.9
65	Egypt	87.8
66	Sri Lanka	87.2
67	Mexico	87.2
68	Jamaica	87.1
69	Kyrgyz Republic	86.4
70	Romania	85.9
71	Costa Rica	85.8
72	Hong Kong SAR	85.3
73	Georgia	84.9
74	Tunisia	84.9
75	Argentina	84.4
76	Russian Federation	84.0
77	Macedonia, FYR	84.0
78	Algeria	83.2
79	Philippines	83.1
80	Azerbaijan	83.0
81	Tajikistan	82.6
82	Bolivia	82.5
83	Colombia	82.2
84	Turkey	78.6
85	Thailand	78.1
86	Suriname	77.5
87	Venezuela	77.0
88	Albania	76.7
89	Botswana	76.5
90	Trinidad and Tobago	76.3
91	Honduras	75.6
92	China	75.5
93	Panama	69.9
94	Syria	69.6
95	Malaysia	69.1
96	Dominican Republic	69.1
97	Ecuador	67.5
98	Paraguay	66.5
99	Nicaragua	65.8
100	Vietnam	64.5
101	El Salvador	64.5
102	Indonesia	64.2
103	Namibia	56.9
104	India	54.0
105	Guatemala	53.5
106	Morocco	52.4
107	Kenya	50.3
108	Ghana	49.3
109	Bosnia and Herzegovina	45.0
110	Gambia, The	44.9
111	Bangladesh	43.8
112	Nepal	43.2
113	Zimbabwe	40.0
114	Cambodia	38.2
115	Lesotho	37.0
116	Benin	32.5
117	Nigeria	32.4
118	Ethiopia	30.5
119	Zambia	30.4
120	Pakistan	30.0
121	Malawi	29.1
122	Mali	28.3
123	Mauritania	25.0
124	Côte d'Ivoire	24.6
125	Madagascar	23.8
126	Senegal	23.8
127	Cameroon	23.7
128	Uganda	18.3
129	Mozambique	15.5
130	Chad	15.2
131	Burkina Faso	14.5
132	Burundi	14.3
133	Tanzania	6.1

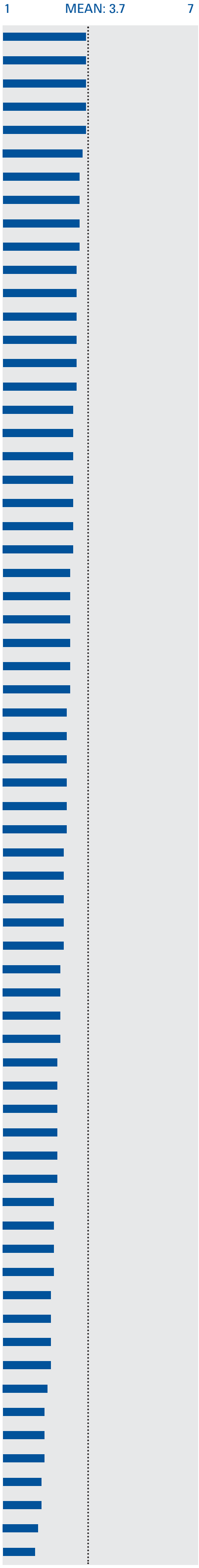
SOURCE: UNESCO, Institute for Statistics (June 2008); The World Bank, *World Development Indicators 2008*; national sources

11.03 Quality of the educational system

The educational system in your country (1 = does not meet the needs of a competitive economy, 7 = meets the needs of a competitive economy)

RANK	COUNTRY/ECONOMY	SCORE
1	Finland	6.2
2	Singapore	6.2
3	Switzerland	6.0
4	Belgium	6.0
5	Iceland	5.9
6	Denmark	5.8
7	Ireland	5.6
8	Canada	5.6
9	Australia	5.5
10	Cyprus	5.4
11	Norway	5.4
12	Sweden	5.3
13	Netherlands	5.3
14	Austria	5.2
15	Barbados	5.1
16	Qatar	5.1
17	Tunisia	5.1
18	Malaysia	5.0
19	United States	5.0
20	France	5.0
21	New Zealand	4.9
22	Hong Kong SAR	4.9
23	Germany	4.9
24	Malta	4.9
25	Taiwan, China	4.8
26	Czech Republic	4.7
27	Jordan	4.6
28	United Kingdom	4.6
29	Korea, Rep.	4.6
30	Estonia	4.5
31	Japan	4.5
32	Costa Rica	4.5
33	Kenya	4.4
34	Gambia, The	4.4
35	Slovenia	4.4
36	Russian Federation	4.3
37	India	4.3
38	United Arab Emirates	4.3
39	Indonesia	4.2
40	Ukraine	4.2
41	Luxembourg	4.1
42	Trinidad and Tobago	4.1
43	Zimbabwe	4.1
44	Sri Lanka	4.1
45	Israel	4.0
46	Philippines	4.0
47	Mauritius	4.0
48	Brunei	4.0
49	Serbia	3.8
50	Botswana	3.8
51	Oman	3.8
52	Spain	3.8
53	Thailand	3.8
54	Poland	3.8
55	China	3.8
56	Bahrain	3.8
57	Montenegro	3.8
58	Puerto Rico	3.8
59	Senegal	3.8
60	Nigeria	3.7
61	Colombia	3.7
62	Uruguay	3.7
63	Latvia	3.7
64	Lithuania	3.7
65	Macedonia, FYR	3.7
66	Croatia	3.6
67	Guyana	3.6
68	Kazakhstan	3.6
69	Zambia	3.6
70	Saudi Arabia	3.6
71	Romania	3.6
72	Malawi	3.6
73	Portugal	3.5
74	Kyrgyz Republic	3.4
75	Ghana	3.4
76	Slovak Republic	3.4
77	Turkey	3.4
78	Azerbaijan	3.3
79	Lesotho	3.3
80	Albania	3.3
81	Bulgaria	3.3
82	Greece	3.3
83	Georgia	3.3
84	Italy	3.2
85	Cameroon	3.2
86	Chile	3.2
87	Hungary	3.2
88	Ethiopia	3.2
89	Benin	3.2
90	Moldova	3.2
91	Syria	3.1
92	Bosnia and Herzegovina	3.1
93	Uganda	3.1
94	Kuwait	3.1
95	Tanzania	3.1
96	Tajikistan	3.1
97	Nepal	3.0
98	Armenia	3.0
99	Jamaica	3.0
100	Morocco	3.0
101	Suriname	3.0
102	El Salvador	3.0
103	Madagascar	2.9
104	Pakistan	2.9
105	Argentina	2.9
106	Côte d'Ivoire	2.9
107	Bangladesh	2.9
108	Panama	2.8
109	Mexico	2.8
110	South Africa	2.8
111	Venezuela	2.8
112	Cambodia	2.7
113	Burkina Faso	2.7
114	Namibia	2.7
115	Mozambique	2.7
116	Honduras	2.7
117	Brazil	2.7
118	Guatemala	2.6
119	Mali	2.6
120	Vietnam	2.6
121	Libya	2.6
122	Algeria	2.5
123	Burundi	2.5
124	Mongolia	2.5
125	Ecuador	2.5
126	Egypt	2.4
127	Chad	2.3
128	Mauritania	2.3
129	Nicaragua	2.3
130	Dominican Republic	2.2
131	Bolivia	2.2
132	Peru	2.1
133	Paraguay	2.0



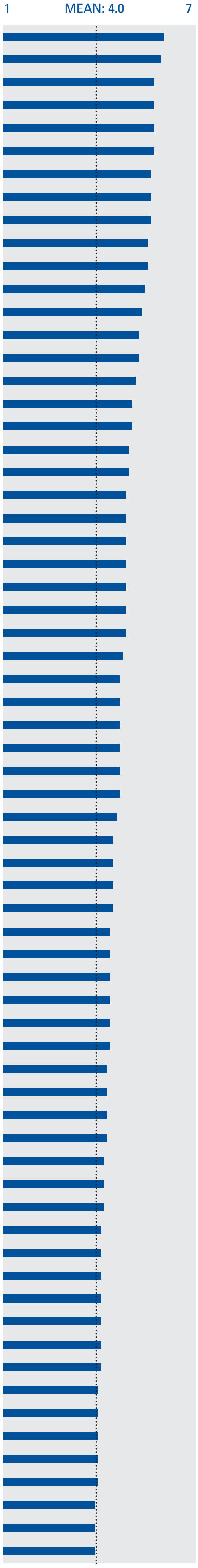


SOURCE: World Economic Forum, Executive Opinion Survey 2007, 2008

11.04 Local availability of specialized research and training services

In your country, specialized research and training services are (1 = not available, 7 = available from world-class local institutions)

RANK	COUNTRY/ECONOMY	SCORE
1	United States	6.1
2	Switzerland	6.0
3	Netherlands	5.8
4	Finland	5.8
5	Germany	5.8
6	Denmark	5.8
7	Sweden	5.7
8	France	5.7
9	United Kingdom	5.7
10	Canada	5.6
11	Belgium	5.6
12	Japan	5.5
13	Singapore	5.4
14	Israel	5.3
15	Australia	5.3
16	Austria	5.2
17	Iceland	5.1
18	Norway	5.1
19	Taiwan, China	5.0
20	Korea, Rep.	5.0
21	Estonia	4.9
22	Ireland	4.9
23	Czech Republic	4.9
24	New Zealand	4.9
25	Hong Kong SAR	4.9
26	Brazil	4.9
27	Malaysia	4.9
28	Tunisia	4.8
29	South Africa	4.7
30	Senegal	4.7
31	Puerto Rico	4.7
32	India	4.7
33	Slovenia	4.7
34	Portugal	4.7
35	Italy	4.6
36	Kenya	4.5
37	Spain	4.5
38	Luxembourg	4.5
39	China	4.5
40	Costa Rica	4.4
41	Sri Lanka	4.4
42	Saudi Arabia	4.4
43	Indonesia	4.4
44	United Arab Emirates	4.4
45	Qatar	4.4
46	Chile	4.3
47	Croatia	4.3
48	Guatemala	4.3
49	Cyprus	4.3
50	Poland	4.2
51	Philippines	4.2
52	Nigeria	4.2
53	Jordan	4.1
54	Barbados	4.1
55	Mexico	4.1
56	Lithuania	4.1
57	Jamaica	4.1
58	Thailand	4.1
59	Slovak Republic	4.1
60	Argentina	4.0
61	Colombia	4.0
62	Uganda	4.0
63	Romania	4.0
64	Kuwait	4.0
65	Panama	3.9
66	Ukraine	3.9
67	Azerbaijan	3.9
68	Turkey	3.9
69	Morocco	3.8
70	Bulgaria	3.8
71	Russian Federation	3.8
72	Bahrain	3.8
73	Hungary	3.8
74	Serbia	3.8
75	Latvia	3.8
76	Vietnam	3.8
77	Uruguay	3.8
78	Montenegro	3.8
79	Oman	3.8
80	Burkina Faso	3.7
81	El Salvador	3.7
82	Kazakhstan	3.7
83	Honduras	3.7
84	Côte d'Ivoire	3.7
85	Benin	3.7
86	Peru	3.7
87	Greece	3.7
88	Mali	3.6
89	Dominican Republic	3.6
90	Mauritius	3.6
91	Trinidad and Tobago	3.6
92	Egypt	3.6
93	Gambia, The	3.5
94	Cameroon	3.5
95	Syria	3.5
96	Malta	3.5
97	Zambia	3.5
98	Madagascar	3.4
99	Macedonia, FYR	3.4
100	Venezuela	3.4
101	Ghana	3.4
102	Malawi	3.3
103	Pakistan	3.3
104	Botswana	3.3
105	Brunei	3.2
106	Libya	3.2
107	Tanzania	3.2
108	Mongolia	3.2
109	Lesotho	3.2
110	Ecuador	3.2
111	Algeria	3.2
112	Nicaragua	3.1
113	Burundi	3.1
114	Ethiopia	3.1
115	Cambodia	3.1
116	Mozambique	3.1
117	Georgia	3.0
118	Bolivia	3.0
119	Nepal	2.9
120	Guyana	2.9
121	Zimbabwe	2.9
122	Moldova	2.9
123	Suriname	2.9
124	Albania	2.8
125	Armenia	2.8
126	Bosnia and Herzegovina	2.8
127	Chad	2.8
128	Kyrgyz Republic	2.8
129	Mauritania	2.8
130	Bangladesh	2.8
131	Paraguay	2.7
132	Tajikistan	2.7
133	Namibia	2.6

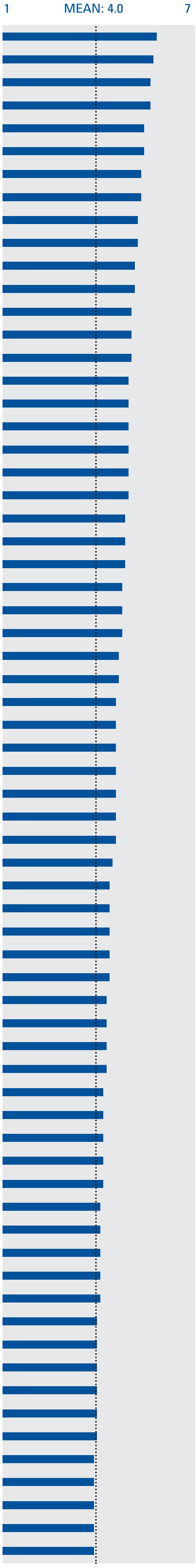


SOURCE: World Economic Forum, Executive Opinion Survey 2007, 2008

11.05 Extent of staff training

The general approach of companies in your country to human resources is (1 = to invest little in training and employee development, 7 = to invest heavily to attract, train, and retain employees)

RANK	COUNTRY/ECONOMY	SCORE
1	Denmark	5.9
2	Switzerland	5.8
3	Singapore	5.7
4	Sweden	5.7
5	Japan	5.5
6	United States	5.5
7	Norway	5.4
8	Netherlands	5.4
9	Iceland	5.3
10	Korea, Rep.	5.3
11	Finland	5.2
12	Germany	5.2
13	Belgium	5.1
14	Luxembourg	5.1
15	South Africa	5.1
16	Taiwan, China	5.0
17	Australia	5.0
18	Austria	5.0
19	Canada	5.0
20	Malaysia	5.0
21	Ireland	5.0
22	United Kingdom	4.9
23	Puerto Rico	4.9
24	France	4.9
25	Costa Rica	4.8
26	New Zealand	4.8
27	Tunisia	4.8
28	Czech Republic	4.7
29	Hong Kong SAR	4.7
30	Philippines	4.6
31	Indonesia	4.6
32	Israel	4.6
33	Qatar	4.6
34	India	4.6
35	Estonia	4.6
36	Mauritius	4.6
37	United Arab Emirates	4.5
38	Lithuania	4.4
39	Azerbaijan	4.4
40	Slovak Republic	4.4
41	Barbados	4.4
42	China	4.4
43	Slovenia	4.3
44	Namibia	4.3
45	Malta	4.3
46	Brazil	4.3
47	Kenya	4.2
48	Chile	4.2
49	Oman	4.2
50	Jordan	4.2
51	Thailand	4.2
52	Saudi Arabia	4.1
53	Gambia, The	4.1
54	Romania	4.1
55	Guatemala	4.1
56	Cyprus	4.1
57	Kuwait	4.0
58	Panama	4.0
59	Sri Lanka	4.0
60	Bahrain	4.0
61	Brunei	4.0
62	Latvia	4.0
63	Spain	3.9
64	Croatia	3.9
65	Trinidad and Tobago	3.9
66	El Salvador	3.9
67	Zimbabwe	3.9
68	Côte d'Ivoire	3.9
69	Botswana	3.8
70	Portugal	3.8
71	Albania	3.8
72	Vietnam	3.8
73	Georgia	3.8
74	Mozambique	3.8
75	Lesotho	3.8
76	Malawi	3.8
77	Honduras	3.8
78	Dominican Republic	3.7
79	Morocco	3.7
80	Russian Federation	3.7
81	Greece	3.7
82	Guyana	3.7
83	Macedonia, FYR	3.7
84	Montenegro	3.7
85	Jamaica	3.7
86	Argentina	3.6
87	Mexico	3.6
88	Nigeria	3.6
89	Poland	3.6
90	Turkey	3.6
91	Colombia	3.6
92	Kazakhstan	3.6
93	Peru	3.5
94	Venezuela	3.5
95	Tanzania	3.5
96	Egypt	3.5
97	Madagascar	3.5
98	Uruguay	3.5
99	Ukraine	3.5
100	Uganda	3.4
101	Hungary	3.4
102	Kyrgyz Republic	3.4
103	Ghana	3.4
104	Cameroon	3.4
105	Tajikistan	3.4
106	Zambia	3.4
107	Cambodia	3.3
108	Suriname	3.3
109	Italy	3.3
110	Senegal	3.3
111	Moldova	3.3
112	Syria	3.3
113	Mongolia	3.3
114	Libya	3.3
115	Nicaragua	3.3
116	Armenia	3.1
117	Bulgaria	3.1
118	Pakistan	3.0
119	Ecuador	3.0
120	Serbia	2.9
121	Benin	2.9
122	Mali	2.9
123	Bolivia	2.8
124	Burkina Faso	2.8
125	Bosnia and Herzegovina	2.8
126	Ethiopia	2.8
127	Algeria	2.8
128	Paraguay	2.7
129	Mauritania	2.7
130	Burundi	2.6
131	Nepal	2.6
132	Bangladesh	2.6
133	Chad	2.5

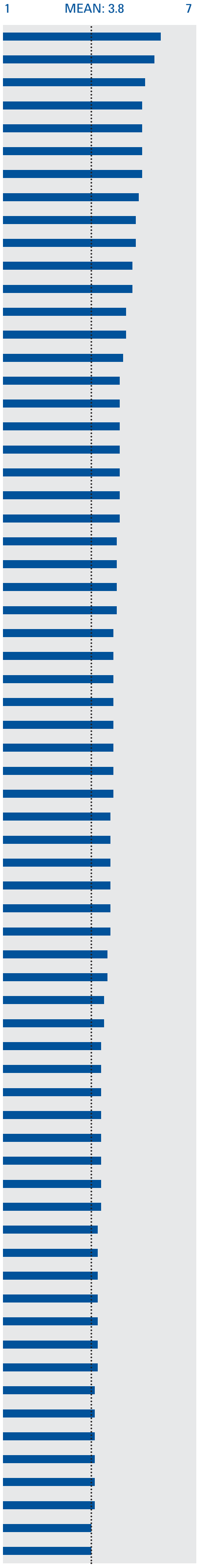


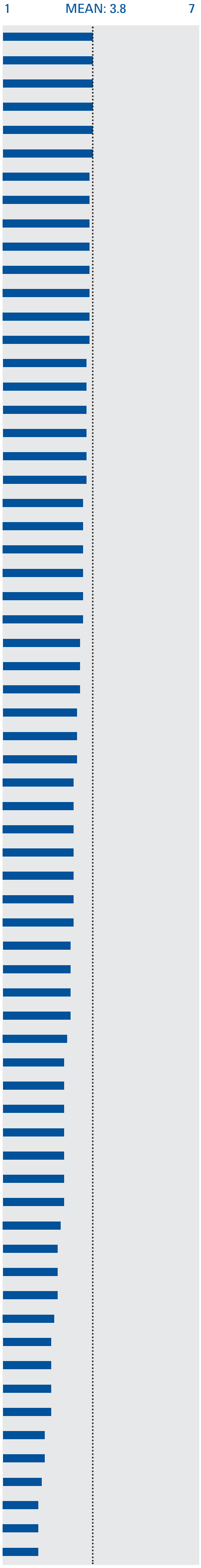
SOURCE: World Economic Forum, Executive Opinion Survey 2007, 2008

11.06 Hiring and firing practices

The hiring and firing of workers is (1 = impeded by regulations, 7 = flexibly determined by employers)

RANK	COUNTRY/ECONOMY	SCORE
1	Denmark	6.0
2	Singapore	5.8
3	Switzerland	5.5
4	Kazakhstan	5.4
5	Georgia	5.4
6	United States	5.4
7	Hong Kong SAR	5.4
8	Iceland	5.3
9	Azerbaijan	5.2
10	Nigeria	5.2
11	Ukraine	5.1
12	Uganda	5.1
13	Tajikistan	4.9
14	Kyrgyz Republic	4.9
15	Costa Rica	4.8
16	Armenia	4.7
17	United Arab Emirates	4.7
18	Mongolia	4.7
19	Indonesia	4.7
20	Bosnia and Herzegovina	4.7
21	Kenya	4.7
22	Gambia, The	4.7
23	Russian Federation	4.6
24	Nicaragua	4.6
25	Taiwan, China	4.6
26	El Salvador	4.6
27	Albania	4.5
28	Zambia	4.5
29	Bangladesh	4.5
30	Canada	4.5
31	Pakistan	4.5
32	Serbia	4.5
33	Moldova	4.5
34	Guyana	4.5
35	Bulgaria	4.4
36	Israel	4.4
37	Dominican Republic	4.4
38	Mali	4.4
39	Thailand	4.4
40	Vietnam	4.4
41	Guatemala	4.3
42	Malaysia	4.3
43	Senegal	4.2
44	Saudi Arabia	4.2
45	Korea, Rep.	4.1
46	Australia	4.1
47	Cambodia	4.1
48	Qatar	4.1
49	Tunisia	4.1
50	Kuwait	4.1
51	Turkey	4.1
52	Madagascar	4.1
53	China	4.0
54	Honduras	4.0
55	Burkina Faso	4.0
56	Cameroon	4.0
57	Benin	4.0
58	Oman	4.0
59	Romania	4.0
60	Morocco	3.9
61	United Kingdom	3.9
62	Ethiopia	3.9
63	Mauritania	3.9
64	Lesotho	3.9
65	Slovak Republic	3.9
66	Jamaica	3.8
67	Hungary	3.8
68	Croatia	3.8
69	Côte d'Ivoire	3.8
70	Barbados	3.8
71	Poland	3.8
72	Bahrain	3.8
73	Colombia	3.8
74	Chile	3.7
75	Sri Lanka	3.7
76	Estonia	3.7
77	Burundi	3.7
78	Macedonia, FYR	3.7
79	Brunei	3.7
80	Trinidad and Tobago	3.7
81	Malawi	3.7
82	Cyprus	3.6
83	Latvia	3.6
84	Ireland	3.6
85	Botswana	3.6
86	Austria	3.6
87	Montenegro	3.6
88	Chad	3.5
89	Finland	3.5
90	Mexico	3.5
91	Egypt	3.5
92	Ghana	3.5
93	Peru	3.5
94	Lithuania	3.4
95	Puerto Rico	3.4
96	Mozambique	3.4
97	Tanzania	3.3
98	Paraguay	3.3
99	Czech Republic	3.3
100	Philippines	3.2
101	Sweden	3.2
102	New Zealand	3.2
103	India	3.2
104	Panama	3.2
105	Syria	3.2
106	Nepal	3.2
107	Malta	3.1
108	Jordan	3.1
109	Mauritius	3.1
110	Japan	3.1
111	Brazil	3.0
112	Luxembourg	2.9
113	Greece	2.9
114	Uruguay	2.9
115	Spain	2.9
116	Belgium	2.9
117	Slovenia	2.9
118	Algeria	2.9
119	Argentina	2.8
120	Libya	2.7
121	Norway	2.7
122	Ecuador	2.7
123	Netherlands	2.6
124	Portugal	2.5
125	France	2.5
126	Bolivia	2.5
127	Zimbabwe	2.5
128	South Africa	2.3
129	Germany	2.3
130	Namibia	2.2
131	Suriname	2.1
132	Venezuela	2.1
133	Italy	2.1

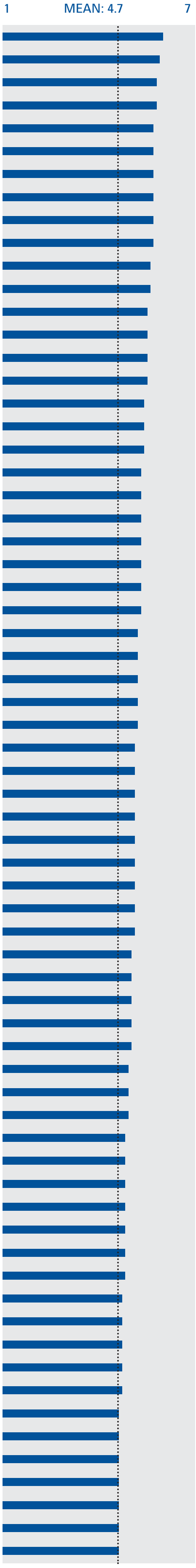




SOURCE: World Economic Forum, Executive Opinion Survey 2007, 2008

11.07 Ease of hiring foreign labor

Labor regulation in your country (1 = prevents your company from employing foreign labor, 7 = does not prevent your company from employing foreign labor)



RANK	COUNTRY/ECONOMY	SCORE
1	United Arab Emirates	6.1
2	Albania	6.0
3	Ireland	5.9
4	Singapore	5.9
5	Nicaragua	5.8
6	Georgia	5.8
7	Dominican Republic	5.8
8	Armenia	5.8
9	Kuwait	5.8
10	Portugal	5.8
11	Iceland	5.7
12	Guyana	5.7
13	Luxembourg	5.6
14	Italy	5.6
15	Uganda	5.6
16	El Salvador	5.6
17	Qatar	5.5
18	United Kingdom	5.5
19	Switzerland	5.5
20	Peru	5.4
21	Nigeria	5.4
22	Paraguay	5.4
23	Finland	5.4
24	Hong Kong SAR	5.4
25	Mauritius	5.4
26	Gambia, The	5.4
27	Uruguay	5.3
28	Benin	5.3
29	Senegal	5.3
30	Indonesia	5.3
31	Moldova	5.3
32	Honduras	5.2
33	Colombia	5.2
34	Czech Republic	5.2
35	Slovak Republic	5.2
36	Burkina Faso	5.2
37	Spain	5.2
38	Denmark	5.2
39	Egypt	5.2
40	Norway	5.2
41	Azerbaijan	5.1
42	Guatemala	5.1
43	Chile	5.1
44	China	5.1
45	Cameroon	5.1
46	Montenegro	5.0
47	United States	5.0
48	Argentina	5.0
49	Netherlands	4.9
50	Malaysia	4.9
51	Mali	4.9
52	Costa Rica	4.9
53	Sweden	4.9
54	Tajikistan	4.9
55	Korea, Rep.	4.9
56	Pakistan	4.8
57	Vietnam	4.8
58	New Zealand	4.8
59	Saudi Arabia	4.8
60	Burundi	4.8
61	Brazil	4.7
62	Romania	4.7
63	Trinidad and Tobago	4.7
64	Mexico	4.7
65	Malta	4.7
66	Ghana	4.7
67	Serbia	4.7
68	Slovenia	4.7
69	Mauritania	4.7
70	Hungary	4.7
71	Macedonia, FYR	4.7
72	Bolivia	4.7
73	Greece	4.7
74	Morocco	4.7
75	Bahrain	4.6
76	Bosnia and Herzegovina	4.6
77	Cambodia	4.6
78	Belgium	4.6
79	Malawi	4.6
80	Suriname	4.6
81	Madagascar	4.6
82	Canada	4.5
83	Germany	4.5
84	Zambia	4.5
85	Kenya	4.5
86	Australia	4.5
87	Turkey	4.5
88	Cyprus	4.5
89	Oman	4.5
90	Ecuador	4.4
91	Lesotho	4.4
92	Botswana	4.4
93	Bulgaria	4.4
94	Jamaica	4.4
95	Côte d'Ivoire	4.4
96	France	4.4
97	Chad	4.3
98	Mongolia	4.3
99	Brunei	4.3
100	Thailand	4.3
101	Jordan	4.3
102	Sri Lanka	4.2
103	Ethiopia	4.2
104	Taiwan, China	4.2
105	Croatia	4.2
106	Ukraine	4.2
107	India	4.2
108	Mozambique	4.2
109	Lithuania	4.2
110	Puerto Rico	4.2
111	Kazakhstan	4.1
112	Syria	4.1
113	Kyrgyz Republic	4.1
114	Poland	4.1
115	Japan	4.0
116	Philippines	4.0
117	Panama	4.0
118	Tunisia	4.0
119	Barbados	4.0
120	Tanzania	4.0
121	Austria	3.8
122	South Africa	3.8
123	Algeria	3.7
124	Bangladesh	3.7
125	Estonia	3.6
126	Latvia	3.6
127	Libya	3.5
128	Russian Federation	3.4
129	Venezuela	3.4
130	Nepal	3.1
131	Israel	3.1
132	Namibia	2.6
133	Zimbabwe	2.6

SOURCE: World Economic Forum, Executive Opinion Survey 2007, 2008

11.08 HIV prevalence (hard data)

HIV prevalence as a percentage of adults aged 15–49 years | 2007 or most recent year available

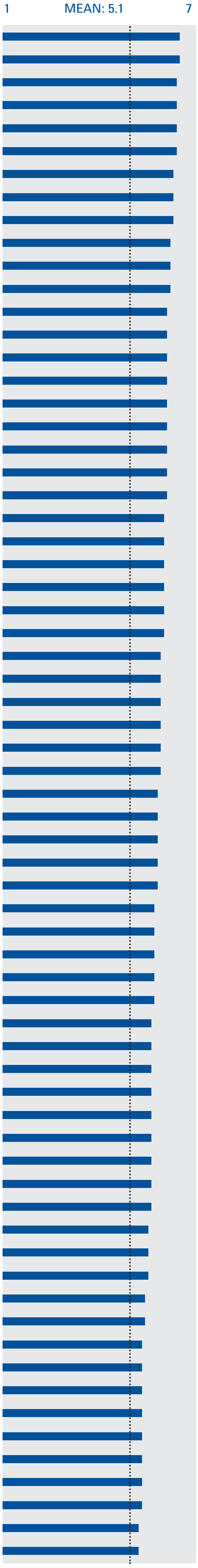
RANK	COUNTRY/ECONOMY	HARD DATA
1	Bangladesh	<0.1
1	Bosnia and Herzegovina	<0.1
1	Brunei	<0.1
1	Bulgaria	<0.1
1	Croatia	<0.1
1	Egypt	<0.1
1	Hong Kong SAR	<0.1
1	Japan	<0.1
1	Jordan	<0.1
1	Korea, Rep.	<0.1
1	Kuwait	<0.1
1	Macedonia, FYR	<0.1
1	Montenegro	<0.1
1	Philippines	<0.1
1	Qatar	<0.1
1	Saudi Arabia	<0.1
1	Slovak Republic	<0.1
1	Slovenia	<0.1
1	Sri Lanka	<0.1
1	Syria	<0.1
1	Turkey	<0.1
22	Albania	0.1
22	Algeria	0.1
22	Armenia	0.1
22	China	0.1
22	Czech Republic	0.1
22	Finland	0.1
22	Georgia	0.1
22	Germany	0.1
22	Hungary	0.1
22	Israel	0.1
22	Kazakhstan	0.1
22	Kyrgyz Republic	0.1
22	Lithuania	0.1
22	Madagascar	0.1
22	Malta	0.1
22	Mongolia	0.1
22	Morocco	0.1
22	New Zealand	0.1
22	Norway	0.1
22	Oman	0.1
22	Pakistan	0.1
22	Poland	0.1
22	Romania	0.1
22	Serbia	0.1
22	Sweden	0.1
22	Tunisia	0.1
48	Taiwan, China	0.1
49	Australia	0.2
49	Austria	0.2
49	Azerbaijan	0.2
49	Bahrain	0.2
49	Belgium	0.2
49	Bolivia	0.2
49	Cyprus	0.2
49	Denmark	0.2
49	Greece	0.2
49	Iceland	0.2
49	Indonesia	0.2
49	Ireland	0.2
49	Luxembourg	0.2
49	Netherlands	0.2
49	Nicaragua	0.2
49	Singapore	0.2
49	United Arab Emirates	0.2
49	United Kingdom	0.2
67	Chile	0.3
67	Ecuador	0.3
67	India	0.3
67	Libya	0.3
67	Mexico	0.3
67	Tajikistan	0.3
73	Canada	0.4
73	Costa Rica	0.4
73	France	0.4
73	Italy	0.4
73	Moldova	0.4
78	Argentina	0.5
78	Malaysia	0.5
78	Nepal	0.5
78	Peru	0.5
78	Portugal	0.5
78	Spain	0.5
78	Vietnam	0.5
85	Brazil	0.6
85	Colombia	0.6
85	Paraguay	0.6
85	Switzerland	0.6
85	United States	0.6
85	Uruguay	0.6
91	Honduras	0.7
91	Venezuela	0.7
93	Puerto Rico	0.8
94	Cambodia	0.8
94	El Salvador	0.8
94	Guatemala	0.8
94	Latvia	0.8
94	Mauritania	0.8
99	Gambia, The	0.9
100	Panama	1.0
100	Senegal	1.0
102	Dominican Republic	1.1
102	Russian Federation	1.1
104	Barbados	1.2
104	Benin	1.2
106	Estonia	1.3
107	Thailand	1.4
108	Mali	1.5
108	Trinidad and Tobago	1.5
110	Burkina Faso	1.6
110	Jamaica	1.6
110	Ukraine	1.6
113	Mauritius	1.7
114	Ghana	1.9
115	Burundi	2.0
116	Ethiopia	2.1
117	Suriname	2.4
118	Guyana	2.5
119	Nigeria	3.1
120	Chad	3.5
121	Côte d'Ivoire	3.9
122	Cameroon	5.1
123	Uganda	5.4
124	Kenya	6.1
125	Tanzania	6.2
126	Malawi	11.9
127	Mozambique	12.5
128	Zambia	15.2
129	Namibia	15.3
129	Zimbabwe	15.3
131	South Africa	18.1
132	Lesotho	23.2
133	Botswana	23.9

SOURCE: UNAIDS, 2008 Report on the Global AIDS Epidemic; UNDP, *Human Development Report 2007/2008*; national sources

11.09 Business impact of HIV/AIDS

How serious do you consider the impact of HIV/AIDS on your company in the next 5 years? (1 = extremely serious, 7 = not a problem)

RANK	COUNTRY/ECONOMY	SCORE
1	Norway	6.6
2	Iceland	6.6
3	Israel	6.5
4	Syria	6.5
5	Sweden	6.5
6	Croatia	6.5
7	Austria	6.4
8	Finland	6.4
9	Denmark	6.4
10	Jordan	6.3
11	Slovak Republic	6.3
12	Cyprus	6.3
13	Hungary	6.2
14	Kuwait	6.2
15	Montenegro	6.2
16	Germany	6.2
17	Portugal	6.2
18	New Zealand	6.2
19	Singapore	6.2
20	Switzerland	6.2
21	Tunisia	6.2
22	Hong Kong SAR	6.1
23	Netherlands	6.1
24	Ireland	6.1
25	Slovenia	6.1
26	Bosnia and Herzegovina	6.1
27	Belgium	6.1
28	Russian Federation	6.0
29	Greece	6.0
30	Qatar	6.0
31	Italy	6.0
32	Egypt	6.0
33	Uruguay	6.0
34	Luxembourg	5.9
35	Australia	5.9
36	Malta	5.9
37	Turkey	5.9
38	Canada	5.9
39	Sri Lanka	5.8
40	France	5.8
41	Spain	5.8
42	Georgia	5.8
43	Chile	5.8
44	Bahrain	5.7
45	United Arab Emirates	5.7
46	Japan	5.7
47	Taiwan, China	5.7
48	China	5.7
49	Armenia	5.7
50	Poland	5.7
51	Lithuania	5.7
52	Latvia	5.7
53	Czech Republic	5.6
54	Oman	5.6
55	Serbia	5.6
56	Albania	5.5
57	Moldova	5.5
58	Costa Rica	5.4
59	Romania	5.4
60	Korea, Rep.	5.4
61	Philippines	5.4
62	Bulgaria	5.4
63	United Kingdom	5.4
64	Azerbaijan	5.4
65	Mauritius	5.4
66	Argentina	5.3
67	Malaysia	5.3
68	Mexico	5.3
69	Brunei	5.3
70	Panama	5.3
71	Brazil	5.2
72	Ecuador	5.2
73	Bangladesh	5.2
74	Guatemala	5.2
75	Vietnam	5.1
76	United States	5.1
77	Macedonia, FYR	5.1
78	Indonesia	5.1
79	Nigeria	5.0
80	Libya	5.0
81	Peru	5.0
82	Estonia	5.0
83	Senegal	4.9
84	Tajikistan	4.9
85	Puerto Rico	4.9
86	Bolivia	4.9
87	Algeria	4.9
88	Morocco	4.8
89	Paraguay	4.8
90	Nicaragua	4.8
91	Saudi Arabia	4.7
92	Gambia, The	4.7
93	Colombia	4.7
94	Pakistan	4.6
95	Kazakhstan	4.6
96	Venezuela	4.6
97	Thailand	4.5
98	India	4.5
99	Ukraine	4.5
100	Honduras	4.4
101	Kyrgyz Republic	4.4
102	Mauritania	4.3
103	Burkina Faso	4.2
104	El Salvador	4.2
105	Nepal	4.2
106	Suriname	4.2
107	Madagascar	4.1
108	Burundi	4.1
109	Cambodia	4.1
110	Mongolia	4.0
111	Ghana	4.0
112	Dominican Republic	3.9
113	Benin	3.8
114	Cameroon	3.8
115	Barbados	3.8
116	Mali	3.8
117	Jamaica	3.6
118	Guyana	3.6
119	Kenya	3.5
120	Trinidad and Tobago	3.2
121	Côte d'Ivoire	3.2
122	Tanzania	3.1
123	Ethiopia	3.0
124	Namibia	3.0
125	Chad	2.9
126	Uganda	2.8
127	Botswana	2.6
128	Zambia	2.5
129	Malawi	2.5
130	Zimbabwe	2.3
131	Mozambique	2.3
132	South Africa	2.2
133	Lesotho	2.1

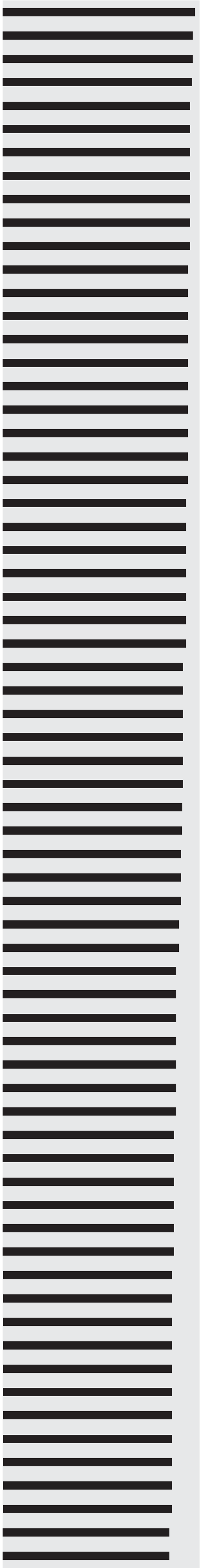


SOURCE: World Economic Forum, Executive Opinion Survey 2007, 2008

11.10 Life expectancy (hard data)

Life expectancy at birth (years) | 2006

RANK	COUNTRY/ECONOMY	HARD DATA
1	Japan	83.0
2	Australia	82.0
2	Switzerland	82.0
4	Hong Kong SAR[1]	81.9
5	Canada	81.0
5	France	81.0
5	Iceland	81.0
5	Israel	81.0
5	Italy	81.0
5	Spain	81.0
5	Sweden	81.0
12	Austria	80.0
12	Cyprus	80.0
12	Germany	80.0
12	Greece	80.0
12	Ireland	80.0
12	Luxembourg	80.0
12	Netherlands	80.0
12	New Zealand	80.0
12	Norway	80.0
12	Singapore	80.0
22	Belgium	79.0
22	Denmark	79.0
22	Finland	79.0
22	Korea, Rep.	79.0
22	Malta	79.0
22	Portugal	79.0
22	United Kingdom	79.0
29	Chile	78.0
29	Costa Rica	78.0
29	Kuwait	78.0
29	Slovenia	78.0
29	United Arab Emirates	78.0
29	United States	78.0
35	Puerto Rico	77.5
36	Taiwan, China[1]	77.4
37	Brunei	77.0
37	Czech Republic	77.0
37	Qatar	77.0
40	Croatia	76.0
40	Panama	76.0
42	Argentina	75.0
42	Bahrain	75.0
42	Barbados	75.0
42	Bosnia and Herzegovina	75.0
42	Paraguay	75.0
42	Poland	75.0
42	Uruguay	75.0
49	Montenegro[1]	74.1
50	Colombia	74.0
50	Mexico	74.0
50	Oman	74.0
50	Slovak Republic	74.0
50	Venezuela	74.0
55	Bulgaria	73.0
55	China	73.0
55	Ecuador	73.0
55	Estonia	73.0
55	Hungary	73.0
55	Macedonia, FYR	73.0
55	Mauritius	73.0
55	Peru	73.0
55	Romania	73.0
55	Serbia	73.0
55	Turkey	73.0
66	Brazil	72.0
66	Jamaica	72.0
66	Libya	72.0
66	Malaysia	72.0
66	Morocco	72.0
66	Sri Lanka	72.0
66	Syria	72.0
66	Thailand	72.0
66	Tunisia	72.0
66	Vietnam	72.0
76	Albania	71.0
76	Algeria	71.0
76	El Salvador	71.0
76	Jordan	71.0
76	Latvia	71.0
76	Lithuania	71.0
76	Nicaragua	71.0
83	Dominican Republic	70.0
83	Georgia	70.0
83	Honduras	70.0
83	Saudi Arabia	70.0
87	Armenia	69.0
87	Trinidad and Tobago	69.0
89	Egypt	68.0
89	Guatemala	68.0
89	Indonesia	68.0
89	Moldova	68.0
89	Philippines	68.0
89	Suriname	68.0
95	Ukraine	67.0
96	Bolivia	66.0
96	Kyrgyz Republic	66.0
96	Mongolia	66.0
96	Russian Federation	66.0
100	Azerbaijan	64.0
100	Guyana	64.0
100	Kazakhstan	64.0
100	Tajikistan	64.0
104	Bangladesh	63.0
104	India	63.0
104	Pakistan	63.0
107	Cambodia	62.0
107	Nepal	62.0
109	Namibia	61.0
110	Gambia, The	59.0
110	Madagascar	59.0
110	Senegal	59.0
113	Mauritania	58.0
114	Ghana	57.0
115	Ethiopia	56.0
116	Benin	55.0
117	Côte d'Ivoire	53.0
117	Kenya	53.0
119	Botswana	52.0
120	Cameroon	51.0
120	South Africa	51.0
122	Malawi	50.0
122	Mozambique	50.0
122	Tanzania	50.0
122	Uganda	50.0
126	Burundi	49.0
127	Nigeria	48.0
128	Burkina Faso	47.0
129	Chad	46.0
129	Mali	46.0
131	Zambia	43.0
131	Zimbabwe	43.0
133	Lesotho	42.0



SOURCE: World Health Organization, *WHO Statistical Information System (WHOSIS)* (May 2008); UNDP, *Human Development Report 2007/2008* online database (May 2008); national sources

[1] 2005

12th pillar

Affinity for Travel & Tourism

12.01 Tourism openness (hard data)

Tourism expenditure and receipts as a percentage of GDP | 2007

RANK	COUNTRY/ECONOMY	HARD DATA
1	Barbados[4]	31.2
2	Albania	24.8
3	Mauritius	23.8
4	Montenegro	22.4
5	Jordan	20.0
6	Croatia	19.9
7	Cyprus	19.5
8	Jamaica	19.0
9	Malta	17.5
10	Luxembourg	15.1
11	Cambodia	14.6
12	Hong Kong SAR	14.0
13	Gambia, The	13.9
14	Burundi[4]	13.8
15	Mongolia[4]	13.1
16	Singapore	12.7
17	Bulgaria	12.5
18	Dominican Republic	12.0
19	Kyrgyz Republic	11.6
20	Morocco	11.1
21	Malaysia	10.5
22	Tanzania	10.4
23	Guyana	10.4
24	Costa Rica	10.1
25	Iceland	9.8
26	Ghana[4]	9.5
27	Egypt	9.2
28	Moldova	8.9
29	Qatar[4]	8.8
30	Tunisia	8.6
31	Thailand	8.5
32	United Arab Emirates[4]	8.5
33	Bahrain	8.1
34	Estonia	8.0
35	Austria	7.9
36	Slovenia	7.9
37	Namibia	7.7
38	Panama	7.6
39	Syria[4]	7.3
40	El Salvador	7.1
41	Honduras	7.0
42	Botswana	6.7
43	New Zealand	6.6
44	Nicaragua	6.6
45	Portugal	6.3
46	Armenia	6.2
47	Belgium	6.2
48	Bosnia and Herzegovina	6.2
49	Guatemala	6.1
50	Greece	6.0
51	Lithuania	6.0
52	Czech Republic	5.9
53	Latvia	5.8
54	Ireland	5.7
55	Kuwait	5.7
56	Sweden	5.7
57	Ukraine	5.6
58	Hungary	5.5
59	Brunei	5.5
60	Georgia	5.4
61	Spain	5.4
62	Puerto Rico	5.3
63	Switzerland	5.3
64	Chad[2]	5.3
65	Mauritania[1]	5.1
66	Vietnam	4.9
67	Nepal	4.9
68	Norway	4.9
69	Denmark	4.8
70	Mali[4]	4.7
71	Slovak Republic	4.7
72	Cameroon[3]	4.7
73	Zimbabwe[1]	4.6
74	Uruguay	4.6
75	Poland	4.6
76	Philippines	4.5
77	Mozambique	4.5
78	South Africa	4.4
79	Netherlands	4.2
80	Uganda	4.2
81	Australia	4.0
82	Kenya	4.0
83	United Kingdom	4.0
84	Israel	3.9
85	Bolivia	3.9
86	Macedonia, FYR	3.8
87	Taiwan, China	3.7
88	Suriname	3.7
89	Madagascar	3.7
90	Germany	3.6
91	France	3.6
92	Oman[4]	3.4
93	Lesotho	3.4
94	Italy	3.3
95	Senegal[4]	3.3
96	Turkey	3.3
97	Argentina	3.2
98	Malawi	2.8
99	Benin	2.8
100	Canada	2.8
101	Korea, Rep.	2.8
102	Finland	2.8
103	Peru	2.7
104	Trinidad and Tobago	2.7
105	Saudi Arabia	2.7
106	Sri Lanka	2.6
107	Côte d'Ivoire	2.6
108	Russian Federation	2.5
109	Ecuador	2.5
110	Serbia	2.4
111	Mexico	2.4
112	Indonesia	2.4
113	China	2.1
114	Kazakhstan	2.0
115	Chile	1.9
116	Paraguay	1.9
117	Colombia	1.9
118	Romania	1.8
119	Burkina Faso[4]	1.8
120	Zambia	1.7
121	Libya[4]	1.7
122	India	1.7
123	Ethiopia	1.5
124	Azerbaijan	1.4
125	Pakistan	1.3
126	United States	1.2
127	Nigeria	1.1
128	Brazil	1.0
129	Venezuela	0.9
130	Japan	0.8
131	Algeria[4]	0.5
132	Bangladesh	0.3
133	Tajikistan	0.3

SOURCE: United Nations World Tourism Organization

[1] 1998 [2] 2002 [3] 2004 [4] 2006

12.02 Attitude of population toward foreign visitors

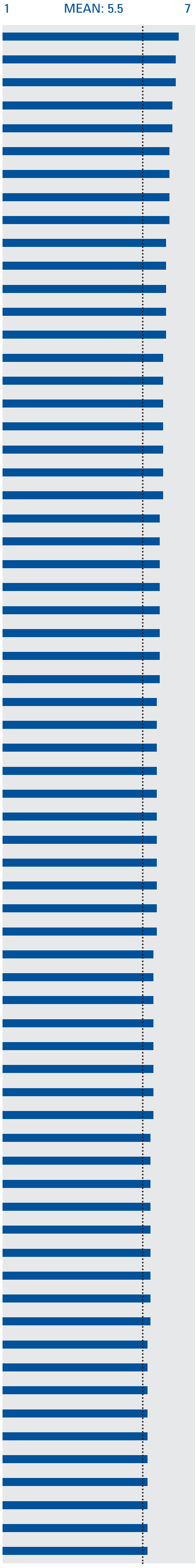
Are foreign visitors welcome in your country (1 = totally unwelcome, 7 = very welcome)

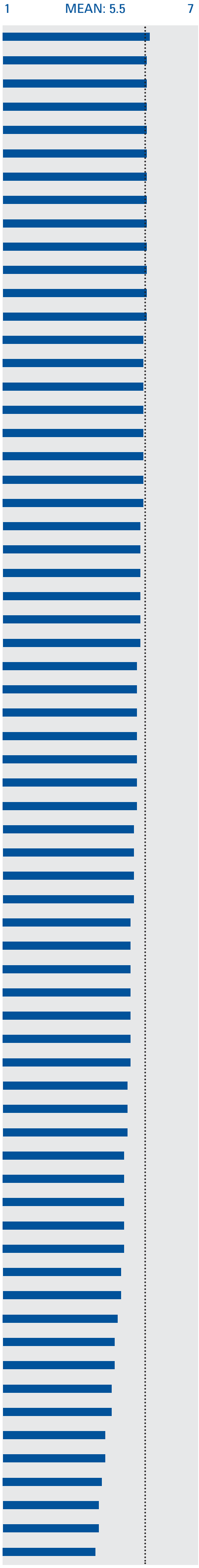
RANK	COUNTRY/ECONOMY	SCORE
1	Barbados	6.9
2	New Zealand	6.9
3	Ireland	6.9
4	Malta	6.8
5	Iceland	6.8
6	Montenegro	6.8
7	Singapore	6.8
8	Senegal	6.8
9	Sweden	6.8
10	United Arab Emirates	6.8
11	Netherlands	6.7
12	Australia	6.7
13	Thailand	6.7
14	Canada	6.7
15	Portugal	6.7
16	Greece	6.7
17	Mauritius	6.7
18	Austria	6.7
19	Belgium	6.7
20	Tunisia	6.7
21	Cyprus	6.7
22	Kenya	6.7
23	Finland	6.7
24	Uganda	6.7
25	Malawi	6.7
26	Zambia	6.7
27	Israel	6.7
28	Dominican Republic	6.6
29	Syria	6.6
30	Namibia	6.6
31	Costa Rica	6.6
32	Mali	6.6
33	Switzerland	6.6
34	Luxembourg	6.6
35	Hong Kong SAR	6.6
36	Norway	6.6
37	Jamaica	6.6
38	Mexico	6.6
39	Gambia, The	6.6
40	Macedonia, FYR	6.6
41	Jordan	6.6
42	Turkey	6.6
43	Nepal	6.6
44	Ghana	6.6
45	Puerto Rico	6.6
46	Philippines	6.6
47	Serbia	6.6
48	Georgia	6.6
49	South Africa	6.6
50	Malaysia	6.5
51	Bahrain	6.5
52	Estonia	6.5
53	Spain	6.5
54	Egypt	6.5
55	Albania	6.5
56	Denmark	6.5
57	Colombia	6.5
58	Uruguay	6.5
59	Croatia	6.5
60	Sri Lanka	6.5
61	India	6.5
62	Taiwan, China	6.5
63	Tanzania	6.5
64	Moldova	6.5
65	Burkina Faso	6.5
66	Honduras	6.5
67	Germany	6.5
68	Slovenia	6.5
69	Guatemala	6.4
70	Libya	6.4
71	France	6.4
72	Czech Republic	6.4
73	Benin	6.4
74	Burundi	6.4
75	Brazil	6.4
76	Indonesia	6.4
77	Bangladesh	6.4
78	Italy	6.3
79	Azerbaijan	6.3
80	Qatar	6.3
81	Armenia	6.3
82	Chile	6.3
83	Mozambique	6.3
84	Mauritania	6.3
85	Peru	6.3
86	United Kingdom	6.3
87	Tajikistan	6.3
88	Romania	6.3
89	Guyana	6.3
90	Morocco	6.3
91	United States	6.3
92	Vietnam	6.3
93	Brunei	6.2
94	Botswana	6.2
95	Madagascar	6.2
96	Bulgaria	6.2
97	Paraguay	6.2
98	Bosnia and Herzegovina	6.2
99	Nicaragua	6.2
100	El Salvador	6.2
101	Côte d’Ivoire	6.2
102	Suriname	6.1
103	Cambodia	6.1
104	Panama	6.1
105	Argentina	6.1
106	Japan	6.1
107	Ecuador	6.1
108	Ethiopia	6.1
109	Nigeria	6.1
110	Cameroon	6.1
111	Lithuania	6.1
112	Hungary	6.0
113	Trinidad and Tobago	6.0
114	Kazakhstan	6.0
115	Korea, Rep.	6.0
116	Latvia	6.0
117	Kyrgyz Republic	5.9
118	Chad	5.9
119	Ukraine	5.9
120	Slovak Republic	5.9
121	China	5.8
122	Bolivia	5.8
123	Oman	5.7
124	Saudi Arabia	5.7
125	Poland	5.7
126	Lesotho	5.7
127	Pakistan	5.7
128	Algeria	5.6
129	Zimbabwe	5.5
130	Kuwait	5.4
131	Russian Federation	5.2
132	Mongolia	5.0
133	Venezuela	4.8

SOURCE: World Economic Forum, Executive Opinion Survey 2007, 2008

12.03 Extension of business trips recommended

When senior executives visit your country for the first time for business purposes, how likely are you to recommend extending their trip for leisure purposes? (1 = I would never recommend it, 7 = I would always recommend it)





RANK	COUNTRY/ECONOMY	SCORE
1	New Zealand	6.6
2	Namibia	6.5
3	Turkey	6.5
4	Switzerland	6.4
5	Austria	6.4
6	Egypt	6.3
7	United Arab Emirates	6.3
8	South Africa	6.3
9	France	6.3
10	Montenegro	6.2
11	Thailand	6.2
12	Georgia	6.2
13	Estonia	6.2
14	Cyprus	6.2
15	Jordan	6.1
16	Sri Lanka	6.1
17	Tunisia	6.1
18	Syria	6.1
19	Puerto Rico	6.1
20	Malta	6.1
21	Guatemala	6.1
22	Barbados	6.0
23	Mauritius	6.0
24	Moldova	6.0
25	Azerbaijan	6.0
26	Kenya	6.0
27	Kyrgyz Republic	6.0
28	Greece	6.0
29	Indonesia	6.0
30	Ireland	5.9
31	Armenia	5.9
32	Malaysia	5.9
33	Spain	5.9
34	Italy	5.9
35	Iceland	5.9
36	Australia	5.9
37	Uruguay	5.9
38	Philippines	5.9
39	Zambia	5.9
40	Israel	5.9
41	Ukraine	5.8
42	Albania	5.8
43	Germany	5.8
44	Dominican Republic	5.8
45	Botswana	5.8
46	Canada	5.8
47	Bulgaria	5.8
48	United States	5.8
49	Portugal	5.7
50	Singapore	5.7
51	Mali	5.7
52	Peru	5.7
53	Costa Rica	5.7
54	Tajikistan	5.7
55	Russian Federation	5.7
56	Brazil	5.7
57	Belgium	5.7
58	Serbia	5.6
59	Argentina	5.6
60	India	5.6
61	Morocco	5.6
62	Honduras	5.6
63	Jamaica	5.6
64	Oman	5.6
65	Romania	5.6
66	Czech Republic	5.6
67	Macedonia, FYR	5.6
68	Kazakhstan	5.6
69	Hong Kong SAR	5.5
70	Netherlands	5.5
71	Nepal	5.5
72	Burkina Faso	5.5
73	Malawi	5.5
74	Slovak Republic	5.5
75	Latvia	5.5
76	Taiwan, China	5.5
77	Mexico	5.5
78	Cambodia	5.5
79	Poland	5.5
80	Zimbabwe	5.5
81	Madagascar	5.4
82	Benin	5.4
83	Panama	5.4
84	Chile	5.4
85	Colombia	5.4
86	Burundi	5.4
87	Gambia, The	5.4
88	Lithuania	5.4
89	Libya	5.3
90	Denmark	5.3
91	Finland	5.3
92	Korea, Rep.	5.3
93	Vietnam	5.3
94	Mauritania	5.3
95	Bahrain	5.2
96	Cameroon	5.2
97	Suriname	5.2
98	Saudi Arabia	5.2
99	United Kingdom	5.2
100	Tanzania	5.2
101	Luxembourg	5.2
102	Uganda	5.1
103	Guyana	5.1
104	Sweden	5.1
105	Senegal	5.1
106	Mozambique	5.0
107	Ethiopia	5.0
108	Qatar	5.0
109	Ecuador	5.0
110	Côte d'Ivoire	5.0
111	Nigeria	5.0
112	Lesotho	5.0
113	Norway	4.9
114	Pakistan	4.9
115	Brunei	4.9
116	Bangladesh	4.8
117	Bosnia and Herzegovina	4.8
118	Nicaragua	4.8
119	Mongolia	4.8
120	Trinidad and Tobago	4.8
121	El Salvador	4.7
122	China	4.7
123	Croatia	4.6
124	Slovenia	4.5
125	Ghana	4.5
126	Bolivia	4.4
127	Hungary	4.4
128	Algeria	4.2
129	Chad	4.2
130	Japan	4.1
131	Paraguay	4.0
132	Kuwait	4.0
133	Venezuela	3.9

SOURCE: World Economic Forum, Executive Opinion Survey 2007, 2008

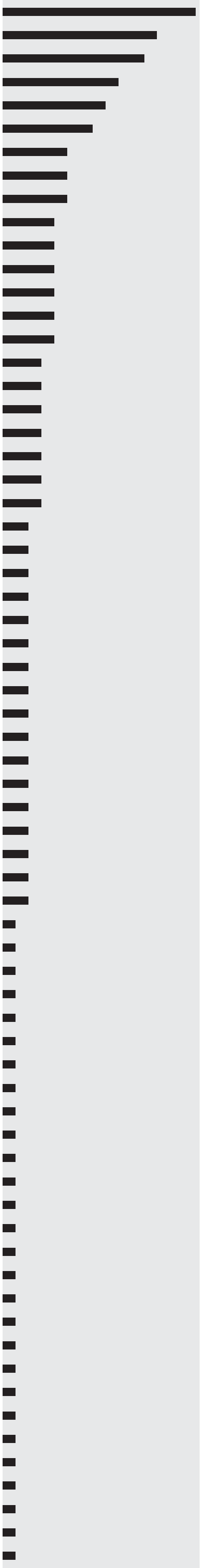
13th pillar

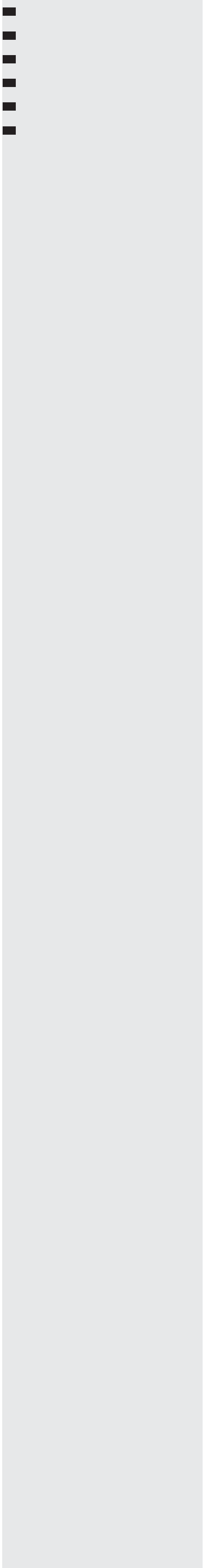
Natural resources

13.01 Number of World Heritage natural sites (hard data)

Number of World Heritage natural sites in the country | August 2008

RANK	COUNTRY/ECONOMY	HARD DATA
1	Australia	15.0
2	United States	12.0
3	China	11.0
4	Canada	9.0
5	Russian Federation	8.0
6	Brazil	7.0
7	India	5.0
7	Spain	5.0
7	United Kingdom	5.0
10	Argentina	4.0
10	Indonesia	4.0
10	Mexico	4.0
10	Peru	4.0
10	South Africa	4.0
10	Tanzania	4.0
16	Costa Rica	3.0
16	Côte d'Ivoire	3.0
16	France	3.0
16	Japan	3.0
16	New Zealand	3.0
16	Panama	3.0
16	Switzerland	3.0
23	Bulgaria	2.0
23	Colombia	2.0
23	Ecuador	2.0
23	Greece	2.0
23	Kenya	2.0
23	Madagascar	2.0
23	Malaysia	2.0
23	Nepal	2.0
23	Philippines	2.0
23	Senegal	2.0
23	Slovak Republic	2.0
23	Sweden	2.0
23	Thailand	2.0
23	Turkey	2.0
23	Uganda	2.0
23	Vietnam	2.0
23	Zimbabwe	2.0
40	Algeria	1.0
40	Bangladesh	1.0
40	Bolivia	1.0
40	Cameroon	1.0
40	Croatia	1.0
40	Denmark	1.0
40	Egypt	1.0
40	Ethiopia	1.0
40	Finland	1.0
40	Germany	1.0
40	Guatemala	1.0
40	Honduras	1.0
40	Hungary	1.0
40	Iceland	1.0
40	Italy	1.0
40	Kazakhstan	1.0
40	Korea, Rep.	1.0
40	Macedonia, FYR	1.0
40	Malawi	1.0
40	Mali	1.0
40	Mauritania	1.0
40	Mongolia	1.0
40	Montenegro	1.0
40	Norway	1.0
40	Poland	1.0
40	Portugal	1.0
40	Romania	1.0
40	Slovenia	1.0
40	Sri Lanka	1.0
40	Suriname	1.0
40	Tunisia	1.0
40	Ukraine	1.0
40	Venezuela	1.0
40	Zambia	1.0
74	Albania	0.0
74	Armenia	0.0
74	Austria	0.0
74	Azerbaijan	0.0
74	Bahrain	0.0
74	Barbados	0.0
74	Belgium	0.0
74	Benin	0.0
74	Bosnia and Herzegovina	0.0
74	Botswana	0.0
74	Brunei	0.0
74	Burkina Faso	0.0
74	Burundi	0.0
74	Cambodia	0.0
74	Chad	0.0
74	Chile	0.0
74	Cyprus	0.0
74	Czech Republic	0.0
74	Dominican Republic	0.0
74	El Salvador	0.0
74	Estonia	0.0
74	Gambia, The	0.0
74	Georgia	0.0
74	Ghana	0.0
74	Guyana	0.0
74	Hong Kong SAR	0.0
74	Ireland	0.0
74	Israel	0.0
74	Jamaica	0.0
74	Jordan	0.0
74	Kuwait	0.0
74	Kyrgyz Republic	0.0
74	Latvia	0.0
74	Lesotho	0.0
74	Libya	0.0
74	Lithuania	0.0
74	Luxembourg	0.0
74	Malta	0.0
74	Mauritius	0.0
74	Moldova	0.0
74	Morocco	0.0
74	Mozambique	0.0
74	Namibia	0.0
74	Netherlands	0.0
74	Nicaragua	0.0
74	Nigeria	0.0
74	Oman	0.0
74	Pakistan	0.0
74	Paraguay	0.0
74	Puerto Rico	0.0
74	Qatar	0.0
74	Saudi Arabia	0.0
74	Serbia	0.0
74	Singapore	0.0
74	Syria	0.0
74	Taiwan, China	0.0
74	Tajikistan	0.0
74	Trinidad and Tobago	0.0
74	United Arab Emirates	0.0
74	Uruguay	0.0





SOURCE: UNESCO, World Heritage Centre

13.02 Protected areas (hard data)

Protected areas as a percentage of total land area | 2007

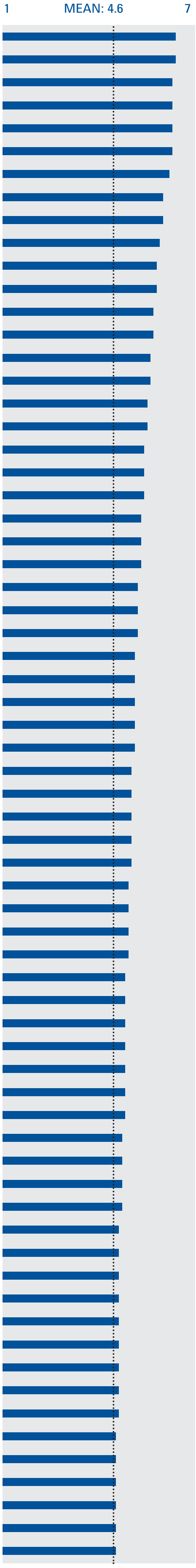
RANK	COUNTRY/ECONOMY	HARD DATA
1	Venezuela	65.7
2	Germany	54.4
3	Hong Kong SAR	50.1
4	Zambia	41.1
5	Tanzania	37.8
6	Saudi Arabia	36.8
7	Dominican Republic	32.6
8	Brunei	32.4
9	Estonia	31.1
10	Guatemala	31.0
11	United States	30.6
12	Colombia	30.3
13	Botswana	30.1
14	Israel	29.1
15	Brazil	28.9
16	Switzerland	28.6
17	Austria	28.0
18	Uganda	26.1
19	Senegal	24.4
20	Poland	23.6
21	Costa Rica	22.9
22	Benin	22.6
23	Cambodia	21.9
24	Bolivia	21.2
25	New Zealand	20.5
26	Côte d'Ivoire	20.4
27	Slovak Republic	19.6
28	Panama	18.5
29	Ethiopia	17.5
30	Thailand	17.4
31	Australia	16.7
32	Luxembourg	16.6
32	Nepal	16.6
34	Honduras	16.1
35	Czech Republic	15.8
35	Ghana	15.8
35	Zimbabwe	15.8
38	Netherlands	15.6
38	Nigeria	15.6
40	Malawi	15.5
40	Malaysia	15.5
42	Nicaragua	15.3
43	Ecuador	15.1
43	United Kingdom	15.1
45	Mozambique	14.7
46	Burkina Faso	14.4
46	Namibia	14.4
48	China	14.3
48	Sri Lanka	14.3
50	Latvia	14.1
51	Chile	14.0
51	France	14.0
53	Mongolia	13.9
54	Tajikistan	13.7
55	Peru	13.2
55	Suriname	13.2
57	Kenya	12.2
58	Romania	11.3
59	Bahrain	11.2
60	Jordan	10.5
61	Cameroon	9.9
61	Puerto Rico	9.9
63	Sweden	9.6
64	Bulgaria	9.5
65	Japan	9.4
66	Chad	9.0
67	Mexico	8.8
67	Russian Federation	8.8
69	Pakistan	8.7
69	Spain	8.7
71	Finland	8.5
71	Trinidad and Tobago	8.5
73	Armenia	8.2
73	Oman	8.2
75	Egypt	7.9
76	Iceland	7.1
76	Jamaica	7.1
78	Macedonia, FYR	7.0
79	Indonesia	6.9
80	Albania	6.8
81	Canada	6.7
82	Slovenia	6.5
83	Croatia	6.4
84	Argentina	6.2
84	Azerbaijan	6.2
86	Lithuania	6.1
86	South Africa	6.1
88	Taiwan, China	6.0
89	Paraguay	6.0
90	Montenegro	5.9
91	Italy	5.7
92	Burundi	5.6
92	Hungary	5.6
94	Algeria	5.0
95	India	4.6
96	Cyprus	4.4
97	Portugal	4.3
98	Denmark	4.2
99	Norway	3.9
100	Korea, Rep.	3.8
101	Georgia	3.6
101	Vietnam	3.6
103	Ukraine	3.5
104	Philippines	3.3
105	Belgium	3.1
105	Kyrgyz Republic	3.1
105	Singapore	3.1
108	Greece	3.0
109	Kazakhstan	2.8
110	Serbia	2.7
111	Madagascar	2.6
112	Guyana	2.2
113	Mali	2.1
114	Turkey	2.0
115	Gambia, The	1.9
116	Bangladesh	1.8
117	Mauritania	1.5
118	Malta	1.4
118	Moldova	1.4
120	Morocco	1.3
120	Tunisia	1.3
122	Kuwait	1.1
123	El Salvador	1.0
124	Bosnia and Herzegovina	0.8
124	Mauritius	0.8
126	Ireland	0.7
126	Syria	0.7
128	Qatar	0.6
129	Uruguay	0.3
130	Lesotho	0.2
130	United Arab Emirates	0.2
132	Barbados	0.1
132	Libya	0.1

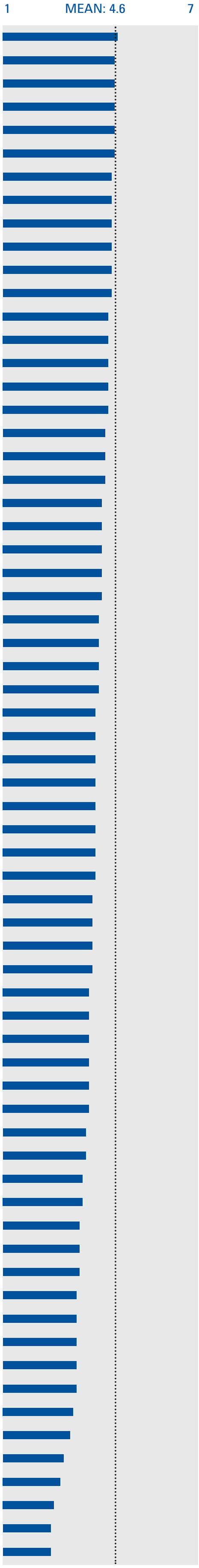
SOURCE: The International Union for Conservation of Nature (IUCN) and UNEP World Conservation Monitoring Centre *World Database on Protected Areas*

13.03 Quality of the natural environment

The natural environment in your country is: (1 = among the most polluted in the world, 7 = as clean as the least polluted countries in the world)

RANK	COUNTRY/ECONOMY	SCORE
1	Iceland	6.5
2	Sweden	6.5
3	New Zealand	6.4
4	Finland	6.4
5	Namibia	6.4
6	Austria	6.4
7	Norway	6.3
8	Uruguay	6.1
9	Switzerland	6.1
10	Brunei	6.0
11	Denmark	5.9
12	Singapore	5.9
13	Oman	5.8
14	Australia	5.8
15	Canada	5.7
16	Croatia	5.7
17	Luxembourg	5.6
18	Germany	5.6
19	Costa Rica	5.5
20	Ireland	5.5
21	Estonia	5.5
22	Bolivia	5.4
23	Qatar	5.4
24	Botswana	5.4
25	Barbados	5.3
26	Latvia	5.3
27	Slovenia	5.3
28	Tunisia	5.2
29	Montenegro	5.2
30	United Arab Emirates	5.2
31	Kyrgyz Republic	5.2
32	France	5.2
33	Cyprus	5.1
34	Portugal	5.1
35	Malaysia	5.1
36	Gambia, The	5.1
37	Tajikistan	5.1
38	Japan	5.0
39	Jordan	5.0
40	Puerto Rico	5.0
41	Panama	5.0
42	Lithuania	4.9
43	Suriname	4.9
44	Honduras	4.9
45	Zimbabwe	4.9
46	Mauritius	4.9
47	Guyana	4.9
48	United Kingdom	4.9
49	United States	4.8
50	Paraguay	4.8
51	South Africa	4.8
52	Chile	4.8
53	Korea, Rep.	4.7
54	Tanzania	4.7
55	Zambia	4.7
56	Moldova	4.7
57	Libya	4.7
58	Brazil	4.7
59	Saudi Arabia	4.7
60	Sri Lanka	4.7
61	Colombia	4.7
62	Greece	4.6
63	Nicaragua	4.6
64	Bahrain	4.6
65	Argentina	4.6
66	Malawi	4.6
67	Netherlands	4.6
68	Ethiopia	4.6
69	Spain	4.5
70	Guatemala	4.5
71	Bosnia and Herzegovina	4.5
72	Israel	4.5
73	Slovak Republic	4.5
74	Ecuador	4.4
75	Venezuela	4.4
76	Peru	4.4
77	Georgia	4.4
78	Mauritania	4.4
79	Mozambique	4.4
80	Burkina Faso	4.3
81	Jamaica	4.3
82	Czech Republic	4.3
83	Syria	4.3
84	Belgium	4.3
85	Dominican Republic	4.2
86	Macedonia, FYR	4.2
87	Italy	4.2
88	Uganda	4.1
89	Mali	4.1
90	Kenya	4.1
91	Burundi	4.1
92	Poland	4.1
93	Kuwait	4.0
94	Hungary	4.0
95	Cameroon	4.0
96	Taiwan, China	4.0
97	Senegal	3.9
98	Trinidad and Tobago	3.9
99	Ghana	3.9
100	Azerbaijan	3.9
101	Morocco	3.9
102	Madagascar	3.9
103	Cambodia	3.9
104	Thailand	3.9
105	Pakistan	3.8
106	Lesotho	3.8
107	Russian Federation	3.8
108	Bulgaria	3.8
109	Serbia	3.7
110	Romania	3.7
111	Algeria	3.7
112	India	3.7
113	Nepal	3.7
114	Malta	3.7
115	Chad	3.6
116	Turkey	3.6
117	Nigeria	3.5
118	Mongolia	3.5
119	Benin	3.4
120	Hong Kong SAR	3.4
121	Mexico	3.4
122	Vietnam	3.3
123	Ukraine	3.3
124	Philippines	3.3
125	Kazakhstan	3.3
126	Armenia	3.3
127	China	3.2
128	Bangladesh	3.1
129	El Salvador	2.9
130	Albania	2.8
131	Egypt	2.6
132	Indonesia	2.5
133	Côte d'Ivoire	2.5





SOURCE: World Economic Forum, Executive Opinion Survey 2007, 2008

13.04 Total known species (hard data)

Total known species (mammals, birds, amphibians) in the country | 2008

RANK	COUNTRY/ECONOMY	HARD DATA
1	Brazil	3,129.0
2	Colombia	2,954.0
3	Peru	2,701.0
4	Indonesia	2,595.0
5	Ecuador	2,418.0
6	China	2,122.0
7	Venezuela	2,019.0
8	Bolivia	2,010.0
9	Mexico	1,965.0
10	India	1,842.0
11	United States	1,603.0
12	Tanzania	1,587.0
13	Argentina	1,525.0
14	Kenya	1,494.0
15	Cameroon	1,400.0
16	Uganda	1,373.0
17	Thailand	1,371.0
18	Panama	1,357.0
19	Australia	1,268.0
19	Costa Rica	1,268.0
21	Vietnam	1,264.0
22	Malaysia	1,248.0
23	Nigeria	1,234.0
24	South Africa	1,175.0
25	Guyana	1,145.0
26	Ethiopia	1,138.0
27	Guatemala	1,065.0
28	Zambia	1,052.0
29	Nepal	1,044.0
30	Honduras	1,034.0
31	Côte d'Ivoire	1,010.0
32	Suriname	1,005.0
33	Ghana	1,002.0
34	Russian Federation	996.0
35	Mozambique	972.0
36	Nicaragua	937.0
37	Paraguay	927.0
38	Malawi	900.0
39	Zimbabwe	890.0
40	Philippines	860.0
41	Namibia	844.0
42	Pakistan	822.0
43	Canada	792.0
44	Bangladesh	771.0
45	Senegal	765.0
46	Burundi	735.0
47	Botswana	729.0
48	Mali	723.0
49	Cambodia	722.0
50	Madagascar	715.0
51	El Salvador	685.0
52	Benin	676.0
53	Chad	655.0
54	Japan	652.0
55	Chile	645.0
56	Kazakhstan	608.0
57	Brunei	602.0
58	Gambia, The	601.0
59	Burkina Faso	595.0
60	Mauritania	576.0
60	Sri Lanka	576.0
62	Trinidad and Tobago	575.0
63	Turkey	571.0
64	Uruguay	552.0
65	Spain	535.0
66	France	512.0
66	Taiwan, China	512.0
68	Italy	505.0
69	Israel	499.0
70	Egypt	495.0
71	Mongolia	486.0
72	Morocco	482.0
73	Greece	470.0
74	Saudi Arabia	464.0
75	Azerbaijan	463.0
76	Korea, Rep.	461.0
77	Singapore	457.0
78	Ukraine	450.0
79	Bulgaria	447.0
80	Romania	439.0
81	Germany	436.0
82	Algeria	434.0
83	Serbia	426.0
84	Croatia	424.0
85	Montenegro	422.0
86	Portugal	418.0
87	Austria	417.0
87	Macedonia, FYR	417.0
89	Jordan	415.0
90	Oman	406.0
91	Kyrgyz Republic	403.0
92	Slovak Republic	401.0
93	Tunisia	400.0
94	Poland	398.0
95	Slovenia	396.0
96	Georgia	395.0
97	Tajikistan	394.0
98	Albania	393.0
98	Switzerland	393.0
100	Armenia	392.0
101	Czech Republic	390.0
102	Syria	384.0
103	Hungary	383.0
104	Bosnia and Herzegovina	376.0
105	Netherlands	365.0
105	Sweden	365.0
107	Denmark	358.0
108	Libya	357.0
109	Belgium	351.0
110	United Kingdom	350.0
111	Latvia	346.0
112	Norway	341.0
113	Dominican Republic	336.0
114	United Arab Emirates	335.0
115	Finland	333.0
116	Puerto Rico	331.0
117	Estonia	327.0
118	Lesotho	326.0
119	Lithuania	319.0
120	Moldova	316.0
121	Cyprus	313.0
122	Kuwait	288.0
123	Hong Kong SAR	275.0
124	New Zealand	270.0
125	Ireland	265.0
126	Jamaica	257.0
127	Luxembourg	250.0
128	Barbados	247.0
129	Bahrain	237.0
130	Qatar	236.0
131	Malta	233.0
132	Iceland	133.0
133	Mauritius	84.0

SOURCE: The International Union for Conservation of Nature (IUCN), Red List of Threatened Species 2008

14th pillar

Cultural resources

14.01 Number of World Heritage cultural sites (hard data)

Number of World Heritage cultural sites and Oral & Intangible Heritage | August 2008

RANK	COUNTRY/ECONOMY	HARD DATA
1	Italy	44.0
2	Spain	39.0
3	China	34.0
4	France	32.0
4	Germany	32.0
6	Mexico	26.0
7	India	25.0
8	United Kingdom	23.0
9	Greece	17.0
9	Russian Federation	17.0
11	Japan	14.0
12	Czech Republic	13.0
12	Sweden	13.0
14	Brazil	12.0
14	Poland	12.0
14	Portugal	12.0
17	Belgium	11.0
17	Turkey	11.0
19	Korea, Rep.	10.0
19	Morocco	10.0
19	Peru	10.0
22	Algeria	8.0
22	Austria	8.0
22	Bulgaria	8.0
22	United States	8.0
26	Bolivia	7.0
26	Egypt	7.0
26	Ethiopia	7.0
26	Hungary	7.0
26	Netherlands	7.0
26	Romania	7.0
26	Tunisia	7.0
33	Australia	6.0
33	Canada	6.0
33	Colombia	6.0
33	Croatia	6.0
33	Finland	6.0
33	Israel	6.0
33	Lithuania	6.0
33	Norway	6.0
33	Pakistan	6.0
33	Slovak Republic	6.0
33	Sri Lanka	6.0
33	Switzerland	6.0
45	Chile	5.0
45	Guatemala	5.0
45	Indonesia	5.0
45	Libya	5.0
45	Mali	5.0
45	Philippines	5.0
45	South Africa	5.0
45	Syria	5.0
45	Vietnam	5.0
54	Argentina	4.0
54	Armenia	4.0
54	Cambodia	4.0
54	Estonia	4.0
54	Georgia	4.0
54	Jordan	4.0
54	Nigeria	4.0
54	Oman	4.0
54	Senegal	4.0
54	Serbia	4.0
54	Zimbabwe	4.0
65	Albania	3.0
65	Azerbaijan	3.0
65	Bangladesh	3.0
65	Cyprus	3.0
65	Denmark	3.0
65	Dominican Republic	3.0
65	Ecuador	3.0
65	Gambia, The	3.0
65	Latvia	3.0
65	Malawi	3.0
65	Malta	3.0
65	Mongolia	3.0
65	Mozambique	3.0
65	Nicaragua	3.0
65	Tanzania	3.0
65	Thailand	3.0
65	Ukraine	3.0
82	Benin	2.0
82	Bosnia and Herzegovina	2.0
82	Ghana	2.0
82	Honduras	2.0
82	Ireland	2.0
82	Kazakhstan	2.0
82	Kenya	2.0
82	Madagascar	2.0
82	Malaysia	2.0
82	Mauritius	2.0
82	Nepal	2.0
82	Panama	2.0
82	Uganda	2.0
82	Venezuela	2.0
82	Zambia	2.0
97	Bahrain	1.0
97	Botswana	1.0
97	Costa Rica	1.0
97	El Salvador	1.0
97	Iceland	1.0
97	Jamaica	1.0
97	Kyrgyz Republic	1.0
97	Luxembourg	1.0
97	Macedonia, FYR	1.0
97	Mauritania	1.0
97	Moldova	1.0
97	Montenegro	1.0
97	Namibia	1.0
97	New Zealand	1.0
97	Paraguay	1.0
97	Saudi Arabia	1.0
97	Suriname	1.0
97	Tajikistan	1.0
97	Uruguay	1.0
116	Barbados	0.0
116	Brunei	0.0
116	Burkina Faso	0.0
116	Burundi	0.0
116	Cameroon	0.0
116	Chad	0.0
116	Côte d'Ivoire	0.0
116	Guyana	0.0
116	Hong Kong SAR	0.0
116	Kuwait	0.0
116	Lesotho	0.0
116	Puerto Rico	0.0
116	Qatar	0.0
116	Singapore	0.0
116	Slovenia	0.0
116	Taiwan, China	0.0
116	Trinidad and Tobago	0.0
116	United Arab Emirates	0.0

SOURCE: UNESCO, World Heritage Centre; UNESCO, Intangible Cultural Heritage

14.02 Sports stadiums (hard data)

Sports stadium capacity per million population | 2008

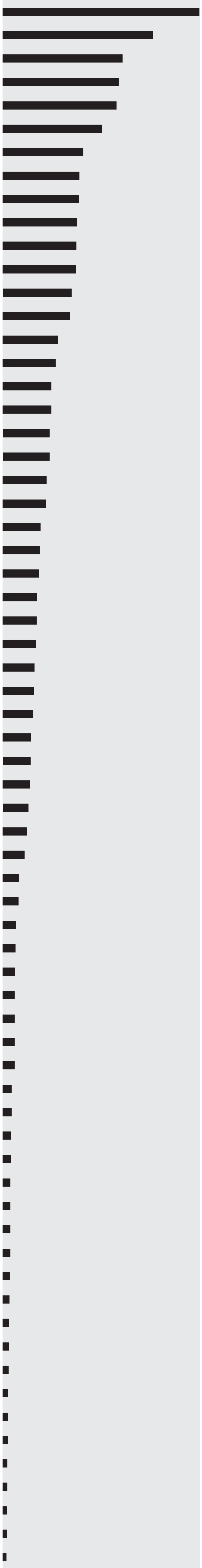
RANK	COUNTRY/ECONOMY	HARD DATA
1	Ireland	255,601.2
2	Qatar	252,469.8
3	Bahrain	187,931.9
4	Iceland	179,057.7
5	Barbados	170,909.1
6	Cyprus	168,850.0
7	Malta	154,878.0
8	Australia	151,121.3
9	Uruguay	147,602.6
10	New Zealand	145,099.3
11	Luxembourg	143,532.4
12	Norway	143,361.5
13	Finland	131,848.7
14	Portugal	125,822.9
15	Spain	119,116.5
16	Switzerland	118,351.0
17	Montenegro	111,873.4
18	Sweden	103,333.8
19	Macedonia, FYR	97,156.7
20	Slovenia	90,801.0
21	Denmark	88,684.9
22	United Kingdom	87,083.5
23	United States	82,937.4
24	Bulgaria	82,343.2
25	Trinidad and Tobago	82,307.7
26	Austria	78,057.2
27	Brunei	77,922.1
28	Belgium	77,839.5
29	Czech Republic	73,715.0
30	Korea, Rep.	71,208.3
31	Suriname	69,523.8
32	Croatia	68,850.9
33	Germany	68,571.4
34	Greece	64,558.3
35	Hungary	63,210.7
36	Bosnia and Herzegovina	59,206.4
37	Argentina	57,354.5
38	Ecuador	56,447.4
39	Canada	55,086.6
40	Netherlands	54,776.2
41	Italy	54,653.3
42	Albania	54,062.5
43	Kuwait	53,750.0
44	Chile	50,832.3
45	Slovak Republic	49,097.6
46	United Arab Emirates	48,229.2
47	Georgia	47,373.4
48	Costa Rica	46,100.2
49	France	45,102.6
50	Libya	43,409.8
51	Jamaica	43,333.3
52	Puerto Rico	43,191.0
53	Oman	41,111.1
54	Brazil	40,834.9
55	Serbia	39,733.4
56	Estonia	39,004.6
57	Romania	38,249.3
58	Armenia	35,756.0
59	Paraguay	35,625.0
60	Malaysia	34,769.4
61	Latvia	34,477.8
62	Poland	33,685.7
63	Honduras	32,054.7
64	Japan	31,876.4
65	South Africa	31,219.4
66	Lithuania	30,922.4
67	Israel	30,912.1
68	Venezuela	30,796.9
69	Taiwan, China	29,015.9
70	Guyana	28,909.3
71	Bolivia	28,842.1
72	Singapore	27,650.9
73	Peru	27,520.7
74	Mauritius	26,307.7
75	Tunisia	26,213.6
76	Hong Kong SAR	25,638.9
77	Guatemala	22,416.9
78	Colombia	21,775.4
79	Turkey	21,049.7
80	Panama	20,303.0
81	Mexico	19,745.6
82	El Salvador	19,718.3
83	Namibia	19,666.7
84	Nicaragua	18,666.7
85	Morocco	18,194.4
86	Zambia	18,181.8
87	Algeria	17,610.6
88	Azerbaijan	17,124.7
89	Ukraine	16,718.3
90	Senegal	16,598.4
91	Dominican Republic	16,162.3
92	Moldova	16,071.7
93	Cameroon	13,372.8
94	Zimbabwe	13,068.2
95	Jordan	13,000.0
96	Kazakhstan	12,954.7
97	Ghana	12,762.8
98	Botswana	12,500.0
98	Mauritania	12,500.0
100	Benin	12,166.7
101	Mali	11,678.3
102	Syria	11,425.0
103	Saudi Arabia	11,298.4
104	Lesotho	11,111.1
105	Kyrgyz Republic	10,185.2
106	Gambia, The	9,375.0
107	Sri Lanka	8,910.0
108	Burkina Faso	8,785.7
109	Egypt	7,873.1
110	Thailand	7,638.9
111	Tanzania	7,430.7
112	Mongolia	7,407.4
113	Kenya	7,144.4
114	Russian Federation	7,045.1
115	Côte d'Ivoire	6,861.7
116	Indonesia	6,293.3
117	Mozambique	5,951.2
118	Nigeria	5,306.1
119	Vietnam	4,444.4
120	Pakistan	3,994.0
121	Malawi	3,703.7
122	Cambodia	3,424.7
123	Burundi	2,716.0
124	Philippines	2,558.5
125	Nepal	2,127.7
126	China	1,955.5
127	Chad	1,941.7
128	Ethiopia	1,699.5
129	Bangladesh	1,651.9
130	Tajikistan	1,492.5
131	India	1,351.1
132	Uganda	1,294.5
133	Madagascar	1,122.4

SOURCE: Booz & Company

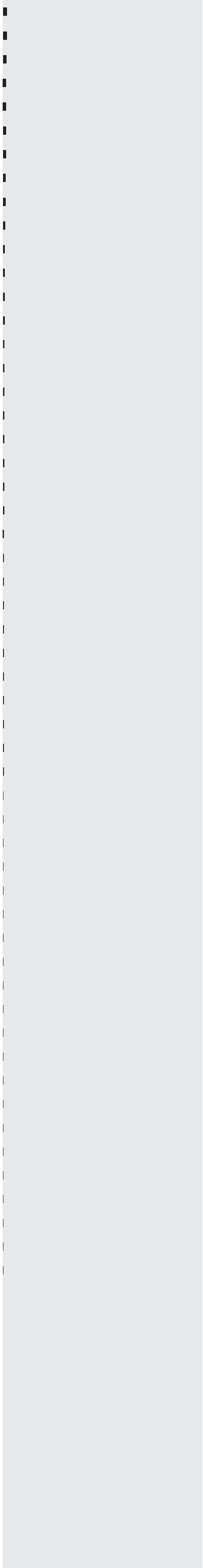
14.03 Number of international fairs and exhibitions (hard data)

Number of international fairs and exhibitions held in the country annually | 2005–2007 average

RANK	COUNTRY/ECONOMY	HARD DATA
1	United States	519.3
2	Germany	395.7
3	United Kingdom	315.0
4	Spain	306.3
5	France	299.7
6	Italy	262.0
7	Netherlands	211.7
8	Japan	202.0
9	Austria	201.0
10	China	195.7
11	Brazil	193.3
12	Australia	192.7
13	Canada	180.7
14	Switzerland	177.0
15	Sweden	146.0
16	Portugal	138.7
17	Korea, Rep.	128.3
18	Singapore	128.0
19	Belgium	122.7
19	Greece	122.7
21	Finland	115.3
22	Hungary	114.7
23	Denmark	99.7
24	Czech Republic	96.7
25	Poland	95.3
26	Mexico	90.0
27	Thailand	89.7
28	Turkey	88.3
29	Norway	83.0
30	Malaysia	82.3
31	Hong Kong SAR	78.7
32	Ireland	74.7
33	India	72.7
34	Taiwan, China	70.7
35	South Africa	67.0
36	Argentina	62.7
37	Chile	57.7
38	Slovenia	42.3
39	Russian Federation	41.3
40	Indonesia	35.0
41	Uruguay	33.3
42	Colombia	32.7
43	Philippines	31.3
44	Croatia	31.0
44	Latvia	31.0
46	New Zealand	30.7
47	Vietnam	23.3
48	Estonia	23.0
49	Iceland	21.0
50	Peru	20.7
51	Cyprus	19.7
51	Egypt	19.7
51	Lithuania	19.7
51	Romania	19.7
55	Malta	18.7
56	United Arab Emirates	17.3
57	Bulgaria	16.7
58	Panama	16.0
59	Ecuador	15.7
60	Slovak Republic	14.0
61	Morocco	13.3
62	Dominican Republic	12.7
63	Luxembourg	12.0
64	Venezuela	11.7
65	Serbia	10.7
66	Costa Rica	10.3
67	Puerto Rico	9.7



RANK	COUNTRY/ECONOMY	HARD DATA
68	Sri Lanka	9.3
68	Ukraine	9.3
70	Guatemala	8.7
71	Bolivia	8.0
71	Tunisia	8.0
73	Kenya	7.7
74	Paraguay	7.0
75	Israel	6.7
76	Senegal	6.3
77	Pakistan	5.3
78	Ghana	4.0
79	El Salvador	3.7
79	Jamaica	3.7
79	Uganda	3.7
82	Qatar	3.3
83	Barbados	2.7
83	Bosnia and Herzegovina	2.7
83	Brunei	2.7
83	Cameroon	2.7
83	Ethiopia	2.7
83	Jordan	2.7
83	Tanzania	2.7
90	Nepal	2.3
91	Mauritius	2.0
91	Mongolia	2.0
91	Nigeria	2.0
91	Trinidad and Tobago	2.0
95	Bahrain	1.7
96	Azerbaijan	1.3
96	Gambia, The	1.3
96	Honduras	1.3
96	Saudi Arabia	1.3
96	Zambia	1.3
101	Armenia	1.0
101	Bangladesh	1.0
101	Burkina Faso	1.0
101	Kuwait	1.0
101	Montenegro	1.0
101	Syria	1.0
107	Albania	0.7
107	Algeria	0.7
107	Benin	0.7
107	Cambodia	0.7
107	Kazakhstan	0.7
107	Libya	0.7
107	Macedonia, FYR	0.7
107	Mali	0.7
107	Nicaragua	0.7
107	Oman	0.7
117	Côte d'Ivoire	0.3
117	Georgia	0.3
117	Malawi	0.3
117	Mozambique	0.3
117	Namibia	0.3
122	Botswana	0.0
122	Burundi	0.0
122	Guyana	0.0
122	Madagascar	0.0
122	Mauritania	0.0
122	Moldova	0.0
122	Zimbabwe	0.0
n/a	Chad	n/a
n/a	Kyrgyz Republic	n/a
n/a	Lesotho	n/a
n/a	Suriname	n/a
n/a	Tajikistan	n/a



SOURCE: International Congress and Convention Association

14.04 Creative industries exports (hard data)

Exports of creative industries products as a share of world total in such exports | 2006 or most recent year available

RANK	COUNTRY/ECONOMY	HARD DATA
1	China	18.2
2	Italy	11.8
3	United States	11.2
4	Hong Kong SAR	8.6
5	Germany	8.2
6	United Kingdom	8.2
7	France	7.8
8	Canada	4.0
9	Switzerland	3.4
10	India	3.3
11	Spain	3.1
12	Belgium	3.0
13	Netherlands	2.0
14	Austria	1.7
15	Thailand	1.3
16	Japan	1.3
17	Mexico	1.2
18	Sweden	1.2
19	Singapore	1.2
20	Korea, Rep.	1.1
21	Malaysia	1.0
22	Poland	0.8
23	Brazil	0.8
24	Czech Republic	0.8
25	Indonesia	0.7
26	Denmark	0.7
27	Pakistan	0.7
28	Ireland	0.7
29	Russian Federation	0.6
30	Taiwan, China	0.6
31	Turkey	0.6
32	Finland	0.5
33	Portugal	0.4
34	Greece	0.4
35	Cambodia	0.3
36	Israel	0.3
37	Philippines	0.3
38	Australia	0.3
39	Romania	0.2
40	Colombia	0.2
41	Slovenia	0.2
42	Slovak Republic	0.2
43	South Africa	0.2
44	Hungary	0.2
45	Croatia	0.1
46	Jordan	0.1
47	Saudi Arabia	0.1
48	Argentina	0.1
49	Peru	0.1
50	Norway	0.1
51	Ukraine	0.1
52	Namibia	0.1
53	New Zealand	0.1
54	Morocco	0.1
55	Chile	0.1
56	Estonia	0.1
57	Luxembourg	0.1
58	Guatemala	0.1
59	Lithuania	0.1
60	Tunisia	0.1
61	Malta	0.1
62	Bulgaria	0.1
63	Sri Lanka	0.1
64	Bangladesh	0.0
65	Nepal	0.0
66	Ghana	0.0
67	Zimbabwe	0.0
68	Bolivia	0.0
69	Mauritius	0.0
70	Latvia	0.0
71	Côte d'Ivoire	0.0
72	Costa Rica	0.0
73	Madagascar	0.0
74	Uruguay	0.0
75	Honduras	0.0
76	Kenya	0.0
77	Moldova	0.0
78	Armenia	0.0
79	Ecuador	0.0
80	Senegal	0.0
81	El Salvador	0.0
82	Venezuela	0.0
83	Oman	0.0
84	Barbados	0.0
85	Bahrain	0.0
86	Bosnia and Herzegovina	0.0
87	Macedonia, FYR	0.0
88	Panama	0.0
89	Cyprus	0.0
90	Kazakhstan	0.0
91	Trinidad and Tobago	0.0
92	Qatar	0.0
93	Albania	0.0
94	Tanzania	0.0
95	Zambia	0.0
96	Cameroon	0.0
97	Uganda	0.0
98	Botswana	0.0
99	Paraguay	0.0
100	Kyrgyz Republic	0.0
101	Nicaragua	0.0
102	Malawi	0.0
103	Ethiopia	0.0
104	Nigeria	0.0
105	Georgia	0.0
106	Iceland	0.0
107	Algeria	0.0
108	Mongolia	0.0
109	Jamaica	0.0
110	Azerbaijan	0.0
111	Burkina Faso	0.0
112	Guyana	0.0
113	Mali	0.0
114	Benin	0.0
115	Mozambique	0.0
116	Gambia, The	0.0
117	Burundi	0.0
118	Brunei	0.0
118	Dominican Republic	0.0
118	Kuwait	0.0
118	Mauritania	0.0
118	Suriname	0.0
n/a	Chad	n/a
n/a	Egypt	n/a
n/a	Lesotho	n/a
n/a	Libya	n/a
n/a	Montenegro	n/a
n/a	Puerto Rico	n/a
n/a	Serbia	n/a
n/a	Syria	n/a
n/a	Tajikistan	n/a
n/a	United Arab Emirates	n/a
n/a	Vietnam	n/a

SOURCE: UNCTAD, Creative Economy and Industries Programme

Technical Notes and Sources

The data used in this *Report* represent the best available estimates from various national authorities, international agencies, and private sources at the time the *Report* was prepared. It is possible that some data will have been revised or updated by national sources after publication. Throughout the statistical tables in this publication, "n/a" denotes that the value is not available, or that available data are unreasonably outdated or do not come from a reliable source.

The following notes provide sources for the hard data—that is, the indicators listed in the Data Tables that do not come from the Executive Opinion Survey.

Pillar 1: Policy rules and regulations

1.04 Visa requirements

Number of countries whose citizens are exempt from obtaining a visa (= 1) or able to obtain one upon arrival (= 0.5) out of all UN countries, 2008

This variable is based on visitor visa requirements of all UN countries. The score refers to the number of UN countries whose citizens are exempt from obtaining a visa to enter each country. In compiling the data, each country that requires no visa at all receives a "1" and each country for which it is possible to obtain a visa upon arrival receives "0.5". Those countries for which a visa is required prior to departure would receive a "0." The sum across all UN countries produces the final score shown in the table.

Source: United Nations World Tourism Organization

1.05 Openness of bilateral Air Service Agreements

Index of openness of bilateral Air Service Agreements, 2005

This index measures the 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 (2005 update), weighted by bilateral scheduled passenger traffic taking place under each ASA. Regulatory data come from ICAO's WASA database (2005) and traffic data were obtained from IATA.

Source: World Trade Organization

1.07 Time required to start a business

Number of days required to start a business, 2008

According to the World Bank, this variable measures the median duration that incorporation lawyers indicate is necessary to complete a procedure with minimum follow up with government agencies and no extra payments.

Source: The World Bank, *Doing Business 2009*

1.08 Cost to start a business

Cost to start a business as a percentage of GNI per capita, 2008

According to the World Bank, this variable measures all official fees and fees for legal or professional services if such services are required by law.

Source: The World Bank, *Doing Business 2009*

Pillar 2: Environmental sustainability

2.04 Carbon dioxide emissions

Carbon dioxide emissions per capita in metric tons, 2004

According to the World Bank, *carbon dioxide emissions* are those emanating from burning of fossil fuels and the manufacture of cement. They include carbon dioxide produced during consumption of solid, liquid, and gas fuels and gas flaring.

Source: The World Bank, *World Development Indicators 2008*

2.05 Particulate matter concentration

Urban population–weighted PM10 micrograms per cubic meter, 2005

According to the World Bank, *particulate matter concentrations* refer to fine suspended particulates less than 10 microns in diameter (PM10) that are able to penetrate deep into the respiratory tract and cause significant health damage. Data for countries are urban population–weighted PM10 levels in residential areas of cities with more than 100,000 residents. The estimates represent the average annual exposure level of the average urban resident to outdoor particulate matter.

Source: The World Bank, *World Development Indicators 2008*

2.06 Threatened species

Threatened species as a percentage of total species (mammals, birds, amphibians), 2008

This variable 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 2008

2.07 Environmental treaty ratification

Total number of ratified environmental treaties, 2008

This variable measures the total number of international treaties from a set of 25 for which a state is a participant. A state becomes a "participant" by Ratification, Formal confirmation, Accession, Acceptance, Definitive signature, Approval, Simplified procedure, Consent to be bound, Succession, and Provisional application (which are here grouped under the term *ratification,* for reasons of convenience). The treaties included are: International Convention for the Regulation of Whaling, 1948 Washington; International Convention for the Prevention of Pollution of the Sea by Oil, 1954, as amended in 1962 and 1969, 1954, London; Convention on Wetlands of International Importance especially as Waterfowl Habitat, 1971 Ramsar; Convention concerning the Protection of the World Cultural and Natural Heritage,1972 Paris; Convention on the Prevention of Marine Pollution by Dumping of Wastes and Other Matter, 1972 London, Mexico City, Moscow, Washington; Convention on International Trade in Endangered Species of Wild Fauna and Flora, 1973 Washington; International Convention for the Prevention of Pollution from Ships (MARPOL) as modified by the Protocol of 1978, 1978 London; Convention on the Conservation of Migratory Species of Wild Animals, 1979 Bonn; United Nations Convention on the Law of the Sea, 1982 Montego Bay; Convention on the Protection of the Ozone Layer, 1985 Vienna; Protocol on Substances that Deplete the Ozone Layer, 1987 Montreal; Convention on the Control of Transboundary Movements of Hazardous Wastes and their Disposal, 1989 Basel; International Convention on Oil Pollution Preparedness, Response and Co-operation, 1990 London; United Nations Framework Convention on Climate Change, 1992 New York; Convention on Biological Diversity, 1992 Rio de Janeiro; International Convention to Combat Desertification in those countries Experiencing Serious Drought and/or Desertification, particularly Africa, 1994 Paris; 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; Agreement relating of the Provisions of the United Nations Convention on the Lay of the Sea relating to the Conservation and Management of Straddling Fish Stocks and Highly Migratory Fish Stocks, 1995 New York; Kyoto Protocol to the United Nations Framework Convention on the Climate Change, Kyoto 1997; Rotterdam Convention on the Prior Informed Consent Procedure for Certain Hazardous Chemicals and Pesticides in International Trade, 1998 Rotterdam; Cartagena Protocol of Biosafety to the Convention on Biological Diversity, 2000 Montreal; Protocol on Preparedness, Response and Cooperation to Pollution Incidents by Hazardous and Noxious Substances, 2000 London; Stockholm Convention on Persistent Organic Pollutants, 2001 Stockholm; International Treaty on Plant Genetic Resources for Food and Agriculture, 2001 Rome; International Tropical Timber Agreement 206, 2001 Geneva.

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

Pillar 3: Safety and security

3.04 Road traffic accidents

Estimated deaths per 100,000 population due to road traffic accidents, 2002

Source: World Health Organization, *World Health Statistics 2007*

Pillar 4: Health and hygiene

4.01 Physician density

Physician density per 1,000 people, 2006 or most recent year available

This variable measures the number of physicians per 1,000 people in the country. The World Bank defines *physicians* as graduates of any faculty of medicine who are working in the country in any medical field (practice, teaching, research).

Source: World Health Organization, *Global Atlas of the Health Workforce* (March 2008 update); The World Bank, *World Development Indicators 2008;* national sources

4.02 Access to improved sanitation

Access to adequate sanitation as a percentage of total population, 2006

This variable refers to the percentage of the population with at least adequate access to excreta disposal facilities that can effectively prevent human, animal, and insect contact with excreta. Improved facilities range from simple but protected pit latrines to flush toilets with a sewerage connection. To be effective, facilities must be correctly constructed and properly maintained.

Source: World Health Organization, *World Health Statistics 2008*

4.03 Access to improved drinking water

Access to safe drinking water as a percentage of total population, 2006

This variable refers to the percentage of the population with reasonable access to an adequate amount of water from an improved source, such as a household connection, public standpipe, borehole, protected well or spring, or rain-water collection. Unimproved sources include vendors, tanker trucks, and unprotected wells and springs. Reasonable access is defined as the availability of at least 20 liters per person per day from a source within 1 kilometer of the dwelling.

Source: World Health Organization, *World Health Statistics 2008*

4.04 Hospital beds

Hospital beds per 10,000 population, 2006 or most recent year available

Source: World Health Organization, *WHO Statistical Information System (WHOSIS)* (May 2008); national sources

Pillar 5: Prioritization of Travel & Tourism

5.02 T&T government expenditure

T&T government expenditure as a percentage of total budget, 2008

This measure 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) or clearance (e.g., immigration/customs) assistance, and so on to visitors.

Source: World Travel & Tourism Council, Tourism Satellite Accounting Research 2008

5.04 T&T fair attendance

Index of country presence at 13 major T&T fairs, 2007–2008

This index was constructed as follows: a country was given a 1 for each time it was represented at one of the 13 Travel & Tourism fairs below that took place during the period August 2007–July 2008. The score is the sum of all fairs at which the country was represented. The fairs included were: ITB Berlin, Salon Mondial du Tourisme (France), World Travel Market (London), Holiday World Prague, International Trade Fair for Tourism (Russia), Arabian Travel Market (Dubai), PATA Travel Mart (Pacific Asia Travel Association), China International Travel Mart, Japan Association of Travel Agents (JATA) World Travel Fair, Travel and Tourism Fair (India), American Society of Travel Agents' Trade Show, Travel Mart Latin America, and the International Tourism Fair of Latin America.

Source: Booz & Company

Pillar 6: Air transportation infrastructure

6.02 Available seat kilometers, domestic

Scheduled available seat kilometers per week originating in country (in millions), January and July 2008 average

This variable measures an airline's passenger-carrying capacity; it is composed of the number of seats available on each flight multiplied by the flight distance in kilometers. The resulting variable is an average of the total for all scheduled flights in a week during January (winter schedule) and July (summer schedule) 2008.

Source: International Air Transport Association, SRS Analyser; national sources

6.03 Available seat kilometers, international

Scheduled available seat kilometers per week originating in country (in millions), January and July 2008 average

This variable measures an airline's passenger-carrying capacity; it is composed of the number of seats available on each flight multiplied by the flight distance in kilometers. The resulting variable is an average of the total for all scheduled flights in a week during January (winter schedule) and July (summer schedule) 2008.

Source: International Air Transport Association, SRS Analyser; national sources

6.04 Departures per 1,000 population

Number of departures per 1,000 population, 2006

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

Source: Booz & Company; national sources

6.05 Airport density

Number of airports per million population, 2007

Number of airports with at least one scheduled flight in 2007 per million population.

Source: International Air Transport Association, SRS Analyser; national sources

6.06 Number of operating airlines

Number of airlines with scheduled flights originating in country, January 2008 and July 2008 average

Source: International Air Transport Association, SRS Analyser

Pillar 7: Ground transport infrastructure

7.05 Road density

Kilometers of road per 100 square kilometers of land, 2005 or most recent year available

According to the World Bank, this variable refers to 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: The World Bank, *World Development Indicators 2008*

Pillar 8: Tourism infrastructure

8.01 Hotel rooms

Number of hotel rooms per 100 population, 2007 or most recent year available

Source: United Nations World Tourism Organization

8.02 Presence of major car rental companies

Index of presence of major car rental companies, 2008

This variable measures the presence of seven major car rental companies: Avis, Budget, Europcar, Hertz, National Car Rental, Sixt, and Thrifty.

Source: Individual rental car websites

8.03 ATMs accepting Visa cards

Number of automated teller machines (ATMs) accepting Visa credit cards per million population, 2007

Source: Visa International

Pillar 9: ICT infrastructure

9.02 Internet users (hard data)

Internet users per 100 population, 2007

Internet users are people with access to the worldwide network.

Source: International Telecommunication Union, *World Telecommunication Indicators 2008*

9.03 Telephone lines

Telephone lines per 100 population, 2007

A *main telephone line* is a telephone line connecting the subscriber's terminal equipment to the public switched telephone network and that has a dedicated port in the telephone exchange equipment.

Source: International Telecommunication Union, *World Telecommunication Indicators 2008*

9.04 Broadband Internet subscribers

Broadband Internet subscribers per 100 population, 2007

The International Telecommunication Union considers *broadband* to be any dedicated connection to the Internet of 256 kilobits per second or faster, in both directions. *Broadband subscribers* refers to the sum of DSL, cable modem, and other broadband (for example, fiber optic, fixed wireless, apartment LANs, satellite connections) subscribers.

Source: International Telecommunication Union, *World Telecommunication Indicators 2008*

9.05 Mobile telephone subscribers

Mobile telephone subscribers per 100 population, 2007

The term *subscribers* refers to users of mobile telephones subscribing to an automatic public mobile telephone service that provides access to the public switched telephone network using cellular technology. This can include analogue and digital cellular systems but should not include non-cellular systems. Subscribers to fixed wireless, public mobile data services, or radio paging services are not included.

Source: International Telecommunication Union, *World Telecommunication Indicators 2008*

Pillar 10: Price competitiveness in the T&T industry

10.01 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), 2008

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 a narrow-body and a 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 percent 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

10.02 Purchasing power parity

Ratio of purchasing power parity (PPP) conversion factor to official exchange rate, 2007

The purchasing power parity (PPP) conversion factors for 2007 were obtained from the International Monetary Fund (IMF)'s *World Economic Outlook* (October 2008). The official exchange rates for 2007 were obtained from the IMF's *International Financial Statistics Online* and from the World Bank's *World Development Indicators 2008*. The World Bank defines the *purchasing power parity 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 result obtained by dividing the PPP conversion factor by the official exchange rate.

Source: The World Bank, *World Development Indicators 2008;* International Monetary Fund, *International Financial Statistics* (October 2008) and *World Economic Outlook* (October 2008); Federal Reserve Bank of New York, *Federal Reserve Statistical Release* (January 2008); national sources; authors' calculations

10.04 Fuel price levels

Retail diesel fuel prices (US cents per liter), 2006

According to the World Bank, this variable refers to the pump prices of the most widely sold grade diesel fuel. Prices are converted from the local currency to the US dollar.

Source: The World Bank, *World Development Indicators 2008*

10.05 Hotel price index

Average room rates calculated for first-class branded hotels for calendar year in US$, 2007

This index measures the average price, in US dollars, of first-class hotel accommodation in each country. The index is calculated by using the average room rate achieved by first-class hotels in each country over a 12-month period from January through December 2007, to mitigate the impact of any seasonality fluctuations.

Source: Deloitte

Pillar 11: Human resources

11.01 Primary education enrollment

Net primary education enrollment rate, 2006 or most recent year available

According to the World Bank, this corresponds to the ratio of children of official school age (as defined by national educational system) who are enrolled in school to the population of the corresponding official school age. Primary education 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.

Source: UNESCO, Institute for Statistics (June 2008); The World Bank, *World Development Indicators 2008;* national sources

11.02 Secondary education enrollment

Gross secondary education enrollment rate, 2006 or most recent year available

According to the World Bank, the *gross secondary enrollment rate* is the ratio of total enrollment, regardless of age, to the population of the age group that officially corresponds to the secondary education level. Secondary education completes the provision of basic education that began at the primary level, and aims at laying the foundations for lifelong learning and human development, by offering more subject- and skill-oriented instruction using more specialized teachers.

Source: UNESCO, Institute for Statistics (June 2008); The World Bank, *World Development Indicators 2008;* national sources

11.08 HIV prevalence

HIV prevalence as a percentage of adults aged 15–49 years, 2007 or most recent year available

Source: UNAIDS, *2008 Report on the Global AIDS Epidemic;* UNDP, *Human Development Report 2007/2008;* national sources

11.10 Life expectancy

Life expectancy at birth (years), 2006

Source: World Health Organization, *WHO Statistical Information System (WHOSIS)* (May 2008); UNDP, *Human Development Report 2007/2008* online database (May 2008); national sources

Pillar 12: Affinity for Travel & Tourism

12.01 Tourism openness

Tourism expenditure and receipts as a percentage of GDP, 2007

This variable is the ratio of the sum of international tourism expenditures and receipts to GDP. *International tourism expenditures* are expenditures of international outbound visitors in other countries, including payments to foreign carriers for international transport. *International tourism receipts* are expenditures of international inbound visitors in other countries, including payments to foreign carriers for international transport.

Source: United Nations World Tourism Organization

Pillar 13: Natural resources

13.01 Number of World Heritage natural sites

Number of World Heritage natural sites in the country, September 2008

Source: UNESCO, World Heritage Centre, (August 2008)

13.02 Protected areas

Protected areas as a percentage of total land area, 2007

According to the IUCN, a *protected area* is an area of land and/or sea especially dedicated to the protection and maintenance of biological diversity, and of natural and associated cultural resources, and managed through legal or other effective means.

Source: The International Union for Conservation of Nature (IUCN) and UNEP World Conservation Monitoring Centre *World Database on Protected Areas*

13.04 Total known species

Total known species (mammals, birds, amphibians) in the country, 2008

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

Source: The International Union for Conservation of Nature (IUCN), Red List of Threatened Species 2008

Pillar 14: Cultural resources

14.01 Number of World Heritage cultural sites

Number of World Heritage cultural sites and Oral & Intangible Heritage, September 2008

Source: UNESCO, World Heritage Centre; UNESCO, Intangible Cultural Heritage (August 2008)

14.02 Sports stadiums

Sports stadium capacity per million population, 2008

This variable is calculated as the ratio of total seats for all major sports stadiums in the country to the total population (in millions).

Source: Booz & Company

14.03 Number of international fairs and exhibitions

Number of international fairs and exhibitions held in the country annually, 2005–2007 average

This variable measures the average number of international fairs and exhibitions held annually in each country between 2005 and 2007. Data on international fairs and exhibitions were obtained from the International Congress and Convention Association (ICCA), which includes meetings organized by international associations attended by at least 50 participants that take place on a regular basis (one-time events are not included) and rotate between a minimum of three countries.

Source: International Congress and Convention Association

14.04 Creative industries exports

Exports of creative industries products as a share of world total in such exports, 2006

This variable measures the country's share of total world exports of the following Creative Industries products: art crafts such as carpets, celebration articles, paperware, wickerware, yarn; films; architecture; fashion; glassware; jewelry; music; books, newspapers, and other written materials; antiques, paintings, photography, sculpture. Data were obtained from the Creative Industries database and HS 96 codes were used.

Source: UNCTAD, Creative Economy and Industries Programme

About the Authors

Selim Ach

Selim Ach is Economic Modeler at the International Air Transport Association (IATA). He is in charge of managing and analyzing air transport economic data and contributes to the writing of several economic publications of the Association. Before joining IATA, Mr Ach worked for six years as a consultant within the air transport industry and participated in a number of European projects for Airbus, Eurocontrol, and the French civil aviation research center of air navigation. He was involved in several economic and statistical analyses as well as in operational studies in the field of air transport infrastructure, more specifically in air traffic management and air traffic control. Mr Ach obtained a BSc in Econometrics and a Master of Air Transportation Economics from the University of Toulouse and the French school of civil aviation (ENAC), France.

Rashid Bashir

Rashid Bashir is an experienced Economist and he leads Deloitte UK's Policy Economics Practice. He has over 10 years experience in economic analysis, modeling, and evidence-based policymaking, both in the United Kingdom and internationally. He has a strong track record in innovating and in tackling some of the most challenging economic policy issues (such as globalization, climate change, and economic competitiveness). He has led economic impact assessments in the Tourism, Hospitality & Leisure industry, including the recent Deloitte study on the Economic Case for the Visitor Economy in the UK, where he applied the tourism economic impact framework. Prior to joining Deloitte, Mr Bashir was Head of Policy and Economics for one of the regional development agencies in the United Kingdom, where he led regional economic development and sector growth strategies.

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Jennifer Blanke is Director and Senior Economist, and Head of the Global Competitiveness Network at the World Economic Forum. Since joining the team in 2002, she has written and lectured extensively on issues related to national competitiveness and has served as a lead editor on a number of regional and topical competitiveness reports, including *The Global Enabling Trade Report, The Travel & Tourism Competitiveness Report,* and *The Lisbon Review.* From 1998 to 2002, she was Senior Programme Manager responsible for developing the business, management, and technology sections of the World Economic Forum's Annual Meeting in Davos. Before joining the Forum, Dr Blanke worked for a number of years as a management consultant for Eurogroup, Mazars Group in Paris, France, where she specialized in banking and financial market organization. Dr Blanke obtained a Master of International Affairs from Columbia University and an MA and a PhD in International Economics from the Graduate Institute of International Studies (Geneva).

Thea Chiesa

Thea Chiesa is Associate Director and Head of Aviation, Travel and Tourism at the World Economic Forum. She has a background in business development and strategic planning in the aerospace/telecom industry, having spent nine years working with Telespazio both as part of Telecom Italia and Finmeccanica. She was part of the founding team of TVFiles SpA, an Italian telecommunication startup offering satellite broadband services to the media, pharmaceutical, and 3G industries, where she held the role of business development and was responsible for the relations with the European Union and the European Space Agency. At the Forum, she has developed an expertise in the Travel & Tourism industry, having headed the community for seven years. Coupled with her background in advanced communications systems, Ms Chiesa has developed a passion for the Travel & Tourism industry. She is currently working with key government and industry leaders in developing strategies and implementing innovative projects in the fields of T&T competitiveness and climate change as well as rebranding campaigns. Ms Chiesa has a BSc in Management from Boston College and a Master in International Relations from Boston University. She is an alumna of the World Economic Forum's Global Leadership Fellows Programme.

Larry Dwyer

Larry Dwyer is Qantas Professor of Travel and Tourism Economics in the Australian School of Business at the University of New South Wales. Professor Dwyer publishes widely in the areas of tourism economics, management, and policy. He maintains strong links with the tourism industry at international, national, state, and local levels. Professor Dwyer is a member of the International Advisory Board of the Business Enterprises for Sustainable Tourism Education Network (BESTEN), the Centre for Tourism Economics and Policy within the Sustainable Tourism Cooperative Research Centre, and the Standards of Excellence Assessment Panel of THE-ICE (International Centre of Excellence in Tourism and Hospitality Education). He is a founding member and Vice President of the International Association for Tourism Economics and an appointed member of the editorial boards of 20 international tourism journals. In 2007, he was appointed Fellow of the International Academy for Study of Tourism, the world's peak academic tourism association.

Peter Forsyth

Peter Forsyth has been Professor of Economics at Monash University since 1997. Most of his research has been on transport economics, especially the economics of air transport and tourism economics. He has published several papers on airport regulation, and has recently published a jointly edited book on Airport Slots (*Airport Slots: International Experiences and Options for Reform,* Ashgate, 2008). Professor Forsyth has been a frequent speaker at the Hamburg Aviation Conference, and in 2005 he delivered the Martin Kunz Memorial Lecture. He has also done substantial research on tourism economics and policy. His research has covered measurement of the benefits of tourism, the assessment of international price competitiveness of tourism industries, and the taxation of tourism. Recent work has involved using computable general equilibrium models in analyzing tourism and aviation policy issues. Current research includes climate change policies and their impact on aviation, and developing models to assess the implications of climate change policies, such as the Australian Government's Emissions Trading Scheme, for the tourism industry.

Amit Gautam

Amit Gautam is an Associate with Booz & Company, based in Amsterdam. He has led projects in the Aviation, Travel and Tourism sector in sustainability, cost restructuring, and strategy development in Europe and the United States. Since June 2008, he has been leading the multi-stakeholder dialogue at the World Economic Forum on the Travel and Tourism Climate change project. Prior to joining Booz & Company, Mr Gautam worked at GE Aircraft Engines as a design engineer. Mr Gautam holds a Bachelor of Mechanical Engineering from IIT Bombay and and an MBA from Carnegie Mellon University, United States. He was contributing author to the US business bestseller *Make or Break: How Manufacturers Can Leap from Decline to Revitalization* (McGraw Hill, 2008).

Amir Girgis

Amir Girgis is an Economist at the World Travel & Tourism Council (WTTC). In close partnership with Oxford Economics, Mr Girgis is involved in the production of WTTC's 181 annual economic impact TSA reports. He is further involved in creating, updating, and training TSA teams across the globe. Mr Girgis travels extensively, promoting concrete economic research as well as reaching out to governments and universities across the world to build awareness of the industry. He obtained a First Class Honours degree in Economics from the University of Southampton and a Master in Economics from Warwick University.

Heather Hancock

Heather Hancock is the Managing Partner for Innovation and Brand in Deloitte UK, and a Consulting Partner. She is the firm's Lead Client Service Partner for the London 2012 Olympic Games, and leads Deloitte's firm-wide services in regional development. In addition, Mrs Hancock heads Deloitte UK's Public Sector Strategy Consulting business and is a member of the UK Executive. Mrs Hancock brings extensive experience in delivering challenging projects in tight timescales and in the public eye. Her skill lies in understanding and anticipating the political and public dimensions of challenging projects—managing stakeholders and external expectations while keeping delivery on track. Her record demonstrates her talent for championing highly aspirational projects and finding creative approaches to deliver them. Mrs Hancock's CV before she began working at Deloitte is notable for her senior roles across the public sector: the youngest ever member of the Senior Civil Service in 1992; Accounting Officer for The Millennium Commission; Chief Executive of a special local authority; and Executive Director of a regional development agency.

Ashraf Ibrahim

Ashraf Ibrahim has been the President and Owner of Clever Travel since 1998. He is a member in the Egyptian National Competitiveness Council's (ENCC) Travel & Tourism Competitiveness Council and was previously a TVET Consultant, Trainer and Professor of Hospitality Management at the American University in Cairo. Before opening his private business, he spent 15 years working with Sheraton Hotels in Egypt. His positions included Sales Executive, Training Manager, Boat Manager for Sheraton Nile Cruises, and Training Director. He is a member of the Travel, Tourism & Aviation Committee in Egyptian Junior Businessmen (EJB), the Training Committee of the Egyptian Tourism Federation, and the Training Committee of the Egyptian Travel Agents Association.

Ufi Ibrahim

As Chief Operating Officer of the World Travel & Tourism Council (WTTC), Ufi Ibrahim is responsible for the successful realization of the Council's mission, aims, and objectives. Working directly with the leaders of industry, Ms Ibrahim oversees the articulation and the implementation of the Council's unique mandate to raise awareness of the importance of the industry. Ms Ibrahim works with heads of state and government, and with cabinet ministers and their teams, advising on tourism policy and sustainable development. Under her supervision, WTTC has issued special reports for governments around the world. Ms Ibrahim has developed the establishment of the Annual Global Travel & Tourism Summit, which she continues to lead. The Summit is the industry's most prestigious gathering for discussions that shape future policies. As the author of the Summit program, she also works closely with industry leaders to define the key topics for dialogue in the signature "Round," whose creation she led. Prior to joining WTTC, Ms Ibrahim had been in charge of the American Express Global Passport and Visa Unit. During her eight years in this role, Ms Ibrahim became a specialist on immigration policy. In 1999, she advised a United Nations (UNWTO)–led project on the facilitation of travel through easing of visa restrictions in countries along the Silk Route, as a means of accelerating economic and social progression in the countries concerned. Ms Ibrahim graduated with honors from the London Metropolitan University in 1991 with a Bachelor of Arts in Leisure & Tourism Management studies. Ms Ibrahim has recently graduated (December 2008) with distinction in her MBA from the Open University; her thesis discussed competitive differentiation through knowledge management in organizations.

John Kester

John Kester is Chief of the Market Intelligence & Promotion Department at the World Tourism Organization (UNWTO), where he has worked since 1999. He is involved in the preparation of the yearly *Tourism Market Trends* series of regional reports, and has contributed to several occasional documents such as the report *Tourism Generating Markets: Overview and Country Profiles* and various reports prepared by UNWTO in the framework of the Tourism Recovery Committee. He has also been in charge of the final editing of the various volumes of the UNWTO's long-term forecast study *Tourism 2020 Vision.* Since its inception in 2003, he has been involved in the development of the UNWTO *World Tourism Barometer,* a publication aimed at monitoring the short-term evolution of tourism, issued three times a year. He also regularly collaborates on the preparation of news releases, as well as on the Facts & Figures section of the UNWTO website. Previously, Mr Kester worked in the UNWTO at the Statistics, Economic Analysis and Market Research section. Before joining the UNWTO, he worked for seven years at Statistics Netherlands as a researcher in the field of socio-cultural statistics. Mr Kester graduated in Social Science with a specialization in research methodology and data analysis from the University of Leiden, the Netherlands.

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Alex Kyriakidis is Global Managing Partner of Tourism, Hospitality & Leisure at Deloitte and is based in Dubai. He has 34 years of experience providing strategic, attest, financial, and integration services to travel, hospitality, and leisure companies. As the partner in charge of the Global Tourism, Hospitality & Leisure Industry program at Deloitte, Mr Kyriakidis' strengths include an in-depth understanding of the industry trends that impact the performance of the industry. He has advised many of the most prominent travel and hospitality companies on strategy, M&A transactions, and risk management. In addition, Mr Kyriakidis has also served as the Lead Client Service Partner for a number of major Hospitality & Leisure companies in Europe and worldwide, including Dubai Holdings, InterContinental Hotels Group, Marriott International, and Global Hyatt. He has represented the firm in its partnership with the World Economic Forum on Travel & Tourism. Mr Kyriakidis has also led global teams on major M&A transactions, including the sale of InterContinental, Le Meridien, and the sale/manage-back of the InterContinental Hotels Group UK asset portfolio of 75 UK hotels.

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Geoffrey Lipman is Assistant Secretary General and Spokesperson of UNWTO, the World Tourism Organization. He is Chair of the Advisory Board of the DeHaan Institute at Nottingham University in the United Kingdom, Adjunct Professor at Victoria University and Griffith University in Australia, and Senior Tourism Research Fellow at George Washington University in the United States. He was the first President of the World Travel & Tourism Council (WTTC), from 1990 to 1999. He was the Chair of Green Globe from 2000 to 2007; prior to that, he was Executive Director of the International Air Transport Association (IATA), where he worked from 1966 to 1985; he was also a Founding Partner in Global Aviation Associates, specializing in aviation government relations and competition. Professor Lipman has written and lectured around the world on tourism strategy, sustainability, and airline liberalization; co-authored books on opening up European aviation; and established a Think Tank on Free Trade in the Air. He has been a member of two European Union High Level Commissions—on Airline Liberalization and on Tourism Employment—as well as a member of the UK Roundtable on Sustainable Development, the President of Zambia's Business Advisory Council, and the Ethiopia Think Tank. He is a Fellow of the Tourism Society.

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Simon Oaten is an Assistant Director in the Deloitte UK Tourism, Hospitality & Leisure group, with over eight years of experience advising and supporting hospitality and leisure businesses. He has worked at a senior level with some of the leading players across the industry in the United Kingdom, Europe, and globally. Mr Oaten brings a considerable breadth of experience in the sector across strategy, business planning, market review, economic impact assessment, and financial and commercial due diligence engagements. In the last 24 months, Mr Oaten has worked extensively in the Middle East, leading large complex strategy and business planning projects.

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Brian Pearce is Chief Economist of International Air Transport Association (IATA). An economist with over 20 years of international experience in several industries, he was formerly Head of Global Economic Research at UBS Warburg and Chief Economist at Ernst & Young. Prior to joining IATA, Mr Pearce was involved in the UK Air Transport White Paper and in the discussion and design of policies to influence aviation's impact on the environment. He also advised on the financial sector's role in promoting good corporate governance and responsibility and directed the initiative launched by the UK Prime Minister at the World Summit on Sustainable Development. Before that he was Head of Global Economic Research at the investment bank SBC Warburg (now UBS), in Tokyo and then London. During this time he published extensively on international financial and economic issues and advised private- and public-sector clients in over 20 countries. As Chief Economist at Ernst & Young's economic forecasting consultancy, the ITEM Club, he worked with the UK Treasury's and other econometric models to analyze public policy and forecast global economic prospects. He was frequently called on by television, radio, and the press to comment on government economic policy.

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Timm Pietsch is a Senior Research Analyst of Booz & Company, based in Düsseldorf, and a member of the company's global transportation group. As such, Dr Pietsch focuses on market assessments, competitive intelligence, and trend analysis on an international basis. His main areas of expertise include Travel & Tourism and passenger and freight transport across aviation, railways, and infrastructure sectors in European and Middle East geographies. Prior to joining Booz & Company in 2005, he worked as a journalist concentrating on passenger rail markets. Dr Pietsch holds an MA and a PhD from Düsseldorf University, Germany.

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Heba Zayed

Heba Zayed is currently working as the Deputy to the Executive Director of the Egyptian National Competitiveness Council (ENCC). She has held the positions of Head of the Research Department at the Egyptian Banking Institute and Financial Markets Advisor to the Senior Financial Advisor of the Minister of Investment at the Egyptian Ministry of Investment. She obtained a Bachelor and a Master of Economics from the American University in Cairo, and is currently working on her PHD Thesis dissertation, entitled "Institutional Restructuring of Financial Regulators: The Case of Egypt."

The World Economic Forum would like to thank the following organizations for their invaluable support of this *Report*.

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Bombardier shares with the World Economic Forum the belief that the world's key challenges can only be overcome through joint efforts. The current global economic turmoil calls for even greater cooperation between industry, government and civil society.

In a world more interconnected than ever before, mobility is essential for economic and social development. Bombardier takes pride in designing and building state-of-the-art airplanes and trains that help address some of the most urgent issues of our time, including climate change and urban congestion, and the need for sustainable modes of transportation.

For Bombardier, sustainability means balancing long-term and profitable growth with the responsible management of its impact on communities, the environment and the economy. To achieve this balance, it recognizes the importance of listening and learning from its stakeholders. As such, Bombardier commends the World Economic Forum for bringing people together to work towards a common and laudable goal.

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For our management magazine *strategy+business* visit www.strategy-business.com.

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BRITISH AIRWAYS

British Airways is one of the world's largest international airlines, carrying in its last financial year to March 31, 2008 over 33 million passengers worldwide. It is one of the world's longest established airlines and is regarded as an industry-leader.

The airline's main operating base is at London Heathrow Airport, the UK's primary international hub airport and one of the busiest in the world. British Airways also serves London Gatwick and London City airports as well as 8 other airports in the UK, and worldwide operates to more than 150 destinations in over 70 countries.

The airline employs 43,000 people, of whom 38,000 work in the United Kingdom.

British Airways offers almost 550 flights to and from Heathrow each weekday, with a further 190 services a day to and from London Gatwick and 40 per day to and from London City airport. British Airways Group fleet as of 31 March 2008 comprised 245 aircraft—one of the largest fleets in Europe. The fleet currently includes 57 Boeing 747s, 42 Boeing 777s, 21 Boeing 767s, 13 Boeing 757s, 69 Airbus A319/320/321s, 33 Boeing 737s and 10 smaller aircraft used in the company's regional business.

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Deloitte.

Deloitte is one of the world's leading professional services organisations with more than 150,000 people in over 150 countries worldwide. Our member firms serve over half of the world's largest companies, as well as large national enterprises, public institutions, and successful, fast-growing global growth companies.

We have assembled a dedicated team to serve the Tourism, Hospitality and Leisure sector across the globe, providing a range of integrated services including Audit, Tax, Consulting and Corporate Finance. Deloitte is recognised as one of the leading advisors to the Tourism, Hospitality and Leisure industry, with unrivalled knowledge of both the industry and the business issues facing individual clients.

We act for owners, operators, developers and investors, and our global network of local offices and strong presence in emerging markets provides our clients with exceptional analysis and a unique perspective of the hospitality market during these challenging times. We provide an outstanding service with a focus on creating value for our clients, enabling them to make informed decisions to maximise their opportunities.

Emirates

Emirates Group consists of Emirates Airline, Dnata, Mercator, Transguard and Emquest. Emirates Airline's divisions include Emirates SkyCargo and Emirates Destination & Leisure Management, which manages Emirates Holidays, Arabian Adventures and Emirates Hotels and Resorts. Emirates operates services to 97 cities in 61 countries in Europe, the Americas, the Middle East, Africa, the Indian subcontinent and Asia-Pacific. Its all wide-bodied fleet comprises over 110 aircraft and it has on order a further 112 aircraft, worth more than US$30 billion.

ETIHAD
AIRWAYS

Etihad Airways, the national airline of the United Arab Emirates, based in its capital, Abu Dhabi, made its first commercial flight in November 2003. Since then, the airline has grown faster than any other in commercial aviation history, currently serving 50 destinations in Africa, Asia, Australia, Europe, the Middle East and North America.

Etihad offers the highest standards of service and comfort both on the ground and in the air with world-class cuisine, award-winning flat-beds in its premium cabins and the widest seats in economy, as well as more than 500 hours of on-demand in-flight entertainment.

Etihad operates a young and environmentally-efficient fleet of 42 aircraft, which is set to grow to 52 by the end of 2011.

International sports sponsorship plays a central role in Etihad's global marketing strategy, as it seeks to develop its profile in markets across the world. Major international sponsorship deals include the Ferrari F1 Grand Prix team, Chelsea Football Club, the Etihad Stadium, Harlequins Rugby Football Club and the All Irish Hurling Championships. Etihad is the title sponsor of the Formula One Etihad Airways Abu Dhabi Grand Prix.

The Hertz Corporation, the world's largest general use car rental brand, operates from approximately 7,900 locations in 145 countries worldwide.

Hertz is the number one airport car rental brand in the U.S. and at 69 major airports in Europe. The Company operates corporate and licensee locations throughout North America, Europe, Latin America, Australia and New Zealand and has licensee locations throughout Africa, Asia, and the Mid-East.

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The International Air Transport Association (IATA), founded in April 1945, is the prime vehicle for inter-airline cooperation in promoting safe, reliable, secure, and economical air services. Today IATA represents 250 airlines comprising 94 percent of international scheduled air traffic.

IUCN, the International Union for Conservation of Nature, helps the world find pragmatic solutions to our most pressing environment and development challenges by supporting scientific research; managing field projects all over the world; and bringing governments, NGOs, the UN, international conventions and companies together to develop policy, laws and best practice.

IUCN is the world's oldest and largest global environmental network. IUCN is a democratic union with more than 1,000 government and NGO member organizations, and almost 11,000 volunteer scientists in more than 160 countries. IUCN's work is supported by over 1,000 professional staff in 60 offices and hundreds of partners in public, NGO and private sectors around the world. www.iucn.org

Jet Airways (I) Ltd., is India's premier International airline and one of the fastest growing airlines in the world. Jet Airways was founded in 1992 by Naresh Goyal, an entrepreneur in travel and tourism industry.

Jet Airways commenced operations on May 05, 1993 and within a short span of 15 years established its position as a market leader. The airline has had the distinction of being repeatedly adjudged India's "Best Domestic Airline" and has won several national and international awards.

Jet Airways has been acclaimed by frequent travelers as their preferred carrier, offering the highest quality of comfort, courtesy, reliability, and standards of in-flight as well as ground operations. Jet Airways is renowned for its service excellence and leading onboard product innovations.

Jet Airways, embodying the Spirit of New India, currently operates a fleet of 87 aircraft, which includes 10 Boeing 777-300 ER aircraft, 12 Airbus A330-200 aircraft, 51 classic and next generation Boeing 737-400/700/800/900 aircraft and 14 modern ATR 72-500 turboprop aircraft. With an average fleet age of 4.48 years, the airline has one of the youngest aircraft fleet in the world. Jet Airways operates over 370 flights daily.

Jet Airways' extensive network connects to 63 destinations across India and beyond, including New York (both JFK and Newark), Toronto, Brussels, London (Heathrow), Hong Kong, Singapore, Kuala Lumpur, Colombo, Bangkok, Kathmandu, Dhaka, Kuwait, Bahrain, Muscat, Doha, Abu Dhabi and Dubai. The airline plans to extend its international operations to other cities in North America, Europe, Africa and Asia in phases with the introduction of additional wide-body aircraft into its fleet.

Jet Airways and its fully owned subsidiary, Jet Lite, today has a combined fleet strength of 111 aircraft and offer customers a schedule of over 480 flights daily.

NETJETS

NetJets Europe is the largest business jet company in Europe. It flies its owners directly to almost 900 airports in Europe and more than 5000 world wide—each flight is determined by the owner's schedule. In fact, with 160 aircraft, NetJets Europe operates four times as many aircraft as the next largest business aviation company. Its 1600 strong owner base includes many of Europe's leading companies and some of the world's most influential decision-makers.

Launched in 1996 and backed by Warren Buffett's Berkshire Hathaway group, the freedom, flexibility and hassle-free nature of NetJets Europe's fractional ownership model has established business aviation as an essential tool for business. In addition to its fractional ownership offering, its Corporate and Private Jet Card Programmes enable a company or individual to enjoy the benefits of business aviation by purchasing a set amount of flying hours per year.

As the only pan-European business jet operator with its own dedicated fleet, NetJets Europe is uniquely capable of delivering a consistent, world-class service with an unrivalled commitment to quality and safety.

NetJets Europe is also the only dedicated business jet operator to hold the internationally recognised IATA Operational Safety Audit certificate from the International Air Transport Association—the highest safety accreditation in the world.

Through the multi-faceted climate initiative it launched in 2007, NetJets Europe has pledged its operations will be carbon neutral by 2012, as well as making it mandatory for all new customers to offset their individual flights.

Rolls-Royce

Rolls-Royce is a global business providing power systems for use on land, at sea and in the air. The Group has a balanced business portfolio with leading market positions.

SILVERSEA®

Silversea is a cruise company reflecting generations of maritime and travel experience. In the early 1990s, the Lefebvre family of Rome, former owners of Sitmar Cruises, conceived and organized a unique cruise company pledging to build and operate the highest-quality ships in the ultra-luxury segment.

Silversea launched its first ship, Silver Cloud, in 1994, followed by Silver Wind in 1995, Silver Shadow in 2000, and the newest ship, Silver Whisper in 2001. The fleet was purpose-built for the ultra-luxury market, establishing a new class of smaller, intimate vessels that could slip into more exotic ports off the beaten path. These elite vessels were specifically designed for fewer guests, more space, and the highest levels of personalized service, delivered by Italian officers and European staff.

Taking the company into the future is Albert Peter, Silversea's Chief Executive Officer. Since taking the leadership reins in June 2001, Mr. Peter has steered the company to a steady course of high customer satisfaction, financial stability, and new product innovation.

swiss Swiss International Air Lines

Swiss International Air Lines is Switzerland's national airline, serving 69 destinations around the world from its Zurich hub and from Basel and Geneva international airports. Operating a fleet of 69 aircraft, SWISS is a key player within the Lufthansa Group and the global Star Alliance. SWISS will remain true to its mission of providing quality air services that link Switzerland with Europe and the world. People who fly with SWISS should always feel at home. And, with its core values of "personal care," "Swiss hospitality," and "quality down to the finest detail," SWISS will continue to maintain its high market profile as Switzerland's national airline, committed at all times to providing first-class service on board and on the ground.

UNWTO • OMT • ЮНВТО

The World Tourism Organization (UNWTO/OMT) is a specialized agency of the United Nations and the leading international organization in the field of tourism. It serves as a global forum for tourism policy issues and a practical source of tourism know-how.

UNWTO plays a central and decisive role in promoting the development of responsible, sustainable and universally accessible tourism, paying particular attention to the interests of developing countries.

The Organization encourages the implementation of the Global Code of Ethics for Tourism, with a view to ensuring that member countries, tourist destinations and businesses maximize the positive economic, social and cultural effects of tourism and fully reap its benefits, while minimizing its negative social and environmental impacts.

Its membership includes 160 countries and territories and more than 350 Affiliate Members representing the private sector, educational institutions, tourism associations and local tourism authorities.

Direct actions that strengthen and support the efforts of National Tourism Administrations are carried out by UNWTO's regional representatives (Africa, the Americas, East Asia and the Pacific, Europe, the Middle East and South Asia) based at the Headquarters in Madrid.

UNWTO is committed to the United Nations Millennium Development Goals, geared toward reducing poverty and fostering sustainable development.

WORLD
TRAVEL &
TOURISM
COUNCIL

The World Travel & Tourism Council (WTTC) is the global business leaders' forum for Travel & Tourism. Its Members are the Chairpersons and Chief Executives of 100 of the world's foremost organizations, representing all regions of the world and all sectors of the industry.

Travel & Tourism is one of the world's largest industries, employing approximately 238 million people and generating almost 10 percent of world GDP. As the voice of the global private sector, WTTC works together with governments to raise awareness of the economic and social importance of our industry across the world. WTTC's extensive economic research provides public and private sector decision makers with estimates and forecasts for the direct and indirect impacts of Travel & Tourism activity. The research identifies Travel & Tourism's contribution to capital investment, exports, gross domestic product, and jobs for 181 countries across the world.

Over the past few years the Travel & Tourism (T&T) industry has weathered many storms. These include mounting concerns about terrorism and fluctuating fuel costs, as well as pandemics and natural disasters. In addition, more recently the sector is facing reduced tourism demand due to the present economic downturn. In this context, the third edition of *The Travel & Tourism Competitiveness Report* is released at a time when the industry finds itself at a crossroads with regard to how it could better address these diverse and mounting challenges.

Despite the current difficulties, the T&T sector is still widely recognized as a critical economic sector worldwide and one that provides significant potential for economic growth and development internationally. A growing national T&T sector contributes to employment, raises national income, and can improve a country's balance of payments. The sector is thus an important driver of growth and prosperity and, particularly within developing countries, it can play a leading role in poverty reduction.

The Travel & Tourism Competitiveness Report 2009 measures and analyzes the drivers of T&T competitiveness in national economies around the world. Its main goal is to provide a useful tool for governments and business leaders in overcoming the obstacles to T&T competitiveness, in order for their countries to benefit fully from the sector's development. The *Report* includes an analysis of the rankings of the Travel & Tourism Competitiveness Index (TTCI), which aims to measure the factors and policies that make it attractive to develop the T&T sector in 133 industrialized and emerging economies. It also features a variety of essays on key T&T issues by prominent industry thinkers.

This year's *Report* is published under the theme of "Managing in a Time of Turbulence," reflecting the many difficulties the industry presently faces that must be overcome to ensure strong sectoral growth going into the future. This is particularly captured by the topics covered by the analytical chapters, exploring issues such as the impact of higher oil prices on the tourism industry, the importance of price competitiveness for attracting tourists, and the extent to which the TTCI explains differences in travel intensity between countries.

The last part of the *Report* contains detailed profiles for the 133 economies covered, together with data tables for each indicator used in the Index's computation.

Written in a nontechnical style, the *Report* appeals to a broad audience including policy-makers, business leaders, and members of the academic community. As part of the series produced by the Global Competitiveness Network of the World Economic Forum, the *Report* also brings together a range of leading experts in the field.

WORLD
ECONOMIC
FORUM

COMMITTED TO
IMPROVING THE STATE
OF THE WORLD

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