

CHAPTER 1.1

The Travel & Tourism Competitiveness Index 2015: T&T as a Resilient Contribution to National Development

ROBERTO CROTTI

TIFFANY MISRAHI

World Economic Forum

INTRODUCTION

The rise of travel and tourism has shown significant resilience globally. Despite slow economic growth in advanced economies and geopolitical tensions in some regions, the T&T sector still accounts for a large part of the global economy (estimated to be approximately 9% of global GDP or US\$ 7 trillion) and employment, while the number of international travellers continues to increase. According to the World Travel & Tourism Council (WTTC), the T&T sector is forecast to continue growing at 4% annually—faster than financial services, transport and manufacturing.

The theme of this year's *Travel & Tourism Competitiveness Report* is "Growing through Shocks." The *Report* analyzes the performance of 141 economies through the Travel & Tourism Competitiveness Index (TTCI) and explores how the T&T sector has responded to economic, security and health shocks over recent decades. Understanding the nature and extent of the sector's resilience to shocks is important, as a strong T&T sector is critical for job creation, economic growth and development in advanced and developing economies alike.

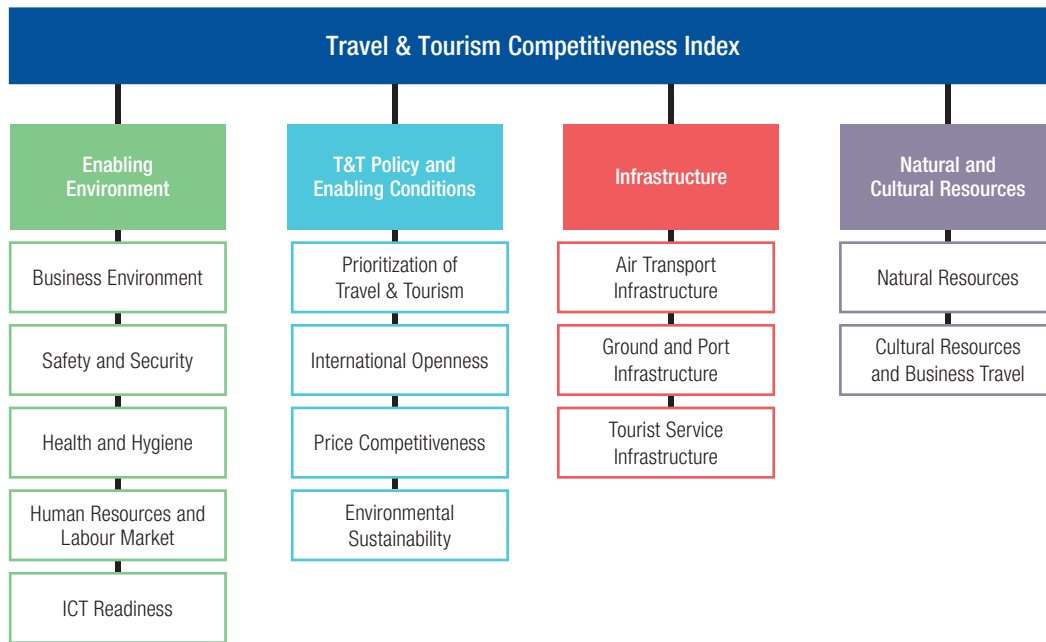
Published every two years, the *Report* provides a strategic tool for both business and governments: it allows for cross-country comparison of the drivers of T&T competitiveness, for benchmarking countries' policy progress and for making investment decisions related to business and industry development. It also offers an opportunity for the T&T industry to highlight to national policymakers the challenges to T&T competitiveness that require policy attention, and to generate multi-stakeholder dialogue on formulating appropriate policies and action.

THE TRAVEL & TOURISM COMPETITIVENESS INDEX

First compiled in 2007, the Travel & Tourism Competitiveness Index (TTCI) measures "*the set of factors and policies that enable the sustainable development of the Travel & Tourism sector, which in turn, contributes to the development and competitiveness of a country*".

The index has been developed in the context of the World Economic Forum's Industry Partnership Programme for Aviation & Travel, and in close collaboration with our strategic design partner Strategy& and our data partners Bloom consulting, Deloitte, the International Air Transport Association (IATA), the International Union for Conservation of Nature (IUCN), the UNWTO and the World Travel & Tourism Council (WTTC). We have also received important feedback from industry partners including AirAsia, Ana Holdings, The Bahrain Economic Development Board, Embraer, Emirates, Etihad Airways, HNA Group, Hilton Worldwide, IHG (InterContinental Hotels Group), Jet Airways,

Figure 1: The T&T Competitiveness Index 2015 framework



Jumeirah Group, Lockheed Martin, Marriott International, Safran, Starwood Hotels & Resorts Worldwide, Swiss International Air Lines and Visa.

While some of the main drivers of T&T competitiveness remain unchanged, some other factors have become more relevant while measurements and data availability improves over time. Following the latest developments, the index's methodology has evolved.

Still based on 14 pillars, this edition's new methodology (see Box 1: Updating the TTCI Methodology) is organized into four subindexes:

The **Enabling Environment** subindex, which captures the general settings necessary for operating in a country:

1. Business Environment
2. Safety and Security
3. Health and Hygiene
4. Human Resources and Labour Market
5. ICT Readiness

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

6. Prioritization of Travel and Tourism
7. International Openness
8. Price Competitiveness
9. Environmental Sustainability

The **Infrastructure** subindex, which captures the availability and quality of physical infrastructure of each economy:

10. Air Transport Infrastructure
11. Ground and Port Infrastructure
12. Tourist Service Infrastructure

And the **Natural and Cultural Resources** subindex, which captures the principal "reasons to travel":

13. Natural Resources
14. Cultural Resources and Business Travel

Figure 1 summarizes the structure of the index. Further details of its composition can be found in Appendix A.

Data and methodology

Two-thirds of the data set for the TTCI is statistical data from international organizations, with the remaining third based on survey data from the World Economic Forum's annual Executive Opinion Survey, which is used to measure concepts that are qualitative in nature or for which internationally comparable statistics are not available for enough countries. Carried out among over 15,000 business executives and business leaders annually in all the economies included in our assessment, the survey represents a unique source of insight into critical qualitative aspects of T&T competitiveness. (see Browne et al., 2014 for more details). The sources of statistical data include Bloom

Table 1: The Travel & Tourism Competitiveness Index 2015 Ranking

Rank	Country/Economy	Value	Rank	Country/Economy	Value
1	Spain	5.31	72	Israel	3.66
2	France	5.24	73	Uruguay	3.65
3	Germany	5.22	74	Philippines	3.63
4	United States	5.12	75	Vietnam	3.60
5	United Kingdom	5.12	76	Jamaica	3.59
6	Switzerland	4.99	77	Jordan	3.59
7	Australia	4.98	78	Kenya	3.58
8	Italy	4.98	79	Tunisia	3.54
9	Japan	4.94	80	Guatemala	3.51
10	Canada	4.92	81	Dominican Republic	3.50
11	Singapore	4.86	82	Macedonia, FYR	3.50
12	Austria	4.82	83	Egypt	3.49
13	Hong Kong SAR	4.68	84	Azerbaijan	3.48
14	Netherlands	4.67	85	Kazakhstan	3.48
15	Portugal	4.64	86	Cape Verde	3.46
16	New Zealand	4.64	87	Bhutan	3.44
17	China	4.54	88	Botswana	3.42
18	Iceland	4.54	89	Armenia	3.42
19	Ireland	4.53	90	Honduras	3.41
20	Norway	4.52	91	El Salvador	3.41
21	Belgium	4.51	92	Nicaragua	3.37
22	Finland	4.47	93	Tanzania	3.35
23	Sweden	4.45	94	Lebanon	3.35
24	United Arab Emirates	4.43	95	Serbia	3.34
25	Malaysia	4.41	96	Lao PDR	3.33
26	Luxembourg	4.38	97	Iran, Islamic Rep.	3.32
27	Denmark	4.38	98	Rwanda	3.32
28	Brazil	4.37	99	Mongolia	3.31
29	Korea, Rep.	4.37	100	Bolivia	3.29
30	Mexico	4.36	101	Suriname	3.28
31	Greece	4.36	102	Nepal	3.27
32	Taiwan, China	4.35	103	Kuwait	3.26
33	Croatia	4.30	104	Guyana	3.26
34	Panama	4.28	105	Cambodia	3.24
35	Thailand	4.26	106	Albania	3.22
36	Cyprus	4.25	107	Zambia	3.22
37	Czech Republic	4.22	108	Swaziland	3.20
38	Estonia	4.22	109	Gambia, The	3.20
39	Slovenia	4.17	110	Venezuela	3.18
40	Malta	4.16	111	Moldova	3.16
41	Hungary	4.14	112	Senegal	3.14
42	Costa Rica	4.10	113	Paraguay	3.11
43	Qatar	4.09	114	Uganda	3.11
44	Turkey	4.08	115	Zimbabwe	3.09
45	Russian Federation	4.08	116	Kyrgyz Republic	3.08
46	Barbados	4.08	117	Côte d'Ivoire	3.05
47	Poland	4.08	118	Ethiopia	3.03
48	South Africa	4.08	119	Tajikistan	3.03
49	Bulgaria	4.05	120	Ghana	3.01
50	Indonesia	4.04	121	Madagascar	2.99
51	Chile	4.04	122	Cameroon	2.95
52	India	4.02	123	Algeria	2.93
53	Latvia	4.01	124	Gabon	2.92
54	Seychelles	4.00	125	Pakistan	2.92
55	Puerto Rico	3.91	126	Malawi	2.90
56	Mauritius	3.90	127	Bangladesh	2.90
57	Argentina	3.90	128	Mali	2.87
58	Peru	3.88	129	Lesotho	2.82
59	Lithuania	3.88	130	Mozambique	2.81
60	Bahrain	3.85	131	Nigeria	2.79
61	Slovak Republic	3.84	132	Sierra Leone	2.77
62	Morocco	3.81	133	Haiti	2.75
63	Sri Lanka	3.80	134	Myanmar	2.72
64	Saudi Arabia	3.80	135	Burundi	2.70
65	Oman	3.79	136	Burkina Faso	2.67
66	Romania	3.78	137	Mauritania	2.64
67	Montenegro	3.75	138	Yemen	2.62
68	Colombia	3.73	139	Angola	2.60
69	Trinidad and Tobago	3.71	140	Guinea	2.58
70	Namibia	3.69	141	Chad	2.43
71	Georgia	3.68			

Box 1: Updating the TTCI Methodology

To keep the Travel & Tourism Competitiveness Index methodology up to date and respond better to policy needs, the World Economic Forum and its data partners (Deloitte, IATA, IUCN, Strategy&, UNWTO and WTTC) have engaged in a year-long review process. The review encompassed several workshops and consultations with experts, including Global Agenda Council members, policymakers and other users of the index.

The review highlighted a number of areas for improvement, which have been implemented in the new index structure, presented in Appendix A. While the main drivers (the 14 pillars) of T&T competitiveness remain conceptually unchanged, the new methodology relies on a larger set of indicators and optimizes the allocation of variables to form a cleaner structure. Informed by statistical tools such as principal component analysis, and guided by policy significance, the review re-allocated pillars to subindexes and some indicators to pillars.

The availability of new data significantly drove the changes in how the 14 pillars are measured. Overall, the new methodology uses more indicators (90 instead of 79), of which two thirds are statistical and one third are data from the Executive Opinion Survey.¹

The main structural changes are outlined below (see Appendix B for details on indicators that have been added or dropped):

Separating the “enabling environment” from “T&T policy and enabling factors”. The more general Enabling Environment subindex now comprises five pillars: Business Environment, Safety and Security, Health and Hygiene, Human Resources and Labour Market and ICT Readiness. These factors are directly linked to economic growth and important for business development, including but not exclusively for the T&T sector. The new T&T Policy and Enabling Conditions subindex is made up of pillars which are more sector-specific: Prioritization of T&T, a direct measure of observable T&T policies; International Openness and Price Competitiveness, factors that can directly impact tourists’ decision to select a destination; and Environmental Sustainability, which indicates to what extent natural capital—on which a large part of the tourism industry relies—is being conserved.

Isolating the Infrastructure subindex. Connectivity and hospitality infrastructure are clearly distinctive drivers of travel & tourism. Dedicating a full subindex to these factors allows them to be assessed more clearly, revealing when they require policy attention.

Elevating the role of natural and cultural resources. Aside from business and personal reasons, cultural and natural heritage arguably constitute the main reasons to visit a country. Some countries have a richer endowment than others, but some are also better than others at promoting and protecting them, a factor which deserves to be elevated to specific policy focus.

Updating and rationalizing the selection of indicators. New data availability allows better selection of indicators and more focused measurement of pillars. Several outdated indicators have been dropped, such as GATS commitment

restrictiveness and number of telephone lines; and more relevant indicators have been included, such as digital demand for cultural and natural tourism.

A summary of all indicators added and dropped by the index is presented at end of the next section.

The New Methodology

This section explains the rationale for selecting concepts and indicators composing the T&T Competitiveness Index.

Pillar 1: Business Environment (12 indicators)

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

Pillar 2: Safety and Security (5 indicators)

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.

Pillar 3: Health and Hygiene (6 indicators)

Health and hygiene is also essential for T&T competitiveness. Access to improved drinking water and sanitation is important for the comfort and health of travellers. In the event that tourists do become ill, the country’s health sector must be able to ensure they are properly cared for, as measured by the availability of physicians and hospital beds. In addition, high prevalence of HIV and malaria can have an impact on the productivity of the T&T labour force and play a role in discouraging tourists from visiting a country.

Pillar 4: Human Resources and Labour market (9 indicators)

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

(Cont’d)

Box 1: Updating the TTCI Methodology (cont'd.)

Pillar 5: ICT Readiness (8 indicators)

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

Pillar 6: Prioritization of Travel & Tourism (6 indicators)

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

Pillar 7: International Openness (3 indicators)

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

Pillar 8: Price Competitiveness in the T&T Industry (4 indicators)

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

Pillar 9: Environmental Sustainability (10 indicators)

The importance of the natural environment for providing an attractive location for tourism cannot be overstated, so policies and factors enhancing environmental sustainability are an important competitive advantage in ensuring a country's future attractiveness as a destination. This pillar consists of policy indicators such as the stringency and enforcement of the government's environmental regulations and variables assessing the status of water, forest resources and seabeds, proxied by coastal shelf fishing pressure.

Given the environmental impacts of tourism itself, we also take into account the extent to which governments prioritize the sustainable development of the T&T industry in their respective economies.

Pillar 10: Air Transport Infrastructure (6 indicators)

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

Pillar 11: Ground and Port Infrastructure (7 indicators)

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

Pillar 12: Tourist Service Infrastructure (4 indicators)

The availability of sufficient quality accommodation, resorts and entertainment facilities can represent a significant competitive advantage for a country. We measure the level of tourism service infrastructure through the number of "upper-level" hotel rooms complemented by the extent of access to services such as car rentals and ATMs.

Pillar 13: Natural Resources (5 indicators)

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

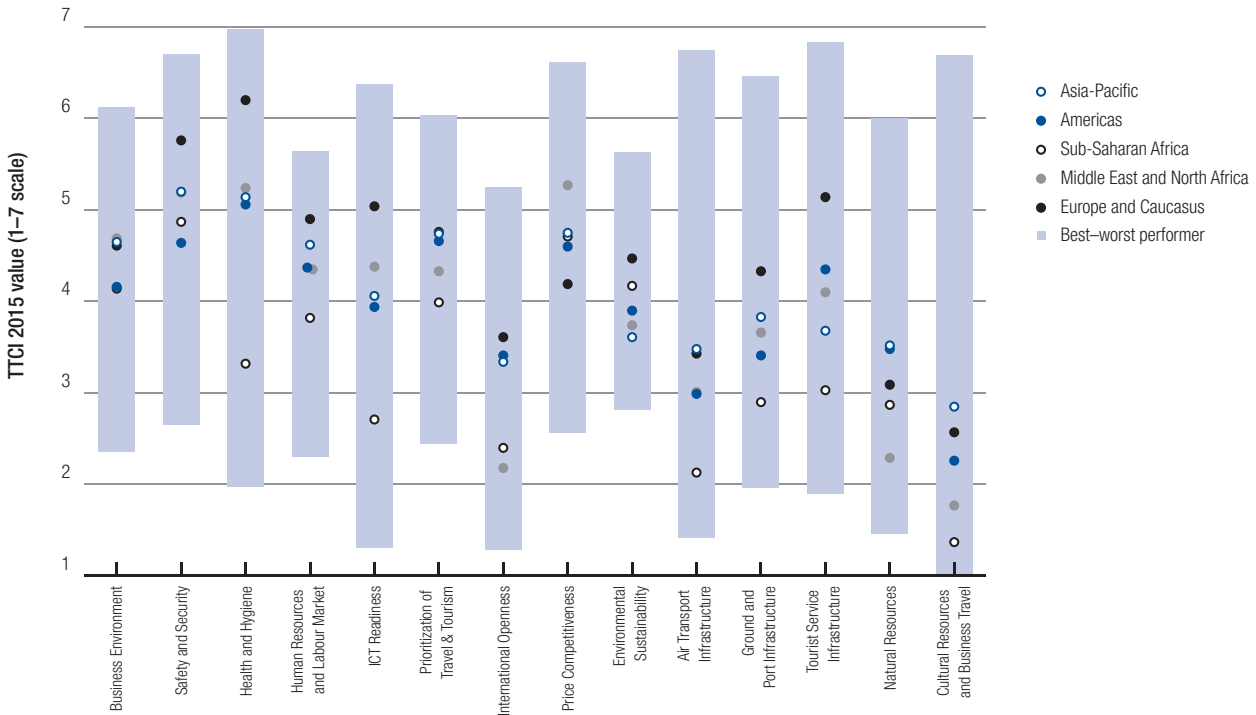
Pillar 14: Cultural Resources and Business Travel (5 indicators)

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

Notes

- 1 Some of these indicators are based on surveys conducted by other institutions.

Figure 2: The Travel & Tourism Competitiveness Index 2015 regional performance
Comparison to best- and worst-performing countries, by pillar



Consulting, Deloitte, IATA, ICCA, ILO, ITU, IUCN, UNESCO, UN Statistics Division, UNWTO, WHO, World Bank/IFC Doing Business, World Bank’s World Development Indicators, World Resources Institute, World Road Statistics, WTO, WTTC, Yale-CIESIN Environmental Performance Index and Visa Analytics.

The overall TCI score is computed through successive aggregations of scores, from the indicator level (i.e. the lowest, most disaggregated level) through the pillar and subindex levels, using a simple average (i.e. arithmetic mean) to combine the components. Scores on each indicator are first normalized onto a common scale.

Country Coverage

Six new economies included in the current edition were not analyzed in the previous *Report*: Gabon, Angola, Tunisia, Bhutan, Lao PDR and Myanmar. Five that were covered in the last report—Benin, Bosnia and Herzegovina, Brunei Darussalam, Ecuador and Ukraine—are not covered this time because of insufficient data. The 141 economies covered this year, one more than in the 2013 *Report*, account for over 98% of world GDP.

INDEX RESULTS—THE TRAVEL & TOURISM COMPETITIVENESS INDEX RANKING 2015

This edition of the TCI covers 141 economies worldwide. Table 1 shows the overall ranking, based on the updated methodology described in full in Appendix

A. Rankings by pillar and subindex are available in Appendix B.

Spain leads the 2015 TCI ranking for the first time, and Europe—with a total of six countries in the top 10—is confirmed as the region with the most T&T-competitive economies. Given the importance of the regional dimension for tourism, the following sections present country performances in the context of five regional groups: Europe and the Caucasus; the Americas (headed by the United States, 4th in the overall list); Asia Pacific, including Central Asia (headed by Australia, 7th overall); Middle East and North Africa (United Arab Emirates, 24th); and Sub-Saharan Africa (South Africa, 48th). For each region, the performance of a few countries is outlined to give a sense of how the results can be interpreted at the national level. Figure 2 shows regional performance by pillar, including the best- and worst-performing countries on each pillar for each region.

Europe and Caucasus

Europe remains the region with the most international arrivals per year, thanks in part to its rich cultural resources, world-class tourism service infrastructure, strong health and hygiene conditions, and—notably with the Schengen Area—high degree of international openness and integration. Nonetheless, three main divides remain.

First, although Europe's outstanding cultural attractions and monuments are not evenly distributed across countries, this does not fully explain the large gaps between the top and bottom performers in terms of cultural resources. While all European countries have a long history, some have made more progress than others in promoting cultural attractions to the level necessary to become a magnet for tourists. Sports and entertainment events, as well as conferences, fairs and exhibitions, also play an important role.

Second, not all countries give the same amount of priority to developing the T&T sector. For example, both Spain and Italy have outstanding attractions for tourists, but Spain has more pro-actively built on these strengths while Italy exhibits a less strategic approach. Meanwhile, other countries, such as Iceland, are investing significant resources in building a stronger tourism brand and leveraging specific niches.

Third, the business environment varies tremendously—it is generally lean and effective in Northern and Central Europe, but less sound in Southern and Eastern Europe. Challenges in building a conducive business environment are often related to a country's institutional set up and the process of change is long, but success is key to competitiveness and prosperity well beyond the T&T sector.

Spain leads the rankings for the first time. It is the third most visited country in the world, with approximately 60.6 million arrivals, a figure that continues to increase thanks primarily to a surge in visitors from emerging markets such as China, Brazil and Mexico. With beautiful heritage sites throughout the country, it boasts top marks for its cultural resources, and also scores highly for business travelers with a significant number of international conferences. It has a high ranking (4th) on online searches for entertainment—restaurants, nightlife and attractions—as well as prioritization of the travel & tourism industry (6th) and tourism service infrastructure (4th). However, there is room for improvement. The low rank for business environment (100th) reflects red tape related to construction permits and an inefficient legal framework, while the labour market is still assessed as somewhat rigid (113th) and sees a mismatch between workers' rewards and productivity (125th).

France ranks 2nd overall and continues to attract the most tourists, with over 84 million arrivals. With its combination of rich history and attractions, ski resorts and coastlines, France ranks high in cultural (2nd) and natural (8th) resources. These are complemented by its emphasis on environmental sustainability (23rd), strongly enforced environmental regulation (29th) and a sustainable approach to developing the T&T industry (48th). France is well connected, ranking in the top 10 on infrastructure for air transport, ground transport and tourism services facilities, and 13th for international

openness. Further development of the sector would require improving the business environment, where taxation is relatively high (133rd) and construction permit procedures somewhat lengthy. In addition, safety and security is emerging as a sensitive issue that needs to be addressed.

Switzerland takes 6th place, performing well across most of the T&T Competitiveness dimensions. It has world-class infrastructure, ranking 4th and 5th respectively in ground infrastructure and tourist services infrastructure, and an extremely conducive business environment (5th), with the top place on the Human Resources and Labour Market pillar. Switzerland makes the most of its favorable geographical position and beautiful mountainous landscapes (ranking 21st on Natural Resources) by enforcing some of the most stringent environmental regulations (2nd) and developing its industry with attention to environmental sustainability (1st). Switzerland's weaknesses include a restrictive visa policy and low price competitiveness, which could be improved by expanding its offer of leisure and entertainment activities to complement the traditional focus on natural tourism.

Italy ranks 8th overall and 6th in Europe. Known for its picturesque towns, monuments and scenery as well as its numerous World Heritage sites (1st), the country's strengths lie in its culture and history—it ranks high on digital demand for culture and entertainment (6th) and natural tourism (2nd). In addition, Italy offers visitors excellent tourism services facilities (3rd) and reliable health and hygiene (20th). Despite these strengths, and the fact that it is the 5th most visited country worldwide, Italy has the potential to further develop the industry. The business environment (127th) hinders private investment for a number of reasons, including an inefficient legal framework, high taxation and regulations that disincentives FDI. Italy is also less price-competitive (133rd) than most other Mediterranean countries, including Spain (105th) and Greece (113th), and could further improve its infrastructure, branding and attention to the environment.

The **Russian Federation** ranks 45th overall. This strong position reflects to a certain extent the fact that much of the data was collected prior to events in Crimea, so the economic impact of the security situation was still negligible. Although the Russian Federation ranks relatively low on seeing tourism as a national priority (90th), its high scores on natural (4th) and cultural (10th) heritage sites show how the industry could potentially play a bigger role in the country's economy. It could build on strengths in air transport infrastructure (22nd) and health and hygiene (6th), but has to overcome challenges in safety and security (126th), environmental sustainability (106th) and the business environment (109th).

Table 2: The Travel & Tourism Competitiveness Index 2015: Europe and Caucasus

Country/Economy	TTCI INDEX		Enabling Environment Pillars, values				
	Regional rank	Global rank	Business Environment	Safety and Security	Health and Hygiene	Human Resources and Labour Market	ICT Readiness
SOUTHERN AND WESTERN EUROPE							
Spain	1	1	4.09	5.97	6.11	4.87	5.26
France	2	2	4.52	5.44	6.52	4.96	5.55
Germany	3	3	5.32	6.06	6.85	5.18	5.51
Switzerland	5	6	5.76	6.32	6.50	5.64	6.03
Italy	6	8	3.59	5.68	6.27	4.45	5.14
Austria	7	12	4.94	6.47	6.97	5.09	5.70
Netherlands	8	14	5.44	6.16	6.24	5.13	5.96
Portugal	9	15	4.54	6.33	6.06	5.18	4.97
Belgium	13	21	4.71	6.18	6.49	5.03	5.47
Luxembourg	16	26	5.73	6.46	6.26	5.16	6.09
Greece	18	31	4.04	5.49	6.57	4.75	4.71
Croatia	19	33	3.65	6.00	6.33	4.41	5.03
Cyprus	20	36	4.72	6.00	5.80	5.16	4.63
Slovenia	23	39	4.03	6.20	6.05	4.69	5.07
Malta	24	40	4.76	6.03	6.35	4.61	5.24
Montenegro	33	67	4.39	5.69	5.71	4.85	4.42
Macedonia, FYR	34	82	4.87	5.75	5.99	4.47	4.47
Serbia	35	95	3.38	5.46	6.04	4.29	4.45
Albania	36	106	4.11	5.34	5.22	4.68	4.07
Southern and Western Europe average			4.56	5.95	6.23	4.87	5.14
Europe standard deviation			0.69	0.35	0.41	0.35	0.59
NORTHERN AND EASTERN EUROPE							
United Kingdom	4	5	5.70	5.44	5.83	5.29	6.09
Iceland	10	18	4.96	6.54	6.07	5.49	5.88
Ireland	11	19	5.37	6.18	5.80	5.27	5.28
Norway	12	20	5.44	6.10	6.17	5.24	6.14
Finland	14	22	5.60	6.70	6.31	5.43	6.37
Sweden	15	23	5.22	6.10	5.94	5.30	6.17
Denmark	17	27	5.28	5.88	6.11	5.47	6.18
Czech Republic	21	37	4.35	5.71	6.73	4.75	5.19
Estonia	22	38	5.13	6.04	6.25	5.12	5.71
Hungary	25	41	4.28	5.79	6.61	4.79	4.93
Russian Federation	26	45	3.98	3.95	6.69	4.83	4.83
Poland	27	47	4.35	5.86	6.21	4.80	4.90
Bulgaria	28	49	4.22	5.24	6.70	4.72	4.76
Latvia	29	53	4.59	5.79	6.17	5.18	5.60
Lithuania	30	59	4.48	5.56	6.81	4.96	5.29
Slovak Republic	31	61	3.92	5.55	6.42	4.75	5.05
Romania	32	66	4.11	5.42	5.94	4.56	4.36
Moldova	37	111	3.90	5.43	6.26	4.50	4.23
Northern and Eastern Europe average			4.72	5.74	6.28	5.03	5.39
Europe standard deviation			0.62	0.59	0.32	0.32	0.66
Europe and Caucasus average			4.61	5.76	6.20	4.90	5.04
Best performer (global)			6.13	6.70	6.97	5.64	6.37

Table 2: The Travel & Tourism Competitiveness Index 2015: Europe and Caucasus (cont'd.)

Country/Economy	T&T Policy and Enabling Conditions Pillars, values				Infrastructure Pillars, values			Natural and Cultural Resources Pillars, values	
	Prioritization of T&T	International Openness	Price Competitiveness	Environmental Sustainability	Air Transport Infrastructure	Ground and Port Infrastructure	Tourist Service Infrastructure	Natural Resources	Cultural Resources & Business Travel
SOUTHERN AND WESTERN EUROPE									
Spain	5.89	3.93	4.22	4.61	4.91	5.54	6.58	4.59	6.69
France	5.16	4.22	2.95	4.67	4.98	5.78	6.15	4.80	6.56
Germany	4.84	4.24	3.62	4.90	4.93	5.99	5.61	4.41	6
Switzerland	5.64	4.11	2.57	5.63	5.03	6	6.35	4.32	2.93
Italy	4.62	4.09	3.49	4.34	4.26	4.65	6.66	4.60	6.51
Austria	5.52	3.99	3.49	5.13	4.01	5.42	6.83	4.07	2.92
Netherlands	4.66	4.25	3.56	4.81	4.89	6.21	4.62	3.19	3.51
Portugal	5.46	4.21	4.23	4.42	3.91	4.54	6.12	3.70	3.71
Belgium	4.47	4.13	3.73	4.28	3.83	5.96	5.65	2.65	3.67
Luxembourg	4.64	4.25	4.10	5.23	3.59	5.73	4.67	3.09	1.62
Greece	5.36	4.09	3.93	4.19	4.25	4.01	6.08	3.49	2.82
Croatia	4.51	4.14	4.28	4.38	3.06	4.20	6.35	3.80	2.67
Cyprus	5.96	3.75	3.97	3.92	3.48	4.91	6.77	2.66	1.88
Slovenia	4.93	3.70	4.34	4.74	2.44	5.13	5.72	3.87	1.40
Malta	6.03	3.94	4.22	4.17	3.83	4.98	5.61	2.22	1.44
Montenegro	4.57	2.44	4.48	4.30	3.03	3.51	5.84	2.76	1.09
Macedonia, FYR	4.41	2.36	4.55	3.65	2.39	3.25	4.58	2.15	1.30
Serbia	3.83	2.39	4.56	4.08	2.13	2.95	4.50	1.90	1.61
Albania	4.03	2.34	4.38	3.60	2.16	3.01	3.94	2.03	1.14
Southern and Western Europe average	4.98	3.71	3.93	4.48	3.74	4.83	5.72	3.38	3.13
Europe standard deviation	0.65	0.72	0.54	0.52	0.99	1.08	0.87	0.95	1.95
NORTHERN AND EASTERN EUROPE									
United Kingdom	5.10	4.24	2.73	4.79	5.12	5.51	5.08	4.79	5.90
Iceland	5.89	4.38	3.59	4.92	4.67	4.35	6.28	3.63	1.53
Ireland	5.25	4.53	3.69	5.31	4.16	4.89	6.10	2.79	2.82
Norway	5.14	3.97	3.23	5.22	5.01	3.81	5.49	3.96	2.22
Finland	4.57	4.10	3.71	5.25	4.41	4.83	5.02	3.16	2.13
Sweden	4.70	4.07	3.38	5.03	4.52	4.76	4.84	3.20	2.93
Denmark	4.31	4.34	3.31	4.92	3.87	5.52	4.67	3.45	2.18
Czech Republic	4.61	4.15	4.47	4.90	3.13	5.15	5.44	2.59	2.30
Estonia	5.76	3.65	4.62	4.73	2.97	4.39	5.87	2.69	1.55
Hungary	5.13	4.15	4.60	5.16	2.71	4.45	5.02	2.72	2.22
Russian Federation	4.33	2.48	4.99	3.70	4.42	3.09	4.65	3.77	3.32
Poland	4.10	4.08	4.94	4.62	2.57	4.08	4.44	3.14	2.77
Bulgaria	4.18	3.87	5.08	4.62	2.46	3.26	6.06	3.44	1.96
Latvia	4.64	3.97	4.84	4.59	3.12	4.22	5.08	2.55	1.33
Lithuania	4.37	3.99	4.87	4.42	2.39	4.55	4.24	2.44	1.50
Slovak Republic	4.04	3.89	4.51	4.49	1.78	4.22	4.94	3.31	1.42
Romania	4.34	3.91	4.89	4.35	2.34	3.10	5.01	2.70	2.07
Moldova	3.82	1.96	4.80	4.22	1.90	2.77	3.29	1.75	1.08
Northern and Eastern Europe average	4.68	3.87	4.24	4.73	3.42	4.27	5.08	3.11	2.29
Europe standard deviation	0.58	0.64	0.75	0.41	1.10	0.81	0.73	0.69	1.09
Europe and Caucasus average	4.76	3.61	4.19	4.47	3.43	4.33	5.14	3.09	2.57
Best performer (global)	6.03	5.25	6.62	5.63	6.75	6.45	6.83	6.01	6.69

Note: Dark green = very strong performance, dark red = weak performance, and yellow = average performance, compared to the best/worst performers on each pillar, globally.

Table 3: The Travel & Tourism Competitiveness Index 2015: The Americas

Country/Economy	TTCI INDEX		Enabling Environment Pillars, values				
	Regional rank	Global rank	Business Environment	Safety and Security	Health and Hygiene	Human Resources and Labour Market	ICT Readiness
NORTH AMERICA AND CARIBBEAN							
United States	1	4	5.28	5.32	5.70	5.28	5.76
Canada	2	10	5.34	6.05	5.60	5.33	5.38
Mexico	4	30	4.09	4.10	5.25	4.45	3.82
Panama	5	34	4.88	5.03	5.09	4.23	4.30
Costa Rica	6	42	4.64	5.58	5.00	4.79	4.16
Barbados	7	46	4.62	5.75	6.02	4.88	4.97
Puerto Rico	9	55	4.85	4.82	5.77	4.44	3.76
Trinidad and Tobago	13	69	4.53	4.10	5.14	4.39	4.52
Jamaica	15	76	4.44	3.85	4.66	4.61	3.73
Guatemala	16	80	4.23	3.57	4.69	4.39	3.82
Dominican Republic	17	81	4.19	4.30	4.89	4.21	3.46
Honduras	18	90	4.09	3.64	4.52	4.25	3.10
El Salvador	19	91	4.22	3.62	4.86	4.26	3.69
Nicaragua	20	92	3.53	5.14	4.32	4.07	3.21
Haiti	26	133	3.02	4.75	3.74	3.76	1.84
North America and Caribbean average			4.40	4.64	5.02	4.49	3.97
North America and Caribbean standard deviation			0.61	0.82	0.60	0.43	0.96
SOUTH AMERICA							
Brazil	3	28	3.60	4.68	5.31	4.51	4.43
Chile	8	51	5.03	5.98	5.18	4.66	4.62
Argentina	10	57	2.67	5.03	6.20	4.20	4.16
Peru	11	58	4.29	4.39	4.79	4.57	3.62
Colombia	12	68	3.99	2.82	4.97	4.44	4.17
Uruguay	14	73	4.58	5.45	5.96	4.50	4.94
Bolivia	21	100	3.43	4.65	4.38	4.05	3.42
Suriname	22	101	3.68	5.61	5.09	3.95	3.78
Guyana	23	104	4.43	4.57	4.52	3.98	3.04
Venezuela	24	110	2.36	3.36	5.08	3.66	3.46
Paraguay	25	113	4.18	4.62	4.89	3.83	3.33
South America average			3.84	4.65	5.12	4.21	3.91
South America standard deviation			0.80	0.92	0.55	0.34	0.60
The Americas average			4.16	4.64	5.06	4.37	3.94
Best performer (global)			6.13	6.70	6.97	5.64	6.37

The Americas

Travel & Tourism plays an important role in the Americas, which collectively received almost 170 million visitors in 2013. On average, the region performs quite well in terms of prioritizing the industry, with most countries aware of its potential as a vehicle for development—especially considering the region's enormous endowment of natural resources. However, there are still hurdles to be removed if the industry is to be further developed.

In South America, the main areas requiring policy intervention are infrastructure gaps, safety and security and business environment issues.

In terms of infrastructure, given the region's geography it is understandable that most countries have prioritized air transport. However, underdeveloped ground transport undermines the economic effect of investments in air infrastructure by limiting the ability to move people across and within countries. Public-private partnerships are rapidly becoming an important mode of delivery of projects in Latin America, leveraging the

Table 3: The Travel & Tourism Competitiveness Index 2015: The Americas (cont'd.)

Country/Economy	T&T Policy and Enabling Conditions Pillars, values				Infrastructure Pillars, values			Natural and Cultural Resources Pillars, values	
	Prioritization of T&T	International Openness	Price Competitiveness	Environmental Sustainability	Air Transport Infrastructure	Ground and Port Infrastructure	Tourist Service Infrastructure	Natural Resources	Cultural Resources & Business Travel
NORTH AMERICA AND CARIBBEAN									
United States	5.47	4.02	4.27	3.56	5.95	4.67	6.30	5.27	4.79
Canada	5.00	3.19	3.63	4.63	6.75	4.11	5.97	4.78	4.02
Mexico	5.16	3.48	4.88	3.37	3.64	3.39	4.47	5.18	4.92
Panama	5.27	4.10	5.15	4.25	4.54	4.16	5.46	4.34	1.70
Costa Rica	5.37	3.98	4.40	4.11	2.96	2.86	5.27	5.09	1.68
Barbados	5.76	2.85	3.58	4.77	3.95	5.67	5.92	2.17	1.13
Puerto Rico	4.99	1.60	4.82	4.84	3.05	5.49	5.40	2.89	1.55
Trinidad and Tobago	3.52	3.50	5.34	3.48	4.18	4.37	5.15	2.28	1.32
Jamaica	5.72	3.60	4.29	3.33	2.44	4.75	4.59	2.50	1.40
Guatemala	4.36	3.94	5.35	3.62	1.89	3.26	3.70	3.67	1.60
Dominican Republic	5.79	3.24	4.02	3.23	2.82	3.58	4.63	2.59	1.51
Honduras	4.68	4.05	5.14	4.12	2.09	3.20	3.70	2.97	1.50
El Salvador	4.45	4.53	4.91	3.70	2.21	4.07	3.67	2.18	1.38
Nicaragua	4.34	3.97	5.26	3.90	1.91	2.87	3.62	3.21	1.35
Haiti	4.00	3.88	5.17	2.88	1.76	2.13	2.99	1.46	1.13
North America and Caribbean average	4.93	3.59	4.68	3.85	3.34	3.90	4.72	3.37	2.06
North America and Caribbean standard deviation	0.68	0.70	0.61	0.59	1.51	1.00	1.02	1.26	1.32
SOUTH AMERICA									
Brazil	4.05	2.59	4.51	3.89	3.64	2.36	4.69	6.01	5.31
Chile	4.88	4.65	4.44	4.38	2.82	3.64	4.83	2.93	2.47
Argentina	4.54	2.77	3.97	3.32	2.55	2.63	4.64	4.08	4.37
Peru	4.75	4.18	3.90	3.75	2.43	2.59	4.75	4.61	3.00
Colombia	4.31	4.30	4.47	3.88	2.66	2.50	3.59	4.13	3.21
Uruguay	5.43	2.75	4.20	4.72	2.15	3.17	4.10	2.40	1.79
Bolivia	3.51	2.78	5.32	3.83	2.16	2.39	3.10	3.55	1.99
Suriname	3.51	2.32	4.50	4.36	2.16	3.18	3.68	2.96	1.06
Guyana	4.11	3.65	5.27	4.18	3.23	3.10	2.18	2.44	1.13
Venezuela	3.36	2.24	4.63	3.38	2.14	2.08	3.08	4.49	2.13
Paraguay	4.94	2.50	4.29	3.83	1.56	2.43	3.67	2.23	1.44
South America average	4.31	3.16	4.50	3.96	2.50	2.74	3.85	3.62	2.54
South America standard deviation	0.67	0.87	0.45	0.42	0.58	0.47	0.85	1.17	1.35
The Americas average	4.66	3.41	4.60	3.90	2.99	3.41	4.35	3.48	2.26
Best performer (global)	6.03	5.25	6.62	5.63	6.75	6.45	6.83	6.01	6.69

Note: Dark green = very strong performance, dark red = weak performance, and yellow = average performance, compared to the best/worst performers on each pillar, globally.

often limited public funds allocated to T&T infrastructure development. Anecdotal evidence suggests that making a success of complex construction projects, such as Quito International Airport and Hong Kong's Line Mass Transit Railway, depends on factors including transparency of process and the creation of a strong legal framework.¹ In many cases, the same business environment constraints that limit the formation of new companies in the T&T sector—such as red tape, insufficient property rights protection and corruption—can also weaken the effectiveness of PPP projects.

In terms of security, while several countries in South America share difficulties in controlling crime and violence, there are different root causes that require country-specific solutions. The United Nations Office on Drugs and Crime (UNODC) recommends a “complementary approaches” model, such as the integrated citizen security model in the Dominican Republic.² More accurate indicators are also needed to understand the local peculiarities of crime, create information management systems and evaluate the impact of reform programmes.

In the Caribbean, common T&T issues include further leveraging of natural and cultural resources and air transport infrastructure, and—with some exceptions—improving the capacity for connectivity. The T&T Competitiveness Index suggests that most Caribbean economies rely extensively on their famous beaches but do not seem to sufficiently promote their cultural resources. More efforts in promoting and leveraging their cultural heritage could further improve the T&T competitiveness of these economies, while the lower than expected performance of Caribbean countries on the Natural Resources pillar is partly explained by a lack of UNESCO natural heritage sites and a low percentage of land being officially protected.

The **United States** is the highest ranked country in the Americas and 4th globally. It welcomed a record 74 million international visitors in 2014. With many World Heritage natural sites (2nd), the United States performs strongly in the Natural Resources pillar (3rd) and it also attracts tourists thanks to cultural, entertainment and sport attractions (13th). This is complemented by a highly competitive business environment (19th) and several bilateral Air Service Agreements (9th), which are supported by the country's air transport infrastructure (2nd). However, visa requirements are restrictive (127th), and despite recent developments in its visa regime leading to a more open policy towards China (not yet reflected in statistics), it should further improve its travel facilitation. Other areas for improvement include the quality of ground transport (31st), safety and security (73rd) and environmental sustainability (111th). Despite some stringent regulations, the natural environment is being eroded with a high share of endangered species and damage to coastline ecosystems.

Brazil ranks 28th overall and 1st in South America. The 2014 FIFA World Cup and upcoming 2016 Rio Olympic Games have led to significant investments in infrastructure and connectivity, helping to make Brazil rank 41st in airport infrastructure and 3rd in the number of sports stadiums. It also ranks in the top 10 in terms of international association meetings. With its rich biodiversity, Brazil tops the ranks in terms of natural resources and the number of known species. Despite its high potential, there are still large investment opportunities, especially in the improvement of ground infrastructure. However, these are hindered by Brazil's restrictive business environment (126th), partly due to high taxation (135th) and the time needed to obtain a construction permit (137th). In addition, safety and security remain an issue in Brazil, due to the high cost of crime and incidence of violence.

Mexico is ranked 30th overall. Endowed with both natural (4th) and cultural (11th) resources, Mexico ranks 8th and 6th, respectively, in terms of natural and cultural UNESCO World Heritage sites. Digital demand data confirms the importance of natural tourism, with Mexico

ranking 18th worldwide for online searches. Another area of strength is the relatively high prioritization of the T&T industry in the country's development strategy (32nd), with approximately 5% of the national budget spent on T&T related activities (43rd globally) and the Pacific Alliance emphasizing international openness and regional integration. Despite this strong overall performance, some areas for improvement remain, notably safety and security (125th) and environmental sustainability (126th), which is strategically significant given the importance of the country's natural resources. Additionally, some areas of the business environment could be improved—Mexico ranks low on costs related to construction permits (131st), market competition (114th) and taxation levels (116th).

Panama is ranked 33rd overall. The country has developed a significant tourism sector (approximately 6% of the economy) on the basis of its rich natural resources (20th) and world-class tourist service infrastructure (27th), which offer tourists an enjoyable experience. Panama is a price-competitive destination (32nd), internationally open (23rd) and well connected thanks to its excellent air transport infrastructure (18th), which allows it to position itself as a travel and trade gateway to Latin America. There are nonetheless aspects where Panama could improve. In terms of human resources (95th), despite the progress made, it is not always easy to find skilled workers (99th), perhaps due to regulatory barriers to sourcing from the international talent pool (111th) and the limited participation of women in the labour force (112th). In terms of cultural resources (63rd), Panama scores relatively low on the amount of culture and entertainment-related online searches (47th) and could expand its entertainment offer, including by better promoting its oral and intangible heritage.

Colombia is 68th globally, with 2.3 million international tourist arrivals—on an upward trajectory since 2011. It is very open internationally (8th), with one of the most liberal visa policies (20th), and it has improved its ICT readiness (67th) over time. Colombia has a highly biodiverse ecosystem, home to almost 3,000 species (2nd), and a vibrant cultural atmosphere, with music and folklore events, such as the Carnival of Barranquilla, which sustain the oral and intangible cultural heritage (13th). Yet, despite recent improvements in some areas of the country, traveler safety concerns drive Colombia into low ranks in safety and security (140st), including terrorism (134th) and crime and violence (132nd). Other areas for improvement include ground infrastructure (124th), with a need for more paved roads, and an increase in government budget allocation to T&T related expenditure (110th).

Asia-Pacific

The Asia-Pacific region is extensive and very heterogeneous, though in general several countries

share a high level of commitment to T&T. The region's most developed areas—including Oceania, the Asian Tigers and Japan—all have world-class transport infrastructure, high degrees of ICT readiness and openness, and outstanding human resources. However, the best performers stand out by better valuing their natural and cultural resources and better protecting their environment.

South-East Asia is where international arrivals have grown the most recently, thanks in part to being highly price competitive and rich in natural capital, and helped also by the rapid expansion of the middle class in surrounding areas. Policymakers have understood the potential multiplier effect of offering a larger, cross-border set of itinerary options, including through cooperation on visa policy. ASEAN countries have already started to work on pilots to implement visa facilitation, aiming in the coming years for holders of a visa for any ASEAN country being able to travel freely in all 25 member states. According to the UNWTO, this could ultimately lead to an increase of up to 10 million visitors in ASEAN countries.³

Despite remarkable progress, cooperation is needed on common aspects that still limit T&T development in South-East Asia. Efforts to bridge the significant divides in digital connectivity and infrastructure between the region's most and least advanced countries—including through public-private partnerships—would play a significant role in complementing the development of a regional visa policy.

Arguably, however, the main priority is to restrain rampant environmental degradation. Rapid urbanization and industrialization are significantly impacting air quality and forest and ocean ecosystems: for example, Forest Watch Indonesia reports that Indonesia lost 990,000 hectares of forest between 2010 and 2013, and a World Resource Institute Report estimates that 45% of coral reefs in the region's "Coral Triangle" face a high level of threat.⁴ The issue needs to remain high on the political agenda, with initiatives and policy guidelines by such organizations as the IUCN, FAO, UNEP and the Roundtable on Sustainable Palm Oil, offering potentially useful models for the necessary multi-stakeholder partnerships.⁵

Australia ranks 7th overall and top in the Asia-Pacific region, and has identified tourism as one of four national investment priorities. With attractions from the Great Barrier Reef to Kangaroo Island and the largest number of World Heritage natural sites, it ranks 2nd globally on natural resources. It is also one of the top three destinations for leisure and entertainment, according to digital demand. Australia has made significant progress on visa requirements (49th), including an expansion of the online visa application system and self-processing border entry facilities for U.S. and U.K. e-passport holders. It remains strong in its openness of

bilateral air service agreements (5th) and air transport infrastructure (4th), though it needs further investment in ground and port infrastructure (57th) and tourism infrastructure (29th) to reach its potential. The country should also consider tackling issues related to price competitiveness (138th) and human resources (49th), where access to the international talent pool is limited (134th) and hiring and firing practices are somewhat rigid (133rd).

Japan is ranked 9th globally and 2nd in the Asia-Pacific. It welcomed over 10 million foreign tourists in 2013, a new record, bouncing back from a drop in arrivals in 2011. Japan's success can be attributed to its rich cultural resources (6th) with unique cultural heritage (2nd) and efficient ground (17th) and air transport (19th) infrastructure. It has also built impressive ICT readiness (9th), launching a paid wireless internet service with access points across the country, which is appreciated by visitors and supports the business operations of firms. Japan's human resources (15th) are highly qualified and excel in terms of treatment of customers, where Japan is ranked 1st globally. The country can rely on a strong business travel component, and is geographically situated in an area where neighboring countries' middle classes are growing significantly. On a less positive note, Japan is not a price-competitive destination (119th).

Singapore ranks 11th globally in this TCI edition. Its excellent business environment (1st) and high-quality human resources (3rd) are extremely conducive to the development of its Travel & Tourism industry, which is also a high national priority (4th). Singapore has taken the necessary measures related to international openness (1st) to ensure the seamless arrival of international visitors, and has strong ground (2nd) and air (6th) transport infrastructure. The country has experienced an increase in spending on sightseeing, entertainment and gaming, and ranks top for entertainment in terms of online searches. Similarly to other advanced economies, however, Singapore is not a very price-competitive destination (116th). It should also dedicate more efforts to environmental sustainability (51st), notably high water stress (128th) and damage to coastal ecosystems.

China ranks 6th regionally and 17th globally. Thanks to its size and its increased relevance for businesses, it welcomed over 55 million international visitors in 2013. Tourists are attracted to the country's incredible cultural resources (4th) and natural resources (the country ranks third in World Heritage natural sites), while several international association meetings every year draw business visitors. China continues to invest in its infrastructure, especially with further planned improvements in air infrastructure (25th) including new and expanded airports. Ground infrastructure remains somewhat less developed (53rd), while tourism service infrastructure offers significant opportunities for future development, especially in terms of available hotel

Table 4: The Travel & Tourism Competitiveness Index 2015: Asia-Pacific

Country/Economy	TTCI INDEX		Enabling Environment Pillars, values				
	Regional rank	Global rank	Business Environment	Safety and Security	Health and Hygiene	Human Resources and Labour Market	ICT Readiness
EASTERN ASIA AND OCEANIA							
Australia	1	7	5.04	6.24	6.14	4.72	5.73
Japan	2	9	5.12	6.05	6.43	5.20	6.00
Hong Kong SAR	4	13	6.08	6.31	6.41	5.30	6.22
New Zealand	5	16	5.69	6.41	5.72	5.34	5.57
China	6	17	4.25	5.47	5.29	5.20	4.15
Korea, Rep.	8	29	4.44	5.45	6.36	4.81	5.97
Taiwan, China	9	32	5.27	6.03	6.13	5.10	5.41
Mongolia	18	99	4.39	5.40	6.02	4.63	3.42
Eastern Asia and Oceania average			5.03	5.92	6.06	5.04	5.31
Eastern Asia and Oceania standard deviation			0.65	0.42	0.39	0.28	0.99
SOUTH-EAST AND SOUTHERN ASIA							
Singapore	3	11	6.13	6.40	5.44	5.49	5.98
Malaysia	7	25	5.60	5.79	5.18	4.98	4.52
Thailand	10	35	4.78	3.75	4.87	4.98	4.34
Indonesia	11	50	4.48	5.16	4.24	4.70	3.73
India	12	52	4.02	3.82	4.32	4.03	2.83
Sri Lanka	13	63	4.59	5.58	5.24	4.33	3.49
Philippines	14	74	4.54	3.84	4.79	4.59	3.71
Vietnam	15	75	4.45	5.31	4.99	4.68	3.37
Bhutan	16	87	4.56	6.02	4.57	4.26	3.51
Lao PDR	17	96	4.58	5.51	4.25	4.50	3.09
Nepal	19	102	3.98	4.52	4.90	4.22	2.36
Cambodia	20	105	3.56	4.96	3.92	4.48	3.19
Pakistan	21	125	4.19	3.04	4.39	3.07	2.54
Bangladesh	22	127	4.06	4.43	4.29	3.85	2.70
Myanmar	23	134	3.20	4.04	4.41	3.85	1.60
South-East and Southern Asia average			4.45	4.81	4.66	4.40	3.40
South-East and Southern Asia standard deviation			0.72	0.98	0.44	0.58	1.04
Asia-Pacific average			4.65	5.20	5.14	4.62	4.06
Best performer (global)			6.13	6.70	6.97	5.64	6.37

rooms (112th). To continue building on its successes and improve the industry's competitiveness, the country should focus on policies that would further enable the business environment (80th) and increase international openness (96th). Future demand for natural tourism also depends on China addressing questions of environmental sustainability (137th) and the falling quality of its natural environment (121st).

India takes 52nd place overall. T&T already accounts for 5% of India's employment and its huge potential for further growth is made visible by comparing the country's 7 million international visitors to China's 55 million. The country's natural resources (17th) are vast and diverse and its cultural resources (10th) include a

unique intangible heritage (8th), sports events and a large entertainment offer. India's relevance as business travel destination is increasing along with its economic growth, it remains a price-competitive destination (8th) and recent changes in its visa regime: not yet reflected in the data rankings—have the potential to boost international arrivals. However, longstanding infrastructure gaps remain, especially in tourism-specific infrastructure (109th) and the quality of roads. Despite some uneven progress, India also lags on health and hygiene (106th) and ICT readiness (114th). The safety and security situation is unsettling, with a perceived increase in the impact of crime and violence (97th), and India ranks only 139th for environmental sustainability.

Table 4: The Travel & Tourism Competitiveness Index 2015: Asia-Pacific (cont'd.)

Country/Economy	T&T Policy and Enabling Conditions Pillars, values				Infrastructure Pillars, values			Natural and Cultural Resources Pillars, values	
	Prioritization of T&T	International Openness	Price Competitiveness	Environmental Sustainability	Air Transport Infrastructure	Ground and Port Infrastructure	Tourist Service Infrastructure	Natural Resources	Cultural Resources & Business Travel
EASTERN ASIA AND OCEANIA									
Australia	4.81	4.04	3.06	4.64	5.80	3.69	5.44	5.31	5.13
Japan	5.44	4.16	3.75	4.30	4.54	5.29	4.11	3.94	5.92
Hong Kong SAR	5.63	3.78	3.59	3.96	5.42	6.45	4.05	3.63	2.58
New Zealand	5.62	4.55	3.77	4.94	4.72	4.06	5.87	4.14	2.27
China	4.73	2.52	5.10	2.93	4.27	3.91	3.04	5.05	6.44
Korea, Rep.	4.52	3.60	4.06	3.86	4.05	5.06	4.33	2.34	4.85
Taiwan, China	4.41	4.07	5.04	4.09	3.40	5.40	4.05	3.01	3.25
Mongolia	4.01	2.69	5.25	3.24	2.33	2.09	3.21	2.51	1.78
Eastern Asia and Oceania average	4.89	3.68	4.20	3.99	4.32	4.49	4.26	3.74	4.03
Eastern Asia and Oceania standard deviation	0.60	0.72	0.82	0.67	1.10	1.34	0.98	1.10	1.78
SOUTH-EAST AND SOUTHERN ASIA									
Singapore	5.95	5.25	3.82	4.31	5.26	6.44	5.17	2.87	3.30
Malaysia	4.71	3.85	5.76	3.42	4.46	4.50	4.43	4.09	2.95
Thailand	4.95	3.70	5.06	3.46	4.57	3.41	5.70	4.47	2.79
Indonesia	5.61	3.55	6.11	3.11	3.81	3.27	3.07	4.36	3.12
India	4.14	3.08	5.59	2.89	3.88	4.02	2.90	4.42	5.09
Sri Lanka	5.17	3.21	4.67	3.74	2.64	4.24	4.15	3.76	1.60
Philippines	5.26	4.05	5.28	3.41	2.77	3.02	3.77	3.39	1.71
Vietnam	3.73	2.68	5.30	3.16	2.72	3.14	2.95	3.61	2.79
Bhutan	4.93	2.13	5.18	4.07	2.93	3.15	2.61	3.13	1.29
Lao PDR	4.83	2.94	4.93	3.55	2.29	3.01	3.22	2.74	1.29
Nepal	4.68	2.80	5.29	3.14	2.08	2.57	2.65	4.11	1.23
Cambodia	4.99	3.43	5.00	3.43	2.10	2.61	2.91	2.84	1.53
Pakistan	3.72	2.21	5.59	2.82	2.09	3.27	2.57	2.25	1.76
Bangladesh	3.19	2.57	4.43	3.01	1.87	3.29	2.32	2.30	1.56
Myanmar	3.99	2.05	3.63	3.57	1.95	2.19	2.06	2.70	1.43
South-East and Southern Asia average	4.66	3.17	5.04	3.41	3.03	3.47	3.36	3.40	2.23
South-East and Southern Asia standard deviation	0.76	0.85	0.68	0.42	1.09	1.03	1.06	0.77	1.09
Asia-Pacific average	4.74	3.34	4.75	3.61	3.48	3.83	3.68	3.52	2.85
Best performer (global)	6.03	5.25	6.62	5.63	6.75	6.45	6.83	6.01	6.69

Note: Dark green = very strong performance, dark red = weak performance, and yellow = average performance, compared to the best/worst performers on each pillar, globally.

Indonesia ranks 50th overall while its growing tourism industry reaching over 8.8 million international visitors in 2014 thanks to national prioritization of the industry (15th) and continued investment in infrastructure—the mobile network now covers all areas of the country, air transport infrastructure has been expanded to reach 39th position with ground transport at 77th. These developments support Indonesia's main competitive advantages: price competitiveness (3rd) and rich natural resources (19th), including biodiversity (ranking 4th on the Total known species indicator) and several heritage sites (10th). Given its dependence on natural resources, however, Indonesia is not placing enough emphasis on environmental sustainability (134th).

Deforestation (97th) is endangering species (129th), and only a minimal fraction of the water used is treated (117th). There are also concerns relating to safety and security, specifically the business cost of terrorism (104th).

Middle East and North Africa

Most countries in the Middle East and North Africa are price-competitive destinations and several have built significant T&T industries in recent years. However, concerns about security—which, unlike in some other regions, are more related to terrorism and political instability than crime and violence—are causing some countries to see a reduction in international arrivals, even

Table 5: The Travel & Tourism Competitiveness Index 2015: Middle East and North Africa

Country/Economy	TTCI INDEX		Enabling Environment Pillars, values				
	Regional rank	Global rank	Business Environment	Safety and Security	Health and Hygiene	Human Resources and Labour Market	ICT Readiness
MIDDLE EAST AND NORTH AFRICA							
United Arab Emirates	1	24	5.90	6.60	5.28	5.15	5.76
Qatar	2	43	6.05	6.61	5.97	5.23	5.44
Bahrain	3	60	5.53	5.33	5.17	4.71	5.76
Morocco	4	62	4.73	5.83	4.54	4.05	4.03
Saudi Arabia	5	64	5.21	5.99	5.10	4.46	5.29
Oman	6	65	5.29	6.38	5.37	4.27	4.83
Israel	7	72	4.61	4.85	6.06	4.81	5.25
Jordan	8	77	4.86	5.79	5.53	4.56	4.17
Tunisia	9	79	4.42	4.86	5.16	4.31	3.94
Egypt	10	83	4.11	3.40	5.40	4.12	3.80
Lebanon	11	94	3.76	3.81	6.04	3.99	3.62
Iran, Islamic Rep.	12	97	3.85	4.89	4.71	3.95	3.36
Kuwait	13	103	4.69	5.76	5.43	4.26	5.01
Algeria	14	123	3.78	4.90	4.97	4.04	3.09
Mauritania	15	137	3.46	5.06	3.03	2.30	2.18
Yemen	16	138	3.58	2.86	3.84	3.31	2.29
Middle East and North Africa average			4.69	5.19	5.24	4.35	4.38
Middle East and North Africa standard deviation			0.82	1.10	0.79	0.70	1.15
Best performer (global)			6.13	6.70	6.97	5.64	6.37

though secluded tourism resorts are far from the most dangerous areas.

Other common difficulties include low international openness, which may be connected to the security concerns, and environmental sustainability, a dimension on which almost all countries in the region perform below the international average.

The region's countries can be divided into three groups: (i) those which have created a strong business environment, developed sound infrastructure, grown specific niches and remained relatively safe as destinations (the top five countries in the list); (ii) those that maintain great tourism attractiveness, but have experienced safety and security concerns or infrastructure limitations (Egypt, Tunisia, Jordan and Lebanon); and (iii) those that are not leveraging enough their T&T capacity (all the others).

The **United Arab Emirates (UAE)** leads the region and takes 24th place globally, welcoming over 10 million tourists in 2013. While the UAE does not have rich natural resources (95th), it has built a unique environment to attract both business and leisure travelers. From Expo 2020 Dubai to the construction of the Louvre and Guggenheim, the UAE is investing in and giving significant importance to the development of the T&T industry. This is supported by its world-renowned air transport infrastructure (3rd) and positioning as

a gateway for Europeans to Africa, the Middle East and Asia. It has created extremely effective branding campaigns (1st) and an enabling business environment for the industry's development, with strides in travel facilitation and the liberalization of its visa regime (30th). The country has a safe and secure environment, but improvements could be made in terms of health and hygiene services (69th), and some aspects of price competitiveness should be monitored as the cost of living is growing (103rd).

Israel is ranked 7th in the region and 72nd globally. With its unique cultural history and religious significance, Israel is at the crossroads of three continents and has a number of World Heritage cultural sites (26th). The country performs well on ICT readiness (32nd), and on the Human Resources and the Labour Market pillar (39th), with especially good rankings on the Ease of finding skilled employees indicator (17th). Infrastructure is mostly well developed, yet more investments are needed in tourism infrastructure (72nd). Similar to other countries in the region, Israel's tourism is affected by concerns about safety and security (99th), terrorism (130st) and instability from conflict. Other areas for improvement include low price competitiveness (136th) and political will to address environmental sustainability (101st)—T&T is not being developed with particular attention to the environment (110th) and there is low

Table 5: The Travel & Tourism Competitiveness Index 2015: Middle East and North Africa (cont'd.)

Country/Economy	T&T Policy and Enabling Conditions Pillars, values				Infrastructure Pillars, values			Natural and Cultural Resources Pillars, values	
	Prioritization of T&T	International Openness	Price Competitiveness	Environmental Sustainability	Air Transport Infrastructure	Ground and Port Infrastructure	Tourist Service Infrastructure	Natural Resources	Cultural Resources & Business Travel
MIDDLE EAST AND NORTH AFRICA									
United Arab Emirates	4.97	2.77	4.95	4.39	5.91	5.06	5.46	2.51	1.97
Qatar	4.89	1.93	5.33	4.32	4.17	4.79	4.81	2.12	1.48
Bahrain	4.14	2.34	5.33	3.73	3.52	5.53	4.74	1.92	1.33
Morocco	5.27	2.56	4.94	4.09	2.86	3.48	4.44	3.11	2.51
Saudi Arabia	4.50	1.49	5.49	3.41	3.79	3.66	4.44	2.68	1.91
Oman	4.51	2.07	5.33	4.07	2.98	4.25	4.53	2.59	1.45
Israel	4.63	2.54	3.24	3.76	3.16	3.91	4.20	2.47	1.98
Jordan	5.46	3.24	4.63	3.92	2.61	3.25	4.37	2.05	1.27
Tunisia	4.91	2.38	5.61	4.22	2.53	3.02	4.54	2.36	1.58
Egypt	4.56	2.17	6.19	3.99	2.93	2.84	3.60	2.45	2.40
Lebanon	5.22	2.50	4.84	3.29	2.46	3.10	5.18	1.71	1.47
Iran, Islamic Rep.	3.35	2.14	6.62	3.47	2.22	3.28	2.61	2.48	2.59
Kuwait	3.03	1.75	5.04	2.95	2.51	3.61	3.84	1.87	1.17
Algeria	2.74	1.51	5.50	3.51	1.98	2.56	2.03	2.04	2.05
Mauritania	3.12	2.94	4.82	4.15	1.59	1.96	2.37	2.12	1.11
Yemen	2.80	1.34	5.99	2.92	1.59	2.55	2.78	2.03	1.45
Middle East and North Africa average	4.33	2.18	5.27	3.74	3.01	3.66	4.10	2.29	1.77
Middle East and North Africa standard deviation	0.94	0.54	0.76	0.46	1.07	0.97	1.03	0.36	0.48
Best performer (global)	6.03	5.25	6.62	5.63	6.75	6.45	6.83	6.01	6.69

Note: Dark green = very strong performance, dark red = weak performance, and yellow = average performance, compared to the best/worst performers on each pillar, globally.

international commitment on environmental agreement (128th).

Morocco is ranked 62nd overall and 4th in the region. Tourism is considered a strategic industry for the country (26th in the prioritization ranking) and has been developed considerably, representing today almost 8% of employment, the highest share in the region. Tourists are attracted to Morocco's cultural resources (39th) and some natural resource hot spots, including popular beach resorts, while the industry benefits from a relatively safe setting (37th) and a business environment where FDI is welcome (10th) and construction procedures are not burdensome (28th). The country's infrastructure also plays a significant role, though air and ground transport have room for improvement. Human resources (107th) could also be improved, including better leveraging talent by incentivizing female participation, investing more in staff training (105th) and making the labour market more flexible, especially to attract foreign workers. Other areas for attention are health and hygiene (98th), especially the availability of hospital beds (113th) and access to improved drinking water (110th).

Saudi Arabia places 5th regionally and 64th out of all countries in the TTCI, distinguishing itself through its enabling business environment (23rd) and price competitiveness (11th). Its significant amount of international visitors travel mainly for business or

religious tourism; however, it remains generally closed as a destination for leisure tourism, as exemplified by its government's low emphasis in prioritizing the T&T industry (100th) and international openness (138th). Its stringent visa restrictions (140th) apply also for the Hajj pilgrimage, though there have been recent policy changes to encourage foreign tourists to visit historical sites (the country scores relatively well, 55th, for cultural resources). Saudi Arabia has good air transport infrastructure (40th), although further investment could be made in ground and tourism infrastructure (67th) and environmental policies for the industry's long-term development (121st).

Egypt is 83rd in the global ranking and 10th in the region, with approximately 9 million tourists per year—below the country's full potential as a price-competitive destination (2nd), with significant investments in the T&T industry (23rd). Egypt's outstanding cultural resources (41st) and long history are perhaps under-leveraged, as reflected in a surprisingly low rank (60th) for oral and intangible heritage. Current instability is reducing Egypt's appeal to international tourists, and limiting receipts and, hence, funds available for investment. It also contributes greatly to the low safety and security performance (136th) and might also have an impact on the country's relatively limited international openness (115th) performance. In addition, ground infrastructure (103rd)

Table 6: The Travel & Tourism Competitiveness Index 2015: Sub-Saharan Africa

Country/Economy	TTCI INDEX		Enabling Environment Pillars, values				
	Regional rank	Global rank	Business Environment	Safety and Security	Health and Hygiene	Human Resources and Labour Market	ICT Readiness
EASTERN AND SOUTHERN AFRICA							
South Africa	1	48	5.35	4.30	3.85	4.09	4.29
Seychelles	2	54	4.63	5.09	5.49	4.62	4.17
Mauritius	3	56	5.19	5.91	5.31	4.75	4.22
Namibia	4	70	4.76	5.02	3.70	3.80	3.82
Kenya	5	78	4.33	3.78	3.29	4.44	3.13
Botswana	7	88	4.86	5.15	3.50	4.20	3.74
Tanzania	8	93	3.97	4.85	2.68	4.03	2.48
Rwanda	9	98	5.13	5.58	3.92	4.36	2.93
Zambia	10	107	4.75	5.40	2.44	4.99	2.51
Swaziland	11	108	4.45	4.65	3.19	3.70	3.00
Uganda	14	114	3.87	4.62	2.72	4.11	2.72
Zimbabwe	15	115	2.97	5.31	3.00	3.83	2.82
Ethiopia	17	118	3.90	5.18	4.35	3.63	1.88
Madagascar	19	121	3.87	4.66	3.28	3.85	2.36
Malawi	22	126	4.03	5.41	2.44	4.18	2.55
Lesotho	24	129	4.23	4.42	2.93	3.91	2.47
Mozambique	25	130	4.23	4.50	1.97	3.57	1.94
Burundi	28	135	3.78	4.55	3.91	3.61	1.90
Eastern and Southern Africa average			4.35	4.91	3.44	4.09	2.94
Eastern and Southern Africa standard deviation			0.60	0.53	0.94	0.41	0.80
CENTRAL AND WEST AFRICA							
Cape Verde	6	86	4.42	5.18	4.64	4.39	3.52
Gambia, The	12	109	4.06	5.61	3.42	4.12	2.74
Senegal	13	112	4.11	5.41	3.13	3.63	3.02
Côte d'Ivoire	16	117	4.13	4.68	3.08	3.29	2.94
Ghana	18	120	4.58	4.96	3.09	4.35	3.05
Cameroon	20	122	3.96	5.29	3.32	4.20	1.89
Gabon	21	124	4.18	5.22	4.19	3.61	2.85
Mali	23	128	3.90	4.15	3.02	3.26	2.28
Nigeria	26	131	4.11	2.65	2.79	3.54	2.81
Sierra Leone	27	132	4.12	5.18	2.93	3.61	1.98
Mauritania	30	137	3.46	5.06	3.03	2.30	2.18
Angola	31	139	3.03	4.73	3.23	2.79	2.37
Guinea	32	140	3.38	4.95	2.51	3.19	1.94
Chad	33	141	2.80	4.36	2.49	2.73	1.31
Central and West Africa average			3.89	4.82	3.18	3.49	2.44
Central and West Africa standard deviation			0.50	0.71	0.57	0.61	0.61
Sub-Saharan Africa average			4.14	4.87	3.32	3.82	2.71
Best performer (global)			6.13	6.70	6.97	5.64	6.37

requires a significant upgrade, especially in terms of quality of roads and efficiency of the transport network.

Sub-Saharan Africa

T&T in Africa has significant potential, notably due to richness in natural resources and the potential to further

develop cultural resources. However, it is still mostly in the early stages of development and strongly connected with more general and longstanding development challenges, including infrastructure as well as health and hygiene. While improvements have been achieved in these areas, especially at the local level, they remain

Table 6: The Travel & Tourism Competitiveness Index 2015: Sub-Saharan Africa (cont'd.)

Country/Economy	T&T Policy and Enabling Conditions Pillars, values				Infrastructure Pillars, values			Natural and Cultural Resources Pillars, values	
	Prioritization of T&T	International Openness	Price Competitiveness	Environmental Sustainability	Air Transport Infrastructure	Ground and Port Infrastructure	Tourist Service Infrastructure	Natural Resources	Cultural Resources & Business Travel
EASTERN AND SOUTHERN AFRICA									
South Africa	4.88	2.38	4.99	4.29	3.28	3.59	5.02	4.28	3.39
Seychelles	5.78	2.73	3.68	5.17	4.30	4.76	5.95	2.65	1.03
Mauritius	5.96	3.42	3.91	4.67	2.95	4.77	5.45	2.03	1.26
Namibia	4.51	2.62	5.20	4.41	3.03	3.68	4.75	3.94	1.12
Kenya	5.36	3.01	4.50	4.42	2.56	3.36	3.30	4.63	1.67
Botswana	4.33	2.12	5.44	4.42	2.27	2.82	3.47	3.59	1.35
Tanzania	4.83	3.25	4.87	3.78	1.94	2.56	2.70	4.91	1.54
Rwanda	4.29	2.93	4.61	4.68	1.84	3.85	2.52	2.75	1.27
Zambia	4.07	2.30	4.92	4.16	1.93	2.80	2.94	3.58	1.28
Swaziland	4.28	2.96	5.49	4.48	3.03	3.49	2.88	2.16	1.02
Uganda	4.04	3.03	4.82	3.96	1.81	2.65	2.61	3.51	1.50
Zimbabwe	3.87	2.22	4.96	4.18	1.79	2.74	2.84	3.51	1.46
Ethiopia	3.75	2.57	4.65	4.00	2.27	2.51	2.23	3.00	1.50
Madagascar	4.47	2.97	4.91	3.46	1.87	2.38	2.91	2.65	1.39
Malawi	3.46	2.03	4.69	4.01	1.51	2.62	2.54	2.93	1.30
Lesotho	4.03	1.66	5.27	3.87	1.59	2.83	3.01	1.98	1.02
Mozambique	3.78	3.05	4.36	3.93	1.78	2.27	2.84	2.61	1.25
Burundi	2.45	3.15	5.02	3.78	1.64	2.80	1.90	1.91	1.14
Eastern and Southern Africa average	4.34	2.69	4.79	4.20	2.30	3.14	3.33	3.15	1.42
Eastern and Southern Africa standard deviation	0.83	0.48	0.47	0.41	0.75	0.75	1.16	0.91	0.53
CENTRAL AND WEST AFRICA									
Cape Verde	4.52	3.13	4.48	4.32	3.63	3.42	4.56	1.83	1.05
Gambia, The	4.88	2.02	5.90	4.49	1.99	3.66	2.67	2.23	1.16
Senegal	3.79	3.07	3.56	4.36	2.03	2.89	3.38	3.04	1.43
Côte d'Ivoire	3.31	1.76	4.46	4.09	2.04	3.31	3.26	3.30	1.27
Ghana	3.46	1.90	4.32	3.99	2.07	3.11	2.55	2.57	1.47
Cameroon	3.42	1.80	4.83	3.93	1.79	2.60	2.59	3.18	1.29
Gabon	3.00	1.34	4.99	4.30	2.03	2.14	2.68	2.80	1.18
Mali	3.93	2.91	4.24	4.55	1.75	2.64	2.57	2.09	1.74
Nigeria	3.34	1.85	4.38	3.86	2.02	2.42	2.70	2.69	1.80
Sierra Leone	3.94	1.84	4.89	3.77	1.51	2.79	1.98	2.38	1.29
Mauritania	3.12	2.94	4.82	4.15	1.59	1.96	2.37	2.12	1.11
Angola	2.67	1.29	5.46	3.41	1.96	2.07	2.44	2.34	1.24
Guinea	2.96	1.75	4.32	3.81	1.54	2.09	1.94	2.76	1.33
Chad	3.57	1.66	3.76	4.34	1.42	2.13	2.09	2.49	1.03
Central and West Africa average	3.56	2.06	4.60	4.12	1.93	2.62	2.67	2.53	1.31
Central and West Africa standard deviation	0.58	0.63	0.59	0.32	0.52	0.56	0.66	0.43	0.22
Sub-Saharan Africa average	3.99	2.40	4.71	4.17	2.13	2.90	3.03	2.87	1.37
Best performer (global)	6.03	5.25	6.62	5.63	6.75	6.45	6.83	6.01	6.69

Note: Dark green = very strong performance, dark red = weak performance, and yellow = average performance, compared to the best/worst performers on each pillar, globally.

important hurdles to attracting international tourists. As the region's average GDP per capita is less than 4,000 PPP USD, the industry's growth depends heavily on attracting tourists from other continents.

Most countries in the region are aware of the potential role of tourism as an economic opportunity and

development catalyst, and have drafted strategic plans to develop the sector. However, the extent to which the actual implementation of those plans is a national priority varies significantly. Tanzania, Gambia, Kenya and South Africa are all putting significant efforts into advancing T&T development, trailing behind only the Seychelles

and Mauritius, where the tourism sector's share of the economy is particularly large. Also related to political and institutional issues, the business environment varies widely, with South Africa, Botswana, Rwanda and Mauritius among the region's leaders and Angola, Zimbabwe and Chad among those performing less well.

Two aspects in particular require more international cooperation. One is openness, with some recent policy changes showing a will to make progress—for example, the 15 members of Economic Community of West African States (ECOWAS) have introduced a visa policy that enables free movement of people across member states, offering a larger market to international travellers. Nonetheless, most countries in the region still have significant travel restrictions in place, and there are even discussions of tightening visa policies in countries such as South Africa.

While most countries in the region perform well on environmental sustainability, specific issues such as poaching also require more international collaboration. African governments have already started to work collaboratively to pool resources and information, deploy rangers across cross-border areas and collaborate with customs and law enforcement in destination markets for products derived from poaching, notably in Asia.⁶

South Africa leads the regional ranking and ranks 48th overall, driven by its rich natural (22nd) and cultural (20th) resources, a positive business environment (15th) characterized by little red tape and modest administrative burden and relatively good infrastructure compared to neighboring countries. South Africa is still reaping the benefits of the 2010 World Cup, with several sports stadiums that can host significant entertainment events. In addition, several international association meetings take place in the country every year (36th). South Africa is blessed with abundant wildlife (25th) and several World Heritage sites (15th), which attract the attention of tourists worldwide, ranking 24th in online searches for nature-related activities. The country's attention to forestry (5th) and participation in international treaties has further supported its tourism industry, though further efforts should be taken to protect coastlines (104th), biodiversity (almost 8% of the large variety of species is endangered) and land (only 6.5% is protected). South Africa also still needs to develop in terms of security (119th) and health (114th), which, together with the labour market (135th), represent the main challenges not only for the tourist sector, but also for the country's general competitiveness. In addition, South Africa's visa policy (where the country currently ranks 67th) is poised to become more stringent with the imposition of new immigration laws that also impact visitors, this could certainly harm South Africa's T&T competitiveness going forward.

Mauritius is a major tourist destination, ranking 3rd in the region and 56th globally. Tourism is one of its main

industries, accounting for over 10% of GDP and more than 16% of government investment. Mauritius offers a safe (33rd) and business friendly (24th) environment to develop the T&T industry, with qualified human resources (47th) and a ground (27th) and tourist service infrastructure (28th) that can adequately transport and receive the almost 1 million tourists visiting the country annually. Its air transport infrastructure is somewhat less developed (60th) and could perhaps extend its capacity and open to more airlines. However, sustainability is key for Mauritius; balancing infrastructure development with conservation is becoming more challenging, with a high share of species under threat (134th) and limited protected areas. Greater attention to all aspects of environmental conservation could be beneficial, both by maintaining its resources and by improving the country's positioning and competitiveness in terms of natural tourism.

Kenya ranks 78th overall and 5th in the region. Natural resources (11th) are well-known assets, as seen in the high number of online searches for natural tourism (10th); Kenya is home to many species and UNESCO heritage sites. The government is trying to leverage these resources by attributing a high importance to the T&T sector (23rd): it is investing approximately 7% of its budget in tourism and has carried out an effective marketing campaign, according to both business leaders (21st) and an external assessment (31st). Environmental sustainability (39th) is also an area of strength, with the notable exception of deforestation (84th) and percentage of wastewater treated (109th). Similarly to other countries in the region, safety and security (131st) and health and hygiene (121st) are the main areas for improvement. For example, the business costs associated with crime and violence (127th) and the incidence of terrorism (131st) limit the tourism and business potential. Kenya's low access to improved sanitation (125th) and drinking water (131st) highlight the efforts still required to develop the country, as does ICT readiness (103rd), especially in terms of mobile services and broadband internet availability which is going to play an increasingly important role going forward.

Botswana ranks only 7th in the region and 88th overall, despite its remarkable natural resources, including biodiversity and stunning landscapes, notably the Kgalagadi Park, which it shares with South Africa. Botswana has a strong price competitiveness advantage (14th), a relatively conducive business environment (36th) and better safety and security levels (84th) than many peers. However, infrastructures are not well developed, also compared to neighboring South Africa and Namibia. Ground transport (105th) attains a somewhat lower score, and air and tourist service infrastructures (91st) also need significant upgrades. The limited air service impacts the country's connectedness and actual degree of openness (118th). In addition, despite the prevalence of rich cultural resources, they are not well leveraged,

Box 2: Priority Issues for the Global Agenda Council on the Future of Travel & Tourism

We are in a period where governments realize the value of travel as a creator of jobs and a generator of growth. Yet, there is a higher expectation than ever before from consumers for affordable, accessible, convenient and sustainable travel. It is critical to envision what it will take to sustain travel growth (in excess of GDP) year over year.

In this context, and acknowledging the current geopolitical tensions, terrorism threats and the risk of pandemics, the Global Agenda Council on the Future of Travel & Tourism will take forward the work it developed on Smart Travel in 2014. It will consider what technological advances, innovations and infrastructure are needed at the local, national, regional and global level to facilitate travel while improving security, with a special interest in developing and emerging markets.

Specifically, it will envision a future 'Smart Traveller', empowered by technologies (Smart Visa) and enhanced trust relationships between governments and citizens that enable more data-sharing to facilitate travel with enhanced security.

At the same time, given the move towards regionalization and the advancements of agreements among regional blocs in establishing common policies—from ASEAN to the Pacific Alliance—the international community should encourage and enhance collaboration within and across regional blocks. There is a need to expand the audience on discussions

surrounding freedom of travel from policymakers to travellers and potential travellers.

The council has also identified sustainability as a priority issue for the industry and its importance to achieve its growth targets. Indeed, sustainability is the industry's permission slip to grow.

As such, the industry must be mindful of the implications of the significant forecasted increase of 31% in passenger air transport by 2017. While the economic benefits of such growth are clear, the repercussions on the environment and local communities are important to consider.

Although global climate agreements are a work in progress, the travel and tourism industry has taken active steps to reduce its environmental and sustainability footprint and plans to continue to do so, all the while implementing better measurement tools.

The Council aims to define a travel and tourism sustainability dashboard and develop some industry commitments on the basis of and in collaboration with the work undertaken by other international institutions, including ICAO, IATA, UNWTO, WTTC and ITP. By bringing together leaders from the sector, the Council aims to advance the dialogue on these issues and help set standards and targets for the industry.

with very few oral and intangible practices recognized worldwide. Country branding is relatively poor given significant T&T-related investment, and a more effective marketing strategy together with long-term infrastructure development could certainly improve the country's T&T competitiveness.

Nigeria attains the 131st position overall. Tourism does not play a very important role in the economy, accounting for only approximately 1.5% of GDP and employment, and it is not high on the government agenda, ranking 131st in terms of T&T prioritization. Given Nigeria's cultural resources (57th) and natural assets, the country's limited development of the tourism industry appears to be a missed opportunity for diversifying the economy and creating employment opportunities. However, significant challenges constrain the potential development of the T&T sector in Nigeria. Firstly, improving the safety and security (141st) situation remains arguably the highest priority, as highlighted by low scores for both the survey and statistics measuring the incidence of violence and terrorism. Secondly, infrastructure is inadequate, hindering economic competitiveness beyond the T&T sector. Nigerian business leaders consider lack of infrastructure as the most problematic factor for doing business, and Nigeria ranks only 127th on ground transport, 111th on air transport and 114th on tourism services infrastructure.⁷ Improving on these aspects is complex and requires time, but would bring long-term benefits not only to T&T competitiveness but also Nigeria's development path.

KEY FINDINGS

Four key findings emerge from the results of the 2015 TTCI and additional quantitative and qualitative analysis. First, the T&T industry continues to grow quickly, and has proven resilient to shocks. Second, new trends are emerging, and the countries performing better in the TTCI are those that are better equipped to capture the opportunities they bring. Third, developing the T&T sector provides growth opportunities for all countries, regardless of their wealth, and offers job opportunities at all skill levels. And finally, the development of the T&T industry is complex, requiring inter-ministerial coordination, and often international and public-private partnerships. These findings are also partially echoed by the recent work by the Global Agenda Council on the Future of Travel & Tourism, which is outlined in Box 2, and by T&T business leaders, whose perspective is presented in Box 3.

T&T resilience and development impact

According to the UNWTO, the tourism industry employs 1 in 11 of the world's workers and accounts for a similar percentage of GDP.⁸ It continues to grow more quickly than the economy as a whole (see Figure 3), driven by technological, socio-economic and cultural forces which are driving more people to move internationally more frequently. Travellers from new countries increasingly contribute to the global growth of international arrivals. The sector also benefits from growth in domestic travel

Box 3: Seven Transformations that May Change the Travel and Tourism Sector—A Business Perspective

Although the T&T sector globally is growing more quickly than many other sectors, seven transformations currently taking place could have significant implications if not addressed in an appropriate and timely manner:

1. *Administrative barriers are hindering the movement of people.* The huge growth potential of travel and tourism is being held back by the outdated practices of visas and border controls. While in other areas great emphasis is placed on the benefits of globalization and free trade, often we forget to think of tourism as an export, and overlook restrictions on the movement of travellers.

Progress is being made—according to a UNWTO study, the proportion of global travellers having to apply for a visa declined from 77% in 2008 to 62% in 2014 (UNWTO, 2014). However, much more could be done. Research estimates that removing travel visas at the bilateral level would more than triple travel flows between countries. Indeed, improving visa processes alone could generate an estimated \$89 billion in additional international tourism receipts and 2.6 million extra jobs in APEC countries by 2016 (UNWTO, 2013).

The private sector is proactively engaging with national governments to highlight the economic case for travel facilitation, urging collaborative efforts among all relevant public and private stakeholders and proposing a fully integrated model to facilitate Smart Travel.¹

2. *Perceptions of instability are increasingly influencing tourist flows.* Despite its resilience to shocks, ultimately the travel and tourism industry's growth and survival is entirely dependent on people's ability to have a safe travel experience. Advances made in the last decade could be undone by factors including current geopolitical tensions, from the Middle East to Ukraine; the growing terrorism threat from ISIS; and the risk of pandemics, as exemplified by the Ebola outbreak.

Whatever the root causes, the impact for the affected destination is the same: a decrease in the number of tourists and amount in revenues, which may be temporary but are nonetheless significant. In high-risk times, the natural instinct of nation states is to re-evaluate their borders and immigration policies. But closing down borders is not a viable solution—it will not resolve security challenges, and will lead to further significant economic losses.

To mitigate these risks, it is critical to implement technological advances and innovative processes that can increase both the efficiency and security of travel. There is a need to consider how to implement improvements in early warning systems, risk profiling and scenario planning, visa systems, data sharing and passenger profiling at airports. The key challenge is to generate the necessary levels of collaboration among international institutions, governments and the private sector.

3. *Increasing difficulties in attracting top talent.* Research shows that for every 30 new tourists to a destination, one new job is created. The aviation and travel sector is already the second-largest employer in the world, with huge potential for further job creation—travel and tourism is forecast to employ 338 million people by 2023, and aviation and aerospace an additional 58 million people.

Yet the industry has difficulties in attracting top talent, both for technical and managerial positions. According to the WTTC, the total global impact of talent gaps could cost the global economy nearly 14 million jobs and \$630 billion GDP loss, with China, Italy, Japan,

Russia and the United States suffering most. The public and private sector need to collaborate closely to update university and training programmes to ensure they keep up with market needs and technological advancements.

4. *Changes in the composition of tourist demand will define business strategies.* As described above, the industry will need to deeply understand and cater their product offerings to the needs of new travellers (such as millennials and the new middle classes coming from emerging countries) and segments where demand is growing (such as senior travellers) to capitalize on shifting demographics.

5. *Increasing attention to reduce carbon footprint.* Passenger air traffic is forecast to increase by 31% by 2017, with environmental implications including a projected 20% increase in energy demand. Given targets to decrease carbon emissions, the industry is working to reduce oil dependency by improving aircraft and airport operations, aircraft design and material use and considering alternative sources of energy. The increase in tourism may also impact local destinations through an increase in waste, water usage and the possible deterioration of cultural and world heritage sites.

While global climate agreements are still a work in progress, the travel and tourism industry has taken active steps to reduce its environmental footprint and plans to continue to do so, including by implementing better measurement tools. International organizations and institutions—including ICAO, IATA, UNWTO, WTTC, ITP and the Forum—have brought leaders from the sector together to advance the dialogue on these issues and help set standards and targets for the industry.

6. *Investments in infrastructure increasingly lag behind industry growth.* While the tourism industry is growing strongly, infrastructure investments—airport development, road and rail, and communication technologies—are lagging behind, leading to significant bottlenecks. These will worsen if not addressed, given that cities are likely to triple in size in the next 20 years.

There is a need for dialogue between the public and private sectors, including airlines and airports, to ensure an integrated infrastructure strategy and alignment on issues such as investment, regulation, sustainability, security, safety and corruption. Airports are not destinations in themselves—people do not go to airports to shop or dine, but to move quickly and seamlessly on to their destinations. They will choose alternative destinations when access is difficult.

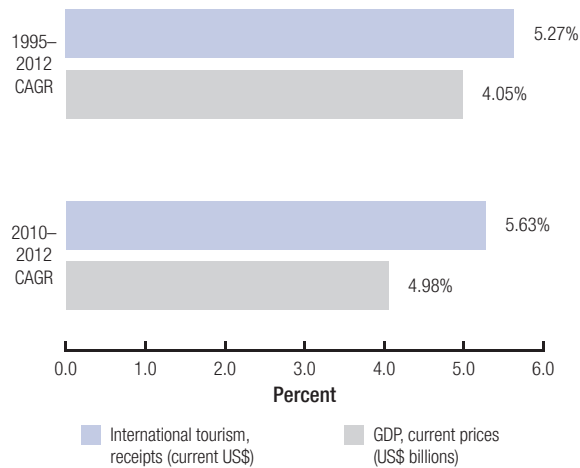
7. *New technologies and innovations are revolutionizing the industry.* As described above, new technologies and innovations, such as GPS-enabled smartphones and growing trust in online transactions, are reshaping parts of the travel industry and requiring businesses to rethink how to deliver services.

There is also a growing need for the public sector to redefine regulatory frameworks in response to the rise of the sharing economy—people are letting out their property as and when it suits them, acting as an ad hoc taxi service and even starting to crowd-source charter flights. The consumer peer-to-peer rental market is worth an estimated \$26 billion, with Airbnb alone having more than 600,000 listings across 160 countries.

Notes

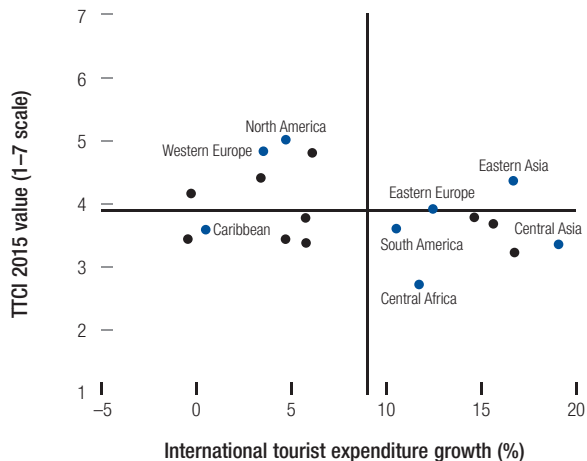
- 1 World Economic Forum, 2014b.

Figure 3: Global tourism and GDP growth



Sources: IMF, *World Economic Outlook*, and UNTWO, 2015.
Note: CAGR: Compound annual growth rate.

Figure 4: TTCI performance and growth in international tourism expenditure, 2010-2013



Source: TTCI 2015 and author's calculation based on World Tourism Organization (UNWTO) *Yearbook of Tourism Statistics, Compendium of Tourism Statistics*.

and tourism, which the WTTC forecasts will rise globally from 3.1% in 2014 to 3.7% in 2015.⁹

The T&T sector has shown surprising resilience to geopolitical tensions, threats of terrorism, global pandemics and sluggish economic growth in advanced economies. While international tourist arrivals are correlated with economic fluctuations and sensitive to security issues, these tend to impact specific countries or regions; if one country is hit by instability, others will receive more tourists. Globally, the trend for growth seems unstoppable.

As shown by contributions to this report, the sector's growth tends to return to trend quickly after a shock—this is true of global air passenger traffic (see page 59 for Chapter 1.4: “Global Air Passenger Markets: Riding Out Periods of Turbulence”, provided by the IATA), occupancy rates (see page 47 for Chapter 1.2: “Adapting

to Uncertainty—The Global Hotel Industry, provided by Deloitte), international arrivals and capital investments (see page 53 for Chapter 1.3: “How to Re-Emerge as a Tourism Destination after a Period of Political Instability”, provided by Strategy&). Persistent slowdowns happen only in countries where the shock itself also persists. This is an important lesson for countries afflicted by all types of shock: the ground lost during a negative event can be quickly regained as soon as the situation comes back to normal.

New trends and what it takes to capture them

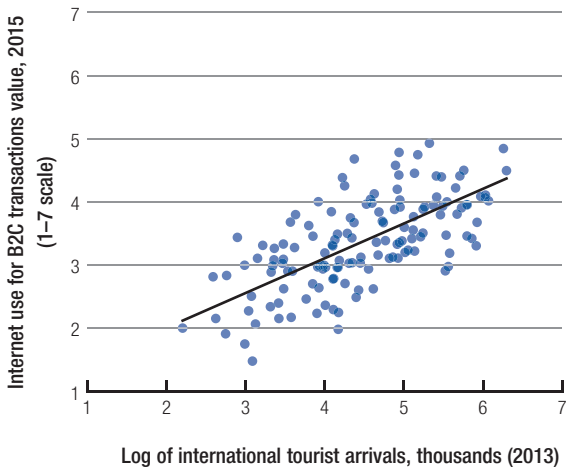
Increasing purchasing power in **emerging and developing countries** is one of the major new trends driving demand for travel experiences: according to research, a family trip is the second-highest priority for the booming middle classes, after buying a car. UNWTO's Barometer shows that China is the largest market in terms of international tourism expenditure, a measure of the aggregate amount spent by a country's citizens on international travel, and is still growing at a double-digit rate.¹⁰ Brazil has become the 10th largest market, while in India, the Philippines, Saudi Arabia and Qatar, expenditures grew by approximately 30% from 2013 to 2014.

Given the importance of regional markets, comparing a region's growth in international tourism expenditure with its performance on the TTCI illustrates where opportunities to capture these new travellers may be largest. Figure 4 plots regions onto four quadrants. Those achieving a good TTCI performance and where expenditure is growing strongly, in the upper-right quadrant, are best placed to benefit. Regions where demand is growing but which are not yet performing well on the TTCI, in the lower-right quadrant, are where investments in T&T development could bring the greatest returns.

Regions where TTCI performance is good but expenditure growth is low, in the upper-left quadrant, are more mature markets that tend already to attract tourists from within the region but still need to be alert to the interests and preferences of new consumers. Finally, those with low expenditure growth and less good performance on TTCI—in the lower-left quadrant—face the most challenges, and need to develop their T&T sector to attract tourists from other regions. The Caribbean is a special case in this analysis, given its strong T&T sector, diversity and existing reliance on tourists from other regions, but many countries in the region still need to address T&T competitiveness gaps.

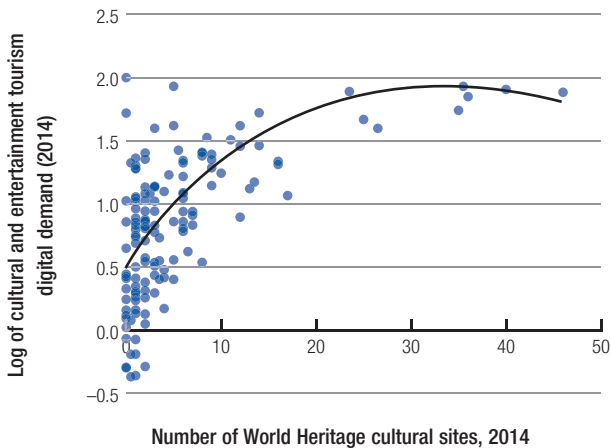
Another major trend in travel and tourism is **shifting demographics**. The number of over-60s in the world is projected to rise from 900 million in 2010 to almost 1.4 billion by 2030.¹¹ Elder travellers tend to require higher standards of quality and sophistication, to have somewhat larger budgets (this demographic

Figure 5: Business-to-consumers internet use and international tourism arrivals



Sources: World Economic Forum Executive Opinion Survey and UNWTO.

Figure 6: Number of cultural heritage sites and demand for cultural tourism



Sources: UNESCO, World Heritage List, and Bloom Consulting.

accounts for 40% of travel but 60% of wealth) and to be immune to seasonality. Some search for “second youth” experiences, while others have physical limitations that need to be catered to.

Meanwhile, **younger travellers** (especially “millennials”) are characterized by distinctive travel preferences. They are not very much interested in traditional vacations packages but they are motivated by increasing their knowledge about the world and experiencing everyday life in other countries, according to a recent survey by the World Youth Student and Educational Travel Confederation. They tend to spend more time exploring more remote destinations and have less interest in luxury.

Younger travellers rely especially heavily on new technologies and **online services** to shape their travel “experience”, often using the sharing economy—but the

internet is increasingly important for all kinds of travellers. A recent study by Boston Consulting Group estimates that 95% of people use digital resources to organize a trip, using an average of 19 websites or mobile applications—not only for booking, but also searching for information and inspiration, making plans and sharing experiences during and after the trip.¹² Internet access during a trip is increasingly seen as a necessity: a Tripadvisor survey found that 74% of the respondents mentioned “free wi-fi” as the main benefit when deciding about accommodation.¹³

More specifically, the prominence of **mobile internet** is increasing. In China, for instance, mobile travel sales accounted for 40% of the business of the most important OTAs, Ctrip and eLong. Deutsche Bank Securities estimates that by the end of this decade mobile hotel bookings worldwide will triple, while non-mobile online reservations will rise by only 4% annually.

The importance of the ICT channel to a country’s T&T competitiveness cannot be overstated. The best performers are luring customers with online marketing strategies and country-level branding, and offering customer care services beyond online booking. This requires management awareness and developing skills from technical and programming knowledge to data interpretation, to understand and meet consumers’ evolving needs. Figure 5 shows how international arrivals (taken in logarithms) are somewhat correlated to the extent of internet usage for business-to consumer transactions.

The importance of online searches also points to the need to value natural and cultural resources, as countries with a higher number of UNESCO heritage sites tend to be searched for more often online (see Figure 6). Giving these resources more visibility can translate into additional internet searches, offering the opportunity to convey information about the country’s other attractions.

Opportunities for all

With low- and middle-income countries now receiving more international visitors than high-income countries (see Figure 7), it is clear the T&T sector can have a significant impact on countries at all stages of development. Increasing the competitiveness of the T&T sector can produce short-term economic effects such as balance of payments gains, while investments in infrastructure to boost tourism can have considerable long-term spillover effects on the wider economy.

In terms of creating employment, not only is the T&T sector relatively labour intensive, it tends to employ more women and young people than most industries, and creates more opportunities for SMEs. While the belief persists that employment in T&T tends to be low-pay/low-skills, the sector increasingly demands high-skilled workers in areas such as ICT, management and marketing. Developing specialized tourism niches

also promotes higher-skilled employment. An anecdotal example comes from medical tourism in Portugal where Lisbon's Hospital Lusíadas activity has grown significantly due to the inflow of international patients.

Coordination and cooperation are key to success

Identifying priorities, upgrading infrastructure, calibrating fiscal incentives and executing international marketing campaigns are among the tasks necessary to succeed in developing the T&T sector—tasks which are often beyond the scope of local administrations and even single national ministries. Therefore, the difference between success and failure in T&T can lie in creating strong collaboration frameworks and overcoming financial, institutional and organizational bottlenecks.

Building transport infrastructure, for example, requires the involvement of at least two ministries—transport and finance—along with local authorities, the contractor, investors and, sometimes, other agencies. Given long investment horizons, investors need to be reassured on feasibility, risk allocation and the public sector's contractual commitment. A recent World Economic Forum-Boston Consulting Group study identifies best practices to overcome these institutional complexities, ranging from the quality of technical, legal and environmental feasibility studies to the rigour of the project preparation process.¹⁴

The province of Salta in Argentina offers a successful case study of an integrated, large-scale approach. Despite the advantages of significant natural and cultural resources, proximity to growing countries such as Chile and a devaluated currency, tourism did not develop before the introduction of a plan which included upgrading tourism and transport infrastructure, restoring cultural heritage and launching a national and international promotional campaign. The plan involved a public-private partnership, with a loan from the Inter-American Development Bank signalling long-term commitment.¹⁵

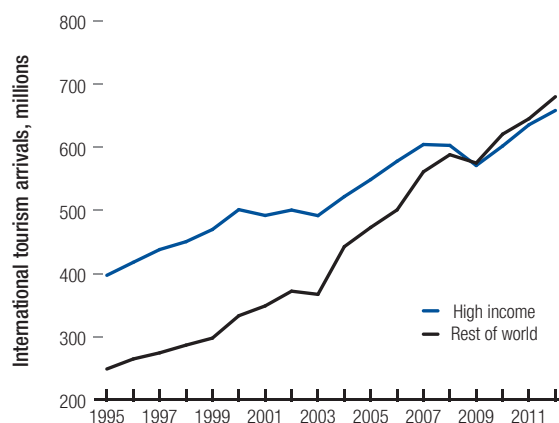
CONCLUSION

We have looked at the T&T competitiveness of 141 economies, based on the updated 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.

This year we present an updated index that reflects latest developments in terms of both concepts and data availability.

Four key findings emerge from the results of the 2015 TTCI and additional quantitative and qualitative analysis. First, the T&T industry continues to grow quickly, and has proven resilient to shocks. Second, new

Figure 7: International tourism arrivals convergence



Source: Author's calculation based on World Tourism Organization (UNWTO) *Yearbook of Tourism Statistics, Compendium of Tourism Statistics*.

trends are emerging, and the countries performing better in the TTCI are those that are better equipped to capture the opportunities they bring. Third, developing the T&T sector provides growth opportunities for all countries, regardless of their wealth, and offers job opportunities at all skill levels. And finally, the development of the T&T industry is complex, requiring inter-ministerial coordination, and often international and public-private partnerships.

By highlighting success factors and obstacles to T&T competitiveness in economies around the world, the TTCI is a tool that can be used to identify the competitive strengths of individual economies as well as the barriers that impede the development of the sector. The index also allows economies to track their progress over time on those indicators of interest. We will continue to publish *The Travel & Tourism Competitiveness Report* on a biennial basis, providing a platform for dialogue between the business community and national policymakers working together to improve the T&T competitiveness of their respective economies, and thus improving prosperity of their citizens.

REFERENCES

- Anderson Bradley and Johan Jooste, "Wildlife Poaching: Africa's Surging Trafficking Threat", Africa Security Brief No. 28, *The Africa Center for Strategic Studies*, 2014, http://africacenter.org/wp-content/uploads/2014/04/AfricaBriefFinal_28.pdf.
- Archibald, Xiomara, Jason LaCorbinière and Winston Moore, *Analysis of Tourism Competitiveness in the Caribbean: A Gravity Model Approach*, Central Bank of Barbados, 2008.
- Blanke, J. and T. Chiesa, "The Travel & Tourism Competitiveness Index: Assessing Key Factors Driving the Sector's Development", in *The Travel & Tourism Competitiveness Report 2007: Furthering the Process of Economic Development*, World Economic Forum, 2007, pp. 3–25.
- . "The Travel & Tourism Competitiveness Index 2008: Measuring Key Elements Driving the Sector's Development" in *The Travel & Tourism Competitiveness Report 2008: Balancing Economic Development and Environmental Sustainability*, World Economic Forum, 2008, pp. 3–26.

- . “The Travel & Tourism Competitiveness Index 2011: Assessing Industry Drivers in the Wake of the Crisis”, in *The Travel & Tourism Competitiveness Report 2011: Beyond the Downturn*, World Economic Forum, 2011, pp. 3–33.
- . “The Travel & Tourism Competitiveness Index 2013: Assessing Industry Drivers in the Wake of the Crisis”, in *The Travel & Tourism Competitiveness Report 2013: Reducing Barriers to Economic Growth and Job Creation*, World Economic Forum, 2013, pp. 3–27.
- Blanke, J., T. Chiesa and E. Trujillo Herrera, “The Travel & Tourism Competitiveness Index 2009: Measuring Sectoral Drivers in a Downturn”, in *The Travel & Tourism Competitiveness Report 2009: Managing in a Time of Turbulence*, World Economic Forum, 2009, pp. 3–37.
- Browne, C., A. Di Battista, T. Geiger, and T. Gutknecht. 2014. “The Executive Opinion Survey: The Voice of the Business Community”, in *The Global Competitiveness Report 2014–2015*, K. Schwab, editor, World Economic Forum, 2014, pp. 85–96.
- Burke, Laretta, Katie Reyntar, Mark Spalding and Allison Perry, “Reefs at Risk Revisited in the Coral Triangle”, *World Resources Institute*, 2012, www.wri.org/publication/reefs-risk-revisited-coral-triangle.
- Castillo, Victoria, Lucas Figal-Garone, Alessandro Maffioli and Lina Salazar, *Tourism Policy, a Big Push to Employment? Evidence from a Multiple Synthetic Control Approach*, IDB WORKING PAPER SERIES No. IDB-WP-572, Inter-American Development Bank, 2015.
- Culiuc, Alexander, *Determinants of International Tourism*, Working Paper No. 14/82, International Monetary Fund (IMF), 2014.
- Food and Agricultural Organization (FAO), *Best Practices for Improving Law Compliance in the Forestry Sector*, 2005, <http://ftp.fao.org/docrep/fao/008/a0146e/a0146e00.pdf>.
- Global Coral Reef Monitoring Network, *Status of Coral Reefs of the World: 2008*, 2008, http://www.icriforum.org/sites/default/files/GCRMN_Status_Coral_Reefs_2008.pdf.
- Guggenheim, Jason, Stephen Kremser, Pranay Jhunjhunwala, Tom McCaleb, Antonio Alvarez Garcia-Mon and Lee McCabe, “Travel Goes Mobile”, *The Boston Consulting Group*, 2014, https://www.bcgperspectives.com/content/articles/transportation_travel_tourism_digital_economy_travel_goes_mobile.
- International Union for Conservation of Nature (IUCN), *Status and Trends of Caribbean Coral Reefs: 1970-2012*, 2014, http://cmsdata.iucn.org/downloads/caribbean_coral_reefs___status_report_1970_2012.pdf.
- United Nations Office on Drugs and Crime and the Latin America and the Caribbean Region of the World Bank, *Report No. 37820: Crime, Violence, and Development: Trends, Costs, and Policy Options in the Caribbean*, March 2007.
- World Economic Forum, *Strategic Infrastructure Steps to Prepare and Accelerate Public-Private Partnerships*, 2013, http://www3.weforum.org/docs/AF13/WEF_AF13_Strategic_Infrastructure_Initiative.pdf.
- . *The Global Competitiveness Report 2014–2015*, 2014a, http://www3.weforum.org/docs/WEF_GlobalCompetitivenessReport_2014-15.pdf.
- . *Smart Travel Unlocking Economic Growth and Development through Travel Facilitation*, 2014b, http://www3.weforum.org/docs/GAC/2014/WEF_GAC_TravelTourism_SmartTravel_WhitePaper_2014.pdf.
- World Tourism Organization (UNWTO), *World Tourism Barometer, Volume 13*, 2015, https://wolfganghthome.files.wordpress.com/2015/02/unwto_barom15_01_january.pdf.
- . *Tourism Highlights, 2014 Edition*, 2014, <http://mkt.unwto.org/publication/unwto-tourism-highlights-2014-edition>.
- World Tourism Organization (UNWTO) and World Travel and Tourism Council, *The Impact of Visa Facilitation in ASEAN Member States*, January 2014, http://dtx4w60xqpw.cloudfront.net/sites/all/files/docpdf/2014impactofvisafacilitationinaseanmemberstate_slowres.pdf.

World Travel and Tourism Council, *Economic Impact of Travel & Tourism 2015 Annual Update*, 2015, http://www.wttc.org/-/media/files/reports/economic%20impact%20research/economic%20impact%202015%20summary_web.pdf.

NOTES

- 1 For more comprehensive PPP guidelines, see Sabol, Patrick and Roberto Puentes, *Private Capital, Public Good: Drivers of Successful Infrastructure Public-Private Partnerships*, Brookings Institution, December 2014, or World Economic Forum, http://www3.weforum.org/docs/AF13/WEF_AF13_Strategic_Infrastructure_Initiative.pdf.
- 2 United Nations Office on Drugs and Crime, 2007.
- 3 World Tourism Organization (UNWTO) et al., 2014.
- 4 Burke et al., 2012.
- 5 See for example on forestry: Food and Agricultural Organization (FAO), 2005; and on coral reefs: International Union for Conservation of Nature (IUCN), 2014, and Global Coral Reef Monitoring Network, 2008.
- 6 Anderson et al., 2014.
- 7 World Economic Forum, 2014a.
- 8 World Tourism Organization (UNWTO), 2014.
- 9 World Travel and Tourism Council, 2015.
- 10 World Tourism Organization (UNWTO), 2015.
- 11 United Nations Department of Economic and Social Affairs statistics, available at: <http://esa.un.org/unpd/wpp/Excel-Data/population.htm>.
- 12 Guggenheim et al., 2014.
- 13 “TripBarometer 2015: Five key traveler trends”, *TripAdvisor*, <http://www.tripadvisor.com/TripAdvisorInsights/n2582/tripbarometer-2015-five-key-traveler-trends#sthash.6qTyXAFK.dpuf>.
- 14 For more details refer to World Economic Forum, 2013.
- 15 Castillo et al., 2015.

Appendix A: Composition of the Travel & Tourism Competitiveness Index

This appendix provides details about the construction of the 2015 edition of the Travel & Tourism Competitiveness Index (TTCI).

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

These 14 pillars are calculated on the basis of data derived from the Executive Opinion Survey (Survey) and quantitative data from other sources.

The Survey data is derived from responses to the World Economic Forum's Executive Opinion Survey and range in value from 1 to 7. 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*.

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 un-weighted average of the individual component variables.

The subindexes are then calculated as un-weighted averages of the included pillars. In the case of the Human Resources and Labour Market pillar, which is, itself, composed of two subpillars (Qualification of the labour force and Labour market), the overall pillar is the un-weighted average of the two subpillars.

The overall TTCI is then the un-weighted average of the three subindexes. The indicators that make up each pillar and subpillar are described below.

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

SUBINDEX A: ENABLING ENVIRONMENT

Pillar 1: Business Environment

- 1.01 Property rights
- 1.02 Impact of rules on FDI
- 1.03 Efficiency of legal framework in settling disputes²
- 1.04 Efficiency of legal framework in challenging regulations²
- 1.05 Time required to deal with construction permits^{*2}
- 1.06 Cost to deal with construction permits^{*2}
- 1.07 Extent of market dominance
- 1.08 Time required to start a business^{*2}
- 1.09 Cost to start a business^{*2}
- 1.10 Extent and effect of taxation on incentives to work²
- 1.11 Extent and effect of taxation on incentives to invest²
- 1.12 Total tax rate*

Pillar 2: Safety and Security

- 2.01 Business costs of crime and violence
- 2.02 Reliability of police services
- 2.03 Business costs of terrorism
- 2.04 Index of terrorism incidence*
- 2.05 Homicide rate*

Pillar 3: Health and Hygiene

- 3.01 Physician density*
- 3.02 Access to improved sanitation^{*2}
- 3.03 Access to improved drinking water^{*2}
- 3.04 Hospital beds*
- 3.05 HIV prevalence*
- 3.06 Malaria incidence*

Pillar 4: Human Resources and Labour Market

Qualification of the labour force

- 4.01 Primary education enrolment rate*
- 4.02 Secondary education enrolment rate*
- 4.03 Extent of staff training
- 4.04 Treatment of customers

Labour market

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

Pillar 5: ICT Readiness

- 5.01 ICT use for business-to-business transactions²
- 5.02 Internet use for business-to-consumer transactions²
- 5.03 Individuals using the internet*
- 5.04 Broadband internet subscribers*
- 5.05 Mobile telephone subscriptions*
- 5.06 Mobile broadband subscriptions*
- 5.07 Mobile network coverage*
- 5.08 Quality of electricity supply

(Cont'd.)

SUBINDEX B: T&T POLICY AND ENABLING CONDITIONS

Pillar 6: Prioritization of Travel & Tourism

- 6.01 Government prioritization of the T&T industry
- 6.02 T&T government expenditure*
- 6.03 Effectiveness of marketing to attract tourists
- 6.04 Comprehensiveness of annual T&T data*²
- 6.05 Timeliness of providing monthly/quarterly T&T data*²
- 6.06 Country Brand Strategy rating*

Pillar 7: International Openness

- 7.01 Visa requirements*
- 7.02 Openness of bilateral Air Service Agreements*
- 7.03 Number of regional trade agreements in force*

Pillar 8: Price Competitiveness

- 8.01 Ticket taxes and airport charges*
- 8.02 Hotel price index*
- 8.03 Purchasing power parity*
- 8.04 Fuel price levels*

Pillar 9: Environmental Sustainability

- 9.01 Stringency of environmental regulations²
- 9.02 Enforcement of environmental regulations²
- 9.03 Sustainability of travel and tourism industry development
- 9.04 Particulate matter (2.5) concentration*
- 9.05 Number of environmental treaty ratifications*
- 9.06 Baseline water stress*
- 9.07 Threatened species*
- 9.08 Forest cover change*
- 9.09 Wastewater treatment*
- 9.10 Coastal shelf fishing pressure*

SUBINDEX C: INFRASTRUCTURE

Pillar 10: Air Transport Infrastructure

- 10.01 Quality of air transport infrastructure
- 10.02 Available seat kilometres, domestic*³
- 10.03 Available seat kilometres, international*³
- 10.04 Aircraft departures*
- 10.05 Airport density*
- 10.06 Number of operating airlines*

Pillar 11: Ground and Port Infrastructure

- 11.01 Quality of roads
- 11.02 Quality of railroad infrastructure
- 11.03 Quality of port infrastructure
- 11.04 Quality of ground transport network
- 11.05 Railroad density*
- 11.06 Road density*²
- 11.07 Paved road density*²

Pillar 12: Tourist Service Infrastructure

- 12.01 Hotel rooms*
- 12.02 Extension of business trips recommended
- 12.03 Presence of major car rental companies*
- 12.04 ATMs accepting Visa cards*

SUBINDEX D: NATURAL AND CULTURAL RESOURCES

Pillar 13: Natural Resources

- 13.01 Number of World Heritage natural sites*
- 13.02 Total known species*
- 13.03 Total protected areas*
- 13.04 Natural tourism digital demand*
- 13.05 Quality of the natural environment

Pillar 14: Cultural Resources and Business Travel

- 14.01 Number of World Heritage cultural sites*³
- 14.02 Number of oral and intangible cultural heritage expressions*³
- 14.03 Number of sports stadiums*
- 14.04 Number of international association meetings*
- 14.05 Cultural and entertainment tourism digital demand*

NOTES

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

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

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

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

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

- 2 These indicators are combined applying a simple average aggregation to form one single indicator. Consequently, they are implicitly weighted by a factor of 0.5.
- 3 Indicators 10.02, *Available seat kilometers, domestic*, and 10.03, *Available seat kilometers, international*, are summed to form a single indicator, which is then averaged with indicators 10.01, 10.04, 10.05 and 10.06 to calculate the pillar average. Similarly, indicators 14.01, *Number of World Heritage cultural sites*, and 14.02, *Number of oral and intangible cultural heritage expressions*, are summed to form a single indicator, which is then averaged with indicators 14.03, 14.04 and 14.05 to calculate the pillar average.

Note that countries with zero reported incidences receive a 7, regardless of their scores on the related Survey question.

Appendix B: TTCI Indicators Update

This appendix provides a detailed list of all the indicators added to and removed from the T&T Competitiveness Index 2015 framework and explains the rationale for such changes.

Indicator	Type	Rationale	
Pillar 1: Business Environment			
Added indicators			
1.03	Efficiency of legal framework in settling disputes	SURVEY	Efficient legal enforcement is necessary to guarantee contracts and property rights.
1.04	Efficiency of legal framework in challenging regulations	SURVEY	
1.05	Number of days required to deal with construction permits	STATISTICAL	Construction permits represent an important factor for tourism development.
1.06	Cost of dealing with construction permits	STATISTICAL	
1.07	Extent of market dominance	SURVEY	Competition is beneficial to business efficiency.
1.10	Extent and effect of taxation on incentives to work	SURVEY	Replaces the previous indicator: "Extent and effect of taxation".
1.11	Extent and effect of taxation on incentives to invest	SURVEY	
1.12	Total tax rate	STATISTICAL	Taxation is an important incentive to business creation.
Dropped indicators			
	Prevalence of foreign ownership	SURVEY	"Extent of market dominance indicator" is a better competition indicator.
	GATS commitments restrictiveness index (Tourism)	STATISTICAL	Not available anymore
	Transparency of government policymaking	SURVEY	Too general assessment of institutional strength.
	Visa requirements	STATISTICAL	Moved to International Openness pillar.
	Openness of bilateral Air Service Agreements	STATISTICAL	
Pillar 2: Safety and Security			
Added indicators			
2.04	Index of terrorism incidence	STATISTICAL	Additional, complementary measures of crime and terrorism.
2.05	Homicide rate	STATISTICAL	
Dropped indicators			
	Road traffic accidents	STATISTICAL	Not relevant if safety is understood as violence and crime.
Pillar 3: Health and Hygiene			
Added indicators			
3.05	HIV prevalence (moved from the Human Resources and Labour Market pillar)	STATISTICAL	High prevalence of infectious diseases can discourage tourism and reduce the efficiency of labour force.
3.06	Malaria incidence	STATISTICAL	
Pillar 4: Human Resources and Labour Market			
Added indicators			
4.04	Treatment of customers	SURVEY	Customer care is a key feature of T&T services.
4.06	Ease of finding skilled employees	SURVEY	Human capital skill-matching is fundamental factor for T&T development.
4.08	Pay and productivity	SURVEY	Indicator of capacity of attracting and retaining skilled workers.
4.09	Female labour force participation	STATISTICAL	Female participation increases skill pool.

(Cont'd.)

Indicator	Type	Rationale
Pillar 4. Human Resources and Labour Market (cont'd.)		
Dropped indicators		
Availability of training services	SURVEY	Redundant with indicator "Extent of staff training".
HIV prevalence	STATISTICAL	Moved to Health and Hygiene pillar
Life expectancy	STATISTICAL	Too broad a measure of total health.
Pillar 5. ICT Readiness		
Added indicators		
5.07 Mobile network coverage	STATISTICAL	Improved measure of ICT infrastructure.
5.08 Quality of electricity supply	SURVEY	Electricity blackouts have a negative impact on ICT use.
Dropped indicators		
Fixed telephone lines	STATISTICAL	Outdated, as mobile or broadband penetration is rising in all countries.
Pillar 6. Prioritization of Travel & Tourism		
Added indicators		
6.06 Country Brand Strategy rating	STATISTICAL	Government's efficacy in promoting the country brand has a direct impact on tourists' perceptions.
Pillar 7. International Openness		
Added indicators		
7.01 Visa requirements	STATISTICAL	Important factors for travel facilitation.
7.02 Openness of bilateral Air Service Agreements	STATISTICAL	
7.03 Number of regional trade agreements in force	STATISTICAL	
Dropped indicators		
Tourism openness	STATISTICAL	Imprecise measures.
Attitude of population toward foreign visitors	SURVEY	
Pillar 9. Environmental Sustainability		
Added indicators		
9.04 Particulate matter (2.5) concentration	STATISTICAL	Replaces the indicator "Particulate matter concentration (PM10)", as PM2.5 are more harmful to human health than PM10.
9.06 Baseline water stress	STATISTICAL	Proxies for degradation of a country's water, forest resources and sea-beds, which have a detrimental effect on attractiveness to tourists.
9.08 Forest cover change	STATISTICAL	
9.09 Wastewater treatment	STATISTICAL	
9.10 Coastal shelf fishing pressure	STATISTICAL	
Dropped indicators		
Carbon dioxide emissions	STATISTICAL	Imprecise and indirect measure of environmental degradation.
Pillar 13. Natural Resources		
Added indicators		
13.03 Total protected areas	STATISTICAL	Replaces the indicator "total biome protection". For the purposes of the index, this measure better proxies the extent of natural parks.
13.04 Natural tourism digital demand	STATISTICAL	Proxies interest in the country's natural resources, assuming that more searches means better natural resources.
Pillar 14. Cultural Resources and Business Travel		
Added indicators		
14.05 Cultural and entertainment tourism digital demand	STATISTICAL	Proxies interest in the country's cultural and entertainment resources, assuming that more searches imply better cultural resources.

Appendix C: T&T Competitiveness Index 2015 pillar rankings

This appendix presents the detailed rankings and scores of the 14 pillars composing the T&T Competitiveness Index 2015 for all 141 economies covered this year. This complements the regional rankings presented earlier in the main chapter.

Pillar 1: Business Environment

Rank	Economy	Value	Rank	Economy	Value	Rank	Economy	Value
1	Singapore	6.13	48	Seychelles	4.63	95	Egypt	4.11
2	Hong Kong SAR	6.08	49	Barbados	4.62	96	Romania	4.11
3	Qatar	6.05	50	Armenia	4.62	97	Nigeria	4.11
4	United Arab Emirates	5.90	51	Israel	4.61	98	Mexico	4.09
5	Switzerland	5.76	52	Sri Lanka	4.59	99	Honduras	4.09
6	Luxembourg	5.73	53	Latvia	4.59	100	Spain	4.09
7	United Kingdom	5.70	54	Uruguay	4.58	101	Gambia, The	4.06
8	New Zealand	5.69	55	Ghana	4.58	102	Bangladesh	4.06
9	Finland	5.60	56	Lao PDR	4.58	103	Burkina Faso	4.05
10	Malaysia	5.60	57	Bhutan	4.56	104	Greece	4.04
11	Bahrain	5.53	58	Portugal	4.54	105	Malawi	4.03
12	Netherlands	5.44	59	Turkey	4.54	106	Slovenia	4.03
13	Norway	5.44	60	Philippines	4.54	107	India	4.02
14	Ireland	5.37	61	Trinidad and Tobago	4.53	108	Colombia	3.99
15	South Africa	5.35	62	France	4.52	109	Russian Federation	3.98
16	Canada	5.34	63	Indonesia	4.48	110	Nepal	3.98
17	Germany	5.32	64	Lithuania	4.48	111	Tanzania	3.97
18	Oman	5.29	65	Azerbaijan	4.45	112	Cameroon	3.96
19	United States	5.28	66	Vietnam	4.45	113	Slovak Republic	3.92
20	Denmark	5.28	67	Swaziland	4.45	114	Mali	3.90
21	Taiwan, China	5.27	68	Jamaica	4.44	115	Moldova	3.90
22	Sweden	5.22	69	Korea, Rep.	4.44	116	Ethiopia	3.90
23	Saudi Arabia	5.21	70	Guyana	4.43	117	Uganda	3.87
24	Mauritius	5.19	71	Tunisia	4.42	118	Madagascar	3.87
25	Rwanda	5.13	72	Cape Verde	4.42	119	Iran, Islamic Rep.	3.85
26	Estonia	5.13	73	Montenegro	4.39	120	Burundi	3.78
27	Japan	5.12	74	Mongolia	4.39	121	Algeria	3.78
28	Australia	5.04	75	Czech Republic	4.35	122	Lebanon	3.76
29	Chile	5.03	76	Poland	4.35	123	Tajikistan	3.73
30	Iceland	4.96	77	Kenya	4.33	124	Suriname	3.68
31	Austria	4.94	78	Peru	4.29	125	Croatia	3.65
32	Georgia	4.91	79	Hungary	4.28	126	Brazil	3.60
33	Panama	4.88	80	China	4.25	127	Italy	3.59
34	Macedonia, FYR	4.87	81	Kyrgyz Republic	4.24	128	Yemen	3.58
35	Jordan	4.86	82	Mozambique	4.23	129	Cambodia	3.56
36	Botswana	4.86	83	Guatemala	4.23	130	Nicaragua	3.53
37	Puerto Rico	4.85	84	Lesotho	4.23	131	Mauritania	3.46
38	Thailand	4.78	85	Bulgaria	4.22	132	Bolivia	3.43
39	Namibia	4.76	86	El Salvador	4.22	133	Serbia	3.38
40	Malta	4.76	87	Pakistan	4.19	134	Guinea	3.38
41	Zambia	4.75	88	Dominican Republic	4.19	135	Myanmar	3.20
42	Morocco	4.73	89	Gabon	4.18	136	Angola	3.03
43	Cyprus	4.72	90	Paraguay	4.18	137	Haiti	3.02
44	Kazakhstan	4.71	91	Côte d'Ivoire	4.13	138	Zimbabwe	2.97
45	Belgium	4.71	92	Sierra Leone	4.12	139	Chad	2.80
46	Kuwait	4.69	93	Albania	4.11	140	Argentina	2.67
47	Costa Rica	4.64	94	Senegal	4.11	141	Venezuela	2.36

Pillar 2: Safety and Security

Rank	Economy	Value	Rank	Economy	Value	Rank	Economy	Value
1	Finland	6.70	48	Italy	5.68	95	Algeria	4.90
2	Qatar	6.61	49	Suriname	5.61	96	Iran, Islamic Rep.	4.89
3	United Arab Emirates	6.60	50	Gambia, The	5.61	97	Kyrgyz Republic	4.88
4	Iceland	6.54	51	Rwanda	5.58	98	Tunisia	4.86
5	Austria	6.47	52	Costa Rica	5.58	99	Israel	4.85
6	Luxembourg	6.46	53	Sri Lanka	5.58	100	Tanzania	4.85
7	New Zealand	6.41	54	Lithuania	5.56	101	Puerto Rico	4.82
8	Singapore	6.40	55	Slovak Republic	5.55	102	Haiti	4.75
9	Oman	6.38	56	Lao PDR	5.51	103	Angola	4.73
10	Portugal	6.33	57	Greece	5.49	104	Brazil	4.68
11	Switzerland	6.32	58	China	5.47	105	Côte d'Ivoire	4.68
12	Hong Kong SAR	6.31	59	Serbia	5.46	106	Madagascar	4.66
13	Australia	6.24	60	Uruguay	5.45	107	Swaziland	4.65
14	Slovenia	6.20	61	Korea, Rep.	5.45	108	Bolivia	4.65
15	Ireland	6.18	62	France	5.44	109	Uganda	4.62
16	Belgium	6.18	63	United Kingdom	5.44	110	Paraguay	4.62
17	Netherlands	6.16	64	Moldova	5.43	111	Guyana	4.57
18	Norway	6.10	65	Romania	5.42	112	Burundi	4.55
19	Sweden	6.10	66	Senegal	5.41	113	Nepal	4.52
20	Germany	6.06	67	Malawi	5.41	114	Mozambique	4.50
21	Canada	6.05	68	Zambia	5.40	115	Bangladesh	4.43
22	Japan	6.05	69	Mongolia	5.40	116	Lesotho	4.42
23	Estonia	6.04	70	Albania	5.34	117	Peru	4.39
24	Taiwan, China	6.03	71	Bahrain	5.33	118	Chad	4.36
25	Malta	6.03	72	Kazakhstan	5.32	119	South Africa	4.30
26	Bhutan	6.02	73	United States	5.32	120	Dominican Republic	4.30
27	Cyprus	6.00	74	Zimbabwe	5.31	121	Turkey	4.23
28	Croatia	6.00	75	Vietnam	5.31	122	Mali	4.15
29	Saudi Arabia	5.99	76	Tajikistan	5.30	123	Trinidad and Tobago	4.10
30	Chile	5.98	77	Cameroon	5.29	124	Mexico	4.10
31	Spain	5.97	78	Bulgaria	5.24	125	Myanmar	4.04
32	Georgia	5.96	79	Gabon	5.22	126	Russian Federation	3.95
33	Mauritius	5.91	80	Ethiopia	5.18	127	Jamaica	3.85
34	Denmark	5.88	81	Cape Verde	5.18	128	Philippines	3.84
35	Poland	5.86	82	Sierra Leone	5.18	129	India	3.82
36	Azerbaijan	5.83	83	Indonesia	5.16	130	Lebanon	3.81
37	Morocco	5.83	84	Botswana	5.15	131	Kenya	3.78
38	Armenia	5.80	85	Nicaragua	5.14	132	Thailand	3.75
39	Hungary	5.79	86	Seychelles	5.09	133	Honduras	3.64
40	Latvia	5.79	87	Mauritania	5.06	134	El Salvador	3.62
41	Jordan	5.79	88	Argentina	5.03	135	Guatemala	3.57
42	Malaysia	5.79	89	Panama	5.03	136	Egypt	3.40
43	Kuwait	5.76	90	Namibia	5.02	137	Venezuela	3.36
44	Barbados	5.75	91	Ghana	4.96	138	Pakistan	3.04
45	Macedonia, FYR	5.75	92	Cambodia	4.96	139	Yemen	2.86
46	Czech Republic	5.71	93	Guinea	4.95	140	Colombia	2.82
47	Montenegro	5.69	94	Burkina Faso	4.90	141	Nigeria	2.65

Pillar 3: Health and Hygiene

Rank	Economy	Value	Rank	Economy	Value	Rank	Economy	Value
1	Austria	6.97	48	Armenia	5.92	95	Jamaica	4.66
2	Germany	6.85	49	United Kingdom	5.83	96	Cape Verde	4.64
3	Lithuania	6.81	50	Ireland	5.80	97	Bhutan	4.57
4	Czech Republic	6.73	51	Cyprus	5.80	98	Morocco	4.54
5	Bulgaria	6.70	52	Puerto Rico	5.77	99	Guyana	4.52
6	Russian Federation	6.69	53	Kyrgyz Republic	5.73	100	Honduras	4.52
7	Kazakhstan	6.68	54	New Zealand	5.72	101	Myanmar	4.41
8	Hungary	6.61	55	Montenegro	5.71	102	Pakistan	4.39
9	Greece	6.57	56	United States	5.70	103	Bolivia	4.38
10	France	6.52	57	Tajikistan	5.65	104	Ethiopia	4.35
11	Switzerland	6.50	58	Canada	5.60	105	Nicaragua	4.32
12	Belgium	6.49	59	Jordan	5.53	106	India	4.32
13	Japan	6.43	60	Seychelles	5.49	107	Bangladesh	4.29
14	Slovak Republic	6.42	61	Singapore	5.44	108	Lao PDR	4.25
15	Hong Kong SAR	6.41	62	Kuwait	5.43	109	Indonesia	4.24
16	Korea, Rep.	6.36	63	Turkey	5.41	110	Gabon	4.19
17	Malta	6.35	64	Egypt	5.40	111	Rwanda	3.92
18	Croatia	6.33	65	Oman	5.37	112	Cambodia	3.92
19	Finland	6.31	66	Brazil	5.31	113	Burundi	3.91
20	Italy	6.27	67	Mauritius	5.31	114	South Africa	3.85
21	Luxembourg	6.26	68	China	5.29	115	Yemen	3.84
22	Moldova	6.26	69	United Arab Emirates	5.28	116	Haiti	3.74
23	Estonia	6.25	70	Mexico	5.25	117	Namibia	3.70
24	Netherlands	6.24	71	Sri Lanka	5.24	118	Botswana	3.50
25	Poland	6.21	72	Albania	5.22	119	Gambia, The	3.42
26	Argentina	6.20	73	Malaysia	5.18	120	Cameroon	3.32
27	Latvia	6.17	74	Chile	5.18	121	Kenya	3.29
28	Norway	6.17	75	Bahrain	5.17	122	Madagascar	3.28
29	Australia	6.14	76	Tunisia	5.16	123	Angola	3.23
30	Taiwan, China	6.13	77	Trinidad and Tobago	5.14	124	Swaziland	3.19
31	Georgia	6.12	78	Saudi Arabia	5.10	125	Senegal	3.13
32	Denmark	6.11	79	Suriname	5.09	126	Ghana	3.09
33	Spain	6.11	80	Panama	5.09	127	Côte d'Ivoire	3.08
34	Iceland	6.07	81	Venezuela	5.08	128	Mauritania	3.03
35	Portugal	6.06	82	Costa Rica	5.00	129	Mali	3.02
36	Israel	6.06	83	Vietnam	4.99	130	Zimbabwe	3.00
37	Slovenia	6.05	84	Algeria	4.97	131	Lesotho	2.93
38	Serbia	6.04	85	Colombia	4.97	132	Sierra Leone	2.93
39	Lebanon	6.04	86	Nepal	4.90	133	Nigeria	2.79
40	Barbados	6.02	87	Dominican Republic	4.89	134	Burkina Faso	2.78
41	Mongolia	6.02	88	Paraguay	4.89	135	Uganda	2.72
42	Macedonia, FYR	5.99	89	Thailand	4.87	136	Tanzania	2.68
43	Qatar	5.97	90	El Salvador	4.86	137	Guinea	2.51
44	Azerbaijan	5.96	91	Philippines	4.79	138	Chad	2.49
45	Uruguay	5.96	92	Peru	4.79	139	Malawi	2.44
46	Romania	5.94	93	Iran, Islamic Rep.	4.71	140	Zambia	2.44
47	Sweden	5.94	94	Guatemala	4.69	141	Mozambique	1.97

Pillar 4: Human Resources and Labour Market

Rank	Economy	Value	Rank	Economy	Value	Rank	Economy	Value
1	Switzerland	5.64	48	Bulgaria	4.72	95	Panama	4.23
2	Iceland	5.49	49	Australia	4.72	96	Nepal	4.22
3	Singapore	5.49	50	Georgia	4.72	97	Dominican Republic	4.21
4	Denmark	5.47	51	Tajikistan	4.72	98	Cameroon	4.20
5	Finland	5.43	52	Bahrain	4.71	99	Argentina	4.20
6	New Zealand	5.34	53	Indonesia	4.70	100	Botswana	4.20
7	Canada	5.33	54	Slovenia	4.69	101	Malawi	4.18
8	Hong Kong SAR	5.30	55	Vietnam	4.68	102	Gambia, The	4.12
9	Sweden	5.30	56	Albania	4.68	103	Egypt	4.12
10	United Kingdom	5.29	57	Chile	4.66	104	Uganda	4.11
11	United States	5.28	58	Mongolia	4.63	105	South Africa	4.09
12	Ireland	5.27	59	Seychelles	4.62	106	Nicaragua	4.07
13	Norway	5.24	60	Malta	4.61	107	Morocco	4.05
14	Qatar	5.23	61	Jamaica	4.61	108	Bolivia	4.05
15	Japan	5.20	62	Philippines	4.59	109	Algeria	4.04
16	China	5.20	63	Peru	4.57	110	Tanzania	4.03
17	Germany	5.18	64	Romania	4.56	111	India	4.03
18	Portugal	5.18	65	Jordan	4.56	112	Lebanon	3.99
19	Latvia	5.18	66	Brazil	4.51	113	Guyana	3.98
20	Cyprus	5.16	67	Lao PDR	4.50	114	Iran, Islamic Rep.	3.95
21	Luxembourg	5.16	68	Moldova	4.50	115	Suriname	3.95
22	United Arab Emirates	5.15	69	Uruguay	4.50	116	Lesotho	3.91
23	Netherlands	5.13	70	Kyrgyz Republic	4.49	117	Myanmar	3.85
24	Estonia	5.12	71	Armenia	4.48	118	Bangladesh	3.85
25	Taiwan, China	5.10	72	Cambodia	4.48	119	Madagascar	3.85
26	Austria	5.09	73	Macedonia, FYR	4.47	120	Zimbabwe	3.83
27	Belgium	5.03	74	Saudi Arabia	4.46	121	Paraguay	3.83
28	Zambia	4.99	75	Italy	4.45	122	Namibia	3.80
29	Thailand	4.98	76	Mexico	4.45	123	Haiti	3.76
30	Malaysia	4.98	77	Kenya	4.44	124	Swaziland	3.70
31	France	4.96	78	Puerto Rico	4.44	125	Venezuela	3.66
32	Lithuania	4.96	79	Colombia	4.44	126	Ethiopia	3.63
33	Barbados	4.88	80	Croatia	4.41	127	Senegal	3.63
34	Spain	4.87	81	Guatemala	4.39	128	Gabon	3.61
35	Montenegro	4.85	82	Cape Verde	4.39	129	Burundi	3.61
36	Azerbaijan	4.84	83	Trinidad and Tobago	4.39	130	Sierra Leone	3.61
37	Kazakhstan	4.83	84	Rwanda	4.36	131	Mozambique	3.57
38	Russian Federation	4.83	85	Ghana	4.35	132	Nigeria	3.54
39	Israel	4.81	86	Sri Lanka	4.33	133	Yemen	3.31
40	Korea, Rep.	4.81	87	Tunisia	4.31	134	Burkina Faso	3.31
41	Poland	4.80	88	Turkey	4.30	135	Côte d'Ivoire	3.29
42	Costa Rica	4.79	89	Serbia	4.29	136	Mali	3.26
43	Hungary	4.79	90	Oman	4.27	137	Guinea	3.19
44	Czech Republic	4.75	91	Bhutan	4.26	138	Pakistan	3.07
45	Greece	4.75	92	El Salvador	4.26	139	Angola	2.79
46	Slovak Republic	4.75	93	Kuwait	4.26	140	Chad	2.73
47	Mauritius	4.75	94	Honduras	4.25	141	Mauritania	2.30

Pillar 5: ICT Readiness

Rank	Economy	Value	Rank	Economy	Value	Rank	Economy	Value
1	Finland	6.37	48	Kazakhstan	4.74	95	Mongolia	3.42
2	Hong Kong SAR	6.22	49	Greece	4.71	96	Bolivia	3.42
3	Denmark	6.18	50	Cyprus	4.63	97	Vietnam	3.37
4	Sweden	6.17	51	Chile	4.62	98	Iran, Islamic Rep.	3.36
5	Norway	6.14	52	Azerbaijan	4.58	99	Kyrgyz Republic	3.34
6	United Kingdom	6.09	53	Trinidad and Tobago	4.52	100	Paraguay	3.33
7	Luxembourg	6.09	54	Malaysia	4.52	101	Nicaragua	3.21
8	Switzerland	6.03	55	Macedonia, FYR	4.47	102	Cambodia	3.19
9	Japan	6.00	56	Serbia	4.45	103	Kenya	3.13
10	Singapore	5.98	57	Brazil	4.43	104	Honduras	3.10
11	Korea, Rep.	5.97	58	Montenegro	4.42	105	Algeria	3.09
12	Netherlands	5.96	59	Romania	4.36	106	Lao PDR	3.09
13	Iceland	5.88	60	Thailand	4.34	107	Ghana	3.05
14	United States	5.76	61	Panama	4.30	108	Guyana	3.04
15	Bahrain	5.76	62	South Africa	4.29	109	Senegal	3.02
16	United Arab Emirates	5.76	63	Moldova	4.23	110	Swaziland	3.00
17	Australia	5.73	64	Mauritius	4.22	111	Côte d'Ivoire	2.94
18	Estonia	5.71	65	Jordan	4.17	112	Rwanda	2.93
19	Austria	5.70	66	Seychelles	4.17	113	Gabon	2.85
20	Latvia	5.60	67	Colombia	4.17	114	India	2.83
21	New Zealand	5.57	68	Turkey	4.17	115	Zimbabwe	2.82
22	France	5.55	69	Armenia	4.16	116	Nigeria	2.81
23	Germany	5.51	70	Costa Rica	4.16	117	Gambia, The	2.74
24	Belgium	5.47	71	Argentina	4.16	118	Uganda	2.72
25	Qatar	5.44	72	China	4.15	119	Bangladesh	2.70
26	Taiwan, China	5.41	73	Albania	4.07	120	Malawi	2.55
27	Canada	5.38	74	Georgia	4.05	121	Pakistan	2.54
28	Saudi Arabia	5.29	75	Morocco	4.03	122	Zambia	2.51
29	Lithuania	5.29	76	Tunisia	3.94	123	Tanzania	2.48
30	Ireland	5.28	77	Namibia	3.82	124	Lesotho	2.47
31	Spain	5.26	78	Mexico	3.82	125	Angola	2.37
32	Israel	5.25	79	Guatemala	3.82	126	Nepal	2.36
33	Malta	5.24	80	Egypt	3.80	127	Madagascar	2.36
34	Czech Republic	5.19	81	Suriname	3.78	128	Yemen	2.29
35	Italy	5.14	82	Puerto Rico	3.76	129	Mali	2.28
36	Slovenia	5.07	83	Botswana	3.74	130	Tajikistan	2.22
37	Slovak Republic	5.05	84	Jamaica	3.73	131	Mauritania	2.18
38	Croatia	5.03	85	Indonesia	3.73	132	Sierra Leone	1.98
39	Kuwait	5.01	86	Philippines	3.71	133	Guinea	1.94
40	Portugal	4.97	87	El Salvador	3.69	134	Mozambique	1.94
41	Barbados	4.97	88	Lebanon	3.62	135	Burundi	1.90
42	Uruguay	4.94	89	Peru	3.62	136	Cameroon	1.89
43	Hungary	4.93	90	Cape Verde	3.52	137	Ethiopia	1.88
44	Poland	4.90	91	Bhutan	3.51	138	Haiti	1.84
45	Oman	4.83	92	Sri Lanka	3.49	139	Burkina Faso	1.75
46	Russian Federation	4.83	93	Dominican Republic	3.46	140	Myanmar	1.60
47	Bulgaria	4.76	94	Venezuela	3.46	141	Chad	1.31

Pillar 6: Prioritization of Travel & Tourism

Rank	Economy	Value	Rank	Economy	Value	Rank	Economy	Value
1	Malta	6.03	48	Gambia, The	4.88	95	Bulgaria	4.18
2	Mauritius	5.96	49	Germany	4.84	96	India	4.14
3	Cyprus	5.96	50	Lao PDR	4.83	97	Bahrain	4.14
4	Singapore	5.95	51	Tanzania	4.83	98	Guyana	4.11
5	Iceland	5.89	52	Australia	4.81	99	Poland	4.10
6	Spain	5.89	53	Georgia	4.76	100	Zambia	4.07
7	Dominican Republic	5.79	54	Peru	4.75	101	Brazil	4.05
8	Seychelles	5.78	55	China	4.73	102	Slovak Republic	4.04
9	Estonia	5.76	56	Malaysia	4.71	103	Uganda	4.04
10	Barbados	5.76	57	Sweden	4.70	104	Lesotho	4.03
11	Jamaica	5.72	58	Azerbaijan	4.69	105	Albania	4.03
12	Switzerland	5.64	59	Nepal	4.68	106	Mongolia	4.01
13	Hong Kong SAR	5.63	60	Honduras	4.68	107	Haiti	4.00
14	New Zealand	5.62	61	Netherlands	4.66	108	Myanmar	3.99
15	Indonesia	5.61	62	Luxembourg	4.64	109	Tajikistan	3.97
16	Austria	5.52	63	Latvia	4.64	110	Sierra Leone	3.94
17	United States	5.47	64	Israel	4.63	111	Mali	3.93
18	Portugal	5.46	65	Italy	4.62	112	Zimbabwe	3.87
19	Jordan	5.46	66	Czech Republic	4.61	113	Serbia	3.83
20	Japan	5.44	67	Montenegro	4.57	114	Moldova	3.82
21	Uruguay	5.43	68	Finland	4.57	115	Kyrgyz Republic	3.81
22	Costa Rica	5.37	69	Egypt	4.56	116	Senegal	3.79
23	Kenya	5.36	70	Argentina	4.54	117	Mozambique	3.78
24	Greece	5.36	71	Korea, Rep.	4.52	118	Ethiopia	3.75
25	Panama	5.27	72	Cape Verde	4.52	119	Vietnam	3.73
26	Morocco	5.27	73	Oman	4.51	120	Pakistan	3.72
27	Philippines	5.26	74	Croatia	4.51	121	Chad	3.57
28	Ireland	5.25	75	Namibia	4.51	122	Burkina Faso	3.55
29	Lebanon	5.22	76	Saudi Arabia	4.50	123	Trinidad and Tobago	3.52
30	Sri Lanka	5.17	77	Madagascar	4.47	124	Suriname	3.51
31	France	5.16	78	Belgium	4.47	125	Bolivia	3.51
32	Mexico	5.16	79	El Salvador	4.45	126	Ghana	3.46
33	Norway	5.14	80	Armenia	4.43	127	Malawi	3.46
34	Hungary	5.13	81	Macedonia, FYR	4.41	128	Cameroon	3.42
35	United Kingdom	5.10	82	Taiwan, China	4.41	129	Venezuela	3.36
36	Canada	5.00	83	Turkey	4.39	130	Iran, Islamic Rep.	3.35
37	Cambodia	4.99	84	Kazakhstan	4.38	131	Nigeria	3.34
38	Puerto Rico	4.99	85	Lithuania	4.37	132	Côte d'Ivoire	3.31
39	United Arab Emirates	4.97	86	Guatemala	4.36	133	Bangladesh	3.19
40	Thailand	4.95	87	Nicaragua	4.34	134	Mauritania	3.12
41	Paraguay	4.94	88	Romania	4.34	135	Kuwait	3.03
42	Bhutan	4.93	89	Botswana	4.33	136	Gabon	3.00
43	Slovenia	4.93	90	Russian Federation	4.33	137	Guinea	2.96
44	Tunisia	4.91	91	Denmark	4.31	138	Yemen	2.80
45	Qatar	4.89	92	Colombia	4.31	139	Algeria	2.74
46	South Africa	4.88	93	Rwanda	4.29	140	Angola	2.67
47	Chile	4.88	94	Swaziland	4.28	141	Burundi	2.45

Pillar 7: International Openness

Rank	Economy	Value	Rank	Economy	Value	Rank	Economy	Value
1	Singapore	5.25	48	Cyprus	3.75	95	Israel	2.54
2	Chile	4.65	49	Thailand	3.70	96	China	2.52
3	New Zealand	4.55	50	Slovenia	3.70	97	Lebanon	2.50
4	El Salvador	4.53	51	Guyana	3.65	98	Paraguay	2.50
5	Ireland	4.53	52	Estonia	3.65	99	Russian Federation	2.48
6	Iceland	4.38	53	Korea, Rep.	3.60	100	Montenegro	2.44
7	Denmark	4.34	54	Jamaica	3.60	101	Serbia	2.39
8	Colombia	4.30	55	Indonesia	3.55	102	South Africa	2.38
9	Luxembourg	4.25	56	Trinidad and Tobago	3.50	103	Tunisia	2.38
10	Netherlands	4.25	57	Mexico	3.48	104	Macedonia, FYR	2.36
11	United Kingdom	4.24	58	Georgia	3.44	105	Bahrain	2.34
12	Germany	4.24	59	Cambodia	3.43	106	Albania	2.34
13	France	4.22	60	Mauritius	3.42	107	Azerbaijan	2.33
14	Portugal	4.21	61	Turkey	3.34	108	Suriname	2.32
15	Peru	4.18	62	Tanzania	3.25	109	Zambia	2.30
16	Japan	4.16	63	Dominican Republic	3.24	110	Tajikistan	2.29
17	Czech Republic	4.15	64	Jordan	3.24	111	Kyrgyz Republic	2.24
18	Hungary	4.15	65	Sri Lanka	3.21	112	Venezuela	2.24
19	Croatia	4.14	66	Canada	3.19	113	Zimbabwe	2.22
20	Belgium	4.13	67	Burundi	3.15	114	Pakistan	2.21
21	Switzerland	4.11	68	Cape Verde	3.13	115	Egypt	2.17
22	Finland	4.10	69	India	3.08	116	Iran, Islamic Rep.	2.14
23	Panama	4.10	70	Senegal	3.07	117	Bhutan	2.13
24	Italy	4.09	71	Mozambique	3.05	118	Botswana	2.12
25	Greece	4.09	72	Uganda	3.03	119	Oman	2.07
26	Poland	4.08	73	Kenya	3.01	120	Myanmar	2.05
27	Sweden	4.07	74	Madagascar	2.97	121	Malawi	2.03
28	Taiwan, China	4.07	75	Swaziland	2.96	122	Gambia, The	2.02
29	Philippines	4.05	76	Lao PDR	2.94	123	Moldova	1.96
30	Honduras	4.05	77	Mauritania	2.94	124	Kazakhstan	1.95
31	Australia	4.04	78	Rwanda	2.93	125	Qatar	1.93
32	United States	4.02	79	Mali	2.91	126	Ghana	1.90
33	Austria	3.99	80	Barbados	2.85	127	Nigeria	1.85
34	Lithuania	3.99	81	Nepal	2.80	128	Sierra Leone	1.84
35	Costa Rica	3.98	82	Bolivia	2.78	129	Cameroon	1.80
36	Latvia	3.97	83	Armenia	2.78	130	Côte d'Ivoire	1.76
37	Norway	3.97	84	Argentina	2.77	131	Guinea	1.75
38	Nicaragua	3.97	85	United Arab Emirates	2.77	132	Kuwait	1.75
39	Guatemala	3.94	86	Uruguay	2.75	133	Lesotho	1.66
40	Malta	3.94	87	Seychelles	2.73	134	Chad	1.66
41	Spain	3.93	88	Mongolia	2.69	135	Puerto Rico	1.60
42	Romania	3.91	89	Vietnam	2.68	136	Burkina Faso	1.60
43	Slovak Republic	3.89	90	Namibia	2.62	137	Algeria	1.51
44	Haiti	3.88	91	Brazil	2.59	138	Saudi Arabia	1.49
45	Bulgaria	3.87	92	Bangladesh	2.57	139	Yemen	1.34
46	Malaysia	3.85	93	Ethiopia	2.57	140	Gabon	1.34
47	Hong Kong SAR	3.78	94	Morocco	2.56	141	Angola	1.29

Pillar 8: Price Competitiveness

Rank	Economy	Value	Rank	Economy	Value	Rank	Economy	Value
1	Iran, Islamic Rep.	6.62	48	Lao PDR	4.93	95	Mozambique	4.36
2	Egypt	6.19	49	Kazakhstan	4.92	96	Slovenia	4.34
3	Indonesia	6.11	50	Zambia	4.92	97	Guinea	4.32
4	Yemen	5.99	51	El Salvador	4.91	98	Ghana	4.32
5	Gambia, The	5.90	52	Madagascar	4.91	99	Jamaica	4.29
6	Malaysia	5.76	53	Sierra Leone	4.89	100	Paraguay	4.29
7	Tunisia	5.61	54	Romania	4.89	101	Croatia	4.28
8	India	5.59	55	Mexico	4.88	102	United States	4.27
9	Pakistan	5.59	56	Tanzania	4.87	103	Mali	4.24
10	Algeria	5.50	57	Lithuania	4.87	104	Portugal	4.23
11	Saudi Arabia	5.49	58	Latvia	4.84	105	Spain	4.22
12	Swaziland	5.49	59	Lebanon	4.84	106	Malta	4.22
13	Angola	5.46	60	Cameroon	4.83	107	Uruguay	4.20
14	Botswana	5.44	61	Uganda	4.82	108	Luxembourg	4.10
15	Kyrgyz Republic	5.37	62	Mauritania	4.82	109	Korea, Rep.	4.06
16	Guatemala	5.35	63	Puerto Rico	4.82	110	Dominican Republic	4.02
17	Trinidad and Tobago	5.34	64	Moldova	4.80	111	Cyprus	3.97
18	Bahrain	5.33	65	Azerbaijan	4.78	112	Argentina	3.97
19	Qatar	5.33	66	Georgia	4.76	113	Greece	3.93
20	Oman	5.33	67	Malawi	4.69	114	Mauritius	3.91
21	Bolivia	5.32	68	Sri Lanka	4.67	115	Peru	3.90
22	Vietnam	5.30	69	Ethiopia	4.65	116	Singapore	3.82
23	Nepal	5.29	70	Jordan	4.63	117	New Zealand	3.77
24	Philippines	5.28	71	Venezuela	4.63	118	Chad	3.76
25	Guyana	5.27	72	Estonia	4.62	119	Japan	3.75
26	Lesotho	5.27	73	Tajikistan	4.62	120	Belgium	3.73
27	Nicaragua	5.26	74	Rwanda	4.61	121	Finland	3.71
28	Mongolia	5.25	75	Burkina Faso	4.61	122	Ireland	3.69
29	Namibia	5.20	76	Hungary	4.60	123	Seychelles	3.68
30	Bhutan	5.18	77	Armenia	4.58	124	Canada	3.63
31	Haiti	5.17	78	Serbia	4.56	125	Myanmar	3.63
32	Panama	5.15	79	Macedonia, FYR	4.55	126	Germany	3.62
33	Honduras	5.14	80	Slovak Republic	4.51	127	Hong Kong SAR	3.59
34	China	5.10	81	Brazil	4.51	128	Iceland	3.59
35	Bulgaria	5.08	82	Suriname	4.50	129	Barbados	3.58
36	Thailand	5.06	83	Kenya	4.50	130	Netherlands	3.56
37	Kuwait	5.04	84	Montenegro	4.48	131	Senegal	3.56
38	Taiwan, China	5.04	85	Cape Verde	4.48	132	Austria	3.49
39	Burundi	5.02	86	Colombia	4.47	133	Italy	3.49
40	Cambodia	5.00	87	Czech Republic	4.47	134	Sweden	3.38
41	Russian Federation	4.99	88	Côte d'Ivoire	4.46	135	Denmark	3.31
42	South Africa	4.99	89	Chile	4.44	136	Israel	3.24
43	Gabon	4.99	90	Bangladesh	4.43	137	Norway	3.23
44	Zimbabwe	4.96	91	Costa Rica	4.40	138	Australia	3.06
45	United Arab Emirates	4.95	92	Nigeria	4.38	139	France	2.95
46	Poland	4.94	93	Albania	4.38	140	United Kingdom	2.73
47	Morocco	4.94	94	Turkey	4.37	141	Switzerland	2.57

Pillar 9: Environmental Sustainability

Rank	Economy	Value	Rank	Economy	Value	Rank	Economy	Value
1	Switzerland	5.63	48	Chad	4.34	95	Turkey	3.83
2	Ireland	5.31	49	Cape Verde	4.32	96	Guinea	3.81
3	Finland	5.25	50	Qatar	4.32	97	Armenia	3.79
4	Luxembourg	5.23	51	Singapore	4.31	98	Burundi	3.78
5	Norway	5.22	52	Georgia	4.31	99	Tanzania	3.78
6	Seychelles	5.17	53	Japan	4.30	100	Sierra Leone	3.77
7	Hungary	5.16	54	Gabon	4.30	101	Israel	3.76
8	Austria	5.13	55	Montenegro	4.30	102	Peru	3.75
9	Sweden	5.03	56	South Africa	4.29	103	Sri Lanka	3.74
10	New Zealand	4.94	57	Belgium	4.28	104	Bahrain	3.73
11	Iceland	4.92	58	Panama	4.25	105	El Salvador	3.70
12	Denmark	4.92	59	Tunisia	4.22	106	Russian Federation	3.70
13	Czech Republic	4.90	60	Moldova	4.22	107	Macedonia, FYR	3.65
14	Germany	4.90	61	Greece	4.19	108	Guatemala	3.62
15	Puerto Rico	4.84	62	Guyana	4.18	109	Albania	3.60
16	Netherlands	4.81	63	Zimbabwe	4.18	110	Myanmar	3.57
17	United Kingdom	4.79	64	Malta	4.17	111	United States	3.56
18	Barbados	4.77	65	Zambia	4.16	112	Lao PDR	3.55
19	Slovenia	4.74	66	Mauritania	4.15	113	Algeria	3.51
20	Estonia	4.73	67	Honduras	4.12	114	Trinidad and Tobago	3.48
21	Uruguay	4.72	68	Costa Rica	4.11	115	Iran, Islamic Rep.	3.47
22	Rwanda	4.68	69	Taiwan, China	4.09	116	Thailand	3.46
23	France	4.67	70	Morocco	4.09	117	Madagascar	3.46
24	Mauritius	4.67	71	Côte d'Ivoire	4.09	118	Cambodia	3.43
25	Australia	4.64	72	Serbia	4.08	119	Malaysia	3.42
26	Canada	4.63	73	Bhutan	4.07	120	Angola	3.41
27	Bulgaria	4.62	74	Oman	4.07	121	Saudi Arabia	3.41
28	Poland	4.62	75	Malawi	4.01	122	Philippines	3.41
29	Spain	4.61	76	Ethiopia	4.00	123	Tajikistan	3.40
30	Latvia	4.59	77	Egypt	3.99	124	Kyrgyz Republic	3.38
31	Mali	4.55	78	Ghana	3.99	125	Venezuela	3.38
32	Gambia, The	4.49	79	Hong Kong SAR	3.96	126	Mexico	3.37
33	Slovak Republic	4.49	80	Uganda	3.96	127	Jamaica	3.33
34	Swaziland	4.48	81	Mozambique	3.93	128	Argentina	3.32
35	Burkina Faso	4.47	82	Cameroon	3.93	129	Lebanon	3.29
36	Portugal	4.42	83	Cyprus	3.92	130	Mongolia	3.24
37	Botswana	4.42	84	Jordan	3.92	131	Dominican Republic	3.23
38	Lithuania	4.42	85	Nicaragua	3.90	132	Vietnam	3.16
39	Kenya	4.42	86	Brazil	3.89	133	Nepal	3.14
40	Namibia	4.41	87	Colombia	3.88	134	Indonesia	3.11
41	United Arab Emirates	4.39	88	Lesotho	3.87	135	Bangladesh	3.01
42	Croatia	4.38	89	Nigeria	3.86	136	Kuwait	2.95
43	Chile	4.38	90	Korea, Rep.	3.86	137	China	2.93
44	Suriname	4.36	91	Kazakhstan	3.84	138	Yemen	2.92
45	Senegal	4.36	92	Paraguay	3.83	139	India	2.89
46	Romania	4.35	93	Bolivia	3.83	140	Haiti	2.88
47	Italy	4.34	94	Azerbaijan	3.83	141	Pakistan	2.82

Pillar 10: Air Transport Infrastructure

Rank	Economy	Value	Rank	Economy	Value	Rank	Economy	Value
1	Canada	6.75	48	South Africa	3.28	95	El Salvador	2.21
2	United States	5.95	49	Guyana	3.23	96	Tajikistan	2.18
3	United Arab Emirates	5.91	50	Israel	3.16	97	Albania	2.16
4	Australia	5.80	51	Czech Republic	3.13	98	Suriname	2.16
5	Hong Kong SAR	5.42	52	Latvia	3.12	99	Bolivia	2.16
6	Singapore	5.26	53	Croatia	3.06	100	Uruguay	2.15
7	United Kingdom	5.12	54	Puerto Rico	3.05	101	Venezuela	2.14
8	Switzerland	5.03	55	Namibia	3.03	102	Serbia	2.13
9	Norway	5.01	56	Montenegro	3.03	103	Cambodia	2.10
10	France	4.98	57	Swaziland	3.03	104	Honduras	2.09
11	Germany	4.93	58	Oman	2.98	105	Pakistan	2.09
12	Spain	4.91	59	Estonia	2.97	106	Nepal	2.08
13	Netherlands	4.89	60	Costa Rica	2.96	107	Ghana	2.07
14	New Zealand	4.72	61	Mauritius	2.95	108	Côte d'Ivoire	2.04
15	Iceland	4.67	62	Bhutan	2.93	109	Gabon	2.03
16	Turkey	4.66	63	Egypt	2.93	110	Senegal	2.03
17	Thailand	4.57	64	Morocco	2.86	111	Nigeria	2.02
18	Panama	4.54	65	Dominican Republic	2.82	112	Gambia, The	1.99
19	Japan	4.54	66	Chile	2.82	113	Algeria	1.98
20	Sweden	4.52	67	Philippines	2.77	114	Angola	1.96
21	Malaysia	4.46	68	Vietnam	2.72	115	Myanmar	1.95
22	Russian Federation	4.42	69	Hungary	2.71	116	Tanzania	1.94
23	Finland	4.41	70	Colombia	2.66	117	Zambia	1.93
24	Seychelles	4.30	71	Sri Lanka	2.64	118	Nicaragua	1.91
25	China	4.27	72	Jordan	2.61	119	Moldova	1.90
26	Italy	4.26	73	Poland	2.57	120	Guatemala	1.89
27	Greece	4.25	74	Kenya	2.56	121	Kyrgyz Republic	1.89
28	Trinidad and Tobago	4.18	75	Argentina	2.55	122	Madagascar	1.87
29	Qatar	4.17	76	Kazakhstan	2.54	123	Bangladesh	1.87
30	Ireland	4.16	77	Tunisia	2.53	124	Rwanda	1.84
31	Korea, Rep.	4.05	78	Kuwait	2.51	125	Uganda	1.81
32	Austria	4.01	79	Bulgaria	2.46	126	Cameroon	1.79
33	Barbados	3.95	80	Lebanon	2.46	127	Zimbabwe	1.79
34	Portugal	3.91	81	Jamaica	2.44	128	Mozambique	1.78
35	India	3.88	82	Slovenia	2.44	129	Slovak Republic	1.78
36	Denmark	3.87	83	Peru	2.43	130	Haiti	1.76
37	Malta	3.83	84	Azerbaijan	2.43	131	Mali	1.75
38	Belgium	3.83	85	Macedonia, FYR	2.39	132	Burundi	1.64
39	Indonesia	3.81	86	Lithuania	2.39	133	Mauritania	1.59
40	Saudi Arabia	3.79	87	Romania	2.34	134	Yemen	1.59
41	Brazil	3.64	88	Mongolia	2.33	135	Lesotho	1.59
42	Mexico	3.64	89	Lao PDR	2.29	136	Burkina Faso	1.59
43	Cape Verde	3.63	90	Ethiopia	2.27	137	Paraguay	1.56
44	Luxembourg	3.59	91	Botswana	2.27	138	Guinea	1.54
45	Bahrain	3.52	92	Armenia	2.26	139	Malawi	1.51
46	Cyprus	3.48	93	Iran, Islamic Rep.	2.22	140	Sierra Leone	1.51
47	Taiwan, China	3.40	94	Georgia	2.22	141	Chad	1.42

Pillar 11: Ground and Port Infrastructure

Rank	Economy	Value	Rank	Economy	Value	Rank	Economy	Value
1	Hong Kong SAR	6.45	48	El Salvador	4.07	95	Albania	3.01
2	Singapore	6.44	49	New Zealand	4.06	96	Lao PDR	3.01
3	Netherlands	6.21	50	India	4.02	97	Armenia	2.98
4	Switzerland	6.00	51	Greece	4.01	98	Serbia	2.95
5	Germany	5.99	52	Israel	3.91	99	Senegal	2.89
6	Belgium	5.96	53	China	3.91	100	Nicaragua	2.87
7	France	5.78	54	Turkey	3.88	101	Costa Rica	2.86
8	Luxembourg	5.73	55	Rwanda	3.85	102	Kazakhstan	2.85
9	Barbados	5.67	56	Norway	3.81	103	Egypt	2.84
10	Spain	5.54	57	Australia	3.69	104	Lesotho	2.83
11	Bahrain	5.53	58	Namibia	3.68	105	Botswana	2.82
12	Denmark	5.52	59	Gambia, The	3.66	106	Zambia	2.80
13	United Kingdom	5.51	60	Saudi Arabia	3.66	107	Burundi	2.80
14	Puerto Rico	5.49	61	Chile	3.64	108	Sierra Leone	2.79
15	Austria	5.42	62	Kuwait	3.61	109	Moldova	2.77
16	Taiwan, China	5.40	63	South Africa	3.59	110	Zimbabwe	2.74
17	Japan	5.29	64	Dominican Republic	3.58	111	Tajikistan	2.69
18	Czech Republic	5.15	65	Azerbaijan	3.55	112	Uganda	2.65
19	Slovenia	5.13	66	Montenegro	3.51	113	Mali	2.64
20	United Arab Emirates	5.06	67	Georgia	3.50	114	Argentina	2.63
21	Korea, Rep.	5.06	68	Swaziland	3.49	115	Malawi	2.62
22	Malta	4.98	69	Morocco	3.48	116	Cambodia	2.61
23	Cyprus	4.91	70	Cape Verde	3.42	117	Cameroon	2.60
24	Ireland	4.89	71	Thailand	3.41	118	Peru	2.59
25	Finland	4.83	72	Mexico	3.39	119	Nepal	2.57
26	Qatar	4.79	73	Kenya	3.36	120	Tanzania	2.56
27	Mauritius	4.77	74	Côte d'Ivoire	3.31	121	Algeria	2.56
28	Sweden	4.76	75	Bangladesh	3.29	122	Yemen	2.55
29	Seychelles	4.76	76	Iran, Islamic Rep.	3.28	123	Ethiopia	2.51
30	Jamaica	4.75	77	Indonesia	3.27	124	Colombia	2.50
31	United States	4.67	78	Pakistan	3.27	125	Kyrgyz Republic	2.44
32	Italy	4.65	79	Bulgaria	3.26	126	Paraguay	2.43
33	Lithuania	4.55	80	Guatemala	3.26	127	Nigeria	2.42
34	Portugal	4.54	81	Macedonia, FYR	3.25	128	Bolivia	2.39
35	Malaysia	4.50	82	Jordan	3.25	129	Madagascar	2.38
36	Hungary	4.45	83	Honduras	3.20	130	Brazil	2.36
37	Estonia	4.39	84	Suriname	3.18	131	Mozambique	2.27
38	Trinidad and Tobago	4.37	85	Uruguay	3.17	132	Myanmar	2.19
39	Iceland	4.35	86	Bhutan	3.15	133	Gabon	2.14
40	Oman	4.25	87	Vietnam	3.14	134	Burkina Faso	2.13
41	Sri Lanka	4.24	88	Ghana	3.11	135	Chad	2.13
42	Latvia	4.22	89	Lebanon	3.10	136	Haiti	2.13
43	Slovak Republic	4.22	90	Guyana	3.10	137	Guinea	2.09
44	Croatia	4.20	91	Romania	3.10	138	Mongolia	2.09
45	Panama	4.16	92	Russian Federation	3.09	139	Venezuela	2.08
46	Canada	4.11	93	Philippines	3.02	140	Angola	2.07
47	Poland	4.08	94	Tunisia	3.02	141	Mauritania	1.96

Pillar 12: Tourist Service Infrastructure

Rank	Economy	Value	Rank	Economy	Value	Rank	Economy	Value
1	Austria	6.83	48	Peru	4.75	95	Moldova	3.29
2	Cyprus	6.77	49	Bahrain	4.74	96	Côte d'Ivoire	3.26
3	Italy	6.66	50	Georgia	4.69	97	Lao PDR	3.22
4	Spain	6.58	51	Brazil	4.69	98	Mongolia	3.21
5	Switzerland	6.35	52	Denmark	4.67	99	Bolivia	3.10
6	Croatia	6.35	53	Luxembourg	4.67	100	Venezuela	3.08
7	United States	6.30	54	Russian Federation	4.65	101	Indonesia	3.07
8	Iceland	6.28	55	Argentina	4.64	102	China	3.04
9	France	6.15	56	Dominican Republic	4.63	103	Lesotho	3.01
10	Portugal	6.12	57	Netherlands	4.62	104	Haiti	2.99
11	Ireland	6.10	58	Jamaica	4.59	105	Vietnam	2.95
12	Greece	6.08	59	Macedonia, FYR	4.58	106	Zambia	2.94
13	Bulgaria	6.06	60	Cape Verde	4.56	107	Madagascar	2.91
14	Canada	5.97	61	Tunisia	4.54	108	Cambodia	2.91
15	Seychelles	5.95	62	Oman	4.53	109	India	2.90
16	Barbados	5.92	63	Serbia	4.50	110	Swaziland	2.88
17	Estonia	5.87	64	Mexico	4.47	111	Mozambique	2.84
18	New Zealand	5.87	65	Morocco	4.44	112	Zimbabwe	2.84
19	Montenegro	5.84	66	Poland	4.44	113	Yemen	2.78
20	Slovenia	5.72	67	Saudi Arabia	4.44	114	Nigeria	2.70
21	Thailand	5.70	68	Malaysia	4.43	115	Tanzania	2.70
22	Belgium	5.65	69	Jordan	4.37	116	Gabon	2.68
23	Germany	5.61	70	Korea, Rep.	4.33	117	Gambia, The	2.67
24	Malta	5.61	71	Lithuania	4.24	118	Nepal	2.65
25	Norway	5.49	72	Israel	4.20	119	Iran, Islamic Rep.	2.61
26	United Arab Emirates	5.46	73	Armenia	4.18	120	Bhutan	2.61
27	Panama	5.46	74	Sri Lanka	4.15	121	Uganda	2.61
28	Mauritius	5.45	75	Japan	4.11	122	Kyrgyz Republic	2.60
29	Australia	5.44	76	Uruguay	4.10	123	Cameroon	2.59
30	Czech Republic	5.44	77	Taiwan, China	4.05	124	Mali	2.57
31	Puerto Rico	5.40	78	Hong Kong SAR	4.05	125	Pakistan	2.57
32	Costa Rica	5.27	79	Albania	3.94	126	Ghana	2.55
33	Lebanon	5.18	80	Kuwait	3.84	127	Malawi	2.54
34	Singapore	5.17	81	Kazakhstan	3.81	128	Rwanda	2.52
35	Trinidad and Tobago	5.15	82	Philippines	3.77	129	Angola	2.44
36	Latvia	5.08	83	Guatemala	3.70	130	Mauritania	2.37
37	United Kingdom	5.08	84	Honduras	3.70	131	Burkina Faso	2.33
38	Turkey	5.04	85	Suriname	3.68	132	Bangladesh	2.32
39	Hungary	5.02	86	El Salvador	3.67	133	Tajikistan	2.30
40	South Africa	5.02	87	Paraguay	3.67	134	Ethiopia	2.23
41	Finland	5.02	88	Nicaragua	3.62	135	Guyana	2.18
42	Romania	5.01	89	Egypt	3.60	136	Chad	2.09
43	Slovak Republic	4.94	90	Colombia	3.59	137	Myanmar	2.06
44	Sweden	4.84	91	Botswana	3.47	138	Algeria	2.03
45	Chile	4.83	92	Senegal	3.38	139	Sierra Leone	1.98
46	Qatar	4.81	93	Azerbaijan	3.30	140	Guinea	1.94
47	Namibia	4.75	94	Kenya	3.30	141	Burundi	1.90

Pillar 13: Natural Resources

Rank	Economy	Value	Rank	Economy	Value	Rank	Economy	Value
1	Brazil	6.01	48	Bulgaria	3.44	95	United Arab Emirates	2.51
2	Australia	5.31	49	Philippines	3.39	96	Jamaica	2.50
3	United States	5.27	50	Slovak Republic	3.31	97	Chad	2.49
4	Mexico	5.18	51	Côte d'Ivoire	3.30	98	Iran, Islamic Rep.	2.48
5	Costa Rica	5.09	52	Nicaragua	3.21	99	Israel	2.47
6	China	5.05	53	Sweden	3.20	100	Egypt	2.45
7	Tanzania	4.91	54	Netherlands	3.19	101	Guyana	2.44
8	France	4.80	55	Cameroon	3.18	102	Lithuania	2.44
9	United Kingdom	4.79	56	Finland	3.16	103	Uruguay	2.40
10	Canada	4.78	57	Poland	3.14	104	Sierra Leone	2.38
11	Kenya	4.63	58	Bhutan	3.13	105	Tunisia	2.36
12	Peru	4.61	59	Morocco	3.11	106	Angola	2.34
13	Italy	4.60	60	Luxembourg	3.09	107	Korea, Rep.	2.34
14	Spain	4.59	61	Senegal	3.04	108	Tajikistan	2.33
15	Venezuela	4.49	62	Taiwan, China	3.01	109	Bangladesh	2.30
16	Thailand	4.47	63	Ethiopia	3.00	110	Trinidad and Tobago	2.28
17	India	4.42	64	Honduras	2.97	111	Kazakhstan	2.27
18	Germany	4.41	65	Suriname	2.96	112	Pakistan	2.25
19	Indonesia	4.36	66	Malawi	2.93	113	Paraguay	2.23
20	Panama	4.34	67	Chile	2.93	114	Gambia, The	2.23
21	Switzerland	4.32	68	Puerto Rico	2.89	115	Malta	2.22
22	South Africa	4.28	69	Singapore	2.87	116	El Salvador	2.18
23	New Zealand	4.14	70	Cambodia	2.84	117	Burkina Faso	2.18
24	Colombia	4.13	71	Gabon	2.80	118	Barbados	2.17
25	Nepal	4.11	72	Ireland	2.79	119	Swaziland	2.16
26	Malaysia	4.09	73	Turkey	2.78	120	Kyrgyz Republic	2.16
27	Argentina	4.08	74	Guinea	2.76	121	Macedonia, FYR	2.15
28	Austria	4.07	75	Montenegro	2.76	122	Qatar	2.12
29	Norway	3.96	76	Rwanda	2.75	123	Mauritania	2.12
30	Japan	3.94	77	Lao PDR	2.74	124	Mali	2.09
31	Namibia	3.94	78	Hungary	2.72	125	Georgia	2.07
32	Slovenia	3.87	79	Romania	2.70	126	Jordan	2.05
33	Croatia	3.80	80	Myanmar	2.70	127	Algeria	2.04
34	Russian Federation	3.77	81	Estonia	2.69	128	Albania	2.03
35	Sri Lanka	3.76	82	Nigeria	2.69	129	Yemen	2.03
36	Portugal	3.70	83	Saudi Arabia	2.68	130	Azerbaijan	2.03
37	Guatemala	3.67	84	Cyprus	2.66	131	Mauritius	2.03
38	Iceland	3.63	85	Seychelles	2.65	132	Lesotho	1.98
39	Hong Kong SAR	3.63	86	Madagascar	2.65	133	Bahrain	1.92
40	Vietnam	3.61	87	Belgium	2.65	134	Burundi	1.91
41	Botswana	3.59	88	Mozambique	2.61	135	Serbia	1.90
42	Zambia	3.58	89	Czech Republic	2.59	136	Armenia	1.88
43	Bolivia	3.55	90	Oman	2.59	137	Kuwait	1.87
44	Zimbabwe	3.51	91	Dominican Republic	2.59	138	Cape Verde	1.83
45	Uganda	3.51	92	Ghana	2.57	139	Moldova	1.75
46	Greece	3.49	93	Latvia	2.55	140	Lebanon	1.71
47	Denmark	3.45	94	Mongolia	2.51	141	Haiti	1.46

Pillar 14: Cultural Resources and Business Travel

Rank	Economy	Value	Rank	Economy	Value	Rank	Economy	Value
1	Spain	6.69	48	Finland	2.13	95	Slovenia	1.40
2	France	6.56	49	Romania	2.07	96	Jamaica	1.40
3	Italy	6.51	50	Algeria	2.05	97	Kyrgyz Republic	1.39
4	China	6.44	51	Bolivia	1.99	98	Madagascar	1.39
5	Germany	6.00	52	Israel	1.98	99	Armenia	1.38
6	Japan	5.92	53	United Arab Emirates	1.97	100	El Salvador	1.38
7	United Kingdom	5.90	54	Bulgaria	1.96	101	Kazakhstan	1.35
8	Brazil	5.31	55	Saudi Arabia	1.91	102	Botswana	1.35
9	Australia	5.13	56	Cyprus	1.88	103	Nicaragua	1.35
10	India	5.09	57	Nigeria	1.80	104	Guinea	1.33
11	Mexico	4.92	58	Uruguay	1.79	105	Bahrain	1.33
12	Korea, Rep.	4.85	59	Mongolia	1.78	106	Latvia	1.33
13	United States	4.79	60	Pakistan	1.76	107	Trinidad and Tobago	1.32
14	Argentina	4.37	61	Mali	1.74	108	Tajikistan	1.31
15	Canada	4.02	62	Philippines	1.71	109	Malawi	1.30
16	Turkey	3.83	63	Panama	1.70	110	Macedonia, FYR	1.30
17	Portugal	3.71	64	Costa Rica	1.68	111	Bhutan	1.29
18	Belgium	3.67	65	Kenya	1.67	112	Cameroon	1.29
19	Netherlands	3.51	66	Luxembourg	1.62	113	Lao PDR	1.29
20	South Africa	3.39	67	Serbia	1.61	114	Burkina Faso	1.29
21	Russian Federation	3.32	68	Guatemala	1.60	115	Sierra Leone	1.29
22	Singapore	3.30	69	Sri Lanka	1.60	116	Zambia	1.28
23	Taiwan, China	3.25	70	Tunisia	1.58	117	Rwanda	1.27
24	Colombia	3.21	71	Bangladesh	1.56	118	Jordan	1.27
25	Indonesia	3.12	72	Puerto Rico	1.55	119	Côte d'Ivoire	1.27
26	Peru	3.00	73	Estonia	1.55	120	Mauritius	1.26
27	Malaysia	2.95	74	Tanzania	1.54	121	Mozambique	1.25
28	Switzerland	2.93	75	Azerbaijan	1.53	122	Angola	1.24
29	Sweden	2.93	76	Cambodia	1.53	123	Nepal	1.23
30	Austria	2.92	77	Iceland	1.53	124	Gabon	1.18
31	Ireland	2.82	78	Dominican Republic	1.51	125	Kuwait	1.17
32	Greece	2.82	79	Ethiopia	1.50	126	Gambia, The	1.16
33	Vietnam	2.79	80	Lithuania	1.50	127	Albania	1.14
34	Thailand	2.79	81	Honduras	1.50	128	Burundi	1.14
35	Poland	2.77	82	Uganda	1.50	129	Guyana	1.13
36	Croatia	2.67	83	Qatar	1.48	130	Barbados	1.13
37	Iran, Islamic Rep.	2.59	84	Lebanon	1.47	131	Haiti	1.13
38	Hong Kong SAR	2.58	85	Ghana	1.47	132	Namibia	1.12
39	Morocco	2.51	86	Zimbabwe	1.46	133	Mauritania	1.11
40	Chile	2.47	87	Georgia	1.45	134	Montenegro	1.09
41	Egypt	2.40	88	Oman	1.45	135	Moldova	1.08
42	Czech Republic	2.30	89	Yemen	1.45	136	Suriname	1.06
43	New Zealand	2.27	90	Malta	1.44	137	Cape Verde	1.05
44	Hungary	2.22	91	Paraguay	1.44	138	Seychelles	1.03
45	Norway	2.22	92	Myanmar	1.43	139	Chad	1.03
46	Denmark	2.18	93	Senegal	1.43	140	Swaziland	1.02
47	Venezuela	2.13	94	Slovak Republic	1.42	141	Lesotho	1.02