

# The Travel & Tourism Competitiveness Report 2008

Balancing Economic Development and Environmental Sustainability



**Jennifer Blanke**, World Economic Forum

**Thea Chiesa**, World Economic Forum

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World Economic Forum  
Geneva, Switzerland 2008

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# The Travel & Tourism Competitiveness Report 2008

Balancing Economic Development and Environmental Sustainability

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**Jennifer Blanke**, World Economic Forum

**Thea Chiesa**, World Economic Forum

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The terms *country* and *nation* as used in this report do not in all cases refer to a territorial entity that is a state as understood by international law and practice. The terms cover well-defined, geographically self-contained economic areas that may not be states but for which statistical data are maintained on a separate and independent basis.

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# Preface

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Over recent decades, Travel & Tourism has taken its place among the key industries in the world economy, now accounting for a significant share of global gross domestic product (GDP) and employment, and providing an opportunity for developing countries to move up the value chain toward the production of higher value added services. Given the importance of the Travel & Tourism (T&T) industry for industrialized and developing countries alike, the fundamental objective of the *Travel & Tourism Competitiveness Report (TTCR)* is to explore the factors driving T&T competitiveness worldwide.

Over the past three years, the World Economic Forum has engaged key industry and thought leaders through its Aviation, Travel and Tourism Industry Partnership Programme to carry out an in-depth analysis of the T&T competitiveness of economies around the world. The goal is to construct a platform for multi-stakeholder dialogue to ensure the development of strong and sustainable national T&T industries capable of contributing effectively to international economic development.

The theme of this second edition of the TTCR, “Balancing Economic Development and Environmental Sustainability,” reflects the increasing focus on ensuring the industry’s sustained growth while protecting the natural environment upon which it so greatly depends. The goal of achieving a sustainable T&T industry is certainly not new. However, the industry’s need to demonstrate strong leadership in this area has become important only in recent years, primarily as a result of increased global awareness of the impact of global climate change and pollution on tourist destinations.

This year’s report includes the second edition of the Travel & Tourism Competitiveness Index (TTCI), which is at the core of this *Report*. The aim of the TTCI, which covers 130 economies this year, is to provide a comprehensive strategic tool for measuring “the factors and policies that make it attractive to develop the Travel & Tourism sector in different countries.” By providing detailed assessments of the T&T environments in countries worldwide, the results can be used by all stakeholders to work together to improve the industry’s competitiveness in their national economies, thereby contributing to national growth and prosperity. This year’s Index has been reinforced to better capture the extent to which the sector is developed in an environmentally sustainable way.

The *Report* contains detailed profiles for each of the 130 economies featured in the study, as well as an extensive section of data tables with global rankings covering the more than 70 indicators included in the TTCI. In addition, the *Report* includes insightful contributions from a number of industry experts, with a particular focus on this year’s theme of environmental sustainability. These essay contributions explore issues such as identifying useful mechanisms for inducing travel-related emission reductions, the way in which green strategies will change how the tourism industry will operate in the future, and how environmental sustainability has more generally become a key driver of tourism competitiveness.

The *Travel & Tourism Competitiveness Report* could not have been put together without the distinguished thinkers who have shared with us their knowledge and experience. We are grateful to our Strategic Design Partner, Booz Allen Hamilton, and our Data Partners: Deloitte, the International Air Transport Association (IATA), the International Union for Conservation of Nature (IUCN), the World Tourism Organization (UNWTO), and the World Travel & Tourism Council (WTTC) for helping us to design and develop the TTCI and for providing much of the industry-relevant data used in its calculation. We thank our Industry Partners in this *Report*—Abercrombie & Kent, Bombardier, British Airways, Carlson, Emirates Airline, Hertz, Silversea Cruises Group, Swiss International Airlines, and Travelport—for their support in this important venture. We also wish to thank the editors of the *Report*, Jennifer Blanke and Thea Chiesa, for their energy and their commitment to the project. Appreciation also goes to Fiona Puaa, Head of Strategic Insight Teams, and the other members of the competitiveness team: Ciara Browne, Agustina Ciocia, Margareta Drzeniek Hanouz, Thierry Geiger, Irene Mia, Pearl Samandari, and Eva Trujillo. Finally, we would like to commend our network of 142 Partner Institutes worldwide, without whose enthusiasm and hard work the annual administration of the Executive Opinion Survey and this *Report* would not be possible.



# Executive Summary

**JENNIFER BLANKE**, Senior Economist, Global Competitiveness Network, World Economic Forum

**THEA CHIESA**, Head of Aviation, Travel and Tourism, World Economic Forum

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

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

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

## The Travel & Tourism Competitiveness Index

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

The TTCI was produced by the World Economic Forum in close collaboration with Booz Allen Hamilton, Deloitte, the International Air Transport Association (IATA), the International Union for Conservation of Nature (IUCN), the World Tourism Organization (UNWTO), and the World Travel & Tourism Council (WTTC). We have also received important feedback

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

The TTCI aims to measure *the factors and policies that make it attractive to develop the T&T sector in different countries*. The TTCI is composed of a number of "pillars" of T&T competitiveness, of which there are 14 in all. These are:

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

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

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

Each of the pillars is made up of a number of individual variables, of which there are over 70 in all. The dataset includes both hard data and Survey data from the World Economic Forum's annual Executive Opinion Survey. The hard data were obtained from publicly available sources, international T&T institutions, and T&T experts (for example, the IATA, the IUCN, UNESCO, the UNWTO, and the WTTC). The Survey is carried out among CEOs and top business leaders in all economies covered by our research—these are the people making the investment decisions in their respective economies. The Survey provides unique data on many qualitative institutional and business environment issues. The exact methodology underlying the construction of the TTCI is described in Chapter 1.1.

### Adjustments to the TTCI 2008

Some improvements have been made to the TTCI this year, both in terms of the structure of the model and with the addition of new data for important issue areas that were previously missing. In terms of structural changes, a first major improvement is that what was last year called the “environmental regulation” pillar has been revised and improved based on our collaboration with the IUCN and the UNWTO, and is this year re-named the “environmental sustainability” pillar to better reflect its components and to capture the increasingly recognized importance of sustainability in the sector's development.

Second, what was last year a single pillar, “natural and cultural resources,” has been broken into its two subcomponents to create the two distinct pillars of natural resources and cultural resources. This provides a more nuanced and useful description of the strengths and weaknesses of countries, as these are in reality two quite different types of resources, with different policy implications in many cases.

In addition, throughout the model we have used better data proxies for some variables and included a number of new concepts that were previously missing from the model. More details on the structural changes and new data included can be found in Chapter 1.1.

### The TTCI Rankings for 2008

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

Switzerland is ranked 1st in the 2008 TTCI, followed by Austria and Germany, the same top three countries as in the 2007 TTCI. Switzerland is a country rich in cultural and natural resources, including an impressive number of World Heritage cultural and natural sites for

a country of its size. A large percentage of the country's land area is protected (ranked 12th) and the natural environment is assessed as being among the most pristine in the world (ranked 10th). This natural heritage is buttressed by a strong national focus on environmental sustainability: Switzerland is ranked 2nd overall on this pillar, based on strong and well-enforced environmental legislation and with a particular focus on developing the T&T sector sustainably.

As well as being endowed with features that make it an attractive leisure tourism destination, Switzerland is also an important business travel hub, with many international fairs and exhibitions held in the country each year. Staffing of the industry is also facilitated by excellent education and training (ranked 4th), perhaps not surprising in a country with many of the best hotel management schools. Added to these strengths is Switzerland's excellent transport infrastructure (ranked 5th worldwide), with top-quality roads and railroads and an excellent domestic transport network. Also well assessed is the specific tourism infrastructure (ranked 7th), with readily available hotel rooms and ATMs for cash withdrawals. Such high-quality infrastructure makes a tourist's stay in the country easy and comfortable, an experience that is reinforced by the high level of general safety and security (ranked 6th).

Austria is ranked 2nd in the TTCI, attributable to its rich cultural resources, with eight World Heritage cultural sites and many fairs and exhibitions catering to business travelers. The natural environment is also well assessed, along with the country's focus on environmental sustainability. In addition, Austrians are perceived as extremely open and welcoming to foreign travelers (ranked 3rd). Austria's tourism infrastructure is assessed as second to none, with abundant car rental facilities, hotel accommodations, and ATMs. Other strengths include Austria's assessment as one of the safest countries in the world (ranked 3rd), and its excellent health and hygiene levels (ranked 4th).

Germany, ranked 3rd, is also characterized by abundant cultural resources: Germany is ranked 3rd worldwide for its 31 World Heritage cultural sites, and 2nd for the number of international fairs and exhibitions held in the country. The country's infrastructure is among the best in the world, ranked 3rd for the quality of its ground transport infrastructure and 7th for its air transport infrastructure. In addition, Germany gets better marks than Switzerland and Austria for the policy rules and regulations affecting the T&T industry: it is ranked 6th in this area, with policies encouraging foreign investment and bilateral Air Service Agreements that are assessed as open.

Spain and France also place among the top 10, with Spain at 5th and France at 10th place. Both countries benefit from their rich cultural resources, ranked 2nd and 4th worldwide, respectively, for their number of World Heritage cultural sites. Both have built up excel-

lent infrastructure: France's ground and air transport infrastructure are among the best in the world, and Spain's tourism infrastructure is ranked 1st internationally. The Index shows that France's policy rules and regulations are more conducive to developing the sector than Spain's, while Spain's labor market makes finding qualified labor easier there than in France, which is ranked a low 86th on this pillar.

The United States is ranked 7th. The country places 1st for the overall business environment and infrastructure, and 2nd for the country's human, cultural, and natural resources. In particular, the United States has an excellent air transport infrastructure (ranked 2nd), and high-quality tourism and ICT infrastructure. Its natural resources are ranked a high 2nd worldwide, with many protected areas and many World Heritage natural sites, although a perception exists that the environment is not being sufficiently protected (ranked 100th for environmental sustainability). Safety and security, ranked 119th, is also of concern: as well as some concerns about safety from crime, the country has one of the highest rates of road traffic incidents out of all countries covered.

Italy, despite being endowed with the most World Heritage cultural sites in the world, ranks a lower 28th in the TTCI ranking. As well as its cultural richness, Italy's strengths lie in areas such as the health and hygiene of the country (19th) and its excellent tourism infrastructure (4th). However, it faces a number of challenges that bring its overall rating down. These include policy rules and regulations, where Italy ranks 57th because of its very strong foreign ownership restrictions (ranked 102nd) and rules governing FDI (109th). Further, the government is not seen to be prioritizing the sector (ranked 97th). In addition, ground transport infrastructure requires upgrading, and there are some safety and security concerns in the country (81st).

Australia is the highest ranked country from Asia and Oceania. The only one in the top 10, it is ranked 4th, just behind Germany and ahead of Spain. Australia is ranked 1st worldwide for the number of World Heritage natural sites, and 5th for its cultural resources. Given the importance of the natural environment for much of its leisure tourism, it is notable that the stringency and enforcement of its environmental regulations are well assessed. Given the country's distance from other continents, and the related importance of domestic air travel to overcome the large distances between major sites, its competitiveness is also buttressed by excellent air transport infrastructure (ranked 3rd), as well as good general tourism infrastructure. Australia also benefits from the relatively strong government prioritization of the tourism sector and effective destination-marketing campaigns.

Within the region, Australia is joined in the top 20 by Hong Kong (14th) and Singapore (16th). These economies have excellent infrastructures: their ground transport infrastructures are assessed as the top two in

the world, and their air transport infrastructures also get high marks. They also benefit from well-qualified labor to work in the sector, both ranked among the top four in this area. With regard to the policy environment, they hold the top two places out of all countries, with rules and regulations that are extremely conducive to the development of their T&T industries (policies facilitating foreign ownership and FDI, well-protected property rights, few visa restrictions). Further, they are among the safest countries of all assessed with regard to crime and security. Hong Kong is unsurpassed for the quality of health and hygiene, and Singapore is ranked 5th in the overall prioritization of Travel & Tourism.

Japan is ranked 23rd in the TTCI, with good marks for its cultural resources (ranked 14th) attributable to its many World Heritage cultural sites and the large number of international fairs and exhibitions held in the country. The ground transport infrastructure is among the best in the world, especially railroads, and Japan continues to be a leader in the area of education and training. However, Japan ranks third from the bottom for the affinity of the country for Travel & Tourism (128th). Further, the sector is not perceived to be a priority for the government (ranked 87th).

Malaysia is ranked 32nd, with its rich natural resources (ranked 18th) and good ground transport infrastructure. The country also benefits from excellent price competitiveness (ranked 3rd), with low comparative hotel and fuel prices, low ticket taxes and airport charges, and a favorable tax regime. Malaysia's policy environment is measured as highly conducive to the development of the sector (ranked 12th), and the government is prioritizing Travel & Tourism; it also has an excellent evaluation for its destination-marketing campaigns (ranked 7th). With regard to weaknesses, health and hygiene indicators lag behind those of many other countries in the region, with, in particular, a low physician density (placing the country 93rd).

Thailand is ranked 42nd in the TTCI. It is endowed with rich natural resources and a strong affinity for Travel & Tourism (both ranked 20th), with a very friendly attitude of the population toward tourists (ranked 10th). This is buttressed by the sector's strong prioritization by the government (ranked 12th) with, similar to Malaysia, excellent destination-marketing campaigns and strong price competitiveness. However, some weaknesses remain: despite the prioritization of the sector by the government, some aspects of the regulatory environment—such as stringent foreign ownership restrictions, visa restrictions for many travelers, and the long time required for starting a business in the country—are not particularly conducive to developing the sector (ranked 52nd).

China is ranked somewhat lower, at 62nd place. China has many clear strengths: it is ranked 3rd for its World Heritage natural sites and 5th for its cultural sites, demonstrating the rich cultural and natural heritage of



**Table 1: The Travel & Tourism Competitiveness Index**

Country/Economy	SUBINDEXES							
	OVERALL INDEX		T&T Regulatory framework		T&T Business environment and infrastructure		T&T Human, cultural, and natural resources	
	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Switzerland	1	5.63	1	5.94	2	5.55	3	5.39
Austria	2	5.43	4	5.86	8	5.27	7	5.16
Germany	3	5.41	6	5.67	3	5.43	9	5.13
Australia	4	5.34	30	5.23	11	5.18	1	5.61
Spain	5	5.30	28	5.24	5	5.32	4	5.33
United Kingdom	6	5.28	26	5.28	6	5.32	5	5.26
United States	7	5.28	49	4.75	1	5.58	2	5.52
Sweden	8	5.27	9	5.62	15	5.05	8	5.15
Canada	9	5.26	23	5.31	4	5.40	10	5.07
France	10	5.23	12	5.57	7	5.28	12	4.85
Iceland	11	5.16	3	5.86	9	5.21	36	4.40
Finland	12	5.11	5	5.74	23	4.80	14	4.78
Denmark	13	5.10	10	5.61	10	5.20	28	4.49
Hong Kong SAR	14	5.09	2	5.91	16	5.04	42	4.31
Portugal	15	5.09	14	5.50	22	4.83	11	4.93
Singapore	16	5.06	7	5.67	13	5.13	37	4.39
Norway	17	5.05	8	5.66	19	4.90	20	4.60
Netherlands	18	5.01	22	5.35	14	5.11	21	4.58
New Zealand	19	4.96	15	5.48	26	4.72	17	4.70
Luxembourg	20	4.95	24	5.28	12	5.17	35	4.41
Ireland	21	4.93	11	5.57	20	4.90	41	4.31
Greece	22	4.92	17	5.46	30	4.63	18	4.66
Japan	23	4.90	34	5.11	21	4.88	16	4.73
Cyprus	24	4.87	27	5.24	17	5.04	40	4.34
Malta	25	4.86	13	5.56	25	4.73	43	4.28
Estonia	26	4.85	18	5.41	18	4.91	49	4.22
Belgium	27	4.84	21	5.36	31	4.61	22	4.56
Italy	28	4.84	41	4.99	24	4.77	15	4.74
Barbados	29	4.77	16	5.46	32	4.58	46	4.26
Czech Republic	30	4.75	20	5.38	37	4.37	25	4.51
Korea, Rep.	31	4.68	38	5.02	34	4.52	29	4.49
Malaysia	32	4.63	37	5.04	39	4.31	23	4.55
Hungary	33	4.60	19	5.40	41	4.18	50	4.21
Croatia	34	4.59	39	5.02	38	4.32	32	4.43
Israel	35	4.51	32	5.12	36	4.39	59	4.02
Slovenia	36	4.49	42	4.97	33	4.53	61	3.98
Qatar	37	4.44	43	4.90	35	4.50	65	3.92
Slovak Republic	38	4.42	33	5.11	46	3.94	51	4.19
Tunisia	39	4.41	25	5.28	49	3.86	57	4.08
United Arab Emirates	40	4.39	44	4.87	27	4.69	89	3.62
Mauritius	41	4.38	29	5.23	44	4.14	76	3.78
Thailand	42	4.37	63	4.46	42	4.17	30	4.49
Bulgaria	43	4.36	50	4.75	52	3.84	31	4.48
Costa Rica	44	4.35	48	4.76	56	3.76	24	4.52
Latvia	45	4.34	35	5.10	43	4.17	82	3.75
Puerto Rico	46	4.34	40	4.99	40	4.27	80	3.75
Lithuania	47	4.33	31	5.21	45	4.00	74	3.79
Bahrain	48	4.29	68	4.36	28	4.64	69	3.88
Brazil	49	4.29	84	4.11	67	3.55	6	5.21
Panama	50	4.29	52	4.66	47	3.94	47	4.25
Chile	51	4.27	45	4.86	54	3.82	54	4.14
Taiwan, China	52	4.23	69	4.32	29	4.63	79	3.75
Jordan	53	4.21	36	5.06	60	3.64	64	3.92
Turkey	54	4.19	56	4.57	57	3.73	44	4.28
Mexico	55	4.18	71	4.30	61	3.62	19	4.62
Poland	56	4.18	60	4.51	62	3.62	34	4.42
Jamaica	57	4.18	51	4.74	48	3.87	66	3.92
Argentina	58	4.17	65	4.44	64	3.57	27	4.50
Montenegro	59	4.15	53	4.66	68	3.53	45	4.27
South Africa	60	4.11	70	4.31	51	3.85	52	4.18
Uruguay	61	4.10	47	4.84	71	3.37	56	4.09
China	62	4.06	103	3.91	70	3.45	13	4.81
Dominican Republic	63	4.05	54	4.64	63	3.61	67	3.89
Russian Federation	64	4.04	80	4.21	65	3.56	39	4.35
India	65	3.99	107	3.78	59	3.70	26	4.50
Egypt	66	3.96	58	4.54	69	3.47	70	3.86

(Cont'd.)

Table 1: The Travel &amp; Tourism Competitiveness Index (cont'd.)

Country/Economy	SUBINDEXES							
	OVERALL INDEX		T&T Regulatory framework		T&T Business environment and infrastructure		T&T Human, cultural, and natural resources	
	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Morocco	67	3.91	55	4.59	75	3.32	72	3.81
Guatemala	68	3.89	76	4.25	77	3.30	55	4.12
Romania	69	3.88	72	4.29	66	3.55	73	3.79
Peru	70	3.87	86	4.08	88	3.10	33	4.43
Colombia	71	3.86	95	4.03	83	3.20	38	4.35
Georgia	72	3.83	46	4.84	94	2.95	85	3.70
Sri Lanka	73	3.80	79	4.24	81	3.21	63	3.95
Trinidad and Tobago	74	3.79	87	4.08	50	3.86	104	3.44
Honduras	75	3.79	77	4.25	85	3.16	62	3.96
Oman	76	3.77	88	4.07	58	3.70	96	3.54
Ukraine	77	3.76	59	4.53	78	3.24	100	3.51
Serbia	78	3.76	73	4.27	72	3.36	88	3.64
Azerbaijan	79	3.72	62	4.49	79	3.24	105	3.44
Indonesia	80	3.70	108	3.78	86	3.16	53	4.17
Philippines	81	3.70	83	4.14	84	3.20	78	3.75
Saudi Arabia	82	3.68	106	3.83	55	3.78	107	3.43
Macedonia, FYR	83	3.68	93	4.05	80	3.23	81	3.75
Gambia, The	84	3.67	67	4.38	87	3.11	97	3.53
Kuwait	85	3.67	105	3.88	53	3.82	119	3.31
Ecuador	86	3.66	101	3.99	95	2.94	58	4.05
Botswana	87	3.65	82	4.20	76	3.31	103	3.45
Tanzania	88	3.65	89	4.07	117	2.65	48	4.23
Armenia	89	3.63	57	4.56	108	2.73	94	3.59
Uzbekistan	90	3.62	64	4.45	98	2.90	101	3.51
Kazakhstan	91	3.61	61	4.50	96	2.94	112	3.39
Albania	92	3.60	81	4.20	105	2.75	71	3.85
Namibia	93	3.59	92	4.05	74	3.34	113	3.38
Syria	94	3.58	74	4.26	97	2.93	95	3.55
Suriname	95	3.58	110	3.75	89	3.09	68	3.88
Vietnam	96	3.57	97	4.02	92	2.98	84	3.71
El Salvador	97	3.57	85	4.09	73	3.36	121	3.25
Moldova	98	3.56	66	4.39	100	2.89	110	3.39
Nicaragua	99	3.53	96	4.03	99	2.90	87	3.67
Mongolia	100	3.53	78	4.25	106	2.74	91	3.60
Kenya	101	3.53	100	4.00	102	2.82	77	3.76
Algeria	102	3.50	99	4.01	93	2.97	98	3.52
Venezuela	103	3.47	123	3.44	82	3.21	75	3.78
Libya	104	3.45	75	4.26	115	2.66	106	3.43
Bosnia and Herzegovina	105	3.45	98	4.02	91	2.99	117	3.33
Bolivia	106	3.44	122	3.45	101	2.84	60	4.02
Zambia	107	3.42	91	4.06	118	2.60	90	3.62
Senegal	108	3.41	94	4.04	104	2.76	108	3.43
Guyana	109	3.38	104	3.88	114	2.67	93	3.60
Uganda	110	3.36	113	3.66	112	2.68	83	3.74
Pakistan	111	3.36	114	3.65	90	3.02	109	3.39
Cambodia	112	3.32	116	3.61	116	2.65	86	3.69
Kyrgyz Republic	113	3.30	90	4.07	128	2.37	102	3.47
Tajikistan	114	3.24	102	3.95	126	2.40	111	3.39
Paraguay	115	3.24	112	3.72	111	2.68	118	3.32
Nepal	116	3.22	120	3.58	122	2.56	99	3.51
Zimbabwe	117	3.22	118	3.60	113	2.67	114	3.37
Madagascar	118	3.21	111	3.73	107	2.74	124	3.16
Mali	119	3.21	109	3.77	124	2.49	116	3.36
Benin	120	3.19	115	3.63	121	2.58	115	3.36
Ethiopia	121	3.18	126	3.20	110	2.72	92	3.60
Mauritania	122	3.10	117	3.60	120	2.59	125	3.11
Mozambique	123	3.05	119	3.59	119	2.59	128	2.97
Burkina Faso	124	3.04	121	3.56	123	2.56	127	3.01
Nigeria	125	3.03	127	3.15	109	2.73	123	3.19
Cameroon	126	2.99	125	3.39	129	2.31	120	3.25
Bangladesh	127	2.93	129	2.94	103	2.79	126	3.07
Burundi	128	2.91	128	3.15	127	2.39	122	3.20
Lesotho	129	2.82	124	3.39	125	2.46	130	2.61
Chad	130	2.48	130	2.74	130	1.99	129	2.69

Table 2: The Travel &amp; Tourism Competitiveness Index: Regulatory framework

Country/Economy	T&T REGULATORY FRAMEWORK		PILLARS									
	Rank	Score	1. Policy rules and regulations		2. Environmental sustainability		3. Safety and security		4. Health and hygiene		5. Prioritization of Travel & Tourism	
			Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Albania	81	4.20	104	3.69	93	4.08	71	4.93	59	4.76	104	3.55
Algeria	99	4.01	83	4.00	102	3.99	83	4.72	81	4.12	118	3.20
Argentina	65	4.44	91	3.95	107	3.94	98	4.45	40	5.62	70	4.23
Armenia	57	4.56	63	4.28	112	3.88	45	5.43	39	5.65	105	3.55
Australia	30	5.23	27	5.04	53	4.63	21	5.85	37	5.72	32	4.92
Austria	4	5.86	22	5.16	8	5.57	3	6.41	4	6.77	19	5.41
Azerbaijan	62	4.49	72	4.14	101	4.01	43	5.46	49	5.22	101	3.63
Bahrain	68	4.36	62	4.35	125	3.49	39	5.58	76	4.25	75	4.12
Bangladesh	129	2.94	114	3.31	121	3.71	129	2.83	117	2.11	122	2.77
Barbados	16	5.46	29	5.02	26	5.05	27	5.74	31	5.91	13	5.60
Belgium	21	5.36	16	5.28	11	5.49	29	5.71	14	6.51	91	3.81
Benin	115	3.63	117	3.23	30	4.97	77	4.86	121	1.74	112	3.35
Bolivia	122	3.45	127	2.88	104	3.98	92	4.53	102	3.09	121	2.79
Bosnia and Herzegovina	98	4.02	109	3.47	113	3.87	57	5.13	55	4.88	124	2.72
Botswana	82	4.20	74	4.13	68	4.42	50	5.26	97	3.24	82	3.95
Brazil	84	4.11	95	3.81	37	4.90	128	3.15	69	4.46	68	4.24
Bulgaria	50	4.75	85	3.98	73	4.35	90	4.56	12	6.56	65	4.28
Burkina Faso	121	3.56	107	3.62	64	4.47	82	4.76	124	1.46	108	3.50
Burundi	128	3.15	125	2.92	88	4.14	96	4.49	116	2.19	130	2.00
Cambodia	116	3.61	126	2.89	92	4.09	95	4.50	128	1.13	17	5.47
Cameroon	125	3.39	112	3.31	109	3.92	86	4.63	114	2.42	126	2.69
Canada	23	5.31	8	5.43	36	4.90	32	5.68	45	5.48	26	5.05
Chad	130	2.74	130	2.46	124	3.64	116	3.88	129	1.05	127	2.68
Chile	45	4.86	18	5.25	62	4.53	36	5.60	63	4.53	58	4.39
China	103	3.91	89	3.96	110	3.92	121	3.60	99	3.21	36	4.86
Colombia	95	4.03	60	4.36	87	4.17	118	3.75	78	4.22	99	3.68
Costa Rica	48	4.76	54	4.48	32	4.96	66	4.99	67	4.49	35	4.86
Croatia	39	5.02	66	4.26	41	4.84	41	5.52	28	5.99	51	4.48
Cyprus	27	5.24	69	4.20	47	4.73	23	5.82	43	5.53	3	5.93
Czech Republic	20	5.38	38	4.77	21	5.10	44	5.45	6	6.77	39	4.79
Denmark	10	5.61	4	5.59	3	5.88	4	6.40	34	5.82	62	4.35
Dominican Republic	54	4.64	47	4.57	108	3.93	89	4.57	65	4.52	14	5.59
Ecuador	101	3.99	111	3.43	82	4.24	97	4.48	73	4.39	110	3.42
Egypt	58	4.54	70	4.18	81	4.25	84	4.66	86	3.94	12	5.66
El Salvador	85	4.09	45	4.63	55	4.60	109	4.05	94	3.36	89	3.83
Estonia	18	5.41	26	5.06	43	4.82	26	5.75	20	6.27	23	5.14
Ethiopia	126	3.20	96	3.76	114	3.83	111	4.03	130	1.00	111	3.40
Finland	5	5.74	7	5.45	7	5.62	1	6.70	18	6.37	49	4.55
France	12	5.57	24	5.15	5	5.75	54	5.18	7	6.76	29	5.00
Gambia, The	67	4.38	93	3.90	59	4.57	38	5.58	107	2.68	22	5.19
Georgia	46	4.84	68	4.22	54	4.62	37	5.60	42	5.58	72	4.19
Germany	6	5.67	6	5.46	4	5.82	17	5.88	4	6.77	57	4.40
Greece	17	5.46	61	4.35	40	4.85	31	5.69	16	6.42	1	5.99
Guatemala	76	4.25	41	4.72	95	4.07	110	4.03	83	4.00	53	4.45
Guyana	104	3.88	120	3.19	76	4.30	112	4.01	92	3.62	66	4.27
Honduras	77	4.25	44	4.64	61	4.56	87	4.58	95	3.36	76	4.11
Hong Kong SAR	2	5.91	2	5.95	60	4.56	7	6.27	1	7.00	9	5.78
Hungary	19	5.40	35	4.82	25	5.05	28	5.73	11	6.57	37	4.80
Iceland	3	5.86	17	5.25	20	5.14	2	6.54	3	6.86	15	5.53
India	107	3.78	102	3.71	71	4.39	117	3.86	110	2.56	59	4.38
Indonesia	108	3.78	121	3.07	126	3.48	108	4.06	111	2.53	11	5.75
Ireland	11	5.57	3	5.64	12	5.48	19	5.87	24	6.17	40	4.70
Israel	32	5.12	30	5.02	67	4.43	60	5.09	8	6.69	61	4.37
Italy	41	4.99	57	4.42	39	4.87	81	4.80	19	6.28	46	4.58
Jamaica	51	4.74	13	5.34	99	4.02	102	4.36	82	4.01	2	5.96
Japan	34	5.11	32	4.96	48	4.73	74	4.89	23	6.25	41	4.70
Jordan	36	5.06	78	4.12	38	4.87	15	5.98	58	4.84	16	5.50
Kazakhstan	61	4.50	77	4.12	120	3.73	73	4.90	33	5.85	83	3.90
Kenya	100	4.00	101	3.72	19	5.25	120	3.69	118	2.08	20	5.29
Korea, Rep.	38	5.02	33	4.87	50	4.69	67	4.99	38	5.67	34	4.90
Kuwait	105	3.88	97	3.76	130	2.97	18	5.88	77	4.22	129	2.56
Kyrgyz Republic	90	4.07	105	3.64	91	4.09	100	4.43	71	4.43	97	3.74
Latvia	35	5.10	42	4.68	16	5.34	40	5.57	25	6.16	95	3.77
Lesotho	124	3.39	116	3.30	116	3.82	91	4.54	112	2.49	120	2.82
Libya	75	4.26	122	3.06	118	3.79	24	5.81	50	5.20	109	3.43
Lithuania	31	5.21	50	4.55	18	5.32	46	5.43	2	6.98	94	3.80

(Cont'd.)

Table 2: The Travel &amp; Tourism Competitiveness Index: Regulatory framework (cont'd.)

Country/Economy	PILLARS											
	T&T REGULATORY FRAMEWORK		1. Policy rules and regulations		2. Environmental sustainability		3. Safety and security		4. Health and hygiene		5. Prioritization of Travel & Tourism	
	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Luxembourg	24	5.28	14	5.32	22	5.10	9	6.17	22	6.26	103	3.57
Macedonia, FYR	93	4.05	75	4.13	84	4.20	80	4.82	68	4.48	128	2.63
Madagascar	111	3.73	84	4.00	74	4.35	99	4.43	126	1.32	48	4.56
Malaysia	37	5.04	12	5.34	44	4.79	42	5.51	70	4.43	24	5.12
Mali	109	3.77	106	3.63	65	4.46	64	5.02	123	1.59	74	4.17
Malta	13	5.56	51	4.53	42	4.82	12	6.13	10	6.59	10	5.75
Mauritania	117	3.60	113	3.31	86	4.19	47	5.33	125	1.38	93	3.80
Mauritius	29	5.23	28	5.03	46	4.73	33	5.66	57	4.85	4	5.91
Mexico	71	4.30	49	4.56	85	4.20	122	3.59	79	4.21	31	4.94
Moldova	66	4.39	94	3.89	70	4.40	70	4.94	47	5.38	113	3.35
Mongolia	78	4.25	80	4.06	119	3.76	78	4.86	64	4.52	78	4.05
Montenegro	53	4.66	37	4.78	105	3.95	53	5.19	52	5.12	67	4.26
Morocco	55	4.59	40	4.73	31	4.96	61	5.07	98	3.22	30	4.95
Mozambique	119	3.59	90	3.95	57	4.59	103	4.35	127	1.19	85	3.86
Namibia	92	4.05	88	3.96	34	4.93	72	4.92	108	2.62	86	3.86
Nepal	120	3.58	123	2.98	79	4.27	124	3.54	113	2.47	44	4.61
Netherlands	22	5.35	9	5.42	9	5.56	34	5.65	26	6.15	81	3.96
New Zealand	15	5.48	11	5.36	24	5.07	11	6.15	27	6.01	38	4.80
Nicaragua	96	4.03	92	3.94	49	4.72	51	5.24	109	2.59	100	3.67
Nigeria	127	3.15	99	3.73	56	4.60	130	2.67	122	1.68	119	3.08
Norway	8	5.66	20	5.20	6	5.69	5	6.37	29	5.98	28	5.03
Oman	88	4.07	76	4.12	103	3.99	35	5.65	106	2.76	90	3.82
Pakistan	114	3.65	71	4.17	96	4.03	126	3.26	96	3.28	107	3.53
Panama	52	4.66	34	4.83	45	4.77	56	5.14	80	4.17	55	4.42
Paraguay	112	3.72	119	3.19	123	3.65	101	4.43	87	3.79	106	3.54
Peru	86	4.08	64	4.28	77	4.28	106	4.12	93	3.37	60	4.37
Philippines	83	4.14	58	4.37	80	4.27	113	3.99	91	3.63	54	4.43
Poland	60	4.51	65	4.28	58	4.58	88	4.58	54	4.96	73	4.18
Portugal	14	5.50	21	5.19	15	5.36	16	5.94	30	5.96	27	5.04
Puerto Rico	40	4.99	15	5.31	14	5.36	55	5.15	60	4.67	52	4.45
Qatar	43	4.90	86	3.97	69	4.41	10	6.16	48	5.28	42	4.69
Romania	72	4.29	48	4.57	51	4.69	75	4.87	89	3.75	102	3.58
Russian Federation	80	4.21	110	3.46	117	3.79	127	3.16	9	6.65	80	3.98
Saudi Arabia	106	3.83	82	4.02	127	3.44	59	5.09	105	2.88	98	3.72
Senegal	94	4.04	118	3.20	52	4.65	52	5.20	104	2.91	69	4.24
Serbia	73	4.27	59	4.37	128	3.31	76	4.86	46	5.47	114	3.35
Singapore	7	5.67	1	6.19	27	4.98	8	6.23	53	5.05	5	5.87
Slovak Republic	33	5.11	31	5.00	23	5.07	30	5.70	13	6.52	117	3.29
Slovenia	42	4.97	87	3.97	17	5.34	20	5.85	36	5.79	84	3.89
South Africa	70	4.31	36	4.80	35	4.92	123	3.55	84	3.96	63	4.32
Spain	28	5.24	56	4.44	33	4.95	58	5.10	32	5.88	6	5.84
Sri Lanka	79	4.24	53	4.50	115	3.83	104	4.35	85	3.96	50	4.54
Suriname	110	3.75	129	2.77	106	3.95	68	4.95	72	4.40	125	2.69
Sweden	9	5.62	10	5.37	1	6.12	13	6.13	21	6.26	71	4.20
Switzerland	1	5.94	23	5.15	2	5.90	6	6.35	15	6.48	7	5.80
Syria	74	4.26	115	3.30	98	4.02	22	5.84	74	4.34	88	3.83
Taiwan, China	69	4.32	39	4.77	75	4.34	49	5.29	101	3.20	79	4.02
Tajikistan	102	3.95	108	3.56	97	4.02	63	5.04	88	3.78	116	3.33
Tanzania	89	4.07	79	4.07	29	4.97	105	4.31	119	2.07	33	4.92
Thailand	63	4.46	52	4.50	78	4.27	115	3.95	66	4.49	25	5.07
Trinidad and Tobago	87	4.08	46	4.59	129	3.28	107	4.08	61	4.66	92	3.80
Tunisia	25	5.28	25	5.10	13	5.41	25	5.80	75	4.32	8	5.78
Turkey	56	4.57	43	4.67	90	4.11	79	4.85	62	4.61	45	4.60
Uganda	113	3.66	103	3.69	28	4.98	114	3.99	120	1.79	87	3.84
Ukraine	59	4.53	100	3.72	83	4.23	93	4.53	17	6.40	96	3.76
United Arab Emirates	44	4.87	81	4.05	122	3.65	14	6.07	51	5.13	18	5.45
United Kingdom	26	5.28	5	5.54	10	5.56	65	5.01	41	5.58	43	4.69
United States	49	4.75	19	5.22	100	4.02	119	3.75	44	5.50	21	5.26
Uruguay	47	4.84	73	4.14	63	4.51	48	5.32	35	5.82	56	4.41
Uzbekistan	64	4.45	67	4.23	111	3.91	69	4.94	56	4.85	64	4.32
Venezuela	123	3.44	124	2.92	72	4.36	125	3.47	90	3.72	123	2.72
Vietnam	97	4.02	98	3.75	94	4.07	94	4.50	100	3.21	47	4.56
Zambia	91	4.06	55	4.47	66	4.46	62	5.04	115	2.24	77	4.06
Zimbabwe	118	3.60	128	2.83	89	4.13	85	4.65	103	3.06	115	3.34

**Table 3: The Travel & Tourism Competitiveness Index: Business environment and infrastructure**

Country/Economy	PILLARS											
	T&T BUSINESS ENVIRONMENT AND INFRASTRUCTURE		6. Air transport infrastructure		7. Ground transport infrastructure		8. Tourism infrastructure		9. ICT infrastructure		10. Price competitiveness in T&T industry	
	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Albania	105	2.75	112	2.20	116	2.55	86	2.53	86	2.16	90	4.33
Algeria	93	2.97	99	2.40	89	3.06	96	2.29	95	2.00	27	5.09
Argentina	64	3.57	67	2.94	90	3.05	53	3.91	54	3.03	41	4.94
Armenia	108	2.73	97	2.47	100	2.82	118	1.56	101	1.90	42	4.92
Australia	11	5.18	3	5.85	43	4.49	12	6.35	14	5.22	111	4.01
Austria	8	5.27	29	4.25	10	6.03	1	7.00	20	4.88	104	4.17
Azerbaijan	79	3.24	79	2.69	52	4.15	92	2.37	84	2.27	62	4.72
Bahrain	28	4.64	28	4.30	18	5.47	37	4.45	43	3.41	4	5.59
Bangladesh	103	2.79	116	2.12	69	3.56	122	1.29	122	1.52	10	5.44
Barbados	32	4.58	30	4.25	21	5.21	40	4.33	29	4.30	48	4.84
Belgium	31	4.61	38	3.97	7	6.36	41	4.30	24	4.64	122	3.76
Benin	121	2.58	122	2.00	128	2.31	87	2.53	114	1.64	81	4.42
Bolivia	101	2.84	108	2.25	114	2.59	99	2.21	106	1.81	14	5.32
Bosnia and Herzegovina	91	2.99	124	1.97	115	2.55	59	3.61	62	2.70	107	4.13
Botswana	76	3.31	77	2.72	72	3.50	78	2.80	92	2.05	6	5.49
Brazil	67	3.55	45	3.59	95	2.89	47	4.17	58	2.82	92	4.31
Bulgaria	52	3.84	101	2.38	77	3.40	22	5.42	44	3.40	69	4.62
Burkina Faso	123	2.56	126	1.95	102	2.80	94	2.30	121	1.52	101	4.22
Burundi	127	2.39	127	1.83	92	2.95	123	1.29	129	1.29	74	4.57
Cambodia	116	2.65	100	2.39	99	2.83	125	1.22	123	1.52	15	5.32
Cameroon	129	2.31	125	1.96	124	2.40	114	1.73	126	1.45	110	4.01
Canada	4	5.40	1	6.65	26	5.01	17	6.12	12	5.25	114	3.94
Chad	130	1.99	130	1.67	129	2.26	121	1.29	130	1.28	126	3.46
Chile	54	3.82	50	3.44	53	4.13	64	3.37	47	3.28	45	4.87
China	70	3.45	36	3.98	61	3.80	119	1.53	66	2.62	17	5.30
Colombia	83	3.20	63	3.06	101	2.81	81	2.77	70	2.59	55	4.78
Costa Rica	56	3.76	43	3.75	113	2.62	29	4.86	60	2.76	50	4.82
Croatia	38	4.32	66	2.96	54	4.05	10	6.63	37	3.72	98	4.26
Cyprus	17	5.04	25	4.50	17	5.47	3	6.95	34	3.99	95	4.28
Czech Republic	37	4.37	52	3.39	22	5.09	25	5.04	31	4.21	108	4.12
Denmark	10	5.20	12	4.98	6	6.48	23	5.31	5	5.78	128	3.43
Dominican Republic	63	3.61	46	3.54	80	3.33	45	4.23	75	2.44	76	4.49
Ecuador	95	2.94	84	2.65	119	2.49	89	2.49	81	2.30	53	4.80
Egypt	69	3.47	62	3.06	75	3.43	79	2.79	87	2.15	2	5.89
El Salvador	73	3.36	75	2.80	62	3.79	83	2.72	78	2.40	32	5.06
Estonia	18	4.91	55	3.26	25	5.01	11	6.36	17	5.14	60	4.75
Ethiopia	110	2.72	89	2.56	106	2.74	117	1.57	127	1.43	16	5.31
Finland	23	4.80	18	4.85	20	5.27	30	4.82	16	5.15	117	3.90
France	7	5.28	6	5.50	4	6.56	15	6.19	19	4.91	130	3.26
Gambia, The	87	3.11	90	2.56	64	3.77	102	2.09	107	1.81	18	5.29
Georgia	94	2.95	105	2.33	76	3.42	90	2.44	90	2.10	78	4.47
Germany	3	5.43	7	5.47	3	6.57	18	5.99	15	5.19	113	3.95
Greece	30	4.63	20	4.62	46	4.39	9	6.67	39	3.61	120	3.84
Guatemala	77	3.30	76	2.75	81	3.30	82	2.76	74	2.45	23	5.22
Guyana	114	2.67	110	2.24	108	2.72	127	1.08	80	2.31	36	4.99
Honduras	85	3.16	64	3.04	88	3.09	85	2.59	93	2.05	33	5.04
Hong Kong SAR	16	5.04	13	4.96	2	6.57	67	3.32	8	5.48	46	4.87
Hungary	41	4.18	65	2.98	32	4.81	27	4.89	35	3.82	79	4.43
Iceland	9	5.21	16	4.85	35	4.68	7	6.71	1	5.93	119	3.86
India	59	3.70	35	4.00	39	4.51	80	2.78	97	1.98	20	5.23
Indonesia	86	3.16	61	3.07	98	2.87	109	1.87	94	2.04	1	5.96
Ireland	20	4.90	24	4.54	45	4.45	5	6.78	27	4.47	99	4.24
Israel	36	4.39	47	3.52	31	4.86	36	4.51	22	4.75	91	4.32
Italy	24	4.77	26	4.43	40	4.51	4	6.88	25	4.57	124	3.49
Jamaica	48	3.87	53	3.28	38	4.53	55	3.81	45	3.38	85	4.38
Japan	21	4.88	21	4.61	9	6.33	46	4.18	18	4.98	94	4.28
Jordan	60	3.64	60	3.08	65	3.74	56	3.77	65	2.63	37	4.99
Kazakhstan	96	2.94	85	2.63	91	3.04	100	2.19	77	2.40	80	4.42
Kenya	102	2.82	73	2.83	107	2.73	98	2.27	108	1.80	75	4.50
Korea, Rep.	34	4.52	39	3.92	15	5.57	70	3.23	6	5.72	106	4.15
Kuwait	53	3.82	59	3.13	48	4.36	57	3.77	53	3.05	51	4.81
Kyrgyz Republic	128	2.37	119	2.08	121	2.43	129	1.06	112	1.67	70	4.62
Latvia	43	4.17	56	3.22	41	4.50	33	4.77	38	3.72	67	4.65
Lesotho	125	2.46	129	1.68	127	2.33	113	1.74	120	1.52	34	5.03
Libya	115	2.66	103	2.37	130	2.25	110	1.84	91	2.09	57	4.77
Lithuania	45	4.00	82	2.66	27	4.97	58	3.72	33	4.06	73	4.58

(Cont'd.)

Table 3: The Travel &amp; Tourism Competitiveness Index: Business environment and infrastructure (cont'd.)

Country/Economy	T&T BUSINESS ENVIRONMENT AND INFRASTRUCTURE		PILLARS									
	Rank	Score	6. Air transport infrastructure		7. Ground transport infrastructure		8. Tourism infrastructure		9. ICT infrastructure		10. Price competitiveness in T&T industry	
			Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Luxembourg	12	5.17	37	3.97	14	5.61	14	6.19	7	5.58	77	4.48
Macedonia, FYR	80	3.23	113	2.14	79	3.36	61	3.55	72	2.53	72	4.59
Madagascar	107	2.74	91	2.54	120	2.45	88	2.50	128	1.43	52	4.81
Malaysia	39	4.31	32	4.18	28	4.95	71	3.19	46	3.37	3	5.89
Mali	124	2.49	117	2.10	96	2.88	116	1.63	117	1.58	97	4.27
Malta	25	4.73	22	4.56	34	4.79	19	5.97	32	4.11	100	4.24
Mauritania	120	2.59	115	2.12	111	2.67	120	1.43	109	1.79	40	4.94
Mauritius	44	4.14	48	3.48	30	4.90	42	4.29	61	2.73	19	5.27
Mexico	61	3.62	42	3.78	82	3.28	49	4.00	64	2.67	83	4.39
Moldova	100	2.89	118	2.08	104	2.78	91	2.44	82	2.29	49	4.83
Mongolia	106	2.74	74	2.82	125	2.40	107	1.92	103	1.84	61	4.74
Montenegro	68	3.53	54	3.27	71	3.50	31	4.81	63	2.67	129	3.40
Morocco	75	3.32	69	2.92	67	3.62	72	3.18	85	2.19	64	4.69
Mozambique	119	2.59	114	2.14	118	2.53	106	1.95	125	1.49	44	4.88
Namibia	74	3.34	51	3.40	55	4.04	84	2.67	105	1.83	54	4.78
Nepal	122	2.56	109	2.25	122	2.42	126	1.10	124	1.49	5	5.55
Netherlands	14	5.11	17	4.85	8	6.35	35	4.68	2	5.89	121	3.78
New Zealand	26	4.72	10	5.10	50	4.26	34	4.77	21	4.83	68	4.63
Nicaragua	99	2.90	102	2.37	126	2.34	77	2.93	110	1.79	31	5.07
Nigeria	109	2.73	106	2.32	109	2.68	95	2.29	111	1.77	71	4.61
Norway	19	4.90	9	5.23	36	4.61	21	5.86	11	5.36	125	3.47
Oman	58	3.70	57	3.21	56	3.99	63	3.53	71	2.56	22	5.22
Pakistan	90	3.02	94	2.49	68	3.62	101	2.19	104	1.83	38	4.99
Panama	47	3.94	34	4.06	58	3.94	44	4.27	76	2.41	35	5.03
Paraguay	111	2.68	128	1.82	123	2.42	103	2.03	102	1.90	21	5.23
Peru	88	3.10	86	2.60	105	2.75	73	3.13	83	2.28	58	4.76
Philippines	84	3.20	72	2.89	85	3.24	97	2.28	89	2.12	9	5.47
Poland	62	3.62	87	2.57	57	3.95	60	3.60	41	3.59	87	4.36
Portugal	22	4.83	31	4.19	24	5.03	13	6.32	30	4.24	86	4.36
Puerto Rico	40	4.27	11	5.09	29	4.93	54	3.85	50	3.18	93	4.30
Qatar	35	4.50	23	4.56	33	4.79	24	5.22	40	3.61	89	4.34
Romania	66	3.55	88	2.57	74	3.44	38	4.42	48	3.24	109	4.10
Russian Federation	65	3.56	33	4.14	83	3.25	66	3.33	51	3.08	112	3.98
Saudi Arabia	55	3.78	49	3.46	60	3.85	68	3.31	59	2.80	8	5.47
Senegal	104	2.76	78	2.70	94	2.89	93	2.34	100	1.94	116	3.92
Serbia	72	3.36	92	2.54	86	3.15	52	3.91	57	2.82	82	4.40
Singapore	13	5.13	15	4.93	1	6.61	43	4.28	23	4.67	25	5.18
Slovak Republic	46	3.94	104	2.35	37	4.61	28	4.87	42	3.51	84	4.38
Slovenia	33	4.53	70	2.90	23	5.06	20	5.93	26	4.55	102	4.21
South Africa	51	3.85	40	3.79	59	3.89	51	3.94	73	2.53	29	5.08
Spain	5	5.32	8	5.34	16	5.54	1	7.00	28	4.37	88	4.35
Sri Lanka	81	3.21	81	2.68	42	4.50	111	1.81	96	1.98	26	5.10
Suriname	89	3.09	93	2.52	117	2.53	65	3.34	79	2.37	63	4.69
Sweden	15	5.05	14	4.95	12	5.79	26	4.98	3	5.87	123	3.63
Switzerland	2	5.55	19	4.71	5	6.55	7	6.71	4	5.87	118	3.89
Syria	97	2.93	95	2.49	70	3.55	104	1.99	98	1.96	66	4.67
Taiwan, China	29	4.63	41	3.79	13	5.78	74	3.11	10	5.40	30	5.07
Tajikistan	126	2.40	121	2.02	110	2.67	128	1.07	118	1.57	65	4.67
Tanzania	117	2.65	107	2.28	93	2.94	115	1.67	115	1.61	56	4.77
Thailand	42	4.17	27	4.32	51	4.15	39	4.36	67	2.61	11	5.42
Trinidad and Tobago	50	3.86	58	3.17	44	4.47	69	3.28	49	3.18	24	5.18
Tunisia	49	3.86	68	2.93	47	4.38	48	4.02	69	2.59	13	5.39
Turkey	57	3.73	44	3.71	63	3.79	50	4.00	55	2.97	103	4.19
Uganda	112	2.68	120	2.02	87	3.13	108	1.89	116	1.59	59	4.75
Ukraine	78	3.24	98	2.44	84	3.24	62	3.54	52	3.06	115	3.94
United Arab Emirates	27	4.69	5	5.50	49	4.34	32	4.79	36	3.76	28	5.08
United Kingdom	6	5.32	4	5.65	11	5.85	16	6.18	9	5.46	127	3.44
United States	1	5.58	2	6.34	19	5.45	6	6.74	13	5.23	105	4.16
Uruguay	71	3.37	111	2.21	66	3.71	75	3.07	56	2.97	43	4.88
Uzbekistan	98	2.90	80	2.68	73	3.47	130	1.04	99	1.95	12	5.39
Venezuela	82	3.21	71	2.90	112	2.66	76	3.03	68	2.61	47	4.85
Vietnam	92	2.98	83	2.65	78	3.38	124	1.25	88	2.15	7	5.47
Zambia	118	2.60	96	2.47	103	2.80	112	1.79	113	1.66	96	4.27
Zimbabwe	113	2.67	123	1.98	97	2.88	105	1.95	119	1.56	39	4.99

**Table 4: The Travel & Tourism Competitiveness Index: Human, cultural, and natural resources**

Country/Economy	T&T HUMAN, CULTURAL, AND NATURAL RESOURCES		PILLARS							
	Rank	Score	11. Human resources		12. Affinity for Travel & Tourism		13. Natural resources		14. Cultural resources	
			Rank	Score	Rank	Score	Rank	Score	Rank	Score
Albania	71	3.85	58	5.03	6	6.32	130	1.87	75	2.17
Algeria	98	3.52	96	4.64	117	4.16	97	2.64	55	2.65
Argentina	27	4.50	60	5.01	74	4.69	12	5.01	41	3.29
Armenia	94	3.59	79	4.87	43	5.05	107	2.35	79	2.11
Australia	1	5.61	14	5.71	63	4.82	4	5.72	5	6.20
Austria	7	5.16	19	5.62	23	5.45	37	4.00	11	5.59
Azerbaijan	105	3.44	54	5.04	69	4.75	110	2.31	99	1.66
Bahrain	69	3.88	49	5.06	32	5.27	127	1.97	43	3.22
Bangladesh	126	3.07	107	4.26	125	3.95	100	2.61	109	1.44
Barbados	46	4.26	38	5.26	2	6.57	117	2.20	46	3.02
Belgium	22	4.56	18	5.64	44	5.02	119	2.19	15	5.38
Benin	115	3.36	110	4.12	83	4.63	54	3.34	114	1.37
Bolivia	60	4.02	98	4.60	116	4.18	15	4.86	62	2.45
Bosnia and Herzegovina	117	3.33	106	4.27	93	4.50	120	2.19	70	2.37
Botswana	103	3.45	124	3.36	58	4.85	31	4.20	113	1.37
Brazil	6	5.21	66	4.98	94	4.48	3	5.81	12	5.58
Bulgaria	31	4.48	59	5.01	16	5.67	59	3.22	29	4.01
Burkina Faso	127	3.01	123	3.42	104	4.40	67	3.09	127	1.14
Burundi	122	3.20	125	3.30	17	5.62	83	2.87	128	1.02
Cambodia	86	3.69	108	4.26	11	5.83	53	3.42	120	1.26
Cameroon	120	3.25	117	3.83	121	4.06	38	3.92	123	1.21
Canada	10	5.07	10	5.79	68	4.76	16	4.78	21	4.96
Chad	129	2.69	126	3.19	129	3.84	91	2.73	129	1.02
Chile	54	4.14	36	5.29	96	4.46	52	3.49	39	3.30
China	13	4.81	48	5.07	126	3.92	8	5.25	19	5.01
Colombia	38	4.35	67	4.97	89	4.56	5	5.50	68	2.37
Costa Rica	24	4.52	27	5.45	21	5.49	7	5.36	92	1.80
Croatia	32	4.43	50	5.05	7	6.25	68	3.08	37	3.35
Cyprus	40	4.34	63	4.99	5	6.35	106	2.37	32	3.67
Czech Republic	25	4.51	30	5.35	61	4.83	82	2.87	20	4.97
Denmark	28	4.49	3	6.11	84	4.62	63	3.12	27	4.13
Dominican Republic	67	3.89	86	4.79	15	5.69	50	3.50	102	1.60
Ecuador	58	4.05	100	4.52	103	4.41	14	4.90	69	2.37
Egypt	70	3.86	82	4.83	31	5.28	86	2.83	58	2.52
El Salvador	121	3.25	64	4.98	102	4.41	122	2.11	106	1.48
Estonia	49	4.22	33	5.33	18	5.59	43	3.79	74	2.18
Ethiopia	92	3.60	122	3.52	107	4.34	34	4.12	65	2.43
Finland	14	4.78	6	5.90	100	4.42	57	3.24	13	5.56
France	12	4.85	25	5.50	85	4.62	47	3.61	10	5.67
Gambia, The	97	3.53	104	4.35	19	5.56	95	2.67	104	1.53
Georgia	85	3.70	47	5.07	37	5.15	116	2.22	71	2.36
Germany	9	5.13	24	5.50	72	4.74	30	4.26	6	6.01
Greece	18	4.66	43	5.11	39	5.12	75	3.02	16	5.38
Guatemala	55	4.12	91	4.77	48	4.97	19	4.69	81	2.06
Guyana	93	3.60	77	4.87	47	4.98	65	3.10	110	1.44
Honduras	62	3.96	90	4.77	41	5.10	29	4.31	98	1.68
Hong Kong SAR	42	4.31	8	5.83	14	5.70	55	3.30	67	2.42
Hungary	50	4.21	57	5.03	108	4.33	90	2.74	23	4.75
Iceland	36	4.40	4	6.11	24	5.44	101	2.57	36	3.49
India	26	4.50	93	4.75	88	4.57	13	4.94	31	3.73
Indonesia	53	4.17	34	5.31	56	4.88	26	4.42	80	2.08
Ireland	41	4.31	11	5.77	51	4.95	113	2.25	26	4.28
Israel	59	4.02	20	5.62	59	4.85	64	3.11	60	2.50
Italy	15	4.74	39	5.22	67	4.76	60	3.17	8	5.81
Jamaica	66	3.92	69	4.95	4	6.43	99	2.62	100	1.66
Japan	16	4.73	12	5.74	128	3.87	40	3.90	14	5.38
Jordan	64	3.92	70	4.95	9	6.11	87	2.81	91	1.81
Kazakhstan	112	3.39	55	5.03	79	4.65	115	2.23	101	1.63
Kenya	77	3.76	105	4.33	60	4.84	24	4.52	116	1.36
Korea, Rep.	29	4.49	9	5.83	112	4.31	80	2.90	22	4.94
Kuwait	119	3.31	32	5.34	119	4.07	125	2.06	94	1.77
Kyrgyz Republic	102	3.47	92	4.76	26	5.38	102	2.53	125	1.20
Latvia	82	3.75	51	5.05	66	4.79	78	2.98	76	2.17
Lesotho	130	2.61	129	2.92	109	4.33	128	1.97	122	1.22
Libya	106	3.43	99	4.52	105	4.37	114	2.24	56	2.61
Lithuania	74	3.79	53	5.04	52	4.94	92	2.71	63	2.44

(Cont'd.)

Table 4: The Travel &amp; Tourism Competitiveness Index: Human, cultural, and natural resources (cont'd.)

Country/Economy	T&T HUMAN, CULTURAL, AND NATURAL RESOURCES		PILLARS							
	Rank	Score	11. Human resources		12. Affinity for Travel & Tourism		13. Natural resources		14. Cultural resources	
			Rank	Score	Rank	Score	Rank	Score	Rank	Score
Luxembourg	35	4.41	26	5.48	12	5.79	71	3.05	38	3.34
Macedonia, FYR	81	3.75	71	4.94	75	4.69	85	2.84	57	2.52
Madagascar	124	3.16	113	4.09	110	4.32	74	3.02	124	1.20
Malaysia	23	4.55	22	5.53	22	5.47	18	4.70	59	2.50
Mali	116	3.36	120	3.61	55	4.88	77	2.99	83	1.97
Malta	43	4.28	40	5.18	8	6.22	129	1.88	30	3.86
Mauritania	125	3.11	115	3.94	99	4.43	93	2.70	115	1.36
Mauritius	76	3.78	56	5.03	3	6.47	126	2.01	103	1.59
Mexico	19	4.62	52	5.05	86	4.59	25	4.44	25	4.43
Moldova	110	3.39	88	4.77	29	5.29	124	2.07	111	1.43
Mongolia	91	3.60	85	4.79	35	5.23	66	3.09	117	1.30
Montenegro	45	4.27	76	4.88	1	6.69	69	3.08	66	2.43
Morocco	72	3.81	95	4.67	25	5.43	118	2.19	48	2.96
Mozambique	128	2.97	130	2.92	92	4.51	61	3.16	118	1.28
Namibia	113	3.38	127	2.99	33	5.27	42	3.81	108	1.47
Nepal	99	3.51	116	3.84	78	4.67	35	4.11	112	1.43
Netherlands	21	4.58	16	5.68	76	4.68	88	2.78	18	5.16
New Zealand	17	4.70	21	5.62	34	5.25	28	4.33	33	3.59
Nicaragua	87	3.67	94	4.75	71	4.75	45	3.72	107	1.48
Nigeria	123	3.19	112	4.09	118	4.11	70	3.06	105	1.50
Norway	20	4.60	17	5.67	95	4.46	73	3.03	17	5.25
Oman	96	3.54	74	4.92	127	3.91	84	2.87	61	2.47
Pakistan	109	3.39	109	4.21	122	4.04	72	3.04	72	2.28
Panama	47	4.25	89	4.77	50	4.96	6	5.44	89	1.84
Paraguay	118	3.32	103	4.41	124	3.96	62	3.14	95	1.75
Peru	33	4.43	78	4.87	97	4.46	10	5.17	42	3.22
Philippines	78	3.75	61	5.00	65	4.81	58	3.23	82	1.98
Poland	34	4.42	41	5.18	120	4.06	46	3.72	24	4.72
Portugal	11	4.93	37	5.26	42	5.05	81	2.89	2	6.52
Puerto Rico	80	3.75	81	4.84	10	6.11	109	2.32	96	1.72
Qatar	65	3.92	23	5.51	49	4.97	121	2.16	45	3.04
Romania	73	3.79	68	4.96	101	4.42	96	2.67	44	3.12
Russian Federation	39	4.35	72	4.93	111	4.32	22	4.58	34	3.57
Saudi Arabia	107	3.43	83	4.82	123	3.99	44	3.75	126	1.16
Senegal	108	3.43	111	4.11	115	4.21	51	3.50	87	1.89
Serbia	88	3.64	45	5.10	98	4.44	112	2.27	52	2.73
Singapore	37	4.39	1	6.19	13	5.76	98	2.63	47	2.99
Slovak Republic	51	4.19	29	5.39	77	4.68	36	4.01	53	2.69
Slovenia	61	3.98	35	5.30	53	4.94	76	3.01	54	2.66
South Africa	52	4.18	118	3.81	45	5.02	21	4.60	40	3.30
Spain	4	5.33	31	5.34	46	4.99	32	4.19	1	6.80
Sri Lanka	63	3.95	62	4.99	64	4.82	49	3.55	64	2.44
Suriname	68	3.88	101	4.49	106	4.35	41	3.84	50	2.85
Sweden	8	5.15	15	5.70	82	4.64	39	3.92	3	6.36
Switzerland	3	5.39	2	6.17	40	5.12	23	4.53	9	5.76
Syria	95	3.55	97	4.60	27	5.36	123	2.10	77	2.15
Taiwan, China	79	3.75	13	5.72	73	4.70	103	2.44	78	2.13
Tajikistan	111	3.39	87	4.78	91	4.52	56	3.24	130	1.01
Tanzania	48	4.23	119	3.75	28	5.33	1	6.14	97	1.71
Thailand	30	4.49	65	4.98	20	5.51	20	4.63	51	2.83
Trinidad and Tobago	104	3.44	75	4.90	113	4.31	111	2.30	73	2.27
Tunisia	57	4.08	28	5.45	30	5.28	94	2.69	49	2.91
Turkey	44	4.28	73	4.92	38	5.14	79	2.97	28	4.08
Uganda	83	3.74	114	3.95	70	4.75	11	5.01	121	1.25
Ukraine	100	3.51	80	4.87	62	4.83	104	2.39	84	1.95
United Arab Emirates	89	3.62	42	5.15	36	5.18	108	2.33	90	1.81
United Kingdom	5	5.26	7	5.87	90	4.54	27	4.35	4	6.28
United States	2	5.52	5	5.91	114	4.29	2	6.04	7	5.83
Uruguay	56	4.09	46	5.09	54	4.93	89	2.78	35	3.55
Uzbekistan	101	3.51	44	5.10	81	4.65	105	2.37	86	1.90
Venezuela	75	3.78	102	4.44	130	3.51	9	5.21	85	1.94
Vietnam	84	3.71	84	4.80	87	4.58	48	3.58	88	1.86
Zambia	90	3.62	121	3.58	57	4.85	17	4.76	119	1.27
Zimbabwe	114	3.37	128	2.93	80	4.65	33	4.14	93	1.78



the country. In addition, the country is ranked 17th in price competitiveness. However, there are some weaknesses pulling the country's ranking down. China has a relatively good air transport infrastructure (ranked 36th), but ground transport infrastructure gets middling marks (61st), and its tourism infrastructure remains highly underdeveloped (ranked 119th), with very few major international car rental companies operating in the country, few hotel rooms available, and few ATMs. In addition, China has a policy environment that is not conducive to T&T development (ranked a low 89th, just ahead of Mozambique), with property rights that are not sufficiently protected, strong foreign ownership restrictions, and visa requirements for most visitors. Furthermore, policies related to environmental sustainability get low marks (110th), with the government not seen to be prioritizing the development of the sector in a sustainable way. There are also some safety and security concerns (121st), as well as issues related to health and hygiene (99th), with access to improved sanitation and drinking water that is low by international standards. However, on a positive note, China does seem to be prioritizing the sector to a certain extent (36th), with active participation in most international tourism fairs.

India is ranked 65th overall. As with China, India is well assessed for its natural resources (ranked 13th) and cultural resources, with many World Heritage sites, both natural and cultural. The country also benefits from good price competitiveness, ranked 20th overall, despite somewhat high comparative hotel prices. India also has quite a good air transport network (ranked 35th), particularly given the country's stage of development, and a reasonable ground transport infrastructure (ranked 39th). However, the tourism infrastructure remains somewhat underdeveloped (ranked 80th), with very few hotel rooms per capita by international comparison and low ATM penetration. Further, despite government and industry efforts to promote the country abroad (India is ranked 22nd with regard to tourism fair attendance) and the exposure given to recent promotional campaigns, the assessment of marketing and branding to attract tourists remains mediocre (ranked 51st). Another area of concern is the policy environment, ranked 102nd, with much time and cost for starting a business, bilateral Air Service Agreements that are not assessed as open, and visas required for most visitors.

Indonesia is ranked lower, at 80th overall. In terms of strengths, Indonesia places 26th for its natural resources, with several World Heritage natural sites and the richness of its fauna as measured by the known species in the country. Further, the country is ranked 1st overall on price competitiveness in the T&T industry because of very reasonable hotel prices, low ticket taxes and airport charges, favorable fuel prices, and overall relatively low prices in the country. In addition, it is ranked 11th for the national prioritization of Travel & Tourism. However, these strengths are held back by weaknesses such as

underdeveloped infrastructure in the country, including to a certain extent air transport (61st), and especially ground transport (98th) and tourism infrastructure (109th). There are also some concerns related to safety and security, particularly a lack of trust of police services and the prevalence of road traffic accidents.

Barbados is the highest-ranked country in the Latin America and Caribbean region, at 29th overall. Barbados is ranked 2nd for the country's affinity for Travel & Tourism, with a positive attitude toward tourists and toward the value of tourism in the country. The government is prioritizing the sector to a very high degree (ranked 2nd), spending a high percentage of GDP on the sector and ensuring effective destination-marketing campaigns. Further, the country has a regulatory environment that is quite conducive to the development of the sector, requiring few visitors to have visas to enter the country and with open bilateral Air Service Agreements.

Costa Rica, ranked 44th, is second in the region. The country gets excellent marks for its natural resources (ranked 7th), with several World Heritage sites, a high percentage of protected areas, and the country's very diverse fauna. Given the importance of the natural environment for the country's tourism industry, it is notable that it ranks a reasonably high 32nd overall for environmental sustainability. However, safety and security remains a concern (66th). Further, although its tourism infrastructure is well developed (29th), with an excellent presence of major car rental companies and abundant hotel rooms, ground transport infrastructure requires upgrading (113th), particularly roads and ports, making travel in the country somewhat difficult.

Brazil is ranked 49th overall. The country is ranked 3rd for its natural resources and 12th for its cultural resources, with many World Heritage sites, a great proportion of protected land area, and very rich fauna. This is buttressed by some focus on environmental sustainability (ranked 37th). However, the ground transport network remains underdeveloped with the quality of roads, ports, and railroads ranked 110th, 116th, and 87th, respectively. Safety and security continues to be of serious concern, ranked 128th overall, just behind Pakistan and Russia. The country also suffers greatly from a lack of price competitiveness (92nd), attributable in part to high ticket taxes and airport charges in the country. More generally, the overall policy environment is not particularly conducive to the development of the sector, ranked 95th, with discouraging rules on FDI and much time required for starting a business.

Chile is ranked 51st. The country has rich cultural resources, with five World Heritage cultural sites, and it has several international fairs and exhibitions held in the country. In addition, policy rules and regulations are conducive to the development of the T&T sector (18th), with few foreign ownership restrictions, a liberal visa regime, and open bilateral Air Service Agreements.

The country also benefits from good safety and security by regional standards (36th). However, Chile's T&T competitiveness would be strengthened by upgrading its transport and tourism infrastructure and a greater focus on developing the industry in an environmentally sustainable way.

Mexico, in 55th place, gets quite high marks for its natural and cultural resources (both ranked 25th), with many World Heritage sites. This is reinforced by the overall prioritization of the sector in the country (31st), with country-level participation at many T&T fairs and effective marketing and branding campaigns for attracting tourists. Some areas requiring attention are the tourism infrastructure (49th) and especially the ground transport infrastructure (82nd). In addition, Mexico is ranked a low 83rd for its price competitiveness, due in particular to very high ticket taxes and airport charges (ranked a low 124th overall). Safety and security also continues to be a major concern, ranked 122nd with high levels of crime and violence, a police force that cannot be relied on to provide protection from crime, and many road traffic accidents.

Venezuela, despite its top-10 status for its endowment of natural resources, is ranked much lower than most other countries in the region, at 103rd. Among the significant weaknesses are a lack of safety and security (ranked 125th), a low prioritization of the tourism industry (123rd), and the lowest rank of all countries regarding the overall national affinity for Travel & Tourism (130th). In addition, infrastructure is in need of upgrading, particularly ground transport infrastructure (ranked 112th). The policy environment is also not very conducive to the development of the T&T sector. Property rights are not well protected in the country, and FDI is also not encouraged (both these indicators are ranked second to last, or 129th, in both cases just ahead of Zimbabwe).

Israel is the highest ranked country in the Middle East and North Africa region, at 35th overall. The country's human resources base is well evaluated (20th), providing healthy and well-trained people to work in the T&T sector. Further, infrastructure is quite well developed compared with those of other countries in the region, especially its ICT infrastructure. Israel's regulatory environment, ranked 30th, is conducive to the development of the sector, with well protected property rights and low foreign ownership restrictions. And the country's environmental regulation also gets relatively good marks in terms of both stringency and enforcement. But although Israel gets excellent marks related to health and hygiene (ranked 8th), with one of the highest physician densities in the world, safety and security continues to be a major concern, placing the country at 60th, primarily related to concerns about terrorism (ranked 127th, ahead of just Colombia, Sri Lanka, and Nepal).

Tunisia is ranked 39th, with an excellent assessment of the prioritization of Travel & Tourism (8th)—similar to countries such as Spain and Switzerland—with high government spending on the sector, effective destination-marketing campaigns, and attendance at most major international tourism fairs. Further, unlike some other countries in the region, Tunisia is perceived as relatively safe from crime and violence (ranked 25th), including terrorism. In addition, price competitiveness is a positive attribute, ranked 13th, with very competitive hotel prices, reasonable fuel levels, and reasonable taxation, although ticket taxes and airport charges are comparatively onerous. Health and hygiene also remains an area of concern (75th), with a relatively low physician density and a low concentration of hospital beds.

The United Arab Emirates (UAE) also ranks among the top third of all countries at 40th, close behind Israel and Tunisia. While the UAE is not endowed with rich natural and cultural resources (108th and 90th, respectively), it does very well in several other areas captured by the Index. For example, the country exudes an extremely positive attitude toward foreign travelers (6th) and is also seen as safe from crime and violence (ranked 14th). The country also does comparatively well with regard to price competitiveness, ranked 28th in this area, despite a very high price level. This is the result of very low ticket taxes and airport charges, low taxation more generally, and low fuel price levels in the country. The UAE's infrastructure also gets good marks, particularly its air transport infrastructure, which is ranked a high 5th out of all countries assessed. The government is seen as prioritizing the sector strongly (ranked 4th), carrying out very effective destination-marketing campaigns (ranked 1st) and ensuring the presence of the country at major T&T fairs internationally. On the other hand, rules and regulations could be adapted to better support the sector's development, which is ranked 81st overall because of foreign ownership restrictions, visa requirements for many visitors, and much time and cost required for starting a business in the country, for example.

Egypt, a country rich in cultural heritage (with six World Heritage cultural sites), ranks 66th overall in the TTCI. In addition to its cultural attributes, it benefits from excellent price competitiveness, ranked 2nd, just behind Indonesia. This is attributable to overall low comparative prices, including fuel prices and hotel room prices, as well as relatively low ticket taxes and airport charges. Further, there is a national prioritization of the sector, with the government ensuring both relatively high spending on Travel & Tourism and the country's presence at major tourism fairs. On the other hand, the country's infrastructure is somewhat underdeveloped, particularly its tourism infrastructure (79th) and ICT infrastructure (87th). An upgrading of the quality of the country's human resources available to work in the sector, ranked 82nd, would also improve the country's overall T&T competitiveness.

Morocco is ranked 67th, just behind Egypt. Morocco also receives a good evaluation for its cultural resources, being ranked a high 19th for the number of World Heritage cultural sites in the country. In addition, the government is seen to be prioritizing the development of the sector, and its policy rules and regulations are indeed somewhat supportive of the industry (ranked 40th), with a favorable visa regime and relative ease of setting up a business in the country. The government is also seen to be making efforts to develop the T&T sector in a sustainable way, protecting the natural environment. In order to improve the industry's competitiveness further, efforts should be made to improve health and hygiene levels in the country and upgrade the educational system, as well as make further improvements to the country's transport and tourism infrastructure.

Mauritius is the highest-ranked country in the sub-Saharan African region at 41st overall, 19 places higher than the second-ranked country, South Africa. The Mauritian government is unsurpassed in terms of the prioritization of the sector, with very high government spending on the tourism industry (ranked 3rd), and ensuring excellent destination-marketing campaigns to attract tourists (ranked 8th). Along similar lines, Mauritius is ranked 3rd for the country's overall affinity for Travel & Tourism, with the sector representing an important part of the economy and the general attitude of the population to foreign travelers being extremely welcoming. The country's tourism infrastructure is quite well developed, particularly by regional standards, with a high concentration of hotel rooms and many major car rental companies operating in the country. Mauritius also benefits from price competitiveness (ranked 19th), with relatively low prices overall and taxation that is not overly burdensome. Safety and security levels are also very good by regional standards (ranked 33rd), and are on a par with countries such as Canada and the Netherlands. In terms of challenges, there are some areas that could be addressed in order to improve Mauritius' competitiveness. For example, some aspects of the policy environment could be made more advantageous, such as easing up on foreign ownership restrictions and more open bilateral Air Service Agreements. And although the government is seen to be making an effort to develop the industry in a sustainable way (ranked 9th), this could be backed up by more stringent and clearer environmental regulations (ranked 50th).

South Africa, ranked 60th, is the region's second-strongest performer, and the only other country in the region within the top half of rankings. The country is ranked a high 21st for its natural resources and 40th for its cultural resources, based on its many World Heritage sites, its rich fauna, and the many international fairs and exhibitions held in the country. South Africa also benefits from price competitiveness, with reasonably priced hotel rooms and a favorable tax regime. Infrastructure in South Africa is also well developed, particularly for the

region, with air transport infrastructure ranked 40th and a particularly good assessment of road quality (38th). Overall, policy rules and regulations are conducive to the sector's development (ranked 36th), with well-protected property rights and few visa requirements for visitors. The country also gets good marks for environmental sustainability (ranked 35th). And the government prioritizes the development of the T&T sector as a whole, through, for example, effective destination marketing (ranked 21st). However, there are also some areas of weakness that have brought down the country's overall ranking. Safety and security is of serious concern (ranked 123rd), with the costs of crime and violence in particular ranked a low 125th. The country also has weaknesses in the area of health and hygiene, where it is ranked 82nd as a result of its low physician density (91st) and concerns about access to improved sanitation (84th) and drinking water (75th). Related to this, health indicators are extremely worrisome. South Africa's life expectancy is low, at 48 years, placing the country 117th overall, a ranking related in large part to the very high rates of communicable diseases such as HIV/AIDS. This is clearly an area requiring urgent attention to ensure the continuing availability of human resources for the T&T sector, as well as all sectors in the economy.

Botswana is ranked 87th overall in the TTCI. The country, known for its beautiful natural parks, is ranked 31st out of all countries for its natural resources, with much protected land area (ranked 10th) and a lack of environmental damage. The country also benefits from excellent price competitiveness, where it is ranked 6th because of low ticket taxes and airport charges (14th) and a favorable tax regime in the country (17th). However, Botswana does face some challenges that lead to its rather low ranking overall. The policy regime is not extremely conducive to the development of the sector. Although the country does not have an onerous visa policy (21st), the country's bilateral Air Service Agreements are not evaluated as open (100th) and much time is required for starting a new business (108 days, placing the country 121st). Further, Botswana's transport infrastructure is somewhat underdeveloped, as well as its tourism infrastructure, with a low hotel room concentration (71st) and a limited presence of international car rental companies (74th). There are also some concerns in the area of health and hygiene, attributable to a very low physician density (102nd) and very limited access to improved sanitation (108th). Associated with this, the greatest comparative weakness relates to the health of the workforce, where life expectancy of just 35 years places the country last out of all 130 countries, in a tie with Lesotho. Botswana has the highest HIV prevalence rate of all countries covered.

Tanzania, ranked 88th, just after Botswana, is a country with some impressive strengths. The country is ranked 1st worldwide for the natural environment, with several World Heritage natural sites (ranked 10th) and so

much protected land area as to place the country 4th on that indicator. This is buttressed by an important focus in the country on environmental sustainability (ranked 29th), particularly as it pertains to the development of this industry. There is also a general affinity of the population to Travel & Tourism (ranked 28th), and it is clearly seen to be an overall national priority (33rd). On the other hand, the policy environment could be more supportive of the development of the sector, by ensuring more open bilateral Air Service Agreements (106th), pursuing a less stringent visa policy for visitors (67th), ensuring better protection of property rights (94th), and making it less costly to start a business (99th). Other issues of concern are security levels in the country, and a focus must be placed—as in most countries in the region—on improving the health of the workforce, upgrading the educational system, and improving all types of infrastructure on which the industry is dependent.

Looking further down in the rankings, Zimbabwe is ranked 117th overall. This is a low ranking for a country with such natural endowments as the famous Victoria Falls. Indeed, Zimbabwe is ranked 33rd for natural resources overall, with a number of World Heritage natural sites, much protected land area, and rich fauna. Despite these strengths, which have attracted tourists to Zimbabwe over the years, the Index mainly highlights the country's weaknesses in all of the other areas. The policy environment is among the worst in the world (ranked 128th), with rock bottom assessments for laws related to FDI and property rights (both ranked 130th). Safety and security is also a major concern, with high crime and violence and a lack of trust in the reliability of police services to provide protection from crime (123rd), reflecting the general breakdown in law and order in the country in recent years. There are also concerns related to human resources, with low enrollment rates in primary and secondary education by international standards, and among the worst health indicators in the world: life expectancy is just 37 years now in the country, placing it 128th. Better governance will be imperative to get the country back on track for improved T&T competitiveness.

### Exploring sustainable Travel & Tourism

The *Report* also features a number of excellent contributions from T&T industry practitioners and experts, dealing with issues related directly to T&T competitiveness, and with a particular focus this year on environmental sustainability. The T&T industry is increasingly making efforts to make a positive contribution to the quality of the natural environment by adopting more environmentally friendly business practices that cut down CO<sub>2</sub> emissions as well as control overall pollution levels. Efforts are also focused on raising awareness of environmental issues and encouraging tourists to adopt eco-friendly practices that include, among others, offsetting

CO<sub>2</sub> emissions generated during a given trip. These special studies are highly business relevant and complement the TTCI, the country/economy profiles, and the data tables elsewhere in the *Report*.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

In his chapter “What Is Driving Travel Demand? Managing Travel’s Climate Impacts,” Brian Pearce, IATA’s Chief Economist, notes that the focus of existing policy aimed toward reducing CO<sub>2</sub> emissions from air travel, with measures such as the United Kingdom’s recent doubling of the air passenger duty, has been on trying to manage air travel demand by raising the cost of travel for passengers. The recent debate on emissions trading in Europe has also focused on the costs it will impose on airlines and their passengers.

However, Pearce presents new evidence suggesting that policies aiming to reduce CO<sub>2</sub> emissions by raising the cost of air travel are likely to fail. This is because

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

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

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

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

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

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

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

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# Part 1

## Selected Issues of T&T Competitiveness





# The Travel & Tourism Competitiveness Index 2008: Measuring Key Elements Driving the Sector's Development

**JENNIFER BLANKE**, Senior Economist, Global Competitiveness  
Network, World Economic Forum

**THEA CHIESA**, Head of Aviation, Travel and Tourism, World  
Economic Forum

The World Economic Forum has embarked on a multi-year effort to understand and measure the Travel & Tourism (T&T) competitiveness of nations around the world. This chapter presents the second edition of the Travel & Tourism Competitiveness Index (TTCI), launched for the first time last year.

Our interest in benchmarking T&T competitiveness stems from its economic importance. According to the World Tourism Organization (UNWTO), global tourism hit a new record in 2006, with 842 million arrivals—up by 4.5 percent from 2005,<sup>1</sup> and generating tourism receipts of US\$682.7 billion—and it is expected to grow briskly in the coming decade.<sup>2</sup> The World Travel & Tourism Council (WTTC) estimates that, from direct and indirect activities combined, the T&T sector now accounts for 10.4 percent of global GDP, 12.2 percent of world exports, and 9.5 percent of world investment. In addition, the T&T industry in 2007 generated in excess of US\$7 trillion in revenues—a figure that is expected to rise to over US\$13 trillion over the coming decade.<sup>3</sup>

Considering the strong global economic value of the industry, its importance for many countries is not surprising. A growing national T&T sector contributes to employment, raises national income, and can improve the balance of payments. In this context, the sector is an important driver of growth and prosperity and, particularly within developing countries, it can also play a role in poverty reduction.

Nations have thus long been keen on reaping the economic benefits of the T&T industry, many actively working toward enhancing its growth. More recently, several government and business leaders have embraced the idea that long-term industry profitability can be achieved only by striking a balance between industry growth and national “carrying capacity” or “sustainability.” In line with this thinking, this year’s *Report* places great emphasis on the topic of environmentally sustainable tourism, and the TTCI discussed in this chapter includes a reinforced focus on environmental sustainability, as described in Box 1.

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

This *Report* aims to serve two purposes. First, by providing a cross-country analysis of the drivers of T&T

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competitiveness, we intend to provide the industry with useful comparative information and an important benchmarking tool for making decisions related to business/industry development. Second, and more importantly, the analysis provides an opportunity for the T&T industry to highlight to national policymakers the obstacles to T&T competitiveness that require policy attention, and to enable dialogue between the private and public sectors for improving the environment for developing the T&T industry at the national level.

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

### The Travel & Tourism Competitiveness Index

The Travel & Tourism Competitiveness Index (TTCI) was developed within the context of the World Economic Forum's Industry Partnership Programme for the Aviation, Travel and Tourism sector. The TTCI aims to measure *the factors and policies that make it attractive to develop the T&T sector in different countries*. The Index was

developed in close collaboration with our strategic design partner Booz Allen Hamilton, and our data partners Deloitte, the International Air Transport Association (IATA), the IUCN, the UNWTO, and the WTTC. We have also received important feedback from a number of key companies that are industry partners in the effort, namely Abercrombie & Kent, Bombardier, British Airways, Carlson, Emirates Airline, Hertz, Silversea Cruises Group, Swiss International Airlines, and Travelport.

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

#### Box 1: The pursuit of environmental sustainability

A sustainable T&T industry is one that optimizes the use of national resources with minimum ecological, cultural, and social impact, while maximizing the benefits to the environment and community.<sup>1</sup>

The need for achieving a sustainable T&T industry is certainly not a new idea. However, the need for the industry to demonstrate leadership by introducing policy instruments that target the achievement of sustainability has become important only in recent years, primarily as a result of increased global awareness of the impact of global climate change on tourist destinations.

As more regions and countries develop their tourism industries, this has significant effects on natural resources, consumption patterns, pollution, and social systems. The resulting impact on tourism destination ecosystems makes the introduction of policy instruments aimed at achieving tourism sustainability, in particular related to the environment, a crucial element of national tourism development strategies. It is now widely accepted within the industry that those nations that will ultimately become the most competitive in the T&T sector will be those demonstrating their ability to implement measures to conserve the environment, or to correct possible damage to it, while continuing to facilitate the sector's healthy growth.

Sustainable tourism should therefore be about introducing, refocusing, and/or re-adapting national policies. The goal is to find a balance between limits and usage so that continuous

changing, monitoring, and planning ensure that tourism can be properly managed. This requires thinking long term (10 or even upward of 20 years into the future) and recognizing that change is often cumulative, gradual, and irreversible.<sup>2</sup>

In recognition of the interrelation between sustainability and T&T competitiveness, and in particular the interdependence of tourism development with maintaining the quality of the natural environment, the second edition of the TTCI described in this chapter introduces an "environmental sustainability" pillar. Developed together with the IUCN and the UNWTO, this pillar, described more in detail in the text, aims to assess how well nations are performing with regard to managing their natural environments. In addition, several other chapters in this volume explore various aspects of environmental sustainability and T&T development.

The World Economic Forum is actively collaborating with the UNWTO on environmental sustainability issues beyond this *Report* series. The aim of this collaboration is, among others, to express the Forum's support for the UNWTO's work on Tourism and Climate Change, including the Forum's endorsement of the UNWTO Davos Declaration.<sup>3</sup>

#### Notes

- 1 Gómez Gómez et al. 2004.
- 2 Sustainable Tourism Development Center.
- 3 Available at <http://www.world-tourism.org/pdf/pr071046.pdf>.

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

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

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

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

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

The importance of the natural environment for providing an attractive location for tourism cannot be overstated, and it is clear that policies and factors

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

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

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

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

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

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

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

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

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

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

Also included is the *affinity for Travel & Tourism*, which measures the extent to which the country and society are open to tourism and foreign visitors. It is

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

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

Finally, the *cultural resources* at each country's disposal are also a critical driver of T&T competitiveness around the world. In this pillar we include a measure of cultural heritage (the number of UNESCO cultural World Heritage sites) and sports stadium seat capacity, as well as the number of international fairs and exhibitions in the country.

These 14 pillars are regrouped into the three subindexes described above, as shown in Figure 1, and the overall score for each country is derived as an unweighted average of the three subindexes. The details of the composition of the TTCI are shown in Appendix A.

### Adjustments to the Travel & Tourism Competitiveness Index this year

Some adjustments have been made to the TTCI this year. The changes are of three types: the number of countries covered has increased, there have been some adjustments to the structure of the model, and we have added additional data for important issue areas that were previously missing.

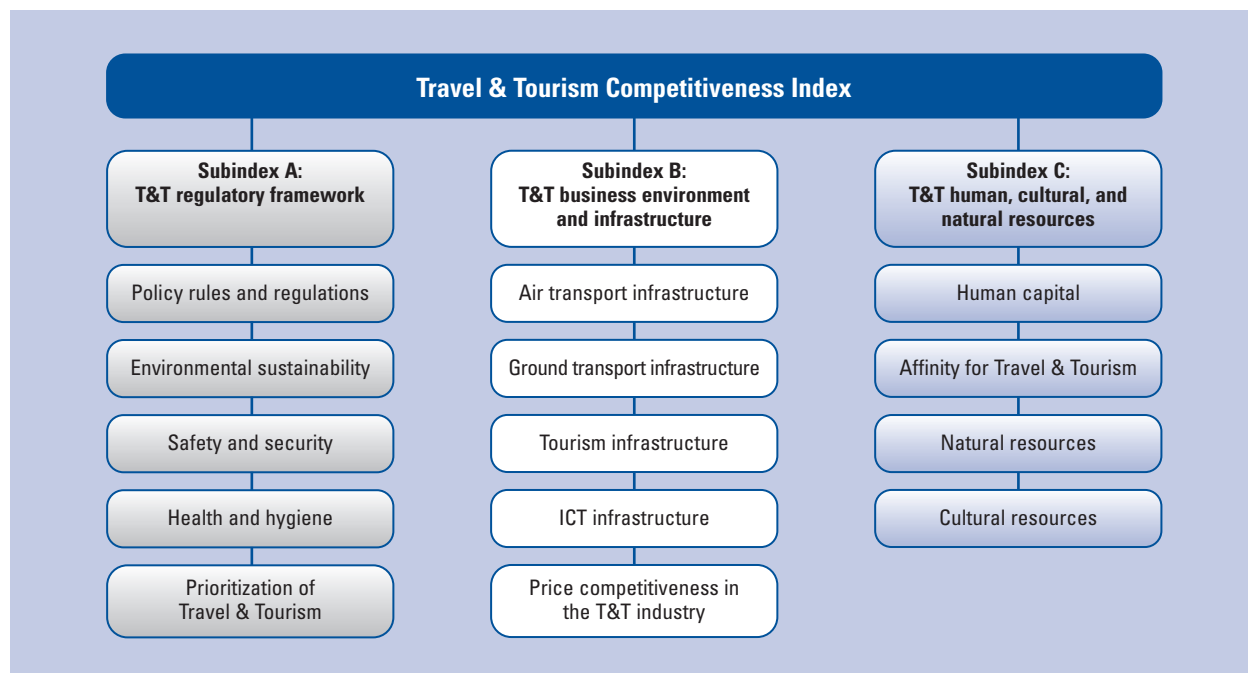
#### Country coverage

Seven new economies have been included in the analysis: Puerto Rico, Libya, Oman, Saudi Arabia, Senegal, Syria, and Uzbekistan. In addition, Serbia and Montenegro, previously analyzed as a single country, are now each included separately. This has increased our coverage to a total of 130 countries this year.

#### Adjustments to the model

Although we have maintained the basic structure and overall logic of the model as originally presented, we have introduced refinements to reflect the results of our experience working with the Index over the past year,

Figure 1: Composition of the three subindexes of the TTCI



and to include new data that have recently become available.

First, what was last year called the “environmental regulation” pillar (pillar 2) has been revised and improved based on our collaboration with the IUCN and the UNWTO, and is this year re-named the “environmental sustainability” pillar to better reflect its components and to capture the increasingly recognized importance of sustainability in the sector’s development. Being a first iteration, we consider the environmental sustainability pillar to be a work-in-progress, which we will continue to strengthen in coming years as more relevant data become available. In its present form it should be viewed as a preliminary estimate of a nation’s approach toward conservation of the environment, rather than a fully comprehensive assessment of its ability to achieve long-term environmental sustainability. We present the pillar this year with the belief that it already contains very useful indications of each nation’s understanding of the importance of environmental protection and the related ability to achieve long-term sustainable growth in the sector, as environmental conservation increasingly becomes a driver of national T&T competitiveness.

Second, what was last year a single pillar, “natural and cultural resources,” has been broken into its two subcomponents to create the two distinct pillars of natural resources and cultural resources. This provides a more nuanced and useful description of the strengths and weaknesses of countries, as these are in reality two quite different types of resources, with different policy implications in many cases.

Third, we have renamed what was last year called the “national tourism perception” pillar to the “affinity for Travel & Tourism” pillar. The elements included remain the same but the new title better captures the concept we are trying to measure.

#### New data

Throughout the model we have used better data proxies for some variables and included a number of new concepts that were previously missing from the model. For example, in the policy rules and regulations pillar we have introduced variables measuring the time and cost to start a business, since this can be an important deterrent to the industry’s development. As mentioned above, within the environmental sustainability pillar we have included a number of new variables that measure this concept, and this year we present data on carbon dioxide emissions, particulate matter concentration, the percentage of endangered species, and an index of ratified environmental treaties and conventions. Similarly, to better capture the natural and cultural resources, we separated the number of World Heritage sites into two variables (last year included together), and included new data on the total known species of animals in the country, the overall quality of the national environment, and the number of international fairs and exhibitions held in the country annually. Finally, within the price competitiveness in the T&T industry pillar, we have incorporated a hotel price index, which has been calculated for the first time this year specifically for inclusion in the TTCI.

Given the number of changes that have been made to the model this year, the rankings are not directly comparable with those of last year. However, from here forward we plan to maintain the current overall structure, which will allow us to make meaningful comparisons between years starting next year. This will serve the important purpose of allowing countries to track their progress in the different issue areas over time.

Based upon data availability, this year the TTCI measures the T&T competitiveness for 130 economies, covering all of the world's regions and accounting for approximately 90 percent of the world's population and 98 percent of world GDP.

### The Travel & Tourism Competitiveness Index 2008 rankings

The rankings from this year's TTCI are shown in Tables 1 through 4, providing a summary of the T&T competitiveness of each country. The results are positively correlated with a number of T&T indicators. For example, Figures 2 and 3 show the correlation between the TTCI and tourist arrivals and between the TTCI and tourism receipts, respectively (both shown in log form) in 2006. As the figures show, the Index is quite highly correlated with both the number of tourists actually traveling to various countries and the annual income generated from Travel & Tourism, with few notable outliers. This supports the idea that the TTCI captures factors that are important for developing the T&T industry in countries.

The rest of this section will discuss some of the highlights of the rankings in a regional context, grouping countries into the following five regional groups: Europe and North America, Asia and Oceania, Latin America and the Caribbean (LAC), Middle East and North Africa (MENA), and sub-Saharan Africa. For further details for each of the 130 economies included in this Index, we provide two-page profiles in Part 2 of the *Report*. The profiles show the rankings on each subindex and pillar, as well as each of the 71 factors included in the Index.

#### Europe and North America

Table 1 shows that many countries from Europe and North America do very well in the rankings. Switzerland is ranked 1st in the 2008 TTCI, followed by Austria and Germany, the same top three countries as in the 2007 TTCI.

**Switzerland** is a country rich in cultural and natural resources, including an impressive number of World Heritage cultural and natural sites for a country of its size. A large percentage of the country's land area is protected (ranked 12th) and the natural environment is assessed as being among the most pristine in the world (ranked 10th). This natural heritage is buttressed by a strong national focus on environmental sustainability: Switzerland is ranked 2nd overall on this pillar, based on

strong and well-enforced environmental legislation and with a particular focus on developing the T&T sector sustainably.

As well as being endowed with features that make it an attractive leisure tourism destination, Switzerland is also an important business travel hub, with many international fairs and exhibitions held in the country each year. Staffing of the industry is also facilitated by excellent education and training (ranked 4th), perhaps not surprising in a country with many of the best hotel management schools. Added to these strengths is Switzerland's excellent transport infrastructure (ranked 5th worldwide), with top-quality roads and railroads and an excellent domestic transport network. Also well assessed is the specific tourism infrastructure (ranked 7th), with readily available hotel rooms and ATMs for cash withdrawals. Such high-quality infrastructure makes a tourist's stay in the country easy and comfortable, an experience that is reinforced by the high level of general safety and security (ranked 6th).

**Austria** is ranked 2nd in the TTCI, attributable to its rich cultural resources, with eight World Heritage cultural sites, and many fairs and exhibitions catering to business travelers. The natural environment is also well assessed, along with the country's focus on environmental sustainability. In addition, Austrians are perceived as extremely open and welcoming to foreign travelers (ranked 3rd). Austria's tourism infrastructure is assessed as second to none, with abundant car rental facilities, hotel accommodations, and ATMs. Other strengths include Austria's assessment as one of the safest countries in the world (ranked 3rd), and its excellent health and hygiene levels (ranked 4th).

**Germany**, ranked 3rd, is also characterized by abundant cultural resources: Germany is ranked 3rd worldwide for its 31 World Heritage cultural sites, and 2nd for the number of international fairs and exhibitions held in the country. The country's infrastructure is among the best in the world, ranked 3rd for the quality of its ground transport infrastructure and 7th for its air transport infrastructure. In addition, Germany gets better marks than Switzerland and Austria for the policy rules and regulations affecting the T&T industry: it is ranked 6th in this area, with policies encouraging foreign investment, and bilateral Air Service Agreements that are assessed as open.

**Spain** and **France** also place among the top 10, with Spain at 5th and France at 10th place. Both countries benefit from their rich cultural resources, ranked 2nd and 4th worldwide, respectively, for their number of World Heritage cultural sites. Both have built up excellent infrastructure: France's ground and air transport infrastructure are among the best in the world and Spain's tourism infrastructure is ranked 1st internationally. The Index shows that France's policy rules and regulations are more conducive to developing the sector than Spain's, while Spain's labor market makes finding

**Figure 2: T&T competitiveness and tourist arrivals**



Source: United Nations World Tourism Organization; World Economic Forum.

**Figure 3: T&T competitiveness and tourism receipts**



Source: United Nations World Tourism Organization; World Economic Forum.



Table 1: The Travel &amp; Tourism Competitiveness Index

Country/Economy	SUBINDEXES							
	OVERALL INDEX		T&T Regulatory framework		T&T Business environment and infrastructure		T&T Human, cultural, and natural resources	
	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Switzerland	1	5.63	1	5.94	2	5.55	3	5.39
Austria	2	5.43	4	5.86	8	5.27	7	5.16
Germany	3	5.41	6	5.67	3	5.43	9	5.13
Australia	4	5.34	30	5.23	11	5.18	1	5.61
Spain	5	5.30	28	5.24	5	5.32	4	5.33
United Kingdom	6	5.28	26	5.28	6	5.32	5	5.26
United States	7	5.28	49	4.75	1	5.58	2	5.52
Sweden	8	5.27	9	5.62	15	5.05	8	5.15
Canada	9	5.26	23	5.31	4	5.40	10	5.07
France	10	5.23	12	5.57	7	5.28	12	4.85
Iceland	11	5.16	3	5.86	9	5.21	36	4.40
Finland	12	5.11	5	5.74	23	4.80	14	4.78
Denmark	13	5.10	10	5.61	10	5.20	28	4.49
Hong Kong SAR	14	5.09	2	5.91	16	5.04	42	4.31
Portugal	15	5.09	14	5.50	22	4.83	11	4.93
Singapore	16	5.06	7	5.67	13	5.13	37	4.39
Norway	17	5.05	8	5.66	19	4.90	20	4.60
Netherlands	18	5.01	22	5.35	14	5.11	21	4.58
New Zealand	19	4.96	15	5.48	26	4.72	17	4.70
Luxembourg	20	4.95	24	5.28	12	5.17	35	4.41
Ireland	21	4.93	11	5.57	20	4.90	41	4.31
Greece	22	4.92	17	5.46	30	4.63	18	4.66
Japan	23	4.90	34	5.11	21	4.88	16	4.73
Cyprus	24	4.87	27	5.24	17	5.04	40	4.34
Malta	25	4.86	13	5.56	25	4.73	43	4.28
Estonia	26	4.85	18	5.41	18	4.91	49	4.22
Belgium	27	4.84	21	5.36	31	4.61	22	4.56
Italy	28	4.84	41	4.99	24	4.77	15	4.74
Barbados	29	4.77	16	5.46	32	4.58	46	4.26
Czech Republic	30	4.75	20	5.38	37	4.37	25	4.51
Korea, Rep.	31	4.68	38	5.02	34	4.52	29	4.49
Malaysia	32	4.63	37	5.04	39	4.31	23	4.55
Hungary	33	4.60	19	5.40	41	4.18	50	4.21
Croatia	34	4.59	39	5.02	38	4.32	32	4.43
Israel	35	4.51	32	5.12	36	4.39	59	4.02
Slovenia	36	4.49	42	4.97	33	4.53	61	3.98
Qatar	37	4.44	43	4.90	35	4.50	65	3.92
Slovak Republic	38	4.42	33	5.11	46	3.94	51	4.19
Tunisia	39	4.41	25	5.28	49	3.86	57	4.08
United Arab Emirates	40	4.39	44	4.87	27	4.69	89	3.62
Mauritius	41	4.38	29	5.23	44	4.14	76	3.78
Thailand	42	4.37	63	4.46	42	4.17	30	4.49
Bulgaria	43	4.36	50	4.75	52	3.84	31	4.48
Costa Rica	44	4.35	48	4.76	56	3.76	24	4.52
Latvia	45	4.34	35	5.10	43	4.17	82	3.75
Puerto Rico	46	4.34	40	4.99	40	4.27	80	3.75
Lithuania	47	4.33	31	5.21	45	4.00	74	3.79
Bahrain	48	4.29	68	4.36	28	4.64	69	3.88
Brazil	49	4.29	84	4.11	67	3.55	6	5.21
Panama	50	4.29	52	4.66	47	3.94	47	4.25
Chile	51	4.27	45	4.86	54	3.82	54	4.14
Taiwan, China	52	4.23	69	4.32	29	4.63	79	3.75
Jordan	53	4.21	36	5.06	60	3.64	64	3.92
Turkey	54	4.19	56	4.57	57	3.73	44	4.28
Mexico	55	4.18	71	4.30	61	3.62	19	4.62
Poland	56	4.18	60	4.51	62	3.62	34	4.42
Jamaica	57	4.18	51	4.74	48	3.87	66	3.92
Argentina	58	4.17	65	4.44	64	3.57	27	4.50
Montenegro	59	4.15	53	4.66	68	3.53	45	4.27
South Africa	60	4.11	70	4.31	51	3.85	52	4.18
Uruguay	61	4.10	47	4.84	71	3.37	56	4.09
China	62	4.06	103	3.91	70	3.45	13	4.81
Dominican Republic	63	4.05	54	4.64	63	3.61	67	3.89
Russian Federation	64	4.04	80	4.21	65	3.56	39	4.35
India	65	3.99	107	3.78	59	3.70	26	4.50
Egypt	66	3.96	58	4.54	69	3.47	70	3.86

(Cont'd.)

Table 1: The Travel &amp; Tourism Competitiveness Index (cont'd.)

Country/Economy	SUBINDEXES							
	OVERALL INDEX		T&T Regulatory framework		T&T Business environment and infrastructure		T&T Human, cultural, and natural resources	
	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Morocco	67	3.91	55	4.59	75	3.32	72	3.81
Guatemala	68	3.89	76	4.25	77	3.30	55	4.12
Romania	69	3.88	72	4.29	66	3.55	73	3.79
Peru	70	3.87	86	4.08	88	3.10	33	4.43
Colombia	71	3.86	95	4.03	83	3.20	38	4.35
Georgia	72	3.83	46	4.84	94	2.95	85	3.70
Sri Lanka	73	3.80	79	4.24	81	3.21	63	3.95
Trinidad and Tobago	74	3.79	87	4.08	50	3.86	104	3.44
Honduras	75	3.79	77	4.25	85	3.16	62	3.96
Oman	76	3.77	88	4.07	58	3.70	96	3.54
Ukraine	77	3.76	59	4.53	78	3.24	100	3.51
Serbia	78	3.76	73	4.27	72	3.36	88	3.64
Azerbaijan	79	3.72	62	4.49	79	3.24	105	3.44
Indonesia	80	3.70	108	3.78	86	3.16	53	4.17
Philippines	81	3.70	83	4.14	84	3.20	78	3.75
Saudi Arabia	82	3.68	106	3.83	55	3.78	107	3.43
Macedonia, FYR	83	3.68	93	4.05	80	3.23	81	3.75
Gambia, The	84	3.67	67	4.38	87	3.11	97	3.53
Kuwait	85	3.67	105	3.88	53	3.82	119	3.31
Ecuador	86	3.66	101	3.99	95	2.94	58	4.05
Botswana	87	3.65	82	4.20	76	3.31	103	3.45
Tanzania	88	3.65	89	4.07	117	2.65	48	4.23
Armenia	89	3.63	57	4.56	108	2.73	94	3.59
Uzbekistan	90	3.62	64	4.45	98	2.90	101	3.51
Kazakhstan	91	3.61	61	4.50	96	2.94	112	3.39
Albania	92	3.60	81	4.20	105	2.75	71	3.85
Namibia	93	3.59	92	4.05	74	3.34	113	3.38
Syria	94	3.58	74	4.26	97	2.93	95	3.55
Suriname	95	3.58	110	3.75	89	3.09	68	3.88
Vietnam	96	3.57	97	4.02	92	2.98	84	3.71
El Salvador	97	3.57	85	4.09	73	3.36	121	3.25
Moldova	98	3.56	66	4.39	100	2.89	110	3.39
Nicaragua	99	3.53	96	4.03	99	2.90	87	3.67
Mongolia	100	3.53	78	4.25	106	2.74	91	3.60
Kenya	101	3.53	100	4.00	102	2.82	77	3.76
Algeria	102	3.50	99	4.01	93	2.97	98	3.52
Venezuela	103	3.47	123	3.44	82	3.21	75	3.78
Libya	104	3.45	75	4.26	115	2.66	106	3.43
Bosnia and Herzegovina	105	3.45	98	4.02	91	2.99	117	3.33
Bolivia	106	3.44	122	3.45	101	2.84	60	4.02
Zambia	107	3.42	91	4.06	118	2.60	90	3.62
Senegal	108	3.41	94	4.04	104	2.76	108	3.43
Guyana	109	3.38	104	3.88	114	2.67	93	3.60
Uganda	110	3.36	113	3.66	112	2.68	83	3.74
Pakistan	111	3.36	114	3.65	90	3.02	109	3.39
Cambodia	112	3.32	116	3.61	116	2.65	86	3.69
Kyrgyz Republic	113	3.30	90	4.07	128	2.37	102	3.47
Tajikistan	114	3.24	102	3.95	126	2.40	111	3.39
Paraguay	115	3.24	112	3.72	111	2.68	118	3.32
Nepal	116	3.22	120	3.58	122	2.56	99	3.51
Zimbabwe	117	3.22	118	3.60	113	2.67	114	3.37
Madagascar	118	3.21	111	3.73	107	2.74	124	3.16
Mali	119	3.21	109	3.77	124	2.49	116	3.36
Benin	120	3.19	115	3.63	121	2.58	115	3.36
Ethiopia	121	3.18	126	3.20	110	2.72	92	3.60
Mauritania	122	3.10	117	3.60	120	2.59	125	3.11
Mozambique	123	3.05	119	3.59	119	2.59	128	2.97
Burkina Faso	124	3.04	121	3.56	123	2.56	127	3.01
Nigeria	125	3.03	127	3.15	109	2.73	123	3.19
Cameroon	126	2.99	125	3.39	129	2.31	120	3.25
Bangladesh	127	2.93	129	2.94	103	2.79	126	3.07
Burundi	128	2.91	128	3.15	127	2.39	122	3.20
Lesotho	129	2.82	124	3.39	125	2.46	130	2.61
Chad	130	2.48	130	2.74	130	1.99	129	2.69

Table 2: The Travel &amp; Tourism Competitiveness Index: Regulatory framework

Country/Economy	T&T REGULATORY FRAMEWORK		PILLARS									
	Rank	Score	1. Policy rules and regulations		2. Environmental sustainability		3. Safety and security		4. Health and hygiene		5. Prioritization of Travel & Tourism	
			Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Albania	81	4.20	104	3.69	93	4.08	71	4.93	59	4.76	104	3.55
Algeria	99	4.01	83	4.00	102	3.99	83	4.72	81	4.12	118	3.20
Argentina	65	4.44	91	3.95	107	3.94	98	4.45	40	5.62	70	4.23
Armenia	57	4.56	63	4.28	112	3.88	45	5.43	39	5.65	105	3.55
Australia	30	5.23	27	5.04	53	4.63	21	5.85	37	5.72	32	4.92
Austria	4	5.86	22	5.16	8	5.57	3	6.41	4	6.77	19	5.41
Azerbaijan	62	4.49	72	4.14	101	4.01	43	5.46	49	5.22	101	3.63
Bahrain	68	4.36	62	4.35	125	3.49	39	5.58	76	4.25	75	4.12
Bangladesh	129	2.94	114	3.31	121	3.71	129	2.83	117	2.11	122	2.77
Barbados	16	5.46	29	5.02	26	5.05	27	5.74	31	5.91	13	5.60
Belgium	21	5.36	16	5.28	11	5.49	29	5.71	14	6.51	91	3.81
Benin	115	3.63	117	3.23	30	4.97	77	4.86	121	1.74	112	3.35
Bolivia	122	3.45	127	2.88	104	3.98	92	4.53	102	3.09	121	2.79
Bosnia and Herzegovina	98	4.02	109	3.47	113	3.87	57	5.13	55	4.88	124	2.72
Botswana	82	4.20	74	4.13	68	4.42	50	5.26	97	3.24	82	3.95
Brazil	84	4.11	95	3.81	37	4.90	128	3.15	69	4.46	68	4.24
Bulgaria	50	4.75	85	3.98	73	4.35	90	4.56	12	6.56	65	4.28
Burkina Faso	121	3.56	107	3.62	64	4.47	82	4.76	124	1.46	108	3.50
Burundi	128	3.15	125	2.92	88	4.14	96	4.49	116	2.19	130	2.00
Cambodia	116	3.61	126	2.89	92	4.09	95	4.50	128	1.13	17	5.47
Cameroon	125	3.39	112	3.31	109	3.92	86	4.63	114	2.42	126	2.69
Canada	23	5.31	8	5.43	36	4.90	32	5.68	45	5.48	26	5.05
Chad	130	2.74	130	2.46	124	3.64	116	3.88	129	1.05	127	2.68
Chile	45	4.86	18	5.25	62	4.53	36	5.60	63	4.53	58	4.39
China	103	3.91	89	3.96	110	3.92	121	3.60	99	3.21	36	4.86
Colombia	95	4.03	60	4.36	87	4.17	118	3.75	78	4.22	99	3.68
Costa Rica	48	4.76	54	4.48	32	4.96	66	4.99	67	4.49	35	4.86
Croatia	39	5.02	66	4.26	41	4.84	41	5.52	28	5.99	51	4.48
Cyprus	27	5.24	69	4.20	47	4.73	23	5.82	43	5.53	3	5.93
Czech Republic	20	5.38	38	4.77	21	5.10	44	5.45	6	6.77	39	4.79
Denmark	10	5.61	4	5.59	3	5.88	4	6.40	34	5.82	62	4.35
Dominican Republic	54	4.64	47	4.57	108	3.93	89	4.57	65	4.52	14	5.59
Ecuador	101	3.99	111	3.43	82	4.24	97	4.48	73	4.39	110	3.42
Egypt	58	4.54	70	4.18	81	4.25	84	4.66	86	3.94	12	5.66
El Salvador	85	4.09	45	4.63	55	4.60	109	4.05	94	3.36	89	3.83
Estonia	18	5.41	26	5.06	43	4.82	26	5.75	20	6.27	23	5.14
Ethiopia	126	3.20	96	3.76	114	3.83	111	4.03	130	1.00	111	3.40
Finland	5	5.74	7	5.45	7	5.62	1	6.70	18	6.37	49	4.55
France	12	5.57	24	5.15	5	5.75	54	5.18	7	6.76	29	5.00
Gambia, The	67	4.38	93	3.90	59	4.57	38	5.58	107	2.68	22	5.19
Georgia	46	4.84	68	4.22	54	4.62	37	5.60	42	5.58	72	4.19
Germany	6	5.67	6	5.46	4	5.82	17	5.88	4	6.77	57	4.40
Greece	17	5.46	61	4.35	40	4.85	31	5.69	16	6.42	1	5.99
Guatemala	76	4.25	41	4.72	95	4.07	110	4.03	83	4.00	53	4.45
Guyana	104	3.88	120	3.19	76	4.30	112	4.01	92	3.62	66	4.27
Honduras	77	4.25	44	4.64	61	4.56	87	4.58	95	3.36	76	4.11
Hong Kong SAR	2	5.91	2	5.95	60	4.56	7	6.27	1	7.00	9	5.78
Hungary	19	5.40	35	4.82	25	5.05	28	5.73	11	6.57	37	4.80
Iceland	3	5.86	17	5.25	20	5.14	2	6.54	3	6.86	15	5.53
India	107	3.78	102	3.71	71	4.39	117	3.86	110	2.56	59	4.38
Indonesia	108	3.78	121	3.07	126	3.48	108	4.06	111	2.53	11	5.75
Ireland	11	5.57	3	5.64	12	5.48	19	5.87	24	6.17	40	4.70
Israel	32	5.12	30	5.02	67	4.43	60	5.09	8	6.69	61	4.37
Italy	41	4.99	57	4.42	39	4.87	81	4.80	19	6.28	46	4.58
Jamaica	51	4.74	13	5.34	99	4.02	102	4.36	82	4.01	2	5.96
Japan	34	5.11	32	4.96	48	4.73	74	4.89	23	6.25	41	4.70
Jordan	36	5.06	78	4.12	38	4.87	15	5.98	58	4.84	16	5.50
Kazakhstan	61	4.50	77	4.12	120	3.73	73	4.90	33	5.85	83	3.90
Kenya	100	4.00	101	3.72	19	5.25	120	3.69	118	2.08	20	5.29
Korea, Rep.	38	5.02	33	4.87	50	4.69	67	4.99	38	5.67	34	4.90
Kuwait	105	3.88	97	3.76	130	2.97	18	5.88	77	4.22	129	2.56
Kyrgyz Republic	90	4.07	105	3.64	91	4.09	100	4.43	71	4.43	97	3.74
Latvia	35	5.10	42	4.68	16	5.34	40	5.57	25	6.16	95	3.77
Lesotho	124	3.39	116	3.30	116	3.82	91	4.54	112	2.49	120	2.82
Libya	75	4.26	122	3.06	118	3.79	24	5.81	50	5.20	109	3.43
Lithuania	31	5.21	50	4.55	18	5.32	46	5.43	2	6.98	94	3.80

(Cont'd.)

Table 2: The Travel &amp; Tourism Competitiveness Index: Regulatory framework (cont'd.)

Country/Economy	T&T REGULATORY FRAMEWORK		PILLARS									
			1. Policy rules and regulations		2. Environmental sustainability		3. Safety and security		4. Health and hygiene		5. Prioritization of Travel & Tourism	
	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Luxembourg	24	5.28	14	5.32	22	5.10	9	6.17	22	6.26	103	3.57
Macedonia, FYR	93	4.05	75	4.13	84	4.20	80	4.82	68	4.48	128	2.63
Madagascar	111	3.73	84	4.00	74	4.35	99	4.43	126	1.32	48	4.56
Malaysia	37	5.04	12	5.34	44	4.79	42	5.51	70	4.43	24	5.12
Mali	109	3.77	106	3.63	65	4.46	64	5.02	123	1.59	74	4.17
Malta	13	5.56	51	4.53	42	4.82	12	6.13	10	6.59	10	5.75
Mauritania	117	3.60	113	3.31	86	4.19	47	5.33	125	1.38	93	3.80
Mauritius	29	5.23	28	5.03	46	4.73	33	5.66	57	4.85	4	5.91
Mexico	71	4.30	49	4.56	85	4.20	122	3.59	79	4.21	31	4.94
Moldova	66	4.39	94	3.89	70	4.40	70	4.94	47	5.38	113	3.35
Mongolia	78	4.25	80	4.06	119	3.76	78	4.86	64	4.52	78	4.05
Montenegro	53	4.66	37	4.78	105	3.95	53	5.19	52	5.12	67	4.26
Morocco	55	4.59	40	4.73	31	4.96	61	5.07	98	3.22	30	4.95
Mozambique	119	3.59	90	3.95	57	4.59	103	4.35	127	1.19	85	3.86
Namibia	92	4.05	88	3.96	34	4.93	72	4.92	108	2.62	86	3.86
Nepal	120	3.58	123	2.98	79	4.27	124	3.54	113	2.47	44	4.61
Netherlands	22	5.35	9	5.42	9	5.56	34	5.65	26	6.15	81	3.96
New Zealand	15	5.48	11	5.36	24	5.07	11	6.15	27	6.01	38	4.80
Nicaragua	96	4.03	92	3.94	49	4.72	51	5.24	109	2.59	100	3.67
Nigeria	127	3.15	99	3.73	56	4.60	130	2.67	122	1.68	119	3.08
Norway	8	5.66	20	5.20	6	5.69	5	6.37	29	5.98	28	5.03
Oman	88	4.07	76	4.12	103	3.99	35	5.65	106	2.76	90	3.82
Pakistan	114	3.65	71	4.17	96	4.03	126	3.26	96	3.28	107	3.53
Panama	52	4.66	34	4.83	45	4.77	56	5.14	80	4.17	55	4.42
Paraguay	112	3.72	119	3.19	123	3.65	101	4.43	87	3.79	106	3.54
Peru	86	4.08	64	4.28	77	4.28	106	4.12	93	3.37	60	4.37
Philippines	83	4.14	58	4.37	80	4.27	113	3.99	91	3.63	54	4.43
Poland	60	4.51	65	4.28	58	4.58	88	4.58	54	4.96	73	4.18
Portugal	14	5.50	21	5.19	15	5.36	16	5.94	30	5.96	27	5.04
Puerto Rico	40	4.99	15	5.31	14	5.36	55	5.15	60	4.67	52	4.45
Qatar	43	4.90	86	3.97	69	4.41	10	6.16	48	5.28	42	4.69
Romania	72	4.29	48	4.57	51	4.69	75	4.87	89	3.75	102	3.58
Russian Federation	80	4.21	110	3.46	117	3.79	127	3.16	9	6.65	80	3.98
Saudi Arabia	106	3.83	82	4.02	127	3.44	59	5.09	105	2.88	98	3.72
Senegal	94	4.04	118	3.20	52	4.65	52	5.20	104	2.91	69	4.24
Serbia	73	4.27	59	4.37	128	3.31	76	4.86	46	5.47	114	3.35
Singapore	7	5.67	1	6.19	27	4.98	8	6.23	53	5.05	5	5.87
Slovak Republic	33	5.11	31	5.00	23	5.07	30	5.70	13	6.52	117	3.29
Slovenia	42	4.97	87	3.97	17	5.34	20	5.85	36	5.79	84	3.89
South Africa	70	4.31	36	4.80	35	4.92	123	3.55	84	3.96	63	4.32
Spain	28	5.24	56	4.44	33	4.95	58	5.10	32	5.88	6	5.84
Sri Lanka	79	4.24	53	4.50	115	3.83	104	4.35	85	3.96	50	4.54
Suriname	110	3.75	129	2.77	106	3.95	68	4.95	72	4.40	125	2.69
Sweden	9	5.62	10	5.37	1	6.12	13	6.13	21	6.26	71	4.20
Switzerland	1	5.94	23	5.15	2	5.90	6	6.35	15	6.48	7	5.80
Syria	74	4.26	115	3.30	98	4.02	22	5.84	74	4.34	88	3.83
Taiwan, China	69	4.32	39	4.77	75	4.34	49	5.29	101	3.20	79	4.02
Tajikistan	102	3.95	108	3.56	97	4.02	63	5.04	88	3.78	116	3.33
Tanzania	89	4.07	79	4.07	29	4.97	105	4.31	119	2.07	33	4.92
Thailand	63	4.46	52	4.50	78	4.27	115	3.95	66	4.49	25	5.07
Trinidad and Tobago	87	4.08	46	4.59	129	3.28	107	4.08	61	4.66	92	3.80
Tunisia	25	5.28	25	5.10	13	5.41	25	5.80	75	4.32	8	5.78
Turkey	56	4.57	43	4.67	90	4.11	79	4.85	62	4.61	45	4.60
Uganda	113	3.66	103	3.69	28	4.98	114	3.99	120	1.79	87	3.84
Ukraine	59	4.53	100	3.72	83	4.23	93	4.53	17	6.40	96	3.76
United Arab Emirates	44	4.87	81	4.05	122	3.65	14	6.07	51	5.13	18	5.45
United Kingdom	26	5.28	5	5.54	10	5.56	65	5.01	41	5.58	43	4.69
United States	49	4.75	19	5.22	100	4.02	119	3.75	44	5.50	21	5.26
Uruguay	47	4.84	73	4.14	63	4.51	48	5.32	35	5.82	56	4.41
Uzbekistan	64	4.45	67	4.23	111	3.91	69	4.94	56	4.85	64	4.32
Venezuela	123	3.44	124	2.92	72	4.36	125	3.47	90	3.72	123	2.72
Vietnam	97	4.02	98	3.75	94	4.07	94	4.50	100	3.21	47	4.56
Zambia	91	4.06	55	4.47	66	4.46	62	5.04	115	2.24	77	4.06
Zimbabwe	118	3.60	128	2.83	89	4.13	85	4.65	103	3.06	115	3.34

Table 3: The Travel &amp; Tourism Competitiveness Index: Business environment and infrastructure

Country/Economy	PILLARS											
	T&T BUSINESS ENVIRONMENT AND INFRASTRUCTURE		6. Air transport infrastructure		7. Ground transport infrastructure		8. Tourism infrastructure		9. ICT infrastructure		10. Price competitiveness in T&T industry	
	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Albania	105	2.75	112	2.20	116	2.55	86	2.53	86	2.16	90	4.33
Algeria	93	2.97	99	2.40	89	3.06	96	2.29	95	2.00	27	5.09
Argentina	64	3.57	67	2.94	90	3.05	53	3.91	54	3.03	41	4.94
Armenia	108	2.73	97	2.47	100	2.82	118	1.56	101	1.90	42	4.92
Australia	11	5.18	3	5.85	43	4.49	12	6.35	14	5.22	111	4.01
Austria	8	5.27	29	4.25	10	6.03	1	7.00	20	4.88	104	4.17
Azerbaijan	79	3.24	79	2.69	52	4.15	92	2.37	84	2.27	62	4.72
Bahrain	28	4.64	28	4.30	18	5.47	37	4.45	43	3.41	4	5.59
Bangladesh	103	2.79	116	2.12	69	3.56	122	1.29	122	1.52	10	5.44
Barbados	32	4.58	30	4.25	21	5.21	40	4.33	29	4.30	48	4.84
Belgium	31	4.61	38	3.97	7	6.36	41	4.30	24	4.64	122	3.76
Benin	121	2.58	122	2.00	128	2.31	87	2.53	114	1.64	81	4.42
Bolivia	101	2.84	108	2.25	114	2.59	99	2.21	106	1.81	14	5.32
Bosnia and Herzegovina	91	2.99	124	1.97	115	2.55	59	3.61	62	2.70	107	4.13
Botswana	76	3.31	77	2.72	72	3.50	78	2.80	92	2.05	6	5.49
Brazil	67	3.55	45	3.59	95	2.89	47	4.17	58	2.82	92	4.31
Bulgaria	52	3.84	101	2.38	77	3.40	22	5.42	44	3.40	69	4.62
Burkina Faso	123	2.56	126	1.95	102	2.80	94	2.30	121	1.52	101	4.22
Burundi	127	2.39	127	1.83	92	2.95	123	1.29	129	1.29	74	4.57
Cambodia	116	2.65	100	2.39	99	2.83	125	1.22	123	1.52	15	5.32
Cameroon	129	2.31	125	1.96	124	2.40	114	1.73	126	1.45	110	4.01
Canada	4	5.40	1	6.65	26	5.01	17	6.12	12	5.25	114	3.94
Chad	130	1.99	130	1.67	129	2.26	121	1.29	130	1.28	126	3.46
Chile	54	3.82	50	3.44	53	4.13	64	3.37	47	3.28	45	4.87
China	70	3.45	36	3.98	61	3.80	119	1.53	66	2.62	17	5.30
Colombia	83	3.20	63	3.06	101	2.81	81	2.77	70	2.59	55	4.78
Costa Rica	56	3.76	43	3.75	113	2.62	29	4.86	60	2.76	50	4.82
Croatia	38	4.32	66	2.96	54	4.05	10	6.63	37	3.72	98	4.26
Cyprus	17	5.04	25	4.50	17	5.47	3	6.95	34	3.99	95	4.28
Czech Republic	37	4.37	52	3.39	22	5.09	25	5.04	31	4.21	108	4.12
Denmark	10	5.20	12	4.98	6	6.48	23	5.31	5	5.78	128	3.43
Dominican Republic	63	3.61	46	3.54	80	3.33	45	4.23	75	2.44	76	4.49
Ecuador	95	2.94	84	2.65	119	2.49	89	2.49	81	2.30	53	4.80
Egypt	69	3.47	62	3.06	75	3.43	79	2.79	87	2.15	2	5.89
El Salvador	73	3.36	75	2.80	62	3.79	83	2.72	78	2.40	32	5.06
Estonia	18	4.91	55	3.26	25	5.01	11	6.36	17	5.14	60	4.75
Ethiopia	110	2.72	89	2.56	106	2.74	117	1.57	127	1.43	16	5.31
Finland	23	4.80	18	4.85	20	5.27	30	4.82	16	5.15	117	3.90
France	7	5.28	6	5.50	4	6.56	15	6.19	19	4.91	130	3.26
Gambia, The	87	3.11	90	2.56	64	3.77	102	2.09	107	1.81	18	5.29
Georgia	94	2.95	105	2.33	76	3.42	90	2.44	90	2.10	78	4.47
Germany	3	5.43	7	5.47	3	6.57	18	5.99	15	5.19	113	3.95
Greece	30	4.63	20	4.62	46	4.39	9	6.67	39	3.61	120	3.84
Guatemala	77	3.30	76	2.75	81	3.30	82	2.76	74	2.45	23	5.22
Guyana	114	2.67	110	2.24	108	2.72	127	1.08	80	2.31	36	4.99
Honduras	85	3.16	64	3.04	88	3.09	85	2.59	93	2.05	33	5.04
Hong Kong SAR	16	5.04	13	4.96	2	6.57	67	3.32	8	5.48	46	4.87
Hungary	41	4.18	65	2.98	32	4.81	27	4.89	35	3.82	79	4.43
Iceland	9	5.21	16	4.85	35	4.68	7	6.71	1	5.93	119	3.86
India	59	3.70	35	4.00	39	4.51	80	2.78	97	1.98	20	5.23
Indonesia	86	3.16	61	3.07	98	2.87	109	1.87	94	2.04	1	5.96
Ireland	20	4.90	24	4.54	45	4.45	5	6.78	27	4.47	99	4.24
Israel	36	4.39	47	3.52	31	4.86	36	4.51	22	4.75	91	4.32
Italy	24	4.77	26	4.43	40	4.51	4	6.88	25	4.57	124	3.49
Jamaica	48	3.87	53	3.28	38	4.53	55	3.81	45	3.38	85	4.38
Japan	21	4.88	21	4.61	9	6.33	46	4.18	18	4.98	94	4.28
Jordan	60	3.64	60	3.08	65	3.74	56	3.77	65	2.63	37	4.99
Kazakhstan	96	2.94	85	2.63	91	3.04	100	2.19	77	2.40	80	4.42
Kenya	102	2.82	73	2.83	107	2.73	98	2.27	108	1.80	75	4.50
Korea, Rep.	34	4.52	39	3.92	15	5.57	70	3.23	6	5.72	106	4.15
Kuwait	53	3.82	59	3.13	48	4.36	57	3.77	53	3.05	51	4.81
Kyrgyz Republic	128	2.37	119	2.08	121	2.43	129	1.06	112	1.67	70	4.62
Latvia	43	4.17	56	3.22	41	4.50	33	4.77	38	3.72	67	4.65
Lesotho	125	2.46	129	1.68	127	2.33	113	1.74	120	1.52	34	5.03
Libya	115	2.66	103	2.37	130	2.25	110	1.84	91	2.09	57	4.77
Lithuania	45	4.00	82	2.66	27	4.97	58	3.72	33	4.06	73	4.58

(Cont'd.)

Table 3: The Travel &amp; Tourism Competitiveness Index: Business environment and infrastructure (cont'd.)

Country/Economy	T&T BUSINESS ENVIRONMENT AND INFRASTRUCTURE		PILLARS									
	Rank	Score	6. Air transport infrastructure		7. Ground transport infrastructure		8. Tourism infrastructure		9. ICT infrastructure		10. Price competitiveness in T&T industry	
			Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Luxembourg	12	5.17	37	3.97	14	5.61	14	6.19	7	5.58	77	4.48
Macedonia, FYR	80	3.23	113	2.14	79	3.36	61	3.55	72	2.53	72	4.59
Madagascar	107	2.74	91	2.54	120	2.45	88	2.50	128	1.43	52	4.81
Malaysia	39	4.31	32	4.18	28	4.95	71	3.19	46	3.37	3	5.89
Mali	124	2.49	117	2.10	96	2.88	116	1.63	117	1.58	97	4.27
Malta	25	4.73	22	4.56	34	4.79	19	5.97	32	4.11	100	4.24
Mauritania	120	2.59	115	2.12	111	2.67	120	1.43	109	1.79	40	4.94
Mauritius	44	4.14	48	3.48	30	4.90	42	4.29	61	2.73	19	5.27
Mexico	61	3.62	42	3.78	82	3.28	49	4.00	64	2.67	83	4.39
Moldova	100	2.89	118	2.08	104	2.78	91	2.44	82	2.29	49	4.83
Mongolia	106	2.74	74	2.82	125	2.40	107	1.92	103	1.84	61	4.74
Montenegro	68	3.53	54	3.27	71	3.50	31	4.81	63	2.67	129	3.40
Morocco	75	3.32	69	2.92	67	3.62	72	3.18	85	2.19	64	4.69
Mozambique	119	2.59	114	2.14	118	2.53	106	1.95	125	1.49	44	4.88
Namibia	74	3.34	51	3.40	55	4.04	84	2.67	105	1.83	54	4.78
Nepal	122	2.56	109	2.25	122	2.42	126	1.10	124	1.49	5	5.55
Netherlands	14	5.11	17	4.85	8	6.35	35	4.68	2	5.89	121	3.78
New Zealand	26	4.72	10	5.10	50	4.26	34	4.77	21	4.83	68	4.63
Nicaragua	99	2.90	102	2.37	126	2.34	77	2.93	110	1.79	31	5.07
Nigeria	109	2.73	106	2.32	109	2.68	95	2.29	111	1.77	71	4.61
Norway	19	4.90	9	5.23	36	4.61	21	5.86	11	5.36	125	3.47
Oman	58	3.70	57	3.21	56	3.99	63	3.53	71	2.56	22	5.22
Pakistan	90	3.02	94	2.49	68	3.62	101	2.19	104	1.83	38	4.99
Panama	47	3.94	34	4.06	58	3.94	44	4.27	76	2.41	35	5.03
Paraguay	111	2.68	128	1.82	123	2.42	103	2.03	102	1.90	21	5.23
Peru	88	3.10	86	2.60	105	2.75	73	3.13	83	2.28	58	4.76
Philippines	84	3.20	72	2.89	85	3.24	97	2.28	89	2.12	9	5.47
Poland	62	3.62	87	2.57	57	3.95	60	3.60	41	3.59	87	4.36
Portugal	22	4.83	31	4.19	24	5.03	13	6.32	30	4.24	86	4.36
Puerto Rico	40	4.27	11	5.09	29	4.93	54	3.85	50	3.18	93	4.30
Qatar	35	4.50	23	4.56	33	4.79	24	5.22	40	3.61	89	4.34
Romania	66	3.55	88	2.57	74	3.44	38	4.42	48	3.24	109	4.10
Russian Federation	65	3.56	33	4.14	83	3.25	66	3.33	51	3.08	112	3.98
Saudi Arabia	55	3.78	49	3.46	60	3.85	68	3.31	59	2.80	8	5.47
Senegal	104	2.76	78	2.70	94	2.89	93	2.34	100	1.94	116	3.92
Serbia	72	3.36	92	2.54	86	3.15	52	3.91	57	2.82	82	4.40
Singapore	13	5.13	15	4.93	1	6.61	43	4.28	23	4.67	25	5.18
Slovak Republic	46	3.94	104	2.35	37	4.61	28	4.87	42	3.51	84	4.38
Slovenia	33	4.53	70	2.90	23	5.06	20	5.93	26	4.55	102	4.21
South Africa	51	3.85	40	3.79	59	3.89	51	3.94	73	2.53	29	5.08
Spain	5	5.32	8	5.34	16	5.54	1	7.00	28	4.37	88	4.35
Sri Lanka	81	3.21	81	2.68	42	4.50	111	1.81	96	1.98	26	5.10
Suriname	89	3.09	93	2.52	117	2.53	65	3.34	79	2.37	63	4.69
Sweden	15	5.05	14	4.95	12	5.79	26	4.98	3	5.87	123	3.63
Switzerland	2	5.55	19	4.71	5	6.55	7	6.71	4	5.87	118	3.89
Syria	97	2.93	95	2.49	70	3.55	104	1.99	98	1.96	66	4.67
Taiwan, China	29	4.63	41	3.79	13	5.78	74	3.11	10	5.40	30	5.07
Tajikistan	126	2.40	121	2.02	110	2.67	128	1.07	118	1.57	65	4.67
Tanzania	117	2.65	107	2.28	93	2.94	115	1.67	115	1.61	56	4.77
Thailand	42	4.17	27	4.32	51	4.15	39	4.36	67	2.61	11	5.42
Trinidad and Tobago	50	3.86	58	3.17	44	4.47	69	3.28	49	3.18	24	5.18
Tunisia	49	3.86	68	2.93	47	4.38	48	4.02	69	2.59	13	5.39
Turkey	57	3.73	44	3.71	63	3.79	50	4.00	55	2.97	103	4.19
Uganda	112	2.68	120	2.02	87	3.13	108	1.89	116	1.59	59	4.75
Ukraine	78	3.24	98	2.44	84	3.24	62	3.54	52	3.06	115	3.94
United Arab Emirates	27	4.69	5	5.50	49	4.34	32	4.79	36	3.76	28	5.08
United Kingdom	6	5.32	4	5.65	11	5.85	16	6.18	9	5.46	127	3.44
United States	1	5.58	2	6.34	19	5.45	6	6.74	13	5.23	105	4.16
Uruguay	71	3.37	111	2.21	66	3.71	75	3.07	56	2.97	43	4.88
Uzbekistan	98	2.90	80	2.68	73	3.47	130	1.04	99	1.95	12	5.39
Venezuela	82	3.21	71	2.90	112	2.66	76	3.03	68	2.61	47	4.85
Vietnam	92	2.98	83	2.65	78	3.38	124	1.25	88	2.15	7	5.47
Zambia	118	2.60	96	2.47	103	2.80	112	1.79	113	1.66	96	4.27
Zimbabwe	113	2.67	123	1.98	97	2.88	105	1.95	119	1.56	39	4.99

Table 4: The Travel &amp; Tourism Competitiveness Index: Human, cultural, and natural resources

Country/Economy	T&T HUMAN, CULTURAL, AND NATURAL RESOURCES		PILLARS							
	Rank	Score	11. Human resources		12. Affinity for Travel & Tourism		13. Natural resources		14. Cultural resources	
			Rank	Score	Rank	Score	Rank	Score	Rank	Score
Albania	71	3.85	58	5.03	6	6.32	130	1.87	75	2.17
Algeria	98	3.52	96	4.64	117	4.16	97	2.64	55	2.65
Argentina	27	4.50	60	5.01	74	4.69	12	5.01	41	3.29
Armenia	94	3.59	79	4.87	43	5.05	107	2.35	79	2.11
Australia	1	5.61	14	5.71	63	4.82	4	5.72	5	6.20
Austria	7	5.16	19	5.62	23	5.45	37	4.00	11	5.59
Azerbaijan	105	3.44	54	5.04	69	4.75	110	2.31	99	1.66
Bahrain	69	3.88	49	5.06	32	5.27	127	1.97	43	3.22
Bangladesh	126	3.07	107	4.26	125	3.95	100	2.61	109	1.44
Barbados	46	4.26	38	5.26	2	6.57	117	2.20	46	3.02
Belgium	22	4.56	18	5.64	44	5.02	119	2.19	15	5.38
Benin	115	3.36	110	4.12	83	4.63	54	3.34	114	1.37
Bolivia	60	4.02	98	4.60	116	4.18	15	4.86	62	2.45
Bosnia and Herzegovina	117	3.33	106	4.27	93	4.50	120	2.19	70	2.37
Botswana	103	3.45	124	3.36	58	4.85	31	4.20	113	1.37
Brazil	6	5.21	66	4.98	94	4.48	3	5.81	12	5.58
Bulgaria	31	4.48	59	5.01	16	5.67	59	3.22	29	4.01
Burkina Faso	127	3.01	123	3.42	104	4.40	67	3.09	127	1.14
Burundi	122	3.20	125	3.30	17	5.62	83	2.87	128	1.02
Cambodia	86	3.69	108	4.26	11	5.83	53	3.42	120	1.26
Cameroon	120	3.25	117	3.83	121	4.06	38	3.92	123	1.21
Canada	10	5.07	10	5.79	68	4.76	16	4.78	21	4.96
Chad	129	2.69	126	3.19	129	3.84	91	2.73	129	1.02
Chile	54	4.14	36	5.29	96	4.46	52	3.49	39	3.30
China	13	4.81	48	5.07	126	3.92	8	5.25	19	5.01
Colombia	38	4.35	67	4.97	89	4.56	5	5.50	68	2.37
Costa Rica	24	4.52	27	5.45	21	5.49	7	5.36	92	1.80
Croatia	32	4.43	50	5.05	7	6.25	68	3.08	37	3.35
Cyprus	40	4.34	63	4.99	5	6.35	106	2.37	32	3.67
Czech Republic	25	4.51	30	5.35	61	4.83	82	2.87	20	4.97
Denmark	28	4.49	3	6.11	84	4.62	63	3.12	27	4.13
Dominican Republic	67	3.89	86	4.79	15	5.69	50	3.50	102	1.60
Ecuador	58	4.05	100	4.52	103	4.41	14	4.90	69	2.37
Egypt	70	3.86	82	4.83	31	5.28	86	2.83	58	2.52
El Salvador	121	3.25	64	4.98	102	4.41	122	2.11	106	1.48
Estonia	49	4.22	33	5.33	18	5.59	43	3.79	74	2.18
Ethiopia	92	3.60	122	3.52	107	4.34	34	4.12	65	2.43
Finland	14	4.78	6	5.90	100	4.42	57	3.24	13	5.56
France	12	4.85	25	5.50	85	4.62	47	3.61	10	5.67
Gambia, The	97	3.53	104	4.35	19	5.56	95	2.67	104	1.53
Georgia	85	3.70	47	5.07	37	5.15	116	2.22	71	2.36
Germany	9	5.13	24	5.50	72	4.74	30	4.26	6	6.01
Greece	18	4.66	43	5.11	39	5.12	75	3.02	16	5.38
Guatemala	55	4.12	91	4.77	48	4.97	19	4.69	81	2.06
Guyana	93	3.60	77	4.87	47	4.98	65	3.10	110	1.44
Honduras	62	3.96	90	4.77	41	5.10	29	4.31	98	1.68
Hong Kong SAR	42	4.31	8	5.83	14	5.70	55	3.30	67	2.42
Hungary	50	4.21	57	5.03	108	4.33	90	2.74	23	4.75
Iceland	36	4.40	4	6.11	24	5.44	101	2.57	36	3.49
India	26	4.50	93	4.75	88	4.57	13	4.94	31	3.73
Indonesia	53	4.17	34	5.31	56	4.88	26	4.42	80	2.08
Ireland	41	4.31	11	5.77	51	4.95	113	2.25	26	4.28
Israel	59	4.02	20	5.62	59	4.85	64	3.11	60	2.50
Italy	15	4.74	39	5.22	67	4.76	60	3.17	8	5.81
Jamaica	66	3.92	69	4.95	4	6.43	99	2.62	100	1.66
Japan	16	4.73	12	5.74	128	3.87	40	3.90	14	5.38
Jordan	64	3.92	70	4.95	9	6.11	87	2.81	91	1.81
Kazakhstan	112	3.39	55	5.03	79	4.65	115	2.23	101	1.63
Kenya	77	3.76	105	4.33	60	4.84	24	4.52	116	1.36
Korea, Rep.	29	4.49	9	5.83	112	4.31	80	2.90	22	4.94
Kuwait	119	3.31	32	5.34	119	4.07	125	2.06	94	1.77
Kyrgyz Republic	102	3.47	92	4.76	26	5.38	102	2.53	125	1.20
Latvia	82	3.75	51	5.05	66	4.79	78	2.98	76	2.17
Lesotho	130	2.61	129	2.92	109	4.33	128	1.97	122	1.22
Libya	106	3.43	99	4.52	105	4.37	114	2.24	56	2.61
Lithuania	74	3.79	53	5.04	52	4.94	92	2.71	63	2.44

(Cont'd.)

Table 4: The Travel &amp; Tourism Competitiveness Index: Human, cultural, and natural resources (cont'd.)

Country/Economy	T&T HUMAN, CULTURAL, AND NATURAL RESOURCES		PILLARS							
	Rank	Score	11. Human resources		12. Affinity for Travel & Tourism		13. Natural resources		14. Cultural resources	
			Rank	Score	Rank	Score	Rank	Score	Rank	Score
Luxembourg	35	4.41	26	5.48	12	5.79	71	3.05	38	3.34
Macedonia, FYR	81	3.75	71	4.94	75	4.69	85	2.84	57	2.52
Madagascar	124	3.16	113	4.09	110	4.32	74	3.02	124	1.20
Malaysia	23	4.55	22	5.53	22	5.47	18	4.70	59	2.50
Mali	116	3.36	120	3.61	55	4.88	77	2.99	83	1.97
Malta	43	4.28	40	5.18	8	6.22	129	1.88	30	3.86
Mauritania	125	3.11	115	3.94	99	4.43	93	2.70	115	1.36
Mauritius	76	3.78	56	5.03	3	6.47	126	2.01	103	1.59
Mexico	19	4.62	52	5.05	86	4.59	25	4.44	25	4.43
Moldova	110	3.39	88	4.77	29	5.29	124	2.07	111	1.43
Mongolia	91	3.60	85	4.79	35	5.23	66	3.09	117	1.30
Montenegro	45	4.27	76	4.88	1	6.69	69	3.08	66	2.43
Morocco	72	3.81	95	4.67	25	5.43	118	2.19	48	2.96
Mozambique	128	2.97	130	2.92	92	4.51	61	3.16	118	1.28
Namibia	113	3.38	127	2.99	33	5.27	42	3.81	108	1.47
Nepal	99	3.51	116	3.84	78	4.67	35	4.11	112	1.43
Netherlands	21	4.58	16	5.68	76	4.68	88	2.78	18	5.16
New Zealand	17	4.70	21	5.62	34	5.25	28	4.33	33	3.59
Nicaragua	87	3.67	94	4.75	71	4.75	45	3.72	107	1.48
Nigeria	123	3.19	112	4.09	118	4.11	70	3.06	105	1.50
Norway	20	4.60	17	5.67	95	4.46	73	3.03	17	5.25
Oman	96	3.54	74	4.92	127	3.91	84	2.87	61	2.47
Pakistan	109	3.39	109	4.21	122	4.04	72	3.04	72	2.28
Panama	47	4.25	89	4.77	50	4.96	6	5.44	89	1.84
Paraguay	118	3.32	103	4.41	124	3.96	62	3.14	95	1.75
Peru	33	4.43	78	4.87	97	4.46	10	5.17	42	3.22
Philippines	78	3.75	61	5.00	65	4.81	58	3.23	82	1.98
Poland	34	4.42	41	5.18	120	4.06	46	3.72	24	4.72
Portugal	11	4.93	37	5.26	42	5.05	81	2.89	2	6.52
Puerto Rico	80	3.75	81	4.84	10	6.11	109	2.32	96	1.72
Qatar	65	3.92	23	5.51	49	4.97	121	2.16	45	3.04
Romania	73	3.79	68	4.96	101	4.42	96	2.67	44	3.12
Russian Federation	39	4.35	72	4.93	111	4.32	22	4.58	34	3.57
Saudi Arabia	107	3.43	83	4.82	123	3.99	44	3.75	126	1.16
Senegal	108	3.43	111	4.11	115	4.21	51	3.50	87	1.89
Serbia	88	3.64	45	5.10	98	4.44	112	2.27	52	2.73
Singapore	37	4.39	1	6.19	13	5.76	98	2.63	47	2.99
Slovak Republic	51	4.19	29	5.39	77	4.68	36	4.01	53	2.69
Slovenia	61	3.98	35	5.30	53	4.94	76	3.01	54	2.66
South Africa	52	4.18	118	3.81	45	5.02	21	4.60	40	3.30
Spain	4	5.33	31	5.34	46	4.99	32	4.19	1	6.80
Sri Lanka	63	3.95	62	4.99	64	4.82	49	3.55	64	2.44
Suriname	68	3.88	101	4.49	106	4.35	41	3.84	50	2.85
Sweden	8	5.15	15	5.70	82	4.64	39	3.92	3	6.36
Switzerland	3	5.39	2	6.17	40	5.12	23	4.53	9	5.76
Syria	95	3.55	97	4.60	27	5.36	123	2.10	77	2.15
Taiwan, China	79	3.75	13	5.72	73	4.70	103	2.44	78	2.13
Tajikistan	111	3.39	87	4.78	91	4.52	56	3.24	130	1.01
Tanzania	48	4.23	119	3.75	28	5.33	1	6.14	97	1.71
Thailand	30	4.49	65	4.98	20	5.51	20	4.63	51	2.83
Trinidad and Tobago	104	3.44	75	4.90	113	4.31	111	2.30	73	2.27
Tunisia	57	4.08	28	5.45	30	5.28	94	2.69	49	2.91
Turkey	44	4.28	73	4.92	38	5.14	79	2.97	28	4.08
Uganda	83	3.74	114	3.95	70	4.75	11	5.01	121	1.25
Ukraine	100	3.51	80	4.87	62	4.83	104	2.39	84	1.95
United Arab Emirates	89	3.62	42	5.15	36	5.18	108	2.33	90	1.81
United Kingdom	5	5.26	7	5.87	90	4.54	27	4.35	4	6.28
United States	2	5.52	5	5.91	114	4.29	2	6.04	7	5.83
Uruguay	56	4.09	46	5.09	54	4.93	89	2.78	35	3.55
Uzbekistan	101	3.51	44	5.10	81	4.65	105	2.37	86	1.90
Venezuela	75	3.78	102	4.44	130	3.51	9	5.21	85	1.94
Vietnam	84	3.71	84	4.80	87	4.58	48	3.58	88	1.86
Zambia	90	3.62	121	3.58	57	4.85	17	4.76	119	1.27
Zimbabwe	114	3.37	128	2.93	80	4.65	33	4.14	93	1.78



qualified labor easier there than in France, which is ranked a low 86th on this pillar.

**The United States** is ranked 7th. The country places 1st for the overall business environment and infrastructure, and 2nd for the country's human, cultural, and natural resources. In particular, the United States has an excellent air transport infrastructure (ranked 2nd), and high-quality tourism and ICT infrastructure. Its natural resources are ranked a high 2nd worldwide, with many protected areas and many World Heritage natural sites, although a perception exists that the environment is not being sufficiently protected (ranked 100th for environmental sustainability). Safety and security, ranked 119th, is also of concern: as well as some concerns about safety from crime, the country has one of the highest rates of road traffic incidents out of all countries covered.

**Canada** is ranked 9th, with its natural resources providing a key strength. The country's eight World Heritage natural sites place it 4th internationally. Canada's air transport infrastructure is second to none, and it also gets good marks for its tourism and ICT infrastructure, facilitating the online T&T environment. Canada receives a better assessment for its efforts toward ensuring environmental sustainability than the United States, and it also gets much better marks for the safety and security environment than its southern neighbor.

**Greece** is ranked 22nd, with rich cultural resources (ranked 16th), excellent health and hygiene (ranked 16th overall), and top-notch tourism infrastructure (9th). Greece is second to none in terms of the country's overall prioritization of Travel & Tourism. Further, there is a strong national affinity for tourism compared with many other European countries, including a generally open and positive attitude toward tourists (17th). The country's overall ranking is held back, however, by policy rules and regulations that are not entirely supportive of the sector's development (ranked 61st), with stringent rules governing FDI and foreign ownership restrictions as well as a long time and high cost involved in starting a new company. Another area of weakness is the country's ground transport infrastructure, which is less efficient than in many other European countries. The availability of qualified labor (ranked 62nd) is another area of concern, with, for example, insufficient training available in the country, and stringent hiring and firing practices.

**Italy**, despite being endowed with the most World Heritage cultural sites in the world, ranks a lower 28th in the TTCI ranking. As well as its cultural richness, Italy's strengths lie in areas such as the health and hygiene of the country (19th) and its excellent tourism infrastructure (4th). However, it faces a number of challenges that bring its overall rating down. These include policy rules and regulations, where Italy ranks 57th because of its very strong foreign ownership restrictions (ranked 102nd) and rules governing FDI (109th). Further, the government is not seen to be prioritizing the sector (ranked 97th). In addition, ground transport

infrastructure requires upgrading, and there are some safety and security concerns in the country (81st).

**Croatia**, a country aiming to join the European Union in the coming years, is ranked a reasonable 34th, on a par with countries such as Malaysia and Hungary and well ahead of several EU members. It is endowed with a number of cultural and natural World Heritage sites, and is ranked a high 7th in terms of its overall affinity for Travel & Tourism. In addition, the country's tourism-specific infrastructure is ranked a high 10th out of all 130 countries. On the other hand, in order to improve the sector's competitiveness further, a goal will be to further upgrade transport infrastructure, particularly railroads and ports, and to bring policy rules and regulations in the country more in line with those that are needed for developing the sector.

**Turkey** is ranked 54th in the TTCI. The country certainly benefits from its rich cultural heritage, with nine World Heritage cultural sites. However, its overall T&T competitiveness is held back by worries about safety and security (79th, particularly related to terrorism and road safety), health and hygiene (62nd), and ground transport infrastructure inadequacies. In addition, protecting the country's natural resources could be further prioritized.

**Russia** is ranked 64th overall. The country gets relatively high marks for natural resources (22nd) and cultural resources (34th), due in particular to its many World Heritage sites. It also has a quite well developed air transport infrastructure (33rd). However, ground transport infrastructure (83rd) and tourism infrastructure (66th) get lower marks, with few available hotel rooms in particular. Safety and security issues are also of serious concern (127th), with a high level of crime and violence, a lack of trust in the police to provide protection from crime, and a high rate of road traffic accidents. Most strikingly, Russia is assessed as having a very disadvantageous policy environment (110th) due, for example, to extremely high foreign ownership restrictions, property rights that are not well protected, and visa requirements for visitors from many countries. Environmental sustainability, ranked 117th, is also an area of concern. More generally, the sector is not seen to be a priority of the government, ranked a low 125th overall.

#### Asia and Oceania

**Australia** is the highest ranked country from Asia and Oceania. The only one in the top 10, it is ranked 4th, just behind Germany and ahead of Spain. Australia is ranked 1st worldwide for the number of World Heritage natural sites, and 5th for its cultural resources. Given the importance of the natural environment for much of its leisure tourism, it is notable that the stringency and enforcement of its environmental regulations are well assessed. Given the country's distance from other continents, and the related importance of domestic air travel to overcome the large distances between major sites, its

competitiveness is also buttressed by excellent air transport infrastructure (ranked 3rd), as well as good general tourism infrastructure. Australia also benefits from the relatively strong government prioritization of the tourism sector and effective destination-marketing campaigns.

Within the region, Australia is joined in the top 20 by **Hong Kong** (14th) and **Singapore** (16th). These economies have excellent infrastructures: their ground transport infrastructures are assessed as the top two in the world, and their air transport infrastructures also get high marks. They also benefit from well-qualified labor to work in the sector, both ranked among the top four in this area. With regard to the policy environment, they hold the top two places out of all countries, with rules and regulations that are extremely conducive to the development of their T&T industries (policies facilitating foreign ownership and FDI, well-protected property rights, few visa restrictions). Further, they are among the safest countries of all assessed with regard to crime and security. Hong Kong is unsurpassed for the quality of health and hygiene, and Singapore is ranked 5th in the overall prioritization of Travel & Tourism.

**Japan** is ranked 23rd in the TTCI, with good marks for its cultural resources (ranked 14th) attributable to its many World Heritage cultural sites and the large number of international fairs and exhibitions held in the country. The ground transport infrastructure is among the best in the world, especially railroads, and Japan continues to be a leader in the area of education and training. However, Japan ranks third from the bottom for the affinity of the country for Travel & Tourism (128th). Further, the sector is not perceived to be a priority for the government (ranked 87th).

**Korea** is ranked 31st, just ahead of Malaysia. Korea's strengths lie in the quality of its human resources (ranked 9th), its excellent ground transport and ICT infrastructure (ranked 15th and 6th, respectively), and its rich cultural heritage. On the other hand, its overall T&T competitiveness is held back by a weak affinity for Travel & Tourism (ranked a low 112th), its relative costliness as a destination (ranked 106th), and its underdeveloped tourism infrastructure (ranked 70th).

**Malaysia** is ranked 32nd, with its rich natural resources (ranked 18th) and good ground transport infrastructure. The country also benefits from excellent price competitiveness (ranked 3rd), with low comparative hotel and fuel prices, low ticket taxes and airport charges, and a favorable tax regime. Malaysia's policy environment is measured as highly conducive to the development of the sector (ranked 12th), and the government is prioritizing Travel & Tourism; it also has an excellent evaluation for its destination-marketing campaigns (ranked 7th). With regard to weaknesses, health and hygiene indicators lag behind those of many other countries in the region, with, in particular, a low physician density (placing the country 93rd).

**Thailand** is ranked 42nd in the TTCI. It is endowed with rich natural resources and a strong affinity for Travel & Tourism (both ranked 20th), with a very friendly attitude of the population toward tourists (ranked 10th). This is buttressed by the sector's strong prioritization by the government (ranked 12th) with, similar to Malaysia, excellent destination-marketing campaigns and strong price competitiveness. However, some weaknesses remain: despite the prioritization of the sector by the government, some aspects of the regulatory environment—such as stringent foreign ownership restrictions, visa restrictions for many travelers, and the long time required for starting a business in the country—are not particularly conducive to developing the sector (ranked 52nd).

**China** is ranked somewhat lower, at 62nd place. China has many clear strengths: it is ranked 3rd for its World Heritage natural sites and 5th for its cultural sites, demonstrating the rich cultural and natural heritage of the country. In addition, the country is ranked 17th in price competitiveness. However, there are some weaknesses pulling the country's ranking down. China has a relatively good air transport infrastructure (ranked 36th), but ground transport infrastructure gets middling marks (61st), and its tourism infrastructure remains highly underdeveloped (ranked 119th), with very few major international car rental companies operating in the country, few hotel rooms available, and few ATMs. In addition, China has a policy environment that is not conducive to T&T development (ranked a low 89th, just ahead of Mozambique), with property rights that are not sufficiently protected, strong foreign ownership restrictions, and visa requirements for most visitors. Furthermore, policies related to environmental sustainability get low marks (110th), with the government not seen to be prioritizing the development of the sector in a sustainable way. There are also some safety and security concerns (121st), as well as issues related to health and hygiene (99th), with access to improved sanitation and drinking water that is low by international standards. However, on a positive note, China does seem to be prioritizing the sector to a certain extent (36th), with active participation in most international tourism fairs.

**India** is ranked 65th overall. As with China, India is well assessed for its natural resources (ranked 13th) and cultural resources, with many World Heritage sites, both natural and cultural. The country also benefits from good price competitiveness, ranked 20th overall, despite somewhat high comparative hotel prices. India also has quite a good air transport network (ranked 35th), particularly given the country's stage of development, and a reasonable ground transport infrastructure (ranked 39th). However, the tourism infrastructure remains somewhat underdeveloped (ranked 80th), with very few hotel rooms per capita by international comparison and low ATM penetration. Further, despite government and industry efforts to promote the country abroad (India is

ranked 22nd with regard to tourism fair attendance) and the exposure given to recent promotional campaigns, the assessment of marketing and branding to attract tourists remains mediocre (ranked 51st). Another area of concern is the policy environment, ranked 102nd, with much time and cost for starting a business, bilateral Air Service Agreements that are not assessed as open, and visas required for most visitors.

**Indonesia** is ranked lower, at 80th overall. In terms of strengths, Indonesia places 26th for its natural resources, with several World Heritage natural sites and the richness of its fauna as measured by the known species in the country. Further, the country is ranked 1st overall on price competitiveness in the T&T industry because of very reasonable hotel prices, low ticket taxes and airport charges, favorable fuel prices, and overall relatively low prices in the country. In addition, it is ranked 11th for the national prioritization of Travel & Tourism. However, these strengths are held back by weaknesses such as underdeveloped infrastructure in the country, including to a certain extent air transport (61st), and especially ground transport (98th) and tourism infrastructure (109th). There are also some concerns related to safety and security, particularly a lack of trust of police services and the prevalence of road traffic accidents.

**The Philippines** is ranked 81st, just behind Indonesia. Among the country's strengths are its natural resources: it is ranked 21st for the number of World Heritage natural sites and, with its rich fauna, is ranked 38th for the total known species in the country. The Philippines also benefits from excellent price competitiveness (ranked 9th), with low prices overall, particularly hotel prices, and low ticket taxes and airport charges. There are also some aspects of the policy rules and regulations regime that are conducive to the development of the sector, such as few visa requirements for foreign visitors (ranked 3rd) and bilateral Air Service Agreements that are assessed as comparatively open (27th), although other areas such as the protection of property rights, rules related to foreign investment, and the difficulty of starting a business in the country remain a challenge. Other matters of concern are safety and security (ranked 113th), health and hygiene levels (91st), and a transport and tourism infrastructure that requires upgrading.

#### Latin America and the Caribbean

**Barbados** is the highest-ranked country in the LAC region, at 29th overall. Barbados is ranked 2nd for the country's affinity for Travel & Tourism, with a positive attitude toward tourists and toward the value of tourism in the country. The government is prioritizing the sector to a very high degree (ranked 2nd), spending a high percentage of GDP on the sector and ensuring effective destination-marketing campaigns. Further, the country has a regulatory environment that is quite conducive to the development of the sector, requiring few visitors to

have visas to enter the country and with open bilateral Air Service Agreements.

**Costa Rica**, ranked 44th, is second in the region. The country gets excellent marks for its natural resources (ranked 7th), with several World Heritage sites, a high percentage of protected areas, and the country's very diverse fauna. Given the importance of the natural environment for the country's tourism industry, it is notable that it ranks a reasonably high 32nd overall for environmental sustainability. However, safety and security remains a concern (66th). Further, although its tourism infrastructure is well developed (29th), with an excellent presence of major car rental companies and abundant hotel rooms, ground transport infrastructure requires upgrading (113th), particularly roads and ports, making travel in the country somewhat difficult.

**Puerto Rico** enters the TTCI for the first time this year, ranked 46th. Puerto Rico has a number of strengths, which include the strong affinity of the country toward Travel & Tourism (ranked 10th), a policy environment that is conducive to the development of the sector (15th), and efforts to ensure environmental sustainability (14th). Puerto Rico's transport infrastructure is also well assessed, particularly the air transport infrastructure (ranked 11th). On the other hand, its T&T competitiveness could be strengthened by upgrading its tourism-specific infrastructure (54th) as well as its ICT infrastructure (50th). Other areas of concern include safety and security in the country (55th) and health and hygiene issues (60th).

**Brazil** is ranked 49th overall. The country is ranked 3rd for its natural resources and 12th for its cultural resources, with many World Heritage sites, a great proportion of protected land area, and very rich fauna. This is buttressed by some focus on environmental sustainability (ranked 37th). However, the ground transport network remains underdeveloped with the quality of roads, ports, and railroads ranked 110th, 116th, and 87th, respectively. Safety and security continues to be of serious concern, ranked 128th overall, just behind Pakistan and Russia. The country also suffers greatly from a lack of price competitiveness (92nd), attributable in part to high ticket taxes and airport charges in the country. More generally, the overall policy environment is not particularly conducive to the development of the sector, ranked 95th, with discouraging rules on FDI and much time required for starting a business.

**Chile** is ranked 51st. The country has rich cultural resources, with five World Heritage cultural sites, and it has several international fairs and exhibitions held in the country. In addition, policy rules and regulations are conducive to the development of the T&T sector (18th), with few foreign ownership restrictions, a liberal visa regime, and open bilateral Air Service Agreements. The country also benefits from good safety and security by regional standards (36th). However, Chile's T&T competitiveness would be strengthened by upgrading its

transport and tourism infrastructure and a greater focus on developing the industry in an environmentally sustainable way.

**Mexico**, in 55th place, gets quite high marks for its natural and cultural resources (both ranked 25th), with many World Heritage sites. This is reinforced by the overall prioritization of the sector in the country (31st), with country-level participation at many T&T fairs and effective marketing and branding campaigns for attracting tourists. Some areas requiring attention are the tourism infrastructure (49th) and especially the ground transport infrastructure (82nd). In addition, Mexico is ranked a low 83rd for its price competitiveness, due in particular to very high ticket taxes and airport charges (ranked a low 124th overall). Safety and security also continues to be a major concern, ranked 122nd with high levels of crime and violence, a police force that cannot be relied on to provide protection from crime, and many road traffic accidents.

**Argentina** is ranked a bit lower than Mexico, at 58th place. Argentina is among the highest-ranked countries for its natural resources (12th), with a number of World Heritage sites, a natural environment that is evaluated as pristine, and very rich fauna. Price competitiveness is also in Argentina's favor (41st) with low comparative hotel and fuel prices as well as a generally competitive price level overall. The country also benefits from a relatively high airport density, abundant seat kilometers, and several operating airlines, although the quality of air transport is highlighted as a problem area (ranked 113th). Some aspects of the quality of human resources are also strengths, such as the high primary enrollment rate and the ease of hiring foreign labor. However, a number of weaknesses are pulling the country's overall score down. For example, several government policies—such as weak property rights (ranked 127th) and stringent rules on FDI (ranked 119th)—are not supporting the development of the sector. Further, environmental regulation is not sufficiently stringent (ranked 111th) or well enforced (ranked 120th), which is of concern given the importance of natural resources for the country's tourism industry.

**Venezuela**, despite its top-10 status for its endowment of natural resources, is ranked much lower than most other countries in the region, at 103rd. Among the significant weaknesses are a lack of safety and security (ranked 125th), a low prioritization of the tourism industry (123rd), and the lowest rank of all countries regarding the overall national affinity for Travel & Tourism (130th). In addition, infrastructure is in need of upgrading, particularly ground transport infrastructure (ranked 112th). The policy environment is also not very conducive to the development of the T&T sector. Property rights are not well protected in the country, and FDI is also not encouraged (both these indicators are ranked second to last, or 129th, in both cases just ahead of Zimbabwe).

### Middle East and North Africa

**Israel** is the highest ranked country in the MENA region, at 35th overall. The country's human resources base is well evaluated (20th), providing healthy and well-trained people to work in the T&T sector. Further, infrastructure is quite well developed compared with those of other countries in the region, especially its ICT infrastructure. Israel's regulatory environment, ranked 30th, is conducive to the development of the sector, with well protected property rights and low foreign ownership restrictions. And the country's environmental regulation also gets relatively good marks in terms of both stringency and enforcement. But although Israel gets excellent marks related to health and hygiene (ranked 8th), with one of the highest physician densities in the world, safety and security continues to be a major concern, placing the country at 60th, primarily related to concerns about terrorism (ranked 127th, ahead of just Colombia, Sri Lanka, and Nepal).

**Tunisia** is ranked 39th, with an excellent assessment of the prioritization of Travel & Tourism (8th)—similar to countries such as Spain and Switzerland—with high government spending on the sector, effective destination-marketing campaigns, and attendance at most major international tourism fairs. Further, unlike some other countries in the region, Tunisia is perceived as relatively safe from crime and violence (ranked 25th), including terrorism. In addition, price competitiveness is a positive attribute, ranked 13th, with very competitive hotel prices, reasonable fuel levels, and reasonable taxation, although ticket taxes and airport charges are comparatively onerous. Health and hygiene also remains an area of concern (75th), with a relatively low physician density and a low concentration of hospital beds.

**The United Arab Emirates (UAE)** also ranks among the top third of all countries at 40th, close behind Israel and Tunisia. While the UAE is not endowed with rich natural and cultural resources (108th and 90th, respectively), it does very well in several other areas captured by the Index. For example, the country exudes an extremely positive attitude toward foreign travelers (6th) and is also seen as safe from crime and violence (ranked 14th). The country also does comparatively well with regard to price competitiveness, ranked 28th in this area, despite a very high price level. This is the result of very low ticket taxes and airport charges, low taxation more generally, and low fuel price levels in the country. The UAE's infrastructure also gets good marks, particularly its air transport infrastructure, which is ranked a high 5th out of all countries assessed. The government is seen as prioritizing the sector strongly (ranked 4th), carrying out very effective destination-marketing campaigns (ranked 1st) and ensuring the presence of the country at major T&T fairs internationally. On the other hand, rules and regulations could be adapted to better support the sector's development, which is ranked 81st overall because of foreign ownership

restrictions, visa requirements for many visitors, and much time and cost required for starting a business in the country, for example.

**Egypt**, a country rich in cultural heritage (with six World Heritage cultural sites), ranks 66th overall in the TTCI. In addition to its cultural attributes, it benefits from excellent price competitiveness, ranked 2nd, just behind Indonesia. This is attributable to overall low comparative prices, including fuel prices and hotel room prices, as well as relatively low ticket taxes and airport charges. Further, there is a national prioritization of the sector, with the government ensuring both relatively high spending on Travel & Tourism and the country's presence at major tourism fairs. On the other hand, the country's infrastructure is somewhat underdeveloped, particularly its tourism infrastructure (79th) and ICT infrastructure (87th). An upgrading of the quality of the country's human resources available to work in the sector, ranked 82nd, would also improve the country's overall T&T competitiveness.

**Morocco** is ranked 67th, just behind Egypt. Morocco also receives a good evaluation for its cultural resources, being ranked a high 19th for the number of World Heritage cultural sites in the country. In addition, the government is seen to be prioritizing the development of the sector, and its policy rules and regulations are indeed somewhat supportive of the industry (ranked 40th), with a favorable visa regime and relative ease of setting up a business in the country. The government is also seen to be making efforts to develop the T&T sector in a sustainable way, protecting the natural environment. In order to improve the industry's competitiveness further, efforts should be made to improve health and hygiene levels in the country and upgrade the educational system, as well as make further improvements to the country's transport and tourism infrastructure.

### Sub-Saharan Africa

**Mauritius** is the highest-ranked country in the sub-Saharan African region at 41st overall, 19 places higher than the second-ranked country, South Africa. The Mauritian government is unsurpassed in terms of the prioritization of the sector, with very high government spending on the tourism industry (ranked 3rd), and ensuring excellent destination-marketing campaigns to attract tourists (ranked 8th). Along similar lines, Mauritius is ranked 3rd for the country's overall affinity for Travel & Tourism, with the sector representing an important part of the economy and the general attitude of the population to foreign travelers being extremely welcoming. The country's tourism infrastructure is quite well developed, particularly by regional standards, with a high concentration of hotel rooms and many major car rental companies operating in the country. Mauritius also benefits from price competitiveness (ranked 19th), with relatively low prices overall and taxation that is not overly burdensome. Safety and security levels are also

very good by regional standards (ranked 33rd), and are on a par with countries such as Canada and the Netherlands. In terms of challenges, there are some areas that could be addressed in order to improve Mauritius' competitiveness. For example, some aspects of the policy environment could be made more advantageous, such as easing up on foreign ownership restrictions and more open bilateral Air Service Agreements. And although the government is seen to be making an effort to develop the industry in a sustainable way (ranked 9th), this could be backed up by more stringent and clearer environmental regulations (ranked 50th).

**South Africa**, ranked 60th, is the region's second-strongest performer, and the only other country in the region within the top half of rankings. The country is ranked a high 21st for its natural resources, and 40th for its cultural resources, based on its many World Heritage sites, its rich fauna, and the many international fairs and exhibitions held in the country. South Africa also benefits from price competitiveness, with reasonably priced hotel rooms and a favorable tax regime. Infrastructure in South Africa is also well developed, particularly for the region, with air transport infrastructure ranked 40th and a particularly good assessment of road quality (38th). Overall, policy rules and regulations are conducive to the sector's development (ranked 36th), with well-protected property rights and few visa requirements for visitors. The country also gets good marks for environmental sustainability (ranked 35th). And the government prioritizes the development of the T&T sector as a whole, through, for example, effective destination marketing (ranked 21st). However, there are also some areas of weakness that have brought down the country's overall ranking. Safety and security is of serious concern (ranked 123rd), with the costs of crime and violence in particular ranked a low 125th. The country also has weaknesses in the area of health and hygiene, where it is ranked 82nd as a result of its low physician density (91st) and concerns about access to improved sanitation (84th) and drinking water (75th). Related to this, health indicators are extremely worrisome. South Africa's life expectancy is low, at 48 years, placing the country 117th overall, a ranking related in large part to the very high rates of communicable diseases such as HIV/AIDS. This is clearly an area requiring urgent attention to ensure the continuing availability of human resources for the T&T sector, as well as all sectors in the economy.

**The Gambia**, ranked 84th, is the next-most competitive economy in the region, closely followed by Botswana. Gambia's government places great priority on tourism (ranked 10th), with nearly 10 percent of its budget devoted to the sector (ranking the country 9th on this indicator). Further, developing the industry sustainably to protect the natural environment is also seen to be a priority for the government. In addition, Gambia benefits greatly from price competitiveness, ranked 1st out of all countries on the hotel price index

and 2nd for its overall low price levels. The country is also perceived to be relatively safe from crime and violence, another important feature. On the other hand, there are a number of areas requiring attention to increase Gambia's competitiveness. Although the ground transport infrastructure is somewhat developed by regional standards (ranked 64th), it could be upgraded. Efforts should also be made to improve the air transport infrastructure (90th) and general tourism infrastructure (102nd). Attention should also be placed on improving the health of the workforce and upgrading the educational system. Finally, policy rules and regulations are not conducive to the industry's development at present (ranked 93rd), with visas required for many visitors, property rights that are not perceived to be sufficiently protected, and much time and cost required for starting a business in the country.

**Botswana** is ranked 87th overall in the TTCI. The country, known for its beautiful natural parks, is ranked 31st out of all countries for its natural resources, with much protected land area (ranked 10th) and a lack of environmental damage. The country also benefits from excellent price competitiveness, where it is ranked 6th because of low ticket taxes and airport charges (14th) and a favorable tax regime in the country (17th). However, Botswana does face some challenges that lead to its rather low ranking overall. The policy regime is not extremely conducive to the development of the sector. Although the country does not have an onerous visa policy (21st), the country's bilateral Air Service Agreements are not evaluated as open (100th) and much time is required for starting a new business (108 days, placing the country 121st). Further, Botswana's transport infrastructure is somewhat underdeveloped, as well as its tourism infrastructure, with a low hotel room concentration (71st) and a limited presence of international car rental companies (74th). There are also some concerns in the area of health and hygiene, attributable to a very low physician density (102nd) and very limited access to improved sanitation (108th). Associated with this, the greatest comparative weakness relates to the health of the workforce, where life expectancy of just 35 years places the country last out of all 130 countries, in a tie with Lesotho. Botswana has the highest HIV prevalence rate of all countries covered.

**Tanzania**, ranked 88th, just after Botswana, is a country with some impressive strengths. The country is ranked 1st worldwide for the natural environment, with several World Heritage natural sites (ranked 10th) and so much protected land area as to place the country 4th on that indicator. This is buttressed by an important focus in the country on environmental sustainability (ranked 29th), particularly as it pertains to the development of this industry. There is also a general affinity of the population to Travel & Tourism (ranked 28th), and it is clearly seen to be an overall national priority (33rd). On the other hand, the policy environment could be more

supportive of the development of the sector, by ensuring more open bilateral Air Service Agreements (106th), pursuing a less stringent visa policy for visitors (67th), ensuring better protection of property rights (94th), and making it less costly to start a business (99th). Other issues of concern are security levels in the country, and a focus must be placed—as in most countries in the region—on improving the health of the workforce, upgrading the educational system, and improving all types of infrastructure on which the industry is dependent.

Looking further down in the rankings, **Zimbabwe** is ranked 117th overall. This is a low ranking for a country with such natural endowments as the famous Victoria Falls. Indeed, Zimbabwe is ranked 33rd for natural resources overall, with a number of World Heritage natural sites, much protected land area, and rich fauna. Despite these strengths, which have attracted tourists to Zimbabwe over the years, the Index mainly highlights the country's weaknesses in all of the other areas. The policy environment is among the worst in the world (ranked 128th), with rock bottom assessments for laws related to FDI and property rights (both ranked 130th). Safety and security is also a major concern, with high crime and violence and a lack of trust in the reliability of police services to provide protection from crime (123rd), reflecting the general breakdown in law and order in the country in recent years. There are also concerns related to human resources, with low enrollment rates in primary and secondary education by international standards, and among the worst health indicators in the world: life expectancy is just 37 years now in the country, placing it 128th. Better governance will be imperative to get the country back on track for improved T&T competitiveness.

## Conclusions

This chapter has assessed the Travel & Tourism competitiveness of 130 economies, spanning all regions of the world, based on the World Economic Forum's Travel & Tourism Competitiveness Index. 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 have improved upon the Index released for the first time last year, with a particular effort to better capture the importance of environmental sustainability for the sector's development.

By highlighting success factors and obstacles to T&T competitiveness in economies around the world, the TTCI is a tool that can be used to identify the competitive strengths of individual countries as well as the barriers that impede the development of the sector. It is our hope that it will be used as a platform for dialogue between the business community and national policymakers working together to improve the T&T

competitiveness of their respective economies, and thus contribute to improving the growth prospects and prosperity of their citizens.

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## Notes

- 1 UNWTO 2007a.
- 2 These figures include direct and indirect effects. See UNWTO 2007c.
- 3 WTTC 2007.

## Appendix A: Composition of the Travel & Tourism Competitiveness Index

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

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

The hard data indicators used in the TTCI are normalized to a 1-to-7 scale in order to align them with the Executive Opinion Survey’s results.<sup>1</sup>

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

### Subindex A: T&T Regulatory Framework

#### Pillar 1: Policy rules and regulations

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

#### Pillar 2: Environmental sustainability

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

#### Pillar 3: Safety and security

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

#### Pillar 4: Health and hygiene

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

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

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

### Subindex B: T&T Business environment and infrastructure

#### Pillar 6: Air transport infrastructure

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

#### Pillar 7: Ground transport infrastructure

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

#### Pillar 8: Tourism infrastructure

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

#### Pillar 9: ICT infrastructure

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

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

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

(Cont'd.)



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

### Subindex C: T&T Human, cultural, and natural resources

#### Pillar 11: Human resources

##### Education and training

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

##### Availability of qualified labor

- 11.06 Hiring and firing practices
- 11.07 Ease of hiring foreign labor
- 11.08 HIV prevalence (hard data)<sup>2</sup>
- 11.09 Business impact of HIV/AIDS<sup>2</sup>
- 11.10 Life expectancy (hard data)

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

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

#### Pillar 13: Natural resources

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

#### Pillar 14: Cultural resources

- 14.01 Number of World Heritage cultural sites (hard data)
- 14.02 Sports stadiums (hard data)
- 14.03 Number of international fairs and exhibitions (hard data)

### Notes

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

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

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

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

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

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

## Environmental Sustainability as a Driver for Competitiveness

JÜRGEN RINGBECK, Senior Partner, Booz Allen Hamilton

STEPHAN GROSS, Senior Associate, Booz Allen Hamilton

As concerns mount about rising kerosene prices for airlines, growing carbon emissions from aviation, the impact of tourism on the natural environment, and the increasing pressure from regulators, investors, and end consumers for green behavior, Travel & Tourism (T&T) companies are finally paying attention to their ecological conduct and environmental sustainability. But what exactly is “environmental sustainability”? How does it drive competitiveness in the public and private sectors? And can it be leveraged to create a win-win solution for T&T operators, investors, national economies, local populations, and travel consumers? We will explore these questions in detail and highlight some of the key success factors to consider in leveraging environmental sustainability to further drive competitiveness in the T&T industry.

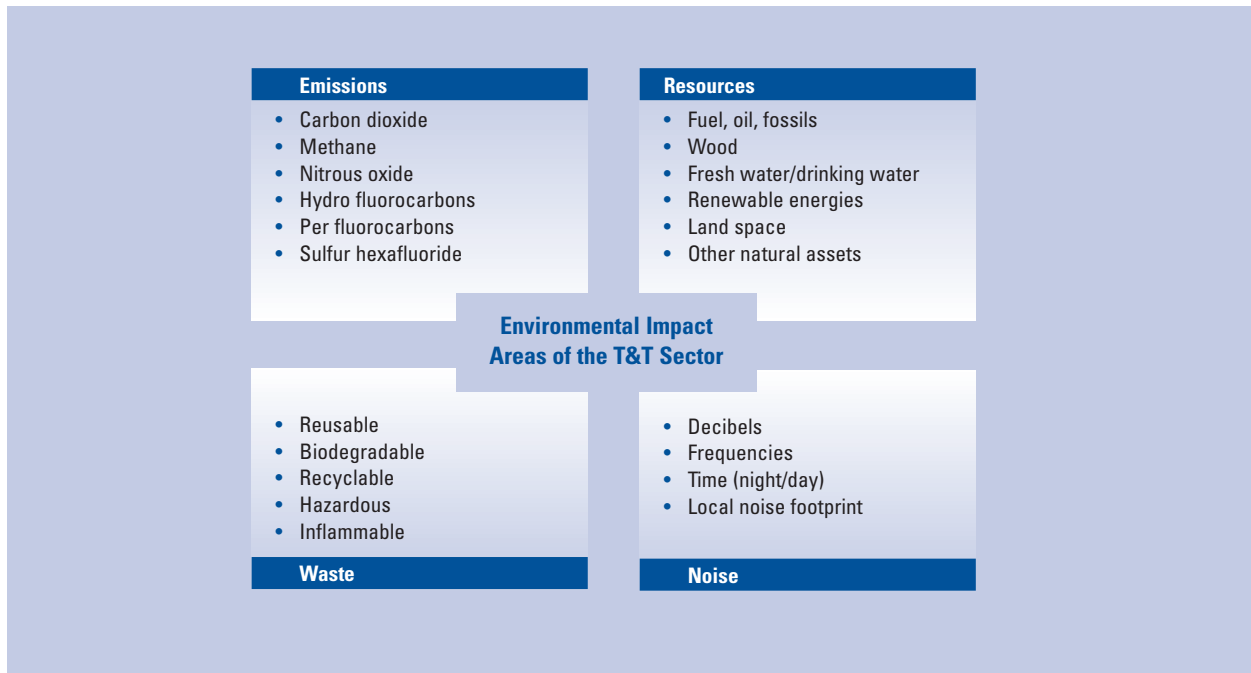
### Dimensions and impact of environmental sustainability

In the context of this chapter, we define *environmental sustainability* as the development of the T&T sector in a way that meets the current needs of the industry at the destination, without compromising the needs of future generations in regard to all human ecological support systems—such as clean air, unpolluted water, or uncontaminated food. The different areas of environmental impact of the T&T industry can be described and structured within four basic categories: emissions, resources, waste, and noise (Figure 1).

These four categories vary in their impact and importance, depending on where along the industry value chain violations or improvements occur—whether in distribution (e.g., tour operators and travel agencies), transportation (e.g., air, rail, and road) or accommodation (e.g., hotels and resorts). And for each player, every dimension of environmental sustainability can be addressed to different degrees on local, regional, or even global levels. The importance of each category also varies by geography, because regional stakeholders put different emphases on environmental impact quality control. For example, whereas noise had been the number one issue for many airports for a long time, CO<sub>2</sub> emissions are currently the main focus for the air travel industry. But each player has the capacity to address every dimension of environmental sustainability to some degree, on a local, regional, or worldwide level (see Figure 2).

As a result of global warming, the issue of **emissions** has recently been the most widely discussed and recognized environmental problem. Since the effects of greenhouse gases on climate, and thus tourism, are indisputable, both public awareness and regulatory bodies have evinced an interest in “greener” travel, which focuses on the reduction of CO<sub>2</sub> emissions. A number of international and even global initiatives have already

The authors would like to thank Dr Timm Pietsch and Andreas Adrion for their excellent research assistance.

**Figure 1: Categories of environmental impact of the T&T sector**

Source: Booz Allen Hamilton.

been implemented across different countries and regions to deal with these issues. With its strong growth to date and its potential to continue that growth, the T&T sector already attracts a lot of attention from environmental groups and public regulators. The next stakeholders who request the sector to cut down on its carbon footprint and ask for cleaner ways to travel may be private investors and consumers. Discussions about global warming and the impact of the T&T industry in this area have just started—and are not expected to cease in the years to come.

The efficient use of **natural resources** also has some relevance at the global level—for instance, in considering the decreasing availability of fossil fuels and the rising demand for oil and kerosene in transportation. However, its impact is clearest at the local level (e.g., when expanding infrastructure) and the regional level, such as when clean water is scarce and usage needs to be split between the needs of the domestic population and incoming tourists. Looking at islands, for example, where natural resources are mostly composed of coral reefs, nearby tourism resorts often poorly maintain their septic tanks, which leads to sewage pollution of the drinking water as well as to a deterioration of near-shore water quality—damaging and even destroying their major tourism attractions. Considering that an average hotel room in island resorts can create as much as 20 to 30 kilograms of waste and uses up to 700 liters of water each day, the impact on natural resources can be tremendous, if not managed sustainably.

**Waste** management is also relevant on a regional level. This especially holds true for destinations with restricted land areas, such as islands, where imported tourism consumables quickly turn into rubbish that is dumped in ever-growing landfills. If not handled in a sustainable way, short-term solutions not only endanger these fragile ecosystems; they also put tourism at risk in the long run.

Finally, at a local level, **noise pollution** remains a key environmental issue for the T&T sector and the air travel industry in particular, despite the fact that modern aircraft are considerably quieter than their predecessors. The increasing volume of traffic has outweighed this improvement in most of the world's major hubs and imposes a major hurdle that needs to be overcome when expanding ground infrastructure and increasing aircraft movements at airports with communities nearby.

Due to increasing public awareness, all players in the T&T industry need to start thinking about environmental sustainability holistically when developing their strategy. As the demand for green travel continues to grow, both governments and industry operators are forced to look at all dimensions of environmental sustainability and consider the impact of regulation and corporate conduct on both natural and cultural assets. Only the countries that manage to create a win-win solution by balancing the requirements of the tourism industry with the preservation of these assets will be successful in the long run and gain a competitive advantage over other destinations. Public authorities as well as

Figure 2: Examples of environmental impacts of different players along the T&amp;T value chain

		Distribution (e.g., tour operators, travel agencies)	Transportation (e.g., airlines, airports)	Accommodation (e.g., hotels, resorts)
Global ↑ Local	Emissions	<ul style="list-style-type: none"> <li>• Heating/cooling</li> <li>• Company cars</li> </ul>	<ul style="list-style-type: none"> <li>• In-flight (airlines)</li> <li>• On-ground (airports, roads)</li> </ul>	<ul style="list-style-type: none"> <li>• Heating/cooling</li> <li>• Electricity usage</li> </ul>
	Resources	<ul style="list-style-type: none"> <li>• Energy consumption</li> <li>• Administration</li> </ul>	<ul style="list-style-type: none"> <li>• Gasoline/kerosene</li> <li>• Land-area usage</li> <li>• Building materials</li> </ul>	<ul style="list-style-type: none"> <li>• Energy consumption</li> <li>• Water usage</li> <li>• Land-area usage</li> </ul>
	Waste	<ul style="list-style-type: none"> <li>• Hard-copy advertising</li> </ul>	<ul style="list-style-type: none"> <li>• In-flight and on-ground consumables</li> <li>• Tires, oils, grease</li> </ul>	<ul style="list-style-type: none"> <li>• Buildings</li> <li>• Food</li> <li>• Laundry</li> </ul>
	Noise	<ul style="list-style-type: none"> <li>• n/a</li> </ul>	<ul style="list-style-type: none"> <li>• Take-off &amp; landing</li> <li>• Airport operations</li> <li>• Maintenance</li> </ul>	<ul style="list-style-type: none"> <li>• Construction</li> <li>• Entertainment</li> </ul>

Source: Booz Allen Hamilton.

private operators that see environmental sustainability as an opportunity to gain competitive advantage rather than as a threat may be able to create a new selling proposition and thereby attract new customers. But how? By looking at the Travel & Tourism Competitiveness Index (TTCI) results and taking some country and industry examples as case studies, we can shed some light on this question.

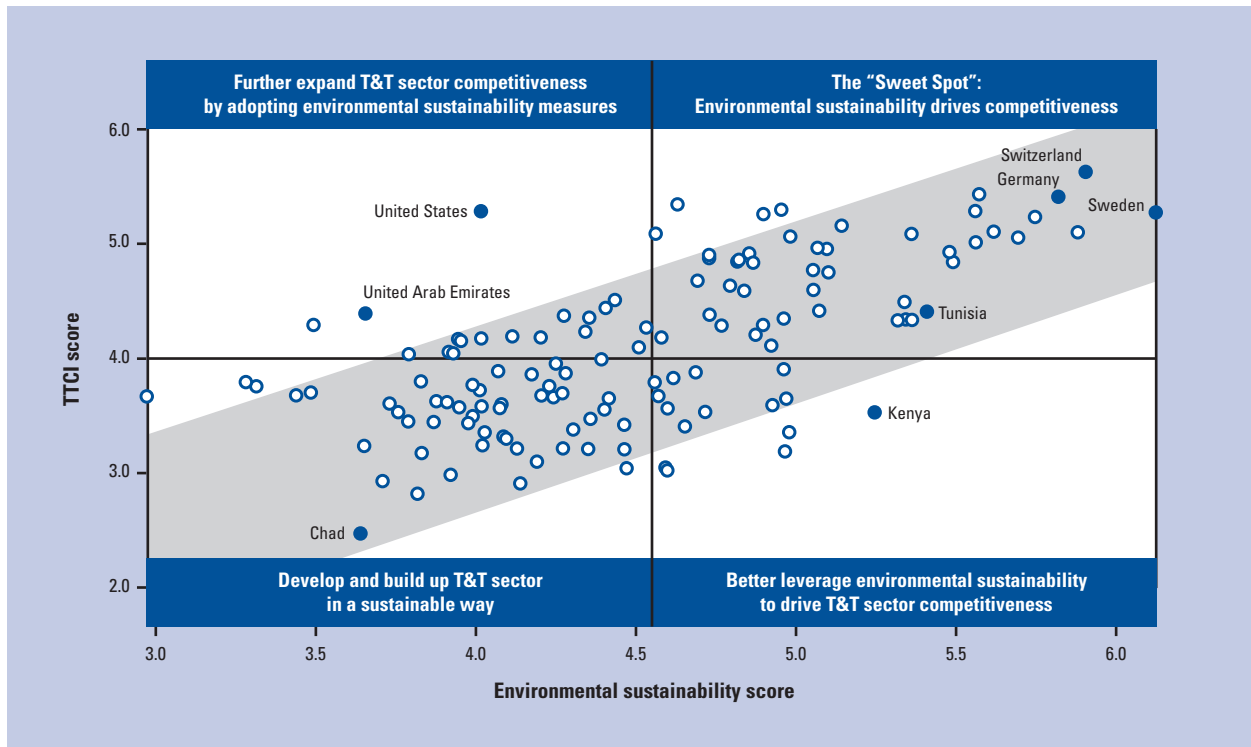
### Environmental sustainability: A driver of a country's sector competitiveness

A country's level of environmental sustainability can be determined by its input measures, such as regulatory policies, and output measures, such as the eco-footprint of a country's tourism sector on a macro level and the behavior of private operators in the industry on a micro level. To evaluate the impact of these measures on the sector's competitiveness, this year the TTCI included, for the first time, an additional pillar on environmental sustainability. This pillar evaluates the stringency and enforcement of environmental regulation, ratified environmental treaties, and the sustainability of the T&T industry's development, as input measures. As output measures, carbon dioxide emissions, particulate matter concentration and the percentage of threatened species give some indication of an economy's impact on its environment. Of course, these outputs are not solely driven by Travel & Tourism, but by economic activity as a whole. However, in light of scarce statistics regarding

industry-specific environmental measures, these variables seem to be the best available proxy of ecological behavior and its influence on the T&T sector's competitiveness.

Looking at the overall scores of the TTCI on one side and the scores of the environmental sustainability pillar on the other shows a positive correlation, which underscores the fact that T&T industry competitiveness can be the result of long-term, sustainable regulatory policies that aim to preserve natural and cultural assets. Countries that score well in the sustainability category also show a high competitiveness ranking overall (Figure 3). The leading economies in the environmental sustainability pillar have very strict and stringent environmental policies—related not only to the tourism industry, but to other sectors overall. In Germany, for example, renewable energy production is subsidized heavily by the state; the building of infrastructure and the control of particulate measures in inner cities are also tightly controlled by the government to prevent environmental and health damage for tourists as well as the domestic population. This is one of many reasons that Germany ranks not only among the top countries in the environmental sustainability pillar, but also among the top three in the overall TTCI.

The top right corner of Figure 3 highlights the “sweet spot” in which countries have established a sustainable regulatory framework, assigning value to the protection of its natural assets as a means to drive the T&T sector's competitiveness. In addition to Switzerland, Germany, and Sweden, the majority of the other European countries also emerge in this quadrant, mainly

**Figure 3: Travel & Tourism Competitiveness Index score vs. environmental sustainability pillar results**

Source: World Economic Forum, TTCI 2008; Booz Allen Hamilton analysis.

because of the strict environmental regulations in the European Union (EU). The Nordic countries especially rank exceptionally high on the environmental sustainability pillar: Sweden leads the way, closely followed by Denmark (ranking 3rd), Norway (6th), and Finland (7th).

Finland offers many good examples of how to protect the natural environment. Wide-ranging and detailed environmental data and high levels of technological skill form the basis of Finland's effective environmental protection policies. Enhancing efficiency in the use of materials is one of the main goals of the country's environmental policies: the concept of eco-efficiency is used to promote ecological improvements, with the idea being to produce more commodities and well-being using the same amounts of resources. Initiatives designed to increase eco-efficiency include a far-reaching national program to promote sustainable consumption and production, which includes more than 70 measures designed to save energy and natural resources. The low population density and comparatively unspoiled natural environment in the Scandinavian countries also facilitate nature conservation: most Nordic countries have built up an extensive network of protected areas to safeguard biodiversity, which is one of the reasons why they show up at the top of the environmental sustainability pillar ranking.

But less-developed countries such as Tunisia (ranked 13th) and Puerto Rico (at 14th) are also relatively competitive in terms of environmental regulations. Tunisia,

for example, is one of the few developing countries that place a high priority on the state of the environment and land development. Clear-sighted policies and a vigorous application of regulations have resulted in Tunisia enjoying the status of being one of the cleanest countries in the southern Mediterranean. In addition to the positive impact this has on health and tourism, it could become a crucial competitive element when international environmental regulations begin to emerge in the near future.

Apart from these best practice examples of countries where environmental sustainability goes hand in hand with Travel & Tourism, there are also countries that score quite well in the overall TTCI, but perform relatively weakly in terms of environmental sustainability measures (visible in the top left corner of Figure 3). For example, despite the fact that the United Arab Emirates has started to invest in green buildings and cities that only use recyclable and renewable resources to reduce waste, a lot of infrastructure projects are driven by economic instead of ecological goals. The building of the artificial islands at the Dubai coast, for instance, might have a negative impact on maritime life; also, the country still does not regard solar energy as an alternative to cheap local fossil fuels for energy production.

Being one of the major domestic and inbound tourism destinations in the world, the United States also scores well in the overall TTCI (ranking 7th), but looking at the environmental sustainability pillar, the country

falls back to 100th place. The low score on this pillar is not only a result of its relatively weak regulatory measures to combat global warming, but is also driven by inefficient energy consumption and the relatively high levels of air pollution in major cities as a result of limited public transportation and relatively high fuel burn of private cars. In general, countries within this top-left quadrant already score high in overall competitiveness but might consider further improvement of the T&T sector by adopting, implementing, and controlling environmental policies—whether monetary incentives or regulatory measures—that preserve not only natural assets within the country but also contribute to its global brand awareness, which might attract more tourists in the long term.

Countries that find themselves within the lower right corner of Figure 3 have already adopted a competitive, environmentally friendly regulatory framework, but do not yet score high in the overall T&T. Kenya, for example, is ranked 19th on the environmental sustainability pillar, but only 101st in the overall Index. Since Kenya is well aware of its natural assets (ranked 24th) it has established a multitude of national parks to preserve its wilderness attractions. On the other hand, however, the country is lacking in other metrics of the T&T, such as safety and security (ranked 120th), health and hygiene (118th), and ground transportation infrastructure (107th). A lot of countries that depend on their natural resources find themselves in the same dilemma: natural and cultural assets alone are not sufficient to be competitive; the basic elements for tourism also need to be developed in a sustainable way, such as providing access by road, rail, or air network links and ensuring the safety and health of incoming visitors. With increasing green tourism trends, these countries have a solid opportunity if they leverage their natural and cultural assets in an environmentally friendly way—thus attracting a newly emerging tourism segment in the years to come.

Countries that show both relatively low overall Index scores and low rankings within the environmental sustainability pillar, such as Chad, need to build up the basic elements of the sector (e.g., its regulatory framework, infrastructure, distribution channels, and so on). While they look to improve their competitiveness in the overall T&T sector, they need to make sure that they develop a strategic plan, which takes not only short-term tourism receipts into account, but also the impact of that tourism on the domestic population and the financial viability of potential public or private investments. Regardless of a country's development stage, such a sustainable tourism strategy can drive competitiveness—not only for the public sector, with its goal of increasing inbound T&T receipts, but also for the private sector to grow profitably into new markets. By not only looking at best practice but also learning from bad examples of other countries, these economies can build up their T&T sector effectively in a relatively short time.

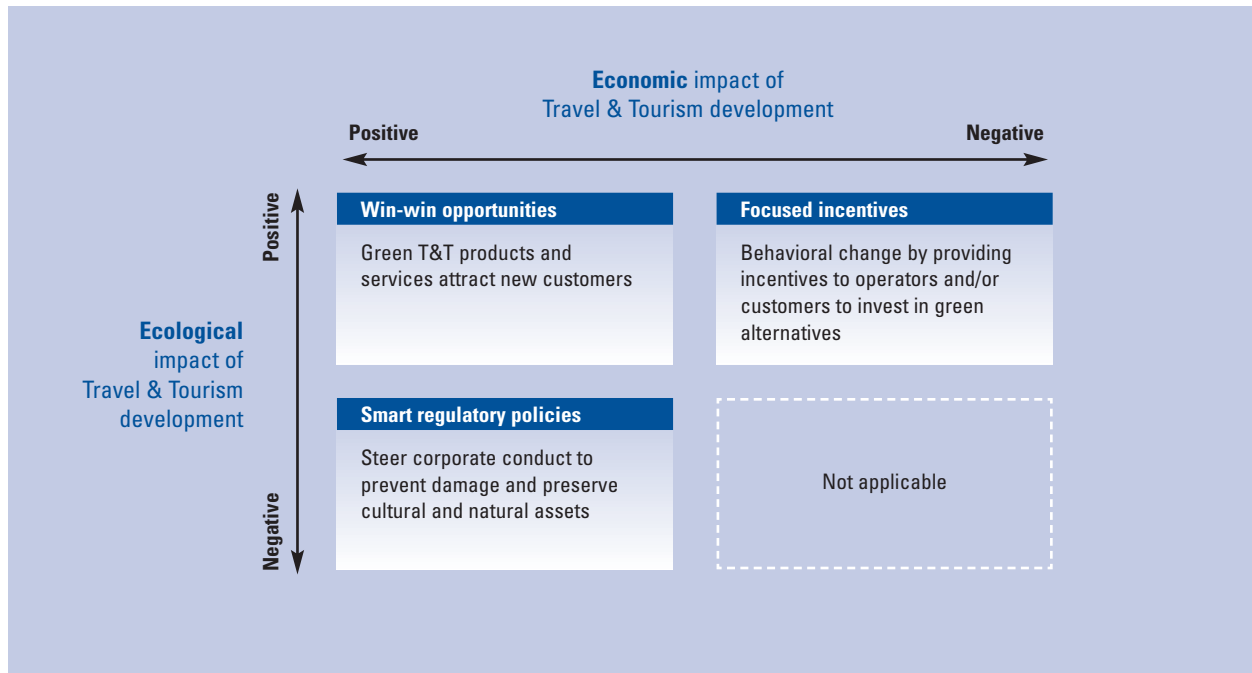
### **The public sector: Safeguarding environmental sustainability**

Since the private sector always needs to strive for profitable growth, environmental sustainability will be embedded in the product portfolio and corporate conduct of the industry only if it pays off economically. Thus, one of the key challenges for public authorities will be to balance the tradeoffs between the economic goals of private investors and operators and the long-term environmental requirements of current and future tourists and the local population. But what if an environmentally viable model is not supported by a positive business case? Alternately, what if certain measures yield positive monetary results at the expense of the environment?

Because of this potential conflict, the public sector needs to step in to safeguard environmentally sustainable development of the T&T sector. Public authorities need to evaluate environmental impacts and define and implement the most effective measures to steer both corporate and end-consumer behavior, striking a balance between the costs incurred by private operators and the costs that occur as a result of the usage or even the damage of natural and cultural resources. This can be regulated either by allocating incentives or by adopting public standards, measures, and policies. But since any regulation that is put in place will come at a cost—either to the state, the industry, or the end consumer—the public sector also needs to consider the impacts of its regulatory framework not only on the environment but also on overall tourism demand and the sector's competitiveness. Depending on the price sensitivity of visitors and the competitive level of a country's T&T industry, additional costs that are imposed on the sector might drive tourists out of the country—and result in the opposite effects of any regulation's original intent. Hence, the public sector needs to define a regulatory framework that considers all costs implied to establish a balance that effectively develops the sector in a sustainable way by:

- supporting operators that invest in green tourism products and/or services;
- preserving cultural and natural assets; and
- maintaining a constant, and potentially even growing, tourism stream.

Events that will have irreversible or cost-intensive impacts on the environment, such as the destruction of natural or cultural assets, especially need to be addressed by government policy and regulation. But reversible impacts (which can be ameliorated over time, once there is a viable business case) also need to be considered; the actual costs incurred need to be taken into account, which is possible only if assets are priced correctly. As a result, short-term profits might become losses if tourism attractions are destroyed in the long term. On the other

**Figure 4: Examples of public-sector initiatives to manage the balance of economic and ecological T&T development**

Source: Booz Allen Hamilton.

hand, innovative ways of using renewable energy production technologies might suddenly pay off, if the environmental damage of traditional technologies is considered. Apart from cost, the value added—both for incoming tourists and also for the domestic population—should be part of the equation.

In terms of the economic and ecological impacts of development activities in the T&T sector, there are basically three types of initiatives in which the public sector can steer the industry (see Figure 4). First, governments need to identify and promote potential win-win opportunities that not only provide a viable business case for private investors and operators but that also have a positive impact on cultural and/or natural assets and the local population. One example of such a win-win opportunity is the T&T strategy of the Tuscany region in northern Italy, which implemented policies for tourism infrastructure such as accommodation and hotels (the so-called agricultural tourism strategy). To keep the cultural heritage and the natural landscape, the region prevents the build-up of large tourism resorts but provides incentives for the restoration and transformation of old farmhouses into little lodges.

Second, in cases where the return on investment is positive for the private sector but the environmental impact on nature and society is negative, the public sector needs to step in to prevent long-term damage to its assets and the destination's reputation. By adopting a smart

regulatory policy in regard to sustainable tourism, a country can make sure that economic, mostly short-term goals from the private sector are balanced against the ecological, long-term goals of the domestic society, the natural environment, and incoming tourism needs and expectations. Therefore, this regulatory framework needs to consider all aspects of environmental impacts from emissions, resources, waste, and noise. This framework can be driven by regulatory penalties, laws, and legislation that set standards and targets—for example, for carbon emissions, recycling, and utility usage. In addition to defining environmental regulation, governments need to ensure that policies are actually implemented and that they drive both corporate as well as private sustainable behavior.

For example, Montenegro, as one of youngest nations on the planet as well as one of the fastest-growing of all tourist destinations, has declared itself an “ecological state.” In order to avoid the problems caused by mass tourism in other, more established Mediterranean destinations, Montenegro has set up an agenda for tourism development that has sustainability, nature protection, and ecotourism at its core (Box 1). Because attracting foreign investment continues to be an important aspect of the country's tourism-development agenda, policymakers have ensured sustainable infrastructure construction by implementing sustainability principles with

which all investments must comply. These principles are being realized through:

- the introduction of transparent emission-taxation schemes (e.g., a mandatory fee for cars entering the country);
- implementation of location-specific land use requirements to enable sustainable growth of tourism without jeopardizing natural beauty;
- creation of a high-quality tourism product portfolio through investments in human capital and through recruitment support and training to complement and support “hardware” investment;
- introduction of specific programs and policies to attract those investors with a long-term perspective, with operating expertise, and with a sensitivity and commitment to the impact of national tourism development;
- a commitment to environmental education as part of the mission of the government generally and the tourism Ministry in particular;
- a “Middle Path” approach, balancing the need for growth with the need for truly sustainable development; and
- creation of a rigorous and consistent tender process for privatization of tourism-related assets that focuses on the quality of the investor, of the operator, and of the proposed project.

Third, there are alternative solutions (e.g., for transportation, energy production, and consumption or consumables) that have a positive ecological impact but currently have a negative return on investment—especially compared with other, cheaper solutions and technologies. In the areas of waste management or alternative power resources, for instance, the private sector will often fail to use recyclable materials or solar energy if no additional incentives are provided by the government. Many cases have shown that without the support of the public sector, behavioral change might not take place. But, if public policy provides incentives to invest in hybrid cars or new energy sources, then operators as well as the end consumer will shift toward environmentally friendly alternatives.

California, for example, enacted global-warming legislation to force the state’s largest industrial polluters to reduce their greenhouse gas emissions 25 percent by 2020. This law led to the creation of a carbon market, allowing clean-energy producers in the world’s sixth-largest economy to sell carbon credits to polluters who

### Box 1: The Case of Montenegro: Steps toward environmentally sustainable tourism development

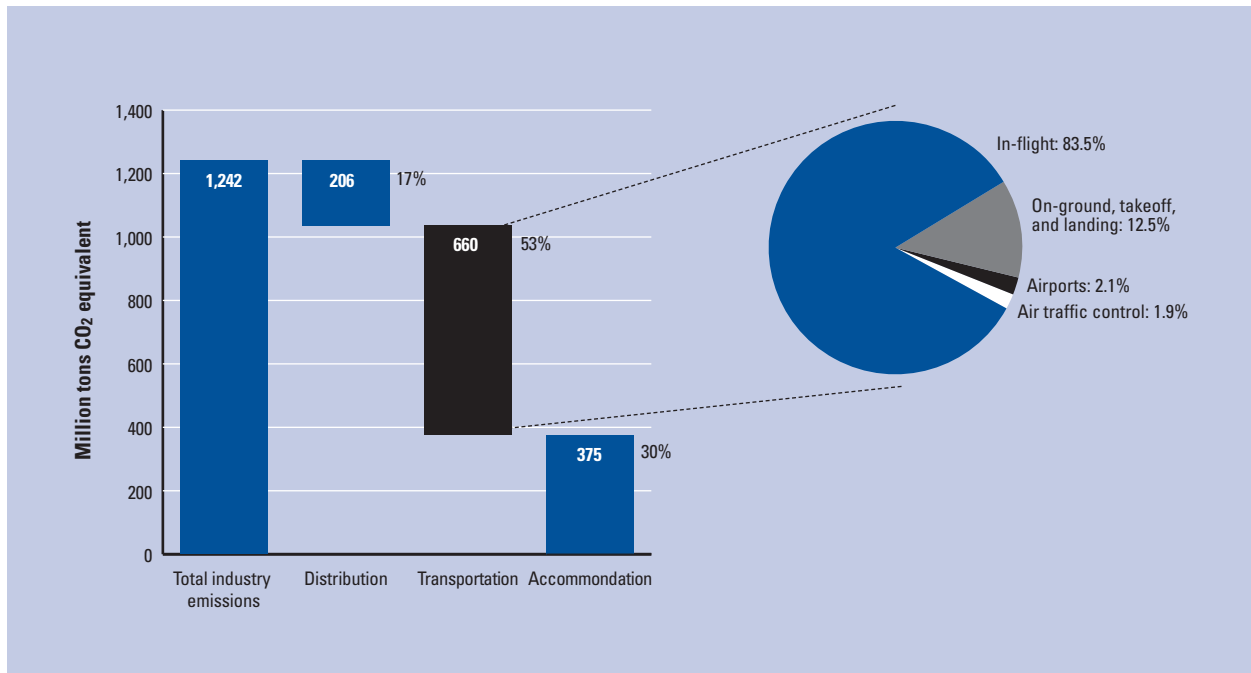
In ensuring that the development of tourism supports and sustains the environment, the government of Montenegro believes it must accomplish four key goals—goals it has put at the core of its tourism strategy:

- 1. Planning: Articulation and implementation of a clear, long-term strategic plan** specifically addressing issues of tourism and environment. This must involve all stakeholders in the process, including the national government, municipalities, the private sector, NGOs, and so on. This master plan needs to provide the foundation for any specific planning and regulatory regime, and serve as a framework for specific spatial and land-use planning for each local development project. The result is a national Sustainable Development Strategy that complements the country’s National Tourism Strategy.
- 2. Stimulation of appropriate investment, including foreign investment, in the right kinds of projects**, by clearly communicating to the investment community that the country is supportive of investors that are themselves committed to a product that is sustainable, environmentally positive, and appropriate to the physical and cultural setting—for example, by including appropriately stringent environmental criteria in all public tenders, such as density and aesthetic criteria, and environmentally sensitive operational criteria.
- 3. Mitigation of environmental impact** by moving toward carbon neutrality and decreased emission through incentives, appropriate regulation, enforcement, offsets, and partnership with the private tourism sector. As an example Montenegro has implemented a carbon tax on vehicles in order to lower emissions and fund environmental projects. Programs like this are designed to both lower emissions and create a more attractive environment.
- 4. Appropriate regulation and enforcement**, by establishing a comprehensive enforcement regime, designed to both signal strong commitment to environmental issues and ensure that this commitment is shared and realized.

These four “policy pillars” are the foundation for an active and creative approach to planning, public communication, and implementation of new programs. They are critical to a long-term and broadly sustainable approach to tourism. Tourism issues must always be considered in the context of their environmental implications. And of course, to achieve these goals, government must be organized and structured appropriately. In Montenegro, this commitment to an integrated and truly environmentally sensitive approach is both facilitated by, and reflected in, Montenegro’s decision to create a single, integrated Ministry of Tourism and Environment Protection, ensuring that structure matches mission.

Source: Ministry of Tourism and Environment Protection of Montenegro.



**Figure 5: Greenhouse gas emissions across the Travel & Tourism value chain (in million tons CO<sub>2</sub> equivalent)**

Source: Booz Allen Hamilton and Boston Analytics.

cannot or will not reduce their emissions. In addition, California also committed \$3.2 billion to fund a drive to install solar panels on a million rooftops by 2018. Now California's largest corporate solar-power installation is in operation at Oakland International Airport, which fuels 80 percent of the hub facility's energy needs, substituting the sun for fossil fuel and other sources of electricity.

Any strategic plan for Travel & Tourism needs to address all of these types of initiatives to define an effective regulatory framework, one that balances monetary as well as ecological impacts of planned investments and their implied costs—taking into account the needs of investors, operators, incoming and domestic tourists, the country's inhabitants, and the preservation of natural and cultural assets. An effective mix of industry policies, standards, and incentives will drive economically and ecologically viable infrastructure investments. Only the combination of a clear and well-thought-out strategy with excellent execution will achieve the desired results and economic benefit for a country to further develop the T&T sector in an environmentally sustainable way.

### Driving for environmental sustainability: The case of CO<sub>2</sub> emission control

Although noise, waste, and resources are mostly dealt with at local and/or regional levels, emissions is the only one of the four dimensions of environmental sustainability that is currently most discussed in the global community. Especially now, when governments around the globe are

in intense discussions to develop a regulatory framework that will follow the Kyoto Protocol, the T&T industry has come under intense scrutiny and gotten calls to regulate its carbon emissions of air transportation.

Although the T&T industry's contribution to global warming is relatively low—about 5 percent, compared with other sectors such as energy, which represents about 38 percent—the rise in international tourism and the increasing number of air passengers has brought the sector to the attention of policymakers and environmental stakeholders. According to the UNWTO, the 4 percent annual growth in international tourism arrivals will drive up CO<sub>2</sub> emissions by 152 percent by the year 2035.<sup>1</sup>

Looking at the total greenhouse gas emissions across the major segments of the T&T value chain, the sector emits about 1.2 billion tons of CO<sub>2</sub>-equivalent greenhouse gases per year (see Figure 5). Looking at the different parts of the value chain, air transport accounts for more than half of the overall industry's emissions, which are mostly driven by emissions during the flight itself—making the airline industry the focal point of public discussions and politicians in their search for potential sources of emissions reduction.

Because of the global nature of the aviation sector, it is difficult to develop fair and effective policy measures to impose incentives for the reduction and/or limitation of greenhouse gas emissions on the industry players. Currently, different regulatory instruments are being discussed to set effective incentives to reduce greenhouse gas emissions. However, any environmental regulation

needs to recognize that there is presently no alternative to long-distance air transportation, and adopted policies shouldn't result in a drastic reduction of demand, which would have negative effects on the global economy. Although the necessity of reducing carbon emissions is indisputable among global institutions, there are different approaches to meeting that goal.

The United States favors better air traffic management and technological innovation as the most feasible ways to cut emissions: the view of the US Federal Aviation Administration is that investments in modernizing air traffic management and creating new aircraft technologies will yield an immediate reduction in emissions without the need to put a price tag on those emissions. In the long term, changing the nature of fuel—either by using synthetic kerosene or developing alternative fuels—is viewed as having the greatest effect on emissions reduction.

Apart from the fact that next-generation air traffic management systems and ongoing research into cleaner engines and fuel might help reduce emissions, the EU's environmental ministers have agreed upon a future directive to incorporate the aviation sector into the existing emissions trading scheme (ETS) system. The directive is supposed to cover all CO<sub>2</sub> emissions from domestic flights starting in 2011 and international flights to and from EU airports starting in 2012—applying to both EU and non-EU operators. Most leading aviation organizations believe that a fair and effective ETS needs to be a worldwide scheme with the participation of large global economies—for example, the United States, China, and India—instead of a regional system limited to Europe only. This conflict is currently up for debate and there will be some legal challenges to be overcome before any regulation will be finally put in place.

Currently, airlines are the focal point in climate change regulations, but they depend heavily on other industry players to reduce fuel burn and carbon emissions: aircraft manufacturers, airports, and air traffic management all need to be considered when thinking about industry emission reduction levers.

### Airlines

Because of rising kerosene prices, airlines have an intrinsic interest in reducing fuel burn per passenger kilometer—driving them to optimize utilization per flight. Additionally, air carriers can invest in modern aircraft or operate with larger planes that are more fuel-efficient per passenger kilometer flown. Finally, air carriers can give their pilots incentives to fly economically to reduce fuel burn and emissions.

### Aircraft manufacturers

Reducing CO<sub>2</sub> emissions from aircraft is a challenging target because emissions from current kerosene-fueled aircraft are related directly to fuel burn. In 2002, the Advisory Council for Aeronautics Research in Europe

(ACARE) set environmental objectives for new aircraft fuel efficiency per seat-kilometer relative to a baseline in 2000—with the objective of reducing CO<sub>2</sub> emissions by 50 percent and NO<sub>x</sub> emissions by 80 percent by 2020. In the United States, NASA set similar objectives. Technological improvements driven by manufacturers also include the development of more fuel-efficient engines and cleaner/alternative fuels, and changes in aircraft structure and design (e.g., by fitting winglets to reduce drag).

### Air traffic management

Both the regulation and management of air space present opportunities to reduce fuel burn significantly. Due to national air-space limitations, airlines sometimes need to fly longer distances and burn unnecessary fuel. Opening up national air space can result in more direct air routes, which will heavily reduce greenhouse gas emissions. Optimizing air traffic control services can also improve air routes. In Europe, for example, airlines are faced with 34 local air traffic control providers, which makes it difficult to fly the most direct path between two airports. Compared with the United States (with only one agency), this leads to inefficiencies, delays, and too much time in the air. Thus, the adoption of a “single European sky,” managed by a solitary air traffic control authority, would reduce fuel consumption by an estimated 12 percent per seat-kilometer flown.

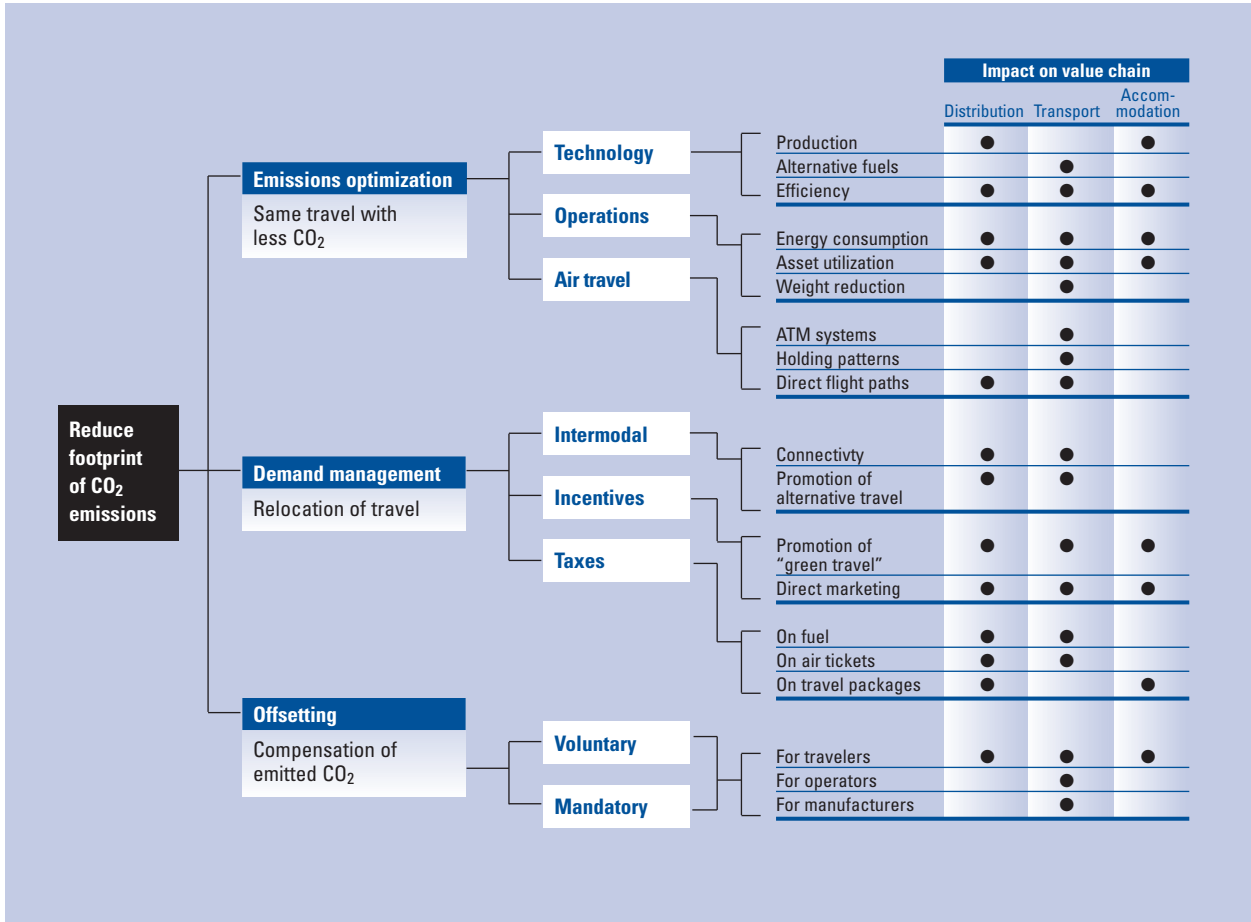
### Airports

In light of the strong growth in passenger and cargo air transportation, capacity bottlenecks occur not only in the sky but also on the ground—increasing the amount of time aircraft spend in holding patterns. Improving airport operations and adding additional capacity in runways, aprons, gates, and terminal space—especially at already-congested international hub airports—can reduce fuel burn and, hence, greenhouse gas emissions.

In conjunction with the reduction of bottlenecks in air-space and ground capacities, the optimization of air traffic management, the development of new engine technology, and the use of new fuel sources, emissions trading might be a viable economic option to motivate and speed up the application of emission-reduction levers by air carriers. For airlines, this could be a workable solution that avoids the imposition of environmental taxes, if emission reduction levels are applied globally and effectively by all industry players of the T&T value chain (see examples of potential emission reduction initiatives in Figure 6).

As regulators are facing greater pressure from action groups to decide on air emission targets, the industry needs to ask itself what its role should be in controlling its environmental impact. All players in the industry should start to consider new ways to engage in environmental management. Their aim should be to influence

Figure 6: Examples of different environmental initiatives to cut greenhouse gases



Source: Booz Allen Hamilton.

both public opinion and policymakers to adopt measures that enable the market to respond to growing air travel demand, but ensure that it is done in a sustainable way —while keeping an eye on the industry’s cost and revenue position.

Aside from emissions from air transport, accommodation also accounts for a sizable amount of the sector’s CO<sub>2</sub> emissions (about 30 percent) and needs to develop adequate measures to reduce its contribution in order to reduce global warming. The hotel sector’s response to the increasing need for environmental consciousness has been to establish systems and procedures at the core of the decision-making process and to bring sustainable tourism to hotels through environmental initiatives, such as environmental management systems and eco-labeling schemes. The largest emission-reduction levers are more efficient insulation of buildings as well as the substitution of conventional heating or cooling systems—shifting toward alternative solar or thermal energy sources. Aside from energy conservation, hotels and resorts also have a multitude of other levers that drive environmental sus-

tainability, such as effective waste and recycling management, reduced water usage, and the promotion of local conservation projects.

Public awareness of the need for environmentally friendly behavior will continue to grow, becoming a major factor in consumer decisions, and ensuring that the demand for green tourism products will rise further —making environmentally friendly packages the preferred solution. But what can the players in the tourism value chain do to develop a competitive advantage through environmental initiatives and at the same time not jeopardize their current cost structure? And are customers willing to pay a premium for greener products and services?

**Managing the tradeoff between economic and environmental objectives**

Taking airlines as an example for private T&T operators, adopting a green strategy is nothing new in the industry, but it is mostly driven by opportunistic factors. A lot of big network airlines and even low-cost carriers practice

Figure 7: Examples of airline mitigation options along the four sustainability dimensions

	Procurement	Ground operations	Flight operations	Customer service
Emissions	<ul style="list-style-type: none"> <li>Invest in fuel-efficient technologies</li> <li>Lighter material for A/C interior</li> </ul>	<ul style="list-style-type: none"> <li>Single-engine taxiing</li> <li>Hybrid or electrical ground vehicles</li> </ul>	<ul style="list-style-type: none"> <li>Reducing speed and holding patterns</li> <li>Different takeoff procedures</li> </ul>	<ul style="list-style-type: none"> <li>Offsetting schemes</li> <li>Use hybrid cars for passenger transport</li> </ul>
Resources	<ul style="list-style-type: none"> <li>Build insulation</li> <li>Energy-efficient lighting systems and efficient toilet flushes</li> </ul>	<ul style="list-style-type: none"> <li>Reduced utility usage for aircraft cleaning</li> </ul>	<ul style="list-style-type: none"> <li>Monitor use of fresh water</li> <li>Reduce energy consumption in flight</li> </ul>	<ul style="list-style-type: none"> <li>Promote and incentivize changed customer behavior</li> </ul>
Waste	<ul style="list-style-type: none"> <li>Purchase recyclable materials for operations and administration</li> </ul>	<ul style="list-style-type: none"> <li>Trash separation at aircraft cleaning</li> <li>Limit waste of deicing systems</li> </ul>	<ul style="list-style-type: none"> <li>Use of recyclable packaging</li> </ul>	<ul style="list-style-type: none"> <li>Avoid paper-based communication/tickets</li> <li>Use “fair trade” products</li> </ul>
Noise	<ul style="list-style-type: none"> <li>Invest in quieter aircrafts</li> </ul>	<ul style="list-style-type: none"> <li>Increase use of mover for taxiing</li> </ul>	<ul style="list-style-type: none"> <li>Continuous-descent approach</li> </ul>	<ul style="list-style-type: none"> <li>Passive noise protection for local residents</li> </ul>

Source: Booz Allen Hamilton.

and communicate green initiatives that span all four dimensions of environmental sustainability along their major value chain components in procurement, ground, and flight operations, as well as customer service.

A lot of these green initiatives (as shown in Figure 7) are driven not solely by environmental sustainability but rather by cost-cutting opportunities—such as reducing fuel burn or increasing aircraft utilization. For example, investments in new aircrafts do have the beneficial side effect of reducing noise pollution and cutting down on emissions per passenger kilometer, but the investments are mostly driven by the better economics of new planes. However, this does not diminish the fact that everywhere along the value chain, airlines are already undergoing a multitude of initiatives that support environmental sustainability, such as the procurement of lighter materials for aircraft interiors, single-engine taxiing on the ground, the continuous-descent approach in the air, or the offering of “offsetting” schemes to their customers.

Currently, most airlines offer these offsetting schemes via external organizations that allow customers to fly CO<sub>2</sub>-neutral by paying extra money toward measures that counteract the effects of global warming, such as reforestation and investments in alternative energy sources. However, offsetting does not reduce any CO<sub>2</sub> emissions from the travel industry, nor is the impact measurable along a proven methodology, because of the lack of generally accepted certificates. Offsetting also presents another major problem: the customer does not see any tangible effects as a result of an offset flight.

Furthermore, the program does not even rely on the emitting airline, but on another organization that has undertaken environmental projects, which the customer cannot directly experience in any way. Thus, it is not surprising that offsetting has not taken off as a viable and sustainable solution for the industry. So far, most carriers have experienced only very low customer response rates on their offsetting schemes.

Since such initiatives can be regarded only as a first step in a long-term sustainable business strategy, airlines—as well as all other T&T companies—need to focus on the development of a holistic environmental strategy that will have a measurable impact on the environment *and* that adds a recognizable value for the customer, while keeping a positive business case on the selected initiatives.

The starting point for a sustainable corporate strategy is to identify potential initiatives that have a measurable positive impact on the environment. Only those initiatives that get measured can be controlled over time, and the results publicized. Identifying measurable initiatives is extremely important, since it allows the company not only to communicate and market the potential effects, but also to show improvements and ensure traceability and credibility across all stakeholders. Additionally, all initiatives need to be technologically, legally, and politically feasible and should be realizable within the near term.

But every environmental initiative will come at a cost, and without a convincing business case, there will

be no chance for a long-term environmental initiative in a competitive corporate environment. Therefore, all initiatives have to be evaluated along their market impact, brand awareness, and potential unique selling proposition on one hand, but also, on the other hand, the costs implied need to be considered as well.

Driven by competitive and regulatory pressures, most large air carriers around the globe will sooner or later need to invest in new technologies and aircraft—diminishing the ability to differentiate themselves even more. Adopting an environmental strategy and creating value for the customer at the same time might be a feasible way for an airline to distinguish itself from other carriers and thus create a competitive advantage, which might lead to attracting new customer segments.

Some ideas around environmental value-adds for customers could lie in the integration of offsetting schemes into an airline's existing frequent flyer miles program. This would not only increase transparency to the traveler, but also reduce transaction cost and time, since any flight can be offset directly by using customers' bonus points or earned miles. In addition, instead of recognizing frequent travelers, an airline could also award carbon-neutral travelers that offset their flights. Apart from the positive environmental effects, the customer can get recognized publicly, for example, by a green baggage tag or the possibility of preferred boarding. Going even further, a new line of products could be offered as a unique selling proposition—such as something like a “Green Pass” that allows customers to check in at green counters, collect and spend green points with a “Green Frequent Flyer Program,” or even use a “Green Credit Card” to pay for a carbon-neutral flight and other environmentally friendly products and services. Price differentiation between the regular and the “Green Booking Class” could be realized, and new sales channels could even be opened with customer groups that usually would turn away from air travel because of its negative environmental reputation.

But green does not stop in the air. It should be taken below the clouds. Organic food, ecological interior materials, and attractive and more environmentally friendly designs of lounges and check-in areas can also make a real difference in the customer's perception, which is one of the main keys to success when thinking about a sustainable competitive strategy. All green initiatives need to provide the customer with a unique and special feeling and therefore add value to the airline's product and service offering. One who feels good, does good; and only if a customer sees and feels the results of his or her actions will there be enough passion to pay a price premium for green products and services. Therefore, offsetting schemes are not necessarily inefficient tools, but they must provide an instant experience, so that the customer can feel the difference he or she makes. Just like a company, the customer needs to see

some sort of payback for green behavior, or it will not be sustainable.

Aside from these selected examples from the aviation industry, there are a multitude of levers that can be applied across the entire T&T value chain to achieve environmental sustainability. For example, the hotel industry has also started to actively adopt ecologically friendly practices to limit its impact on the environment. These range from using green cleaning products; offering organic food, beverages, and flowers; recycling coat hangers; eliminating Styrofoam cups; and offering paperless check-in and check-out (e.g., as practiced by Kimpton EarthCare). While there are levers that can be applied by single players in the value chain, there are also a multitude of initiatives that cut across the industry. Initiatives that support the combined actions of all players in the T&T value chain as well as a company's individual introduction of innovative technologies and the employment of low-carbon technologies can not only lead to a positive environmental impact, but also might yield a positive business case.

To successfully embed a green strategy, the selected environmental initiatives need to be aligned with the overall corporate strategy, the company's business objectives, and its culture. If initiatives do not support the big picture of the T&T operator, staff and management will never truly offer their support and the new green opportunity will be lost and might even damage the company's reputation. Hence, the new green strategy needs to be part of the top goals of the organization and has to build into existing strategic initiatives. Crucial success factors are therefore top management support; proactive communication about the strategic definition process; involvement of all levels of the organization; and, finally, external benchmarks to set realistic targets.

### Defining a sustainable environmental strategy

A comprehensive sustainability approach needs to be driven by a top-down strategy and supported by a capable platform. We see five major steps for the development of a sustainable corporate strategy, as illustrated in Figure 8.

#### Step 1: Baseline: Determine the eco-footprint

First, a company needs to understand the full scope of the pollution it is responsible for—along all four dimensions of emissions, resources, waste, and noise. Both direct as well as indirect environmental impacts need to be evaluated and measured. Direct impacts result from the organization's business activities (e.g., transportation or accommodation), while indirect impacts are driven by suppliers' activities (e.g., building materials for infrastructure and planes, or electricity production). Based on the eco-footprint of a company, the major improvement areas can be identified and prioritized going forward.

Figure 8: Process steps for the definition of a sustainable corporate strategy

Work steps	Baseline: Determining the eco-footprint	Risk and opportunity analysis	Evaluation of strategic options	Strategy formulation and target setting	Implementation, planning, and execution
Activities	<ul style="list-style-type: none"> <li>Identify areas of pollution along               <ul style="list-style-type: none"> <li>Emissions</li> <li>Resources</li> <li>Waste</li> <li>Noise</li> </ul> </li> <li>Measure the degree of pollution along               <ul style="list-style-type: none"> <li>Direct</li> <li>Indirect</li> </ul> </li> <li>Identify main drivers</li> <li>Estimate future developments</li> </ul>	<ul style="list-style-type: none"> <li>Identify risks               <ul style="list-style-type: none"> <li>Regulation &amp; legislation</li> <li>Investors' needs</li> <li>Changing customer behavior</li> <li>Environmental groups</li> </ul> </li> <li>Identify opportunities               <ul style="list-style-type: none"> <li>New customer demand</li> <li>Competitor and supplier strategies</li> <li>Government subsidies and grants</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Match long list of initiatives against targets               <ul style="list-style-type: none"> <li>Corporate culture</li> <li>Realistic initiatives</li> <li>Match with overall business strategy</li> </ul> </li> <li>Evaluate initiatives along assessment criteria (cost, impact, awareness, benefit)</li> <li>Develop business case</li> <li>Evaluate and prioritize options</li> </ul>	<ul style="list-style-type: none"> <li>Define corporate targets               <ul style="list-style-type: none"> <li>Qualitative</li> <li>Quantitative</li> </ul> </li> <li>Formulate corporate environment strategy               <ul style="list-style-type: none"> <li>Strategic goals</li> <li>Communication plan</li> <li>Control mechanism</li> </ul> </li> <li>Ensure alignment with overall corporate strategy</li> <li>Set up measuring and control process</li> </ul>	<ul style="list-style-type: none"> <li>Allocate roles &amp; responsibilities</li> <li>Define milestones initiatives</li> <li>Set specific output initiatives               <ul style="list-style-type: none"> <li>Reporting of progress and results</li> </ul> </li> <li>Evaluate organizational implications</li> <li>Start communication               <ul style="list-style-type: none"> <li>internal</li> <li>external</li> </ul> </li> </ul>
Output	<ul style="list-style-type: none"> <li>Direct and indirect corporate eco-footprint</li> </ul>	<ul style="list-style-type: none"> <li>Prioritization of environmental initiatives (long list)</li> </ul>	<ul style="list-style-type: none"> <li>Short list of strategic options</li> <li>Business case (ROI)</li> </ul>	<ul style="list-style-type: none"> <li>Sustainable environmental strategy</li> </ul>	<ul style="list-style-type: none"> <li>Implementation plan</li> <li>Communication plan</li> <li>Performance control process</li> </ul>

Source: Booz Allen Hamilton.

### Step 2: Risk and opportunity analysis

Second, a company needs to be aware of its potential risks, whether from changed regulation, customer behavior, environmental groups, or potential investors. In the airline industry, for example, the problem of aviation's growing contribution to greenhouse gas emissions has been underestimated for a long time, and the risk of regulatory intervention continues to grow as a result. On the other hand, green initiatives also offer potential opportunities, if implemented and communicated effectively—for example, by creating a unique selling proposition that provides a competitive advantage in the global struggle for enticing travelers. Identifying and evaluating implied risks and opportunities creates a basis for prioritization of strategic environmental initiatives that serves as a long list for further evaluation.

### Step 3: Evaluation of strategic options

The defined high-level long list of potential environmental initiatives needs to be evaluated in more detail to ensure a strategic fit with the company's culture and overall business strategy. Those initiatives that would be feasible need to be analyzed in terms of realization costs and their impact on the market (both in terms of aware-

ness, reputation, and potential revenues). Initiatives with a positive business case should be prioritized into a short list that will be considered in the corporate strategy. Identifying measurable initiatives with high impact that allow a positive business case will be the key for success. It allows a company to control potential effects, show improvements, and ensure traceability and credibility. At the end, all strategic options have to be filtered through a profitability evaluation scheme, which is based on efficiency, implied costs, and impact on public perception.

### Step 4: Strategy formulation and target setting

Strategic goals need to be defined around a set of qualitative and quantitative environmental-performance targets. For example, quantitative targets could be fuel-burn per passenger kilometer flown, investment costs for each initiative, the scope of value-added services for carbon-neutral customers, or acquisition targets for new customers. The targets and the timing of initiatives need to be in line with the overall corporate strategy and need to be embedded with existing performance-management processes. The environmental measurement and control system needs to be transparent and traceable—not only for the company itself but also for outside stakeholders.

For effective performance control, an organizational entity needs to be responsible for data collection, target setting, performance management, and communication of results to the public.

#### Step 5: Implementation planning and execution

The implementation of environmental activities needs to focus on “quick wins” first, making sure that a unique selling proposition is generated early in the process (and, thus, keeping a positive return on investment, which might change if competitors start taking up similar activities). To realize these initiatives effectively, milestones need to be set and clear responsibilities need to be allocated—ideally to the newly established environmental team within the organization. This environmental team needs to be embedded into the organizational design and culture of the firm—making sure that it oversees the eco-footprint of the company and can constantly adjust the strategy if processes and/or market demand and regulation changes. Only what gets communicated will have an impact in the market, so every environmental initiative should reach not only direct customers, but also other stakeholders, such as policymakers, environmental activist groups, and potential investors. Thus, the value of a sustainable environmental strategy will be reflected in the overall public awareness and reputation of the company.

Transforming environmental initiatives from cost drivers to profitable success stories can be achieved by developing a comprehensive, understandable, and well-planned sustainable corporate strategy. Tapping into new potential revenue streams and cutting costs through environmental initiatives might allow a company to become a first mover in the industry. Examples from other sectors—such as Toyota’s positive results from its hybrid-powered Prius—show that this is actually achievable. Although the Prius accounts for less than 5 percent of Toyota’s US sales, the company created a strong selling proposition as a result of the positive publicity and increased sustainable brand awareness. Some players in the T&T industry have also started to lead the way, either by investing in greener technologies or by developing new service offerings that are focused on nature-based eco-tourism. With growing market pressure to conduct business in a more sustainable way, the private sector needs to move from an opportunistic approach and adopt long-term strategies that live up to the challenges ahead.

#### Conclusion

With the growing public concerns about environmental sustainability, the T&T sector needs to rise to the challenge of effectively managing the tradeoffs between the economic and ecological requirements of operators, investors, travelers, and the local population of tourism

destinations. Since the private sector is bound by market forces to invest only in economically viable projects, public authorities need to create a balance that ensures sustainable T&T industry development—either by imposing rules and regulations or by allocating incentives that drive operators and consumers toward environmentally friendly, sustainable behavior. In this chapter, we have highlighted some examples of environmental impacts and potential initiatives that can be applied by different players of the T&T industry value chain to reduce their negative eco-footprint—in either voluntary or mandatory fashion.

Independent of applied regulatory mechanisms, the public’s consciousness of environmentally friendly behavior will continue to rise steadily in the years to come and will become a major factor for future customer decisions. Starting with the distribution and sales of T&T packages, the end customer will have a chance to decide not only on the preferred destination, but also on the mode of transport and the hotel. With the increasing awareness, the demand for green tourism products will grow further in the years to come. If private operators realize this opportunity and effectively leverage this trend, they might be able not only to gain a competitive advantage, but also to attract new customer segments.

Although the private sector is aware of these green trends in the market, only a minority of the industry players have yet developed a holistic, environment-oriented strategy. This behavior is driven by the fact that environmental initiatives are not yet seen as an investment that pays off in monetary terms. But customers will not be the only ones to ask for green alternatives; the financial community will also start measuring companies and their leaders not only by their economic but also by their ecological behavior. To be successful in the long term, it will not be enough to opportunistically engage in green branding campaigns. Companies will have to establish initiatives that have a measurable positive and long-lasting impact on the environment—creating a value-add not only for the tourist but also for the industry and the society at the destination as a whole.

#### Note

- 1 UNWTO 2007, p. 17.

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## Travel & Tourism: Moving on to Sustainability

**UFI IBRAHIM**, Chief Operations Officer, World Travel & Tourism Council

**AMIR GIRGIS**, Economist, World Travel & Tourism Council

The Travel & Tourism Competitiveness Index (TTCI), described in Chapter 1.1 of this volume, builds on the work initiated by the World Travel & Tourism Council (WTTC) at the beginning of this decade, and is the subject to nearly three decades of solid and dedicated research. The TTCI is made up of three subindexes: the T&T regulatory framework subindex; the T&T business environment and infrastructure subindex; and the T&T human, cultural, and natural resources subindex. Together these are composed of a total of 14 pillars and more than 70 individual variables. This paper will present how the results published by the World Economic Forum in this year's *Travel & Tourism Competitiveness Report* can be utilized to assess sustainable tourism from a global perspective.

The Index provides a useful benchmark and enables industry leaders and policymakers to identify obstacles for further development of the industry. A cross-country analysis of the indicators of competitiveness in Travel & Tourism provides useful comparative information for decision-making and provides additional value to governments and businesses wishing to improve their Travel & Tourism (T&T) environments. The *Report* creates a platform for dialogue among all stakeholders, which is invaluable in a world where competitiveness is no longer a government-driven process but has been reshaped into a bilateral process between the public and private sectors. The *Travel & Tourism Competitiveness Report* assists both these sectors in identifying their strengths and, more importantly, their weaknesses, in order to outline an approach for attaining long-lasting tourism. The stakeholders of this booming and substantial industry are undoubtedly large: in 2007, the sector generated 10.7 percent of world gross domestic product (GDP) (US\$5,390.9 billion) and 8.3 percent of world employment (231 million jobs). The completion of this second *Report* complements the aims and objectives of the WTTC.

### The World Travel & Tourism Council

In 1990, the founding members of the WTTC decided that the quantification of Travel & Tourism's impact would be the most important contribution they could make to achieve their goal of raising awareness among policy leaders and Travel & Tourism decision-makers. The subsequent 17 years of solid investment and innovative research made a significant contribution to the development of the new international standard for Tourism Satellite Accounting (TSA) research, adopted in 2001 by the United Nations Statistical Commission.

TSA follows the standardized methodology of measuring Travel & Tourism's impact on an economy's personal consumption, business spending, capital investment, government expenditures, GDP, and employment; it is a crucial step in the quest for recognizing Travel & Tourism's economic contribution and future potential.



### Tourism Satellite Accounting (TSA)

The WTTC, together with its research team Oxford Economics, have developed a rich database and advanced modeling system enabling the quantification of the contribution of the T&T industry in an economy. TSA reports are based on a sophisticated combination of econometrics modeling, macroeconomic forecasting, national accounting, and high-quality T&T statistics. The WTTC conducts annual reports on 176 countries with a further 13 regional reports. The WTTC, in partnership with Oxford Economics, has produced a comprehensive system of research covering all concepts of T&T demand. This information is then translated into economic concepts of production, such as GDP and employment, which can be compared with those of other industries.

The UN standards lay the foundation for the compilation of internationally comparable satellite accounts. The WTTC's research applies the conceptual UN framework with a number of extensions. The WTTC develops the narrow concept of the T&T industry into the broader concept of the T&T economy. The industry level is composed of all inputs to the tourism industry (e.g., food, laundry, services, advertising, etc.). Meanwhile, the T&T economy concept incorporates suppliers of investment goods to the tourism industry (government collective spending on airport infrastructure, and investment such as hotels, exports of goods, etc.).

In theory, and in a world of fully available statistics, one would assess each line item of expenditure in each part of the economy (household, government, investments, net exports) to determine whether it is T&T spending or not. However, in a less-than-perfect world, we must make use of the available data and make educated assumptions and attribute shares of spending to the T&T sector. Most of the effort spent in creating the TSA model is directed toward this quest for information and explanations of the shares applied to the available data, where estimates are made from household budgets or surveys wherever needed.

There is little doubt that TSA research has made a major contribution to ensuring that Travel & Tourism is today increasingly considered an industry that fully justifies mainstream economic and policy consideration. It has also enabled the industry to initiate a broader and more in-depth dialogue with government about how Travel & Tourism can be used as an economic development tool.

The questions asked are no longer *whether* Travel & Tourism is important to our economy—the result is undoubtedly positive. Tables 1 through 4 present the most recent data about the dramatic effect of Travel & Tourism on specific economies. Instead, the question has shifted toward how countries can improve and give themselves a comparative advantage in this increasingly demanding world market. The quest for improvement should not however, be a short-term goal but should extend well into subsequent generations.

**Table 1: T&T demand (2007)**

Economy	US\$ (millions)
United States	1,689,309.0
Japan	523,015.2
Germany	483,598.6
China	439,772.4
United Kingdom	377,122.1
France	366,927.9
Spain	300,099.0
Italy	271,972.6
Canada	201,971.9
Mexico	149,483.7

Source: World Travel & Tourism Council, Tourism Satellite Accounting Research, 2007.

**Table 2: T&T industry GDP (2007)**

Economy	Total GDP (%)
Maldives	31.1
Macau	30.9
Seychelles	29.2
Anguilla	24.5
Antigua and Barbuda	21.1
Aruba	19.1
Bahamas	18.5
British Virgin Islands	17.5
Guadeloupe	16.7
Vanuatu	16.4

Source: World Travel & Tourism Council, Tourism Satellite Accounting Research, 2007.

**Table 3: T&T industry employment (2007)**

Economy	Jobs (thousands)
China	16,584.7
India	11,002.9
United States	5,701.1
Japan	2,920.2
Brazil	2,333.3
Indonesia	1,980.7
Thailand	1,945.5
Spain	1,553.9
Egypt	1,504.9
Philippines	1,388.2

Source: World Travel & Tourism Council, Tourism Satellite Accounting Research, 2007.

**Table 4: T&T demand (2008–17)**

Economy	Annualized real growth (%)
Croatia	8.9
China	8.3
Montenegro	8.2
Namibia	8.1
Kiribati	7.6
Zambia	7.4
Congo, Dem. Rep.	7.3
India	7.3
Vanuatu	7.2
Hong Kong SAR	7.0

Source: World Travel & Tourism Council, Tourism Satellite Accounting Research, 2007.

## Sustainable tourism

Emerging tourism destinations are exerting pressure on their natural, cultural, and socioeconomic surroundings. In line with expert predictions, WTTC research suggests that demand for global Travel & Tourism will continue to grow at a steady annual rate of 4.2 percent over the next 10 years. Long-term negative externalities of this forecasted growth could ultimately outweigh the economic gains. The new challenge is to manage this growth, which generates income and employment, while limiting the industry's impact on the environment and conserving the cultural heritage and local ecosystems of a country.

The T&T industry acknowledges that it is part of the problem, contributing to global carbon emissions; equally, the industry players wish to be part of the solution. Major T&T companies are fully engaged, with in-house sustainability programs. For example, the new Boeing 787-8 Dreamliner uses 20 percent less fuel and travels at speeds comparable to those of other similar sized aircrafts. However, a significant part of the T&T sector is generated by small- and medium-sized enterprises (SMEs); the real challenge is how to create sustainability in the SME section of the industry. Finding a way for governments and other organizations to assist these small SMEs to develop sustainability programs would be beneficial.

From the WTTC's perspective, much of sustainable tourism begins with leadership. It is correct that tourism ministers usually have complete authority over their portfolio; however, their control does not stretch beyond their allocated resources. Unless the top leaders are convinced, then sustainable tourism advantage is in jeopardy. Although the TTCI includes hard data on T&T government expenditure as percentage of total budget, it would be naïve to assume that this alone is a strong proxy for sustainable tourism. More important is *how* the money is spent, not *how much* is spent. Government expenditure on marketing and campaigning destinations has potential short-term returns that are not necessarily sustainable in the long run. Meanwhile, investing in infrastructure, health and safety, and effective regulatory policies are a more long-term investment. However, as politicians are in power for short tenures, the WTTC understands the difficulty inherent in enticing governments to focus on these sustainable investments. The TTCI generally shows that sub-Saharan African countries dominate the bottom of the Index rankings. Although rich in cultural and natural resources, sub-Saharan African countries often score low in infrastructure. This underdevelopment in infrastructure, coupled with the region's poor health and safety environment, deters the development of Travel & Tourism. Policy reform is necessary; creating an environment that supports tourism is essential and requires considerable planning and structured investment, and here it is most evident that the manner of investment is more important than the quantity invested.

The initial problem is how to convince government leaders that tourism should be a top priority. After that has been completed, these same political figures need to know how to sustain this dynamic industry.

The answer to the first problem is straightforward—economics. What is Travel & Tourism's place in the economy? What does Travel & Tourism produce and consume in the economy? How many jobs are produced as a result of Travel & Tourism, and how many jobs are at stake if the flow of business goes away? The use of TSA has been essential in answering these questions, and has successfully convinced all logical and unbiased stakeholders that the T&T sector is too large to be ignored. Although the industry numbers are impressive, catastrophes such as the severe acute respiratory syndrome (SARS) international outbreak in 2003, the 9/11 attack, and the tsunami in the Indian Ocean in 2004 emphasize the depth and breadth of tourism's impact on the economy. It seems that Travel & Tourism receives an appropriate level of attention only when the entire flow is cut off.

Responding to the problem of how to sustain a dynamic T&T industry requires a little more thought. It would be unrealistic to assume a standardized formula that each country can follow. The heterogeneity of each country is what makes this industry truly incredible, although it is also what makes the quest for a standardized approach equally troublesome. On a country basis, it can be useful to use the findings published in this *Report* that compare and contrast the strengths and weaknesses of a country. Identifying the major disadvantages is a critical step for policymakers to identify the areas that require enhanced attention. In a different approach, the WTTC seeks to provide suggestions on a global level.

## Blueprint for new tourism

From a global strategic perspective, the critical policy issues concerning T&T growth are encapsulated in WTTC's policy statement *Blueprint for New Tourism*. The *Blueprint for New Tourism* provides a new strategic framework for ensuring that Travel & Tourism works for all stakeholders in the future—in a way that ensures benefits for everyone. New Tourism looks beyond short-term considerations. It focuses on benefits—not only for those who travel, but also for the local communities they visit and for their respective natural, social, and cultural environments. The vision is based on three key components:

1. governments recognizing Travel & Tourism as a top priority;
2. business balancing economics with people, culture, and environment; and
3. a shared pursuit of long-term growth and prosperity.

### Governments recognizing Travel & Tourism as a top priority

New Tourism depends on governments recognizing Travel & Tourism's valuable flow-through effects for all sectors of the economy and across the whole population, and having the sense of leadership to act on that recognition. Leadership at the highest levels of government should factor Travel & Tourism into policies and decision-making; should coordinate all strategies that have an impact on, or are impacted by, Travel & Tourism; and should reorganize structures and funding so as to ensure effective planning and management. The most effective policy responses are those that encompass key government responsibilities, such as coordinating infrastructure development and fostering competitiveness, rather than focusing on short-term protectionism or micro-intervention in market mechanisms.

The benefits, which can be enjoyed by every economy that adopts measures to help deliver on the promise, include:

- the creation of a competitive business environment that avoids inflationary taxation, guarantees transparency, and offers more attractive corporate ownership rules;
- the assurance that quality statistics and information feed into policy and decision-making processes;
- the inclusion of new professionalism, funding, and coordination in promotion and marketing, employment and training needs, infrastructure, and regional and local policy;
- the development of the human capital required for Travel & Tourism growth. Governments should lead investment in human resources—through education and by bridging the gap between authorities and the industry—to help plan ahead for future needs. An online and easily accessible market monitoring network could link reliable tourism market information with data on employment;
- the liberalization of trade, transport, and communications and the easing of barriers to travel and to investment;
- the building of confidence for customers and investors on safety and security;
- the promotion of product diversification that spreads demand;
- sustainable tourism expansion in keeping with cultures and character; and
- investment in technological advances, such as satellite navigation systems, to facilitate safe and efficient T&T development.

### Business balancing economics with people, culture, and environment

New Tourism requires the T&T industry to achieve the right balance between business imperatives and the wider needs of local communities in terms of quality of life. Private-sector growth can drive sustainable development and contribute to the dignity of the people and cultures it touches. Internally, the sector must adjust business planning and product and service quality, and adopt policies that respect the interests of the people for and with whom it works. Externally, it must systematically embrace opportunities to spread its benefits—from helping to kick-start developing economies into conserving the environment to transferring skills and promoting the dignity of people in local communities. Many of New Tourism's key tasks for the private sector are very concrete:

- expanding markets, while promoting and protecting natural resources and local heritage and lifestyles;
- developing careers, education, and employee relations;
- promoting small firms;
- raising environmental awareness, and helping to narrow the gap between the “haves” and the “have-nots”;
- ensuring a range of tourism products that helps diversify a country's tourism product mix so as to reduce seasonality and increase yields;
- improving the quality of tourism products and services, and adding value-for-money while increasing consumer choice;
- agreeing and implementing quality standards at all levels and in all areas, including staff training;
- transferring industry skills and best practice that spread the benefits of Travel & Tourism widely and efficiently;
- ensuring increasingly sophisticated and more precise measurement of the sector's own activity, to feed into strategic business decisions; and
- communicating more effectively with the world in which it operates—for example, including energetic input from T&T umbrella organizations to government, at strategic and local levels.

The cumulative effect will be a shift toward Travel & Tourism that continues to serve the private sector's own needs while embracing the wider interests of the countries and communities in which it operates.

### A shared pursuit of long-term growth and prosperity

Travel, whether it is for business or private purposes, has become part of the fundamentals of human behavior. The constant growth we have experienced in recent years is going to continue for the foreseeable future in mature and emerging markets.

Protecting the environment is becoming a top priority for the consumer as well as the service providers, but it is in no way the only one. Human resources and infrastructures will have to be considered as essential driving forces for those governments and communities that want to enjoy the full benefits of a sustainable development. Those are long-term commitments, and very few countries have yet made the effort to make them.

More than ever, tourism needs new joint strategies, using new mechanisms springing from new partnerships with public authorities. The challenges are immense and all energies are to be mobilized. The industry's recognition of its broader responsibilities has to be matched by that of government, and both sides must be prepared to adopt a new form of long-term thinking—and a new degree of openness and cooperation—to develop contingency planning as well as development strategies. Specific tasks that can be successfully undertaken by the widest cooperation include:

- applying best practice in tourism development with policies on regional affairs, transport, human resources, the environment, infrastructure, and rural development;
- promoting public-private partnership in the joint preparation of sustainable master plans for the development of entire destinations or holiday regions—a task that is too demanding for a single company or state authority to undertake on its own;
- creating locally driven processes for continuous stakeholder consultation, involvement, and benefit;
- restructuring national tourism organizations (NTOs) as public-private partnerships;
- averting the dangers of excessive, unplanned development, and setting environmental policy goals that can realistically be met;
- developing human resources and deploying skills through planning and legislation that avoids limits based on residence or other requirements;
- collaborating on information requirements for public-sector analysis and policy formation;
- promoting joint efforts to improve security, with private-sector mechanisms complemented by action from public authorities; and

- developing confidence among all stakeholders that efforts are mutually reinforcing.

New Tourism offers the prize of economic activity that enhances quality of life as well as new opportunities for self-sufficiency and local prosperity. This prize can be won by all economies that rise to the challenge of integrating the needs of the T&T industry with national policies.

This is particularly true for SMEs; more than in any other economic sector, SMEs are essential to this industry and give business opportunities to local entrepreneurs. This increase of opportunities helps to build a society where there are opportunities for future generations to create companies and be part of the growth.

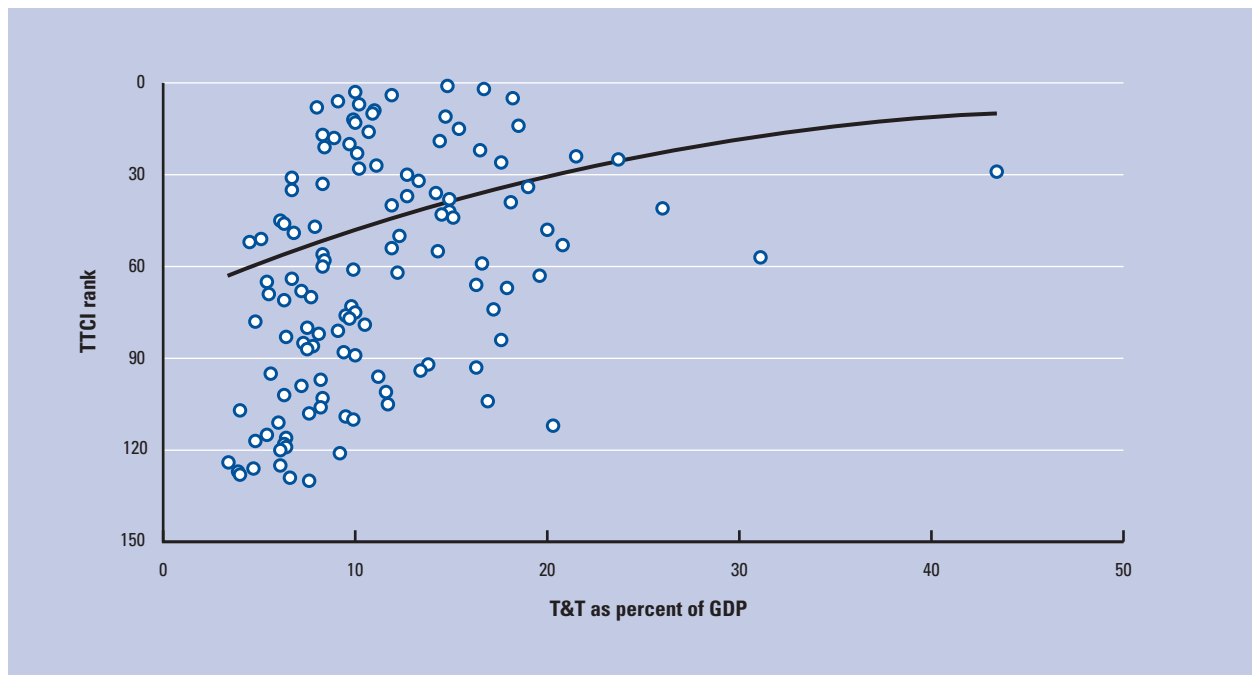
### TTCI and TSA findings

Figure 1 is a cross-sectional analysis showing what appears to be an exponential and positive relationship between tourism as a percentage of GDP and the TTCI ranking. This figure illustrates that countries with a dominant T&T industry relative to their GDP are, on average, ranked higher in the TTCI than countries with a less vigorous T&T industry. This finding is not surprising, and perhaps illustrates the benefits of economies of scale. The exponential relationship implies that the relationship is increasing at a decreasing rate; this indicates that countries at the bottom section of the figure (those countries at the lower tier of the ranking) would find it “easier” to shift up the TTCI. Meanwhile, deviations among the highest-ranked countries are quite low. This finding is substantiated by comparing the previous Index rankings with this year's rankings. The highest-ranked nations illustrated a low level of deviation, with overall stability in the top of the ranking. Most of the deviation occurred at the bottom quartile of the ranking, lending some support to the finding of an exponential relationship.<sup>1</sup> The TTCI findings imply that these countries have great potential to improve on an international level; moreover, further examination of those countries indicates that they are usually less-developed countries.

Despite the general weak rankings that less-developed countries receive, there is still room for improvement. These less-developed countries have a comparative advantage in a wide range of areas. With strong natural and cultural resources and abundant cheap labor, they have seen international arrivals increase at higher rates than the world average. Moreover, our TSA research indicates that it is indeed the less-developed countries that are forecasted to grow at the fastest rates.

With these substantial growth rates forecasted, it is important that these countries include long-term sustainability plans at an early stage of their development schemes.

Finally, the need to gather feasible and reliable data for less-developed countries is an essential condition

**Figure 1: Relationship between the TTCI and the importance of Travel & Tourism in the economy**

Source: World Economic Forum, TTCI 2008; World Travel & Tourism Council, Tourism Satellite Accounting Research, 2007.

**Table 5: T&T economy: Percent of total employment (2007)**

Region	Total employment (%)
World	8.3
Caribbean	14.8
North Africa	12.8
European Union	11.8
North America	11.1
Middle East	10.0
Northeast Asia	9.5
Southeast Asia	8.4
Latin America	6.9
South Asia	5.2

Source: World Travel & Tourism Council, Tourism Satellite Accounting Research, 2007.

**Table 6: T&T economy employment: 10-year real growth, annualized (percent)**

Region	Annualized real growth (%)
World	1.3
Middle East	3.0
Latin America	2.7
North Africa	2.4
Caribbean	2.3
Southeast Asia	1.9
South Asia	1.4
European Union	1.3
North America	1.2
Northeast Asia	0.7

Source: World Travel & Tourism Council, Tourism Satellite Accounting Research, 2007.

necessary to improving statistical estimates and forecasts. Through its work with various worldwide government officials, the WTTC has stressed the need to gather data and maintain up-to-date and accurate national accounts.

### Sustainability amidst a changing world

Entering a new year, financial markets remain volatile and the impact of the credit crunch is progressively more felt in terms of global growth and the policy perspectives of major central banks. Pressures in the money market are starting to spill over into the real economy. Credit surveys have shown commercial banks tightening conditions for borrowers, while central banks have eased monetary policies, providing increased liquidity. The deterioration in economic conditions is increasing concerns about prospects in 2008. Nonetheless, it remains most probable that the slowdown in world GDP growth will be limited. Primarily, emerging markets continue to grow, supported by strong domestic demand and stimulus from increasing trade among themselves, and in turn supporting global growth into 2008.

So how will Travel & Tourism be affected by an economic downturn? International tourism arrivals grew at 5.5 percent in 2007, the fourth successive year where arrivals' growth has exceeded its long-run trend of 4 percent. This, coupled with the increase in tourism spending and the rapid tourism growth in developing countries, has led the WTTC to believe that, although the concerns of an economic downturn might be justified, its ramifications for the T&T industry is limited.

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## Conclusion

This paper has tried to demonstrate the need to develop a new form of dialogue between the private and the public sectors. The importance of the T&T industry is undoubtedly a powerful source of development and is forecasted to continue growing at a remarkable pace. The new mission is to manage this growth; our vision of global sustainable tourism involves participation from all stakeholders. Governments are increasingly aware of the importance of Travel & Tourism. The time has come to plan for the medium and long term accordingly.

Leaders should start by defining coherent and streamlined management structures that can efficiently drive New Tourism. Politicians should elevate Travel & Tourism to a strategic national level with senior level policymaking by factoring Travel & Tourism into all policies and decision-making, to promote growth that respects both business needs and the well-being of citizens. Simultaneously, the industry should adapt strategic thinking in order to develop tourism with benefits for everyone, while at the same time extending and diversifying the products offered, thus improving yields and social value while maintaining a degree of corporate social responsibility.

All stakeholders should cooperate in identifying opportunities for growth and focus on building Travel & Tourism that opens up prospects for people—from employment to development. Everyone involved should work together to remove impediments to growth—from infrastructure shortcomings to pollution, and from outdated legislation to health and security concerns. The research conducted by the World Economic Forum is an important step in the right direction toward accomplishing the WTTC's vision of tourism for the future.

## Note

- 1 Given the changes made to the TTCI last year, scores and rankings across the two years are not strictly comparable. This year's model has placed more weight on natural and cultural resources, which has benefited many developing countries. Still, the potential improvements are striking.

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## The Travel & Tourism Competitiveness Index: Leveling the Playing Field

**GEOFFREY LIPMAN**, Assistant Secretary-General, United Nations

World Tourism Organization (UNWTO)

**JOHN KESTER**, Chief of Market Intelligence and Promotion

Department, United Nations World Tourism Organization (UNWTO)

The present chapter is not a statement of UNWTO policy. It is instead a commentary on fundamental aspects of the Travel & Tourism Competitiveness Index (TTCI) and a call to adapt the processes to ensure that, going into the future, the Index more effectively

1. recognizes the differentiated competitiveness situations of developing and developed states—particularly in light of global priorities to reduce poverty; and
2. takes into account the impact of climate policies on competitiveness criteria.

As part of the network set up by the World Economic Forum to develop a Travel & Tourism Competitiveness Index (TTCI), UNWTO has provided state-of-the-art input to the process of compiling this Index.

The development of any index is an evolving process that must incorporate continuous improvements and adapt to changing external conditions and of the study subject itself.

As we have witnessed in the two short years since its start, the TTCI has in fact achieved these enhancements. A good start to further improvement has been made this year by strengthening the Index's environmental and cultural components, especially because developing countries have a comparative advantage in tradition, culture, and natural resources.

This attribute will be in itself an important factor over time in general and for developing countries in particular, as the natural assets of these countries are also crucial tourism assets. Their proper reflection in competitiveness studies and analysis will also contribute to consolidating their comparative advantages as tourism destinations. This is why, looking ahead, some fundamental issues now emerging need to be contemplated.

In considering these issues we reflected on:

- ***The Travel & Tourism Competitiveness Report***, with some 500 pages of detailed tables, data, and contributed chapters, which sets a methodological base for the Index and identifies related aspects of competition from the perspectives of partner organizations (now in its second iteration).
- **Our 2007 chapter contribution**, calling for policy and development support for enhanced competitiveness for poorer countries and highlighting the opportunities for Least Developed Countries in this area. They include mainstreaming tourism for development (at a national level and in financing institutions) as well as reinvigorating tourism in the Doha Development Round (including its Aid for Trade Package).



- **Global Poverty Summits**, in which the world community has pledged to increase the capacity of developing countries to reduce poverty levels and compete in world markets on level playing field terms. The G8 and industrialized states, as well as the United Nations family and the Breton Woods institutions—the World Bank and the International Monetary Fund (IMF) systems—are committed to implement this development agenda by 2015.
- **The Bali Climate Summit**, which has laid the foundation for a new framework for transition to a low-carbon economy with radically reduced greenhouse gas emission by 2020.

We understand that at the present time the inclusion of these elements in the TTCI is constrained by a lack of cross-country data on a number of fundamental issues. However, we expect such data to become available in coming years and it will be imperative to find a way to integrate this information into the TTCI in order to better capture these elements going into the future.

### The development structural divide

Although many developing countries do well in a number of areas measured by the TTCI (in particular, environmental sustainability, prioritization of Travel & Tourism, price competitiveness, affinity for Travel & Tourism, and natural resources, where they are indeed well represented in the top half of the rankings), we have noted that the criteria for competitiveness tends to place poor countries at a fundamental disadvantage in several fundamental areas: safety and security, health and hygiene, air transport infrastructure, ground transport infrastructure, tourism infrastructure, ICT infrastructure, and human resources.

This is not a criticism of the criteria, but rather a realistic appraisal of the structural fault line between rich and poor nations. The tables reflecting these realities underscore the inherent competitive advantages of industrialized states in the rankings. These basic infrastructural differences will take many years to change and will require a massive transfer of funds, building of infrastructure, and supply of technical know-how to developing countries generally and to African nations specifically. The fact is that until this occurs, the competitive playing field is simply not level in these areas—and consequently not in the overall rankings that are so popular with the media.

*We suggest that this aspect of the Index needs fundamental reappraisal and this reappraisal should be reflected in the presentation of results that to some extent now automatically show poor countries in a disadvantaged way in a number of areas. This is partially because results are not differentiated between developed and developing countries.*

### The climate change paradigm

In the aftermath of the Bali UN Climate Conference, states have started a process to negotiate a post-Kyoto greenhouse gas reduction regime by 2012. Ultimately this will require significant changes to all aspects of human activity—including the approach to competitiveness. Climate change is a universal challenge and the world community has agreed to respond, *in parallel with its commitments to the Millennium Development Goals*. Tourism has a special responsibility and opportunity in this regard: in the world's poorest and emerging countries, the tourism sector is one of the principal services exports with a strong comparative advantage and a proven value in the war on poverty. Responsible growth and competitiveness patterns must find ways to capitalize on this situation.

During 2007, the UNWTO was actively involved in helping the sector assess the climate change/tourism relationship and develop a meaningful response framework. This has included a major stakeholder forum in Davos, in partnership with UNEP and the WMO and with the support of World Economic Forum. The resultant Davos Declaration (augmented by ministerial decisions in London and Cartagena) sets out directions for change for the tourism sector and calls on stakeholders to establish a long-range low-carbon emission roadmap with immediate concrete action plans that support global response to climate change and that are coherent with the commitments to the Millennium Development Goals. The UNWTO also ensured a tourism input—alongside other economic sectors—to the Bali Summit, as well as within Secretary General Ban Ki-moon's systemwide roadmap to support adaptation, mitigation, technology, and finance.

In 2008 the UNWTO will undertake an industry-wide 12-month campaign on Responding to the Challenge of Climate Change. The focus will be on increasing awareness of the Davos Declaration framework and encouraging its implementation by all stakeholders. The Davos Declaration is included in the appendix to this chapter.

*Against this background, the UNWTO will, along with all the partners of the Travel & Tourism Competitiveness Report, strive to include over time all the criteria that will reflect a climate change paradigm—not a new element but a paradigm change of Quadruple Bottom-Line Sustainability—adding climate to the traditional economic, environmental, and social components.*

Clearly a suggested change of this magnitude will take time to evaluate and, if considered relevant, to incorporate meaningfully into an index and report that is to some extent in its incubation stage. There is also a clear interrelationship between the two issues identified here—and the more so because the global Bali/UN Framework and the Tourism Davos Declaration Framework insist that the Millennium Development Strategy and the Climate Change Strategy be pursued in

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a coherent way. There would be some logic in looking at 2012 and 2015 as timelines in a plan to integrate these elements into the TTCI.

UNWTO plans a meeting of its members in mid 2008 to advance their interest in this *Competitiveness Report*—including these issues—and would look to do this in a way that is compatible with the overall work of the partners in this project.

**Note**

- 1 The Rio and Johannesburg Earth Summits, the Monterrey Debt Summit, the Millennium Development Goals, and the emerging Doha Development Round.

## Appendix A: Tourism: Responding to the Challenge of Climate Change

The following elements provided input into the preliminary response to the challenge of climate change represented in this appendix.

- **Davos Declaration:** Second International Conference on Climate Change and Tourism, Davos, Switzerland (October 2007)
- **London Conclusion:** Ministers' Summit on Tourism and Climate Change, London, UK (November 2007)
- **Member Endorsement:** UNWTO General Assembly, Cartagena de Indias, Colombia (November 2007)
- **Technical Background:** UNWTO-UNEP-WMO Report on Climate Change and Tourism (2007)

**Tourism**—business or leisure travel and related services—is one of the biggest and most dynamically growing sectors of the world economy. It generates foreign exchange, investment and jobs for all countries in the world. It will continue to be a vital component of the global economy, an important contributor to the Millennium Development Goals, and an integral positive element in our society.

**Climate** is a key resource for tourism, and the sector is highly sensitive to the impacts of climate change including global warming. It is affected by climate change in all regions of the world—from mountains to tropical beaches, coasts, cities, and heritage sites.

But tourism is also among the causes of this global phenomenon—mainly as a result of the emissions resulting from energy use in buildings and tourism transport. It is estimated to contribute some 5 percent of greenhouse gas (GHG) emissions, which approximately parallels its contribution to world trade and the global economy. In poor countries, small island states, and touro-centric regions such as the Caribbean, the economic contribution of tourism is much higher and the GHG impact much lower. In the Least Developed Countries and Small Island Developing States tourism is the largest export and foreign exchange earner. **This is precisely why solutions to the climate change challenge must not compromise tourism's vital role in development and poverty reduction.**

For the past five years, three United Nations Agencies—the UNWTO (the World Tourism Organization), UNEP (the Environmental Program), and the WMO (the World Meteorological Organization)—have been cooperating to advance the thinking on the relationship between tourism and climate change. The general direction of this thinking was charted in a landmark declaration made in Djerba in 2003.

The Davos Conference on Climate Change and Tourism in October 2007 was a milestone event. It reunited stakeholders from across the sector to review developments and re-chart the future in the light of the rapidly evolving science, global awareness, and market-place reality. In addition, a report was commissioned from a group of leading researchers on the socioeconomic relationship between climate change and tourism.

The resultant Davos Declaration (provided at the end of the appendix) acknowledged the reality of climate change and its strong interrelationship with tourism. It also acknowledged the need for a long-term strategy for the sector to reduce its GHG emissions in line with other sectors. It called for urgent adoption of a range of policies to encourage sustainable tourism and travel patterns that reflects a “quadruple bottom line” of environmental, social, economic, and climate responsiveness.

It gave a clear commitment for action to respond to the climate change challenge in four interrelated areas:

- mitigation of GHG emissions,
- adaptation by businesses and destinations,
- technology to leapfrog to improved energy efficiency, and
- financing for poor regions and countries.

It identified concrete initiatives from governments, industry, consumers, research, and communications networks to build awareness, data, education, collaboration, and a changed culture of priority climate response. Subsequent to the Davos meeting, at a tourism ministerial meeting in London and the General Assembly of the UNWTO in Colombia, the following points of emphasis were underscored:

- The importance for the tourism sector to identify consensus measures to address climate change without losing sight of all other priorities, especially poverty alleviation and tourism's contribution to the Millennium Development Goals.
- The urgent need for the tourism sector to adapt to climate change conditions; to mitigate greenhouse emissions in line with the principle of common but differentiated responsibilities included in the United Nations Framework Conventions on Climate Change (UNFCCC); and to help to transfer new technologies, especially through the clean development mechanism, and to make efforts to secure financial resources to assist developing countries that are especially vulnerable to climate change.

- There should be no discrimination against developing countries by creating obstacles to their economic development; this is particularly important for those developing countries located far from tourist-generating markets. Special consideration should be given to Least Developed Countries and Small Island Developing States in the provision of financial, technical, and training support to tourism destinations and operators—particularly in the context of contributions to the UNFCCC LDC Trust Fund.
- Policy responses should be balanced and comprehensive and focus on measures that are economically efficient. The entire tourism industry—including the private sector—must play a strong role as part of a broader response to climate change; however, it should not be disadvantaged through the imposition of a disproportionate burden either on tourism as a whole or on vital components such as aviation.

These continuing initiatives in the Tourism sector are part of the overall UN effort to develop a common framework in tackling the climate change challenge. This process is possible thanks to the close collaboration between the World Tourism Organization, the United Nations Environment Programme, and the World Meteorological Organization. The three agencies have joined forces with the aim of ensuring an effective response to the challenges ahead, in the true spirit of the “ONE UN” initiative.

## CLIMATE CHANGE AND TOURISM

### DAVOS DECLARATION

#### Climate Change and Tourism Responding to Global Challenges

Davos, Switzerland, 3 October 2007

The international community is taking concerted action against climate change around a commonly agreed framework led by the United Nations. This UN framework will seek to establish a long term post-Kyoto roadmap with rapid deployment and targeted milestones. The tourism sector has an important place in that framework, given its global economic and social value, its role in sustainable development and its strong relationships with climate.

To support this action the UN World Tourism Organization (UNWTO), jointly with the United Nations Environment Programme (UNEP) and the World Meteorological Organization (WMO), with the support of the World Economic Forum (WEF) and the Swiss Government, convened the Second International Conference on Climate Change and Tourism, in Davos, Switzerland, from 1 to 3 October 2007. This event, building on the results of the First International Conference organised on this topic in Djerba, Tunisia in 2003, gathered 450 participants from over 80 countries and 22 international organizations, private sector organizations and companies, research institutions, NGOs and the media, with the aim of responding in a timely and balanced way to climate change imperatives in the tourism sector. In preparation of this Conference the organizers commissioned a report to provide an extensive review of current impacts and analyse options for possible actions.

The Conference agreed that:

- Climate is a key resource for tourism and the sector is highly sensitive to the impacts of climate change and global warming, many elements of which are already being felt. It is estimated to contribute some 5% of global CO<sub>2</sub> emissions.
- Tourism—business and leisure—will continue to be a vital component of the global economy, an important contributor to the Millennium Development Goals and an integral, positive element in our society.
- Given tourism’s importance in the global challenges of climate change and poverty reduction, there is a need to urgently adopt a range of policies which encourages truly sustainable tourism that reflects a “quadruple bottom line” of environmental, social, economic and **climate** responsiveness.
- The tourism sector must rapidly respond to climate change, within the evolving UN framework and progressively reduce its Greenhouse Gas (GHG) contribution if it is to grow in a sustainable manner. This will require action to:
  - **mitigate** its GHG emissions, derived especially from transport and accommodation activities;
  - **adapt** tourism businesses and destinations to changing climate conditions;
  - apply existing and new **technology** to improve energy efficiency;
  - secure **financial** resources to help poor regions and countries.

## Appendix A: Tourism: Responding to the Challenge of Climate Change (*cont'd.*)

**The Conference** calls for the following actions:

### 1) Governments and International Organizations:

- Incorporate tourism in the implementation of existing commitments under the United Nations Framework Convention on Climate Change (UNFCCC) and its Kyoto Protocol, and respond to the call by the United Nations Secretary-General for launching, at the 13th session of the UNFCCC Conference of the Parties in Bali, December 2007, an effective and comprehensive climate change framework for the post-2012 period.
- Implement concrete, simultaneous actions for mitigation, adaptation, technology and financing, consistent with the Millennium Development Goals.
- Provide financial, technical and training support to tourism destinations and operators in developing countries (especially in the least developed countries and Small Island Developing States) to ensure that they can participate in the global climate response framework, through established initiatives, such as the Clean Development Mechanism.
- Promote, at all levels, interdisciplinary partnerships, networks and information exchange systems essential to sustainable development of the sector.
- Collaborate in international strategies, policies and action plans to reduce GHG emissions in the transport (in cooperation with ICAO and other aviation organizations), accommodation and related tourism activities.
- Introduce education and awareness programs for all tourism stakeholders—public and private sector—as well as consumers.
- Develop regional and local climate information services tailored to the tourism sector and promote their use among tourism stakeholders. Build capacities for interpretation and application of this information, strengthening collaboration with WMO's National Meteorological Services.
- Implement policy, regulatory, financial, managerial, educational, behavioural, diversification, research and monitoring measures, for effective adaptation and mitigation.

### 2) Tourism Industry and Destinations:

- Take leadership in implementing concrete measures (such as incentives) in order to mitigate climate change throughout the tourism value chain and to reduce risk to travellers, operators and infrastructure due to dynamic climate variability and shift. Establish targets and indicators to monitor progress.
- Promote and undertake investments in energy-efficiency tourism programmes and use of renewable energy resources, with the aim of reducing the carbon footprint of the entire tourism sector.
- Integrate tourism in the formulation and implementation of regional, national and local level adaptation and mitigation strategies and implementation plans. The Nairobi Work Programme on Impacts, Vulnerability and Adaptation to Climate Change, coordinated by UNFCCC, represents an important opportunity for the tourism sector to enhance knowledge, increase capacities and stimulate action.
- Strive to conserve biodiversity, natural ecosystems and landscapes in ways which strengthen resilience to climate change and ensure a long-term sustainable use of the environmental resource base of tourism—in particular those that serve as “earth lungs” (carbon sinks), sequestering GHGs through forest management and other biological programmes, or that protect coastlines (e.g. mangroves and coral reefs).
- Seek to achieve increasingly carbon free environments by diminishing pollution through design, operations and market responsive mechanisms.
- Implement climate-focused product diversification, to reposition destinations and support systems, as well as to foster all-season supply and demand.
- Raise awareness among customers and staff on climate change impacts and engage them in response processes.

### 3) Consumers:

- In their choices for travel and destination, tourists should be encouraged to consider the climate, economic, societal and environmental impacts of their options before making a decision and, where possible to reduce their carbon footprint, or offset emissions that cannot be reduced directly.

- In their choices of activities at the destination, tourists should also be encouraged to opt for environmentally-friendly activities that reduce their carbon footprint as well as contribute to the preservation of the natural environment and cultural heritage.

#### 4) Research and Communications Networks:

- Encourage targeted, multi-disciplinary research on impacts of climate change in order to address regional gaps in current knowledge, develop tools for risk assessment and cost-benefit analyses with which to gauge the feasibility of various responses.
- Include environmental and climate specific subjects in the study curricula of tourism training programmes and extend these to broader educational systems.
- Promote responsible travel that supports “quadruple bottom line” sustainable tourism, incorporating climate, environmental, social and economic considerations.
- Raise awareness on tourism’s economic role as a tool for development, and present information on causes and effects of climate change based on sound science, in a fair, balanced and user-friendly manner.

#### The Conference:

- sets out a range of specific actions to be taken by all stakeholders in the sector to immediately begin to establish and implement a long range carbon-neutral roadmap;
- invites governments and international organizations; the tourism industry; consumers; research and communications networks to implement these recommendations, with concrete commitments and action plans, and to use the UNWTO on-line Climate Change and Tourism Information Exchange Service as a platform, for committed stakeholders to register their pledges and activities toward adaptation and mitigation on an on-going basis;
- stresses the need that UNWTO, in collaboration with UNEP and WMO, continue to lead this process, and to consider convening a Third Conference on Climate Change and Tourism, at an appropriate time in the future, to review progress, to maintain response levels and to identify further needs and actions;

- urges action by the entire tourism sector to face climate change as one of the greatest challenges to sustainable development, and to the Millennium Development Goals in the 21st Century.

\* \* \*

**The Davos Declaration and results of this conference provided the basis for the UNWTO Minister’s Summit on Tourism and Climate Change, held at the World Travel Market, London, UK, November 13, 2007. It was submitted for adoption at the UNWTO General Assembly in Cartagena deIndias, Colombia, November 23–29, 2007, and also was presented at the United Nations Climate Change Conference in Bali, Indonesia, in December 2007.**



## Natural Capital Stewardship: A Basis for Travel & Tourism Competitiveness

**JULIA MARTON-LEFÈVRE**, Director General, International Union for  
Conservation of Nature (IUCN)

**STEVE MCCOOL**, Professor Emeritus, Department of Society and  
Conservation, The University of Montana (USA)

The rapid growth in international travel projected in the near future has significant implications for the world's natural heritage. This heritage, which includes national parks and monuments, game reserves, wild rivers, mountains and landscapes, has become a major attraction for travelers who wish to view, experience, and engage in nature. More than 100,000 protected areas exist today, covering about 12 percent of the globe's terrestrial surface. Another 4,600 marine protected areas have also been designated, protecting 0.6 percent of the oceans.<sup>1</sup> The doubling of international arrivals between 2005 and 2020 (projected by the World Tourism Organization) means that natural heritage will be put under even greater pressure, but also means that the opportunities to use tourism to fund stewardship of this natural capital also increase dramatically. Natural heritage often forms the foundation for a nation's Travel & Tourism (T&T) industry, particularly in poor developing countries, which tend to have a rich natural heritage.

The rising prominence of natural heritage, along with cultural heritage, as a stimulus for travel is exemplified by the growing number of visitors to World Heritage sites—the 851 places internationally recognized under the World Heritage Convention for incorporating outstanding cultural and natural values that transcend national boundaries. Sites such as the Galapagos Islands in Ecuador, Serengeti National Park in Tanzania, the Great Barrier Reef in Australia, and Sian Ka'an in Mexico have experienced dramatic and sustained growth in visitor numbers over the last decade. The rising popularity of natural heritage has become so significant that it contributes to a nation's competitive advantage as a tourism destination.

The accelerating growth in visitation of course creates certain tensions and raises a number of questions relating to protection and stewardship of our remaining natural heritage. The issues can be environmental, political, or social.

### Indicators of natural heritage sustainability

Within the Travel & Tourism Competitiveness Index described in Chapter 1.1, additional indicators of the level of commitment to the conservation of natural heritage have been introduced this year. These indicators, included in environmental sustainability and natural resources pillars, reflect a country's natural capital and its commitment to conserving it. The IUCN has contributed to the definition of four of these indicators and supports their application by sharing its datasets:

1. total known species (mammals, birds, and frogs) included on the IUCN Red List of Threatened Species;



2. endangered species (as a percentage of total known species: frogs, mammals, and birds) on the IUCN Red List;
3. index of ratified environmental treaties (total number of treaties ratified by each country based on a sample of 25 most relevant treaties); and
4. nationally protected areas (as a percentage of total land area).

The data show substantial variation from country to country in indicator scores. The number of known animal species varies significantly, suggesting that some nations are more endowed in this area than others, and therefore have a natural competitive advantage. The relevant question is how well a country protects that heritage. Countries also vary greatly in their stewardship—in some places, the proportion of species listed as endangered is more than 20 percent, suggesting that significantly more conservation action is needed to safeguard them.

At the same time, some countries have done very well in establishing protected areas, another cornerstone of efforts to conserve their natural wealth. Protected areas include national parks, national scenic areas, game reserves, protected landscapes, forest reserves, and so on (see Box 1). Although the fundamental purposes for which these areas were established differs in many cases, most areas are aimed at conserving landscapes and the biodiversity and natural processes contained within them. They often serve as the foundation of a nation's tourism industry; examples are Kruger National Park in South Africa, the Great Barrier Reef of Australia, or the Amazon Basin of Brazil.

In an era of globalized Travel & Tourism, ratification of environmental treaties and conventions such as the Convention on Biological Diversity, the Ramsar Convention on Wetlands of International Importance, the World Heritage Convention, and the Convention on International Trade in Endangered Species is a key indicator of a nation's willingness to join international efforts to protect the environment. Participation in such agreements is a sign that a nation not only shares

### Box 1: IUCN Protected Area Management Categories

- **Category Ia: Strict nature reserve/wilderness protection area managed mainly for science or wilderness protection**—an area of land and/or sea possessing some outstanding or representative ecosystems, geological or physiological features and/or species, available primarily for scientific research and/or environmental monitoring.
- **Category Ib: Wilderness area: protected area managed mainly for wilderness protection**—large area of unmodified or slightly modified land and/or sea, retaining its natural characteristics and influence, without permanent or significant habitation, which is protected and managed to preserve its natural condition.
- **Category II: National park: protected area managed mainly for ecosystem protection and recreation**—natural area of land and/or sea designated to (a) protect the ecological integrity of one or more ecosystems for present and future generations, (b) exclude exploitation or occupation inimical to the purposes of designation of the area and (c) provide a foundation for spiritual, scientific, educational, recreational and visitor opportunities, all of which must be environmentally and culturally compatible.
- **Category III: Natural monument: protected area managed mainly for conservation of specific natural features**—area containing specific natural or natural/cultural feature(s) of outstanding or unique value because of their inherent rarity, representativeness or aesthetic qualities or cultural significance.
- **Category IV: Habitat/Species Management Area: protected area managed mainly for conservation through management intervention**—area of land and/or sea subject to active intervention for management purposes so as to ensure the maintenance of habitats to meet the requirements of specific species.
- **Category V: Protected Landscape/Seascape: protected area managed mainly for landscape/seascape conservation or recreation**—area of land, with coast or sea as appropriate, where the interaction of people and nature over time has produced an area of distinct character with significant aesthetic, ecological and/or cultural value, and often with high biological diversity. Safeguarding the integrity of this traditional interaction is vital to the protection, maintenance and evolution of such an area.
- **Category VI: Managed Resource Protected Area: protected area managed mainly for the sustainable use of natural resources**—area containing predominantly unmodified natural systems, managed to ensure long-term protection and maintenance of biological diversity, while also providing a sustainable flow of natural products and services to meet community needs.

Source: IUCN, 1994.

concern about biodiversity issues but is also willing to commit resources for conservation.

In summary, the data show that some nations do better on all four indicators than others, suggesting that they will be much more competitive for Travel & Tourism. These countries contain the resources, environments, and heritage people look for in a holiday destination and have taken some key steps to conserve entire ecosystems and species in an effort to ensure their visitors have a pleasurable visit.

### **Growing interest in natural heritage fuels T&T growth**

Action to protect natural heritage are both cause and consequence of growing public concerns about the environment. Concerns range from unmanaged development to climate change. How the public perceives the stewardship of natural heritage increasingly influences their decisions about destinations for holidays, mini-breaks, and business conferences. There is a major shift in consumer attitudes, spending, and decisions toward more socially responsible behavior and purchasing choices. The growth in concern about fair trade issues from conditions of local workers to the way produce is grown is also changing people's purchasing decisions and behavior.

A range of recent studies documents not only this growing demand for responsible behavior from suppliers, but also a dramatic rise in consumer sensitivity to environmental and protected area issues. For example, in Central America, which is a primary nature-based tourism destination region, tourism has recorded consistent growth since 1999.<sup>2</sup> Central America's share of US outward-bound travel (the United States is the largest source of visitors to Central America) has grown steadily over that time period as well, from 5.7 percent to 8.7 percent. The International Ecotourism Society (TIES) reports that travelers are more interested in and concerned about the environment and the local communities that interact directly with it. A recent study summarizes research on travelers in three countries as follows:

More than two-thirds of U.S. and Australian travelers, and 90 percent of British tourists, consider active protection of the environment, including support of local communities, to be part of a hotel's responsibility. According to a 2002 survey, these travelers are more likely to patronize hotels with a "responsible environmental attitude."<sup>3</sup>

Public awareness about the effects of travel choices on global carbon emissions is also influencing the T&T sector; consumers have begun to rethink the effects of traveling to distant locations. While air transportation contributes only about 2 percent of global carbon emissions,<sup>4</sup> increased sensitivity to climate change may place "long haul" destinations at a disadvantage. This disadvantage may be outweighed if the nation in question

undertakes conservation and shows a commitment to protecting its natural heritage.

Regardless of growing consumer concern, we are both witnesses to and agents of a continuous and dramatic loss of our natural heritage. The Convention on Biological Diversity has set the goal of a significant reduction in the rate of biodiversity loss by 2010, just two years from now. The main factors driving biodiversity loss are habitat fragmentation and destruction, invasive species (both plant and animal), unacceptable harvest levels, pollution, and climate change—all potential effects of poorly planned tourism development.

Tourism development, if not well managed, has several effects on our natural heritage at varying scales. In some locations, inappropriate, large-scale, and poorly located tourism facilities can lead to habitat loss, thereby destroying the very foundation of nature-based tourism. Developments that are not sensitive to minimizing energy consumption or waste may pollute local habitats, particularly in freshwater and marine settings. Visitors who engage in inappropriate behavior may also have an impact on the environment leading to unacceptable levels of erosion or disturbance of wildlife.

### **Benefits of a healthy, nature-based T&T sector**

A healthy, vibrant, nature-based T&T sector has three distinct benefits that, taken together, further a nation's competitive advantage. First, nature-based tourism has become an engine of economic growth. Visitors to a national park, for example, spend money on accommodation, food, transport, park entrance and user fees, gifts and crafts, and other services. This transfer of wealth helps develop social capacity, strengthens labor skills, and provides opportunities for people living in or adjacent to the protected area. In many cases, visitor spending results in hundreds of new jobs for local communities, ranging from accountants to guides and protected area managers as well as more traditional employment such as catering services and housekeeping.

Such economic growth also provides tax revenues that provide funding for critical services such as education and health care, and generates financial support for management of the natural heritage upon which tourism is based. In some places, revenues from Travel & Tourism provide 50 percent or more of the operating costs of managing a national park or other protected area.

This financial benefit is particularly important for residents of biophysically rich, but economically poor, regions. Natural heritage, as a basis for Travel & Tourism, can become important for the alleviation of poverty and its associated challenges. By providing income-generating opportunities for local residents, incentives are developed for supporting and participating in conservation.

Second, natural heritage areas serve as "learning laboratories" for visitors. Through interpretive programs and learning centers (often employing local residents),

environmental awareness of visitors is increased: tourists can come away from their visit more aware of their natural heritage and the issues facing biodiversity. Well-designed interpretive programs, trained guides, and inspiring books and videos can lead to a better understanding of the relationship between people and their environments. Such awareness and understanding are the foundation not only for support for the particular protected area visited but also for more informed consumer decisions back home.

Third, successful conservation helps ensure the sustainable delivery of ecosystem services necessary for life on Earth. These ecosystem services include provision of clean air and water, climate regulation, and genetic material. Places where the integrity of natural heritage has been maintained—or restored—tend to be more attractive for tourists and for people who want live in a high-quality environment.

In short, a vibrant, nature-based T&T economy leads to many benefits extending well beyond protection of a country's natural heritage.

### Conservation makes good economic sense

Given the significant contribution that natural heritage makes to national economies through nature-based Travel & Tourism, conservation makes sense, both economically and socially. Conservation that underlies nature-based tourism provides the setting in which many knowledge industries such as accounting, education, and medical care choose to locate for reasons of quality of life. And, by preventing degradation of habitats that are later found essential, conservation reduces the cost of managing human impacts on the environment in the longer term.

By protecting natural capital, including the ecological forces that generate that capital, countries ensure their current competitiveness and lay the foundation for more resilient and competitive economies in the future. Actions such as designating conservation areas, building the technical capacity for their management, regulating harvest of wildlife and removal of vegetation, prohibiting pollution, and managing development are all essential to good conservation practice.

The Travel & Tourism Competitive Index in 2007 showed strong correlations between resources (human, cultural, and natural) and the business environment and regulatory framework. This means that nations doing well in one pillar of the Index also tend to do well in other pillars, suggesting that conservation needs to be well integrated with other dimensions of tourism development. Focusing solely on macroeconomic or large-scale regulatory issues is not enough to score highly on the Index.

### Use of best conservation practice tools underlies T&T competitiveness

Travel & Tourism is the classic double-edged sword: it can be both a tremendous source of financial and political support for conservation as well as a threat to natural heritage if not properly managed. Good conservation practice also means attending to the potential negative consequences of Travel & Tourism, particularly with respect to natural heritage. Rapidly increasing visitation, which many sites have experienced recently, testifies to the growing interest in natural heritage but also has an impact on the area, and on the very values that attract visitors in the first place.

The impacts of tourism occur at several scales: the micro scale where the behavior of individual tourists, such as littering or walking on sensitive areas, has an impact on the environment; the site scale where the accumulated impacts of thousands of tourists, including solid and liquid waste, congestion, and air pollution from vehicle use may not be managed appropriately; and at larger scales that concern the location, scale, and character of development.

### Stewardship of protected areas: An important cornerstone of conservation

Impacts at all three scales interact and accumulate, moving a relatively benign area of economic development into one that may have particularly pernicious consequences if not carefully and sensitively managed. Countries can take a number of actions to safeguard their natural heritage. An important one is to designate areas for protection—national and regional parks, reserves, landscapes, and so on.

While designation of protected areas is a cornerstone of conservation, stewardship of those areas is equally necessary and has many dimensions. One is the development of technically proficient managers—professionally trained individuals who have the capacity to manage both natural systems and tourism development. Another is a system of revenue generation that supports a continuing investment in stewardship. Conservation should be a long-term investment, and sustainable financing mechanisms are needed to support that investment. Mechanisms can include entry and user fees for visitors, concession license fees, local taxes on tourist “luxury” items, and endowments built from country entry or exit fees. In general, visitors accept paying user and entrance fees for parks if they know that these will go to support the park, rather than to a country's general treasury. Although there are significant equity and distribution questions associated with user fees, there is no question that with careful consideration they can be a sustainable source of revenue.

Development of public use plans, where all uses of natural heritage in a protected area—such as tourism, education, and science—are identified and administered

in an integrated and cohesive way, is an important aspect of stewardship. Such plans identify key values, unique resources, and ecosystem services and identify actions to protect them while allowing recreation and tourism on a limited basis. Plans developed in collaboration with local communities have been found to be particularly effective in developing social and financial support for implementation.

A fourth component is a set of tools, both regulatory and managerial, that provide the legal and technical foundation for stewardship. Regulatory tools impart the authority and legal basis for managing tourism development and the use of fees. Methods to manage congestion, provide high-quality interpretation, and ensure a pleasurable experience for visitors are essential to develop and sustain a competitive tourism product. Guidelines for sustainable tourism development provide managers with the tools needed for good stewardship.

A fifth component is the development of a cohesive and integrated science program that promotes research on both natural heritage and visitors to it. Understanding how to attract visitors, market an area's values, and manage visitor experience is essential to sound management and to global competitiveness. Knowledge about the ecological consequences of tourism and development helps planners identify places where tourism developments, ranging from trails to lodges, should or should not be built, how pollution should be managed, and, where necessary, infrastructure should be located.

### **Developing an integrated strategy for conservation of all natural heritage**

Although the legal and managerial tools for stewardship of protected areas and biodiversity conservation are key components of an integrated national conservation strategy involving tourism, other aspects also need to be considered.

Conservation can begin with landscape-level planning that identifies key sites and areas that need protection, and creative ways of implementing conservation. Connecting protected areas with corridors, open spaces, sensitively designed transportation, and utility routes can reduce the impacts of infrastructure. For example, designing highways with wildlife crossings (such as tunnels) has been a successful method in mitigating habitat fragmentation, thereby maintaining wildlife populations. National protected areas can be combined with locally administered parks and open spaces to create a mosaic of conserved landscape that sustains wildlife populations and is attractive to visitors. Tourists visiting locally conserved landscapes are also more likely to interact with residents of the local community, enhancing their experience.

Involvement of the private sector in conservation is important because it creates a sense of "ownership" and responsibility in safeguarding the environment and helps

strengthen the link between natural heritage and good tourism business. The private sector can also be engaged by providing opportunities for the creation of private protected areas in which tourism can occur.

Conservancies, in which two or more landowners develop a partnership for conservation, are growing in popularity, particularly in Africa where governments face challenges in meeting conservation objectives. Where such conservancies include attractive landscapes, unique natural features, or charismatic wildlife, there is potential for tourism. In larger such areas, landowners, if legal requirements are met, may be reimbursed for safeguarding the provision of ecosystem services.

It is important to continue to engage local communities in protected area management and planning. Although conservation planning has traditionally been viewed as the domain of experts, recent experience suggests that residents of local communities have much knowledge to contribute, and engaging them in planning decisions leads to more successful conservation. Such engagement again creates a sense of ownership in a protected area, rather than alienation from it, as has happened in many cases. When local residents feel this sense of ownership, they become actively engaged in its stewardship, exert pressure on their peers to obey rules and regulations, and provide a positive community atmosphere for visitors.

Community engagement in stewardship of the area is more likely to ensure a more equitable spread of benefits, not only of nature-based tourism, but also of the ecological services derived from the protected area. This equitable distribution of benefits creates an even greater sense of responsibility and care for the area, as well as a greater understanding of its values. By building the social capacity in the local community, developments—tourism and otherwise—that might threaten natural heritage values can be modified to be more in harmony with them.

A major long-term step is to implement environmental education programs—from school children to adults—as part of a lifelong learning strategy. Environmental education could focus on developing knowledge about ecological processes and the impacts of human activity on nature and could involve on-site nature interpretation. This is likely to lead to a more ecologically literate population, which will then care more about the sustainability of natural heritage and want to visit it, understand it, and protect it. Countries can increase their competitiveness by supporting policies that generate high-quality guiding, interpretation, pre-arrival information, and educational activities. Websites can help provide visitors with realistic expectations about what they might see and experience during a visit, background information to enhance the quality of their visit, and feedback opportunities for protected area managers.

Effective conservation requires a variety of actors in different roles; thus partnerships, particularly with the

private sector, have become increasingly important. Partnerships are an innovative way of implementing conservation. By understanding varying roles and responsibilities, by playing on the unique strengths of each partner, and by working collaboratively toward a commonly defined goal, a great deal can be accomplished. Partnerships help generate enthusiasm for—and a greater sense of ownership in—conservation.

### Conclusion

Travel & Tourism increasingly depend on opportunities to experience high-quality natural environments.

Consumers are becoming ever more sensitive to measures taken by the tourism industry, and by governments, to minimize impacts on those destinations. Attaining a competitive position requires that nations develop strategies that respond to concerns about the protection of natural heritage.

Recognizing that tourism is one of the sectors that directly rely on the quality of the host environment (recreation is one of the ecosystem services underpinned by biodiversity), it is clear that biodiversity conservation should be an essential element of any strategy aimed at raising and strengthening the competitiveness of the tourism industry in any country. Thanks to its potential to provide sustainable alternative livelihoods, tourism can play a strategic role in poverty reduction strategies, which are intimately linked to any country's efforts toward competitiveness.

However, it should be recognized that these efforts could involve taking sometimes difficult and contentious steps in conserving natural heritage and in restoring species and landscapes in danger. It will require integrated approaches that involve people and habitats in ways that both benefit, in ways that are effective, and in ways that create a sense of ownership and pride among local residents, who often feel they pay the price for conservation without receiving the benefits. But the price to pay for inaction will be very high: both the tourism industry and the society as a whole will pay a much higher price in the long term if actions to conserve biodiversity are not adopted in a timely fashion.

### Notes

- 1 IUCN and WCMC 2003.
- 2 CESD and INCAE 2004.
- 3 CESD and TIES 2005.
- 4 IPCC 1999.

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## Travel & Tourism and the Common Good: A Call for Integrative Global Citizenship

**MARILYN CARLSON NELSON**, Chairman and Chief Executive Officer, Carlson

I don't believe that the solutions in society will come from the left or the right or the north or the south. They will come from islands within those organizations, islands of people with integrity who want to do something.

—Karl-Henrik Robert, MD, Renowned Swedish oncologist, medical researcher, and a key figure in the worldwide sustainability movement

Each and every day around the world billions of people rise to engage in an economic pursuit. Whether that pursuit brings value beyond employment opportunities and shareholder returns is a question increasingly being asked by consumers, governments, and civil society—even business itself.

It is the good fortune of those of us in the Travel & Tourism (T&T)/hospitality industries to have the opportunity to make a positive difference in the quality of life for so many, in so many ways—some not immediately apparent to society and some that may not be revealed for decades to come.

What is apparent is that, since ancient times, the T&T industry has contributed immensely to the human experience. Even before the Silk Road connected people from China to the Mediterranean, Travel & Tourism facilitated commerce in every corner of the globe. Well before modern student-exchange programs, Travel & Tourism provided first-hand educational experiences for youth. Long before any international summit of world leaders was convened, Travel & Tourism brought visionaries together to reach accords. And well before the first theme park or all-inclusive resort were imagined, Travel & Tourism made possible countless opportunities for people to relax, explore, and appreciate the world around them.

The T&T industry is not unique only in that it grew out of a very human desire to traverse the globe and come together in real time, but it remains unique today in that it is one of the world's greatest economic drivers. It provides employment opportunities at every experience level, from entry-level jobs to life-long careers, and it does this at a staggering rate: *one in every 10 workers worldwide is employed because of Travel & Tourism*. In fact, Travel & Tourism is often cited as the most important industry for emerging nation economies—it is “mission critical” to the continuing development of those countries.

Travel & Tourism accounts for 10 percent of world GDP, 8 percent of jobs, and 12 percent of global investment annually. It also has the highest potential for growth of any industry—currently running at more than 4 percent per year.<sup>1</sup>

The resilience of Travel & Tourism—with demand repeatedly bouncing back despite successive high-profile challenges, ranging from terrorism to disease—shows

how much it has become a necessary and vital element to the world. It is a force that can be slowed, but it simply cannot be stopped.

Travel & Tourism is becoming more and more appreciated by its host countries and communities—so much so that they actively compete for it, knowing the economic and social benefits it is yielding worldwide. It is helping build economies emerging from poverty, conflict, and confusion while stimulating infrastructure development and secondary economic activity.<sup>2</sup>

Indeed, Travel & Tourism fills a need and invigorates economies. Fulfilling market need and wealth creation is basic to any industry's survivability. *How* it fills this need is today the focus of enlightened societies, governments, and companies.

As World Economic Forum Chairman, Klaus Schwab correctly points out that “As state power has shrunk, the sphere of influence of business has widened. Companies get involved in the health of workers, the education of employees and their children, and the pensions that sustain them in retirement.”<sup>3</sup> Companies within the travel and hospitality industries have long recognized their potential impact on society. It is the enlightened leaders who have stretched beyond traditional day-to-day trade, however, who have become integral to the betterment of individual lives and freedoms by partnering with governments and the civil sector to address national and global issues.

### Business engagement: An evolving scorecard

In the early 1990s, the perceived value of—and actual activity around—global engagement on the business stage was limited. Since the 1990s, individual stakeholders, media, nongovernmental organizations, and others have increasingly called for companies to act in a socially responsible way. Companies are no longer assessed solely on the financial gains achieved, but now also on the contributions they make to stakeholders, partners, and society as a whole.<sup>4</sup>

Though lagging a bit behind other parts of the world, Americans' expectations of their corporations' social responsibility practices are shifting. A recent study by Fleishman-Hillard-USA and the National Consumers League shows the impact that business engagement efforts have in the mind of Americans today.<sup>5</sup>

Among the findings is the fact that Americans expect corporations to be engaged in their communities in ways that go beyond just making financial contributions. It is obvious that the demand goes much deeper to include employees, quality products and services, and an overall understanding of improving the world in our own communities. Defining exactly what that means to the various stakeholders and where corporate responsibility stops and government or civil society's responsibility starts is challenging (Figure 1).

Being acknowledged as “socially responsible” has become a goal of global corporations. Many find themselves searching for a consistent and sustainable framework for global engagement—one that adds value for both the company and the global space in which they engage. It is clear that global citizenship can reinforce the positive role of business in society and enhance profitability in the long term.<sup>6</sup>

Investors, too, have a growing interest in this trend. In recent years, the Johannesburg Stock Exchange, for example, has provided its users with a socially responsible investment index.<sup>7</sup>

One of the greatest philanthropic efforts to further economic development is, quite simply, to provide a job. For Carlson, an American-founded company today operating global brands, providing jobs and economic growth to nearly 200,000 people all around the world and business operations in more than 150 countries, the development of social entrepreneurship and global corporate citizenship is a fundamental part of everyday activity. The ability to create such economic growth—through direct employment or partnerships with socially responsible companies—results in an improved economy for both the company and the world in which it does business.

Even outside the T&T industry we find examples of a new approach to business partnerships. A case in point: Woolworths' CEO Michael Luscombe has made it clear that the retail giant will “positively discriminate” toward suppliers and business partners with a responsible business practice in place.<sup>8</sup> We see evidence that the media and the general public are demanding the same.<sup>9</sup>

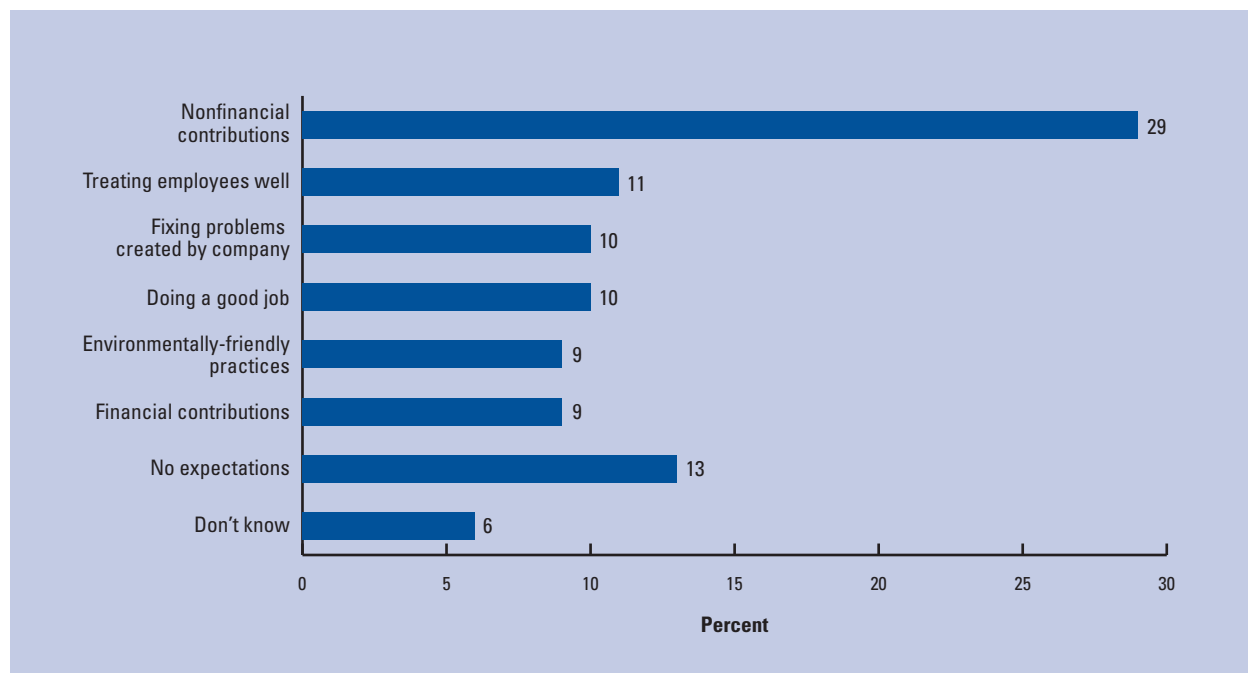
Today, one would be hard pressed to find a global T&T company that is not engaged in socially responsible activities beyond job creation. From corporate philanthropy and social investment to proper corporate governance and transparency, these have become *de rigueur* for companies that desire to carry their brands into the future. There is no turning back on these issues.

### Integrative global citizenship: The model for the future

The great French philosopher Alexis de Tocqueville observed that “In democratic countries knowledge of how to combine is the mother of all other forms of knowledge; on its progress depends that of all the others.”<sup>10</sup>

We need new models that combine the best of society to improve society as a whole—models in which business, governments, and civil societies understand and respect each others' roles and unique capabilities and boundaries. But business isn't alone in its responsibility to social investment. Thoughtful leaders need to find the beneficial intersection of business, government, and the social society.

In a recent issue of *Foreign Affairs*, Klaus Schwab has taken an interesting look at the issues around global

**Figure 1: Expectations of companies' community contributions**

Source: Fleishman-Hillard.

Note: The responses shown in the figure are only a truncated list of the complete set of responses offered by respondents.

corporate social responsibility and has suggested the way in which corporations—and the world—need to address this new age of integrative thinking. He breaks down the issue of business engagement into five key areas: corporate governance, corporate philanthropy, corporate social responsibility, corporate social entrepreneurship, and global corporate citizenship.<sup>11</sup>

By looking beyond the board room in order to contribute to global solutions, Carlson has discovered that it is the integration of all five of these factors that yields the greatest opportunity for impact and results for employees, customers, partners, and the communities in which business operations flourish. For its part, the company has found a particularly unique mix of initiatives to make a meaningful contribution to business engagement in what it calls *integrative global citizenship*. Integrative global citizenship suggests that companies must not only be engaged with their stakeholders, but that they must also see themselves as stakeholders alongside governments and civil society.

With corporate leaders thinking across broad business sectors and developing public-private partnerships to solve social problems, the T&T industry can help provide for the stable development of democratic societies. A stable economy—with employment opportunities and financial stability—decreases the risk of negative choices such as gang activity, terrorism, and sex trafficking.

In looking at corporate social responsibility, Michael Porter, a Harvard Business School professor, and Mark Kramer, managing director of FSG Social Impact

Advisors, wrote in the *Harvard Business Review* that corporations must engage in global issues while understanding that the business community cannot on its own solve global problems such as poverty, poor education, and inadequate health care. Governments and multilateral organizations cannot be discharged from their responsibilities to deliver such public goods.<sup>12</sup> The key is to find the proper niche for each entity to do what it does best to support corporate social responsibility.

### The model explained

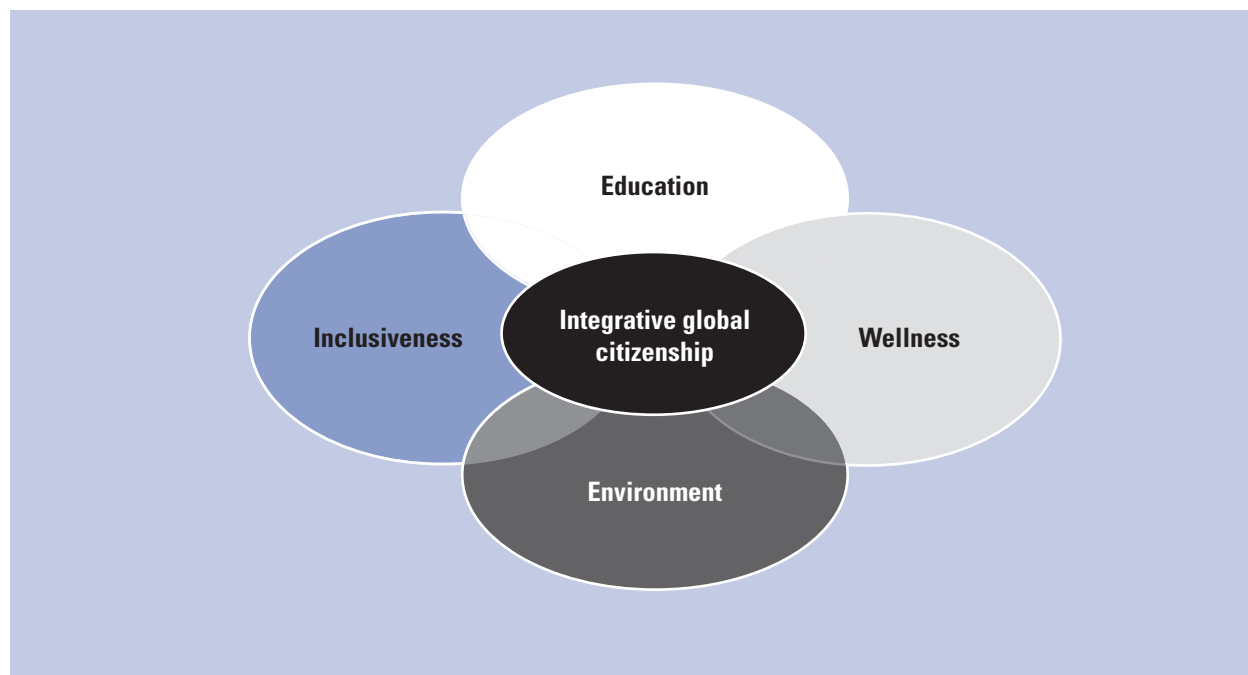
On an enterprise-wide context, an innovative way to work the issues of social responsibility into an integrative global citizenship model can be illustrated through the diagram shown in Figure 2.<sup>13</sup>

### Education

At the earliest stages, philanthropic and volunteer efforts should be aimed at youth at risk. With financial support to organizations such as the US Big Brothers/Big Sisters and the Knowledge Is Power Program (KIPP),<sup>14</sup> companies are addressing the need for quality early education and safety nets for our future generations.<sup>15</sup>

The impact of educational social responsibility at the post-secondary level is worthy of note, as well. Financial support to universities and training institutions helps to build that pipeline for men and women who will find new prosperity within the T&T industry.<sup>16</sup>



**Figure 2: Integrated global citizenship model**

Source: Carlson.

For example, supporting industry-focused training programs at the high school level such as that offered by the United States-based Academy of Hospitality & Tourism enables students to gain an understanding of the connections that exist between their education and the workplace. Academy teachers and industry mentors provide students with the curriculum and guidance necessary for rewarding careers. With more than 500 travel-related companies participating as business partners, the academy fosters the personal, analytical, technical, and communications skills needed for a career path in hospitality and tourism.<sup>17</sup>

#### Inclusiveness and social issues

As part of this new integrative model, the advancement of women and the protection of children from sexual exploitation in the T&T industry should be the hallmarks of Travel & Tourism-related companies' social responsibility programs.<sup>18</sup>

#### Women

Social entrepreneurship and engagement for women is part of a best practices effort within global companies to expand roles for women. Carlson Women's Advisory Board, for example, pulls leading women from the local community into the Carlson culture for a best practices sharing of ideas and inspiration.<sup>19</sup>

Within the T&T industry, the past 20 years have seen a significant increase in the participation of women. The industry has also been a major factor in the war on

poverty in the lives of women, in particular. For most developing countries it is the largest single export and major driver of jobs, investment, and economic transformation.<sup>20</sup> However, it is clear across the industry that at the executive level there continues to be a dearth of women in top roles. Outside the industry—for example, with the International Business Council at the World Economic Forum—the number of women members is still small in contrast to the number of men.

The *Global Gender Gap Report 2007*, developed by the World Economic Forum's Women Leaders Programme and supported by corporate partners, including Carlson, intends to provide a guide for assessing successful policies that help improve conditions for women around the globe both within the industry and beyond. The areas of economic empowerment, political participation, and educational attainment are the key indexes in determining the gap between men and women.<sup>21</sup>

The latest scores of the *Gender Gap Report* reveal that, globally, progress has been made on narrowing the gap between men and women in these key areas, but more work is to be done to create truly inclusive societies. The continued engagement of women in the T&T industry will only help close this gap long term and provide for greater prosperity for women and their families.

From a purely financial perspective, efforts to support organizations such as Athena International help to support and celebrate women leaders from all sectors of society.<sup>22</sup>

## Children

In pursuit of helping young people at risk, nonprofit organizations such as the World Childhood Foundation are dedicated to serving the most vulnerable children in the world: street children, sexually abused and exploited children, children trafficked for sexual purposes, and institutionalized children, with a particular focus on girls and young mothers.<sup>23</sup> The World Childhood Foundation supports more than 100 programs in 14 countries. Prevention, intervention, and education are hallmarks of these programs, which are found in urban, suburban, and rural areas over the world.<sup>24</sup>

The growing clout of the ECPAT International (End Child Prostitution, Child Pornography and Trafficking of Children for Sexual Purposes) program to combat child sex tourism is a testament to the impact that industry-related social responsibility programs can have on the lives of children around the world. Global efforts to combat the commercial sexual exploitation of children began more than a decade ago and continue to focus the world's attention on the problem. As a result, there is greater awareness about the root causes of the problem and work is being done to decrease the risk of trafficking and child sex tourism involving the most vulnerable among us.

The ECPAT Code of Conduct was initiated by ECPAT Sweden in 1998 in cooperation with Scandinavian tour operators and the UN World Tourism Organization. Carlson was among the first and very largest North American travel company to sign the ECPAT Code, demonstrating its increasing awareness and commitment to banning the exploitation of children within the company, the industry, and the communities in which Carlson operates.<sup>25</sup>

The Code encourages companies adopting it to commit themselves to:

1. establish an ethical corporate policy against sexual exploitation of children;
2. educate and train personnel to create awareness of the problem and be more aware of possible signs of the exploitation in both the country of origin and travel destinations;
3. introduce a clause that repudiates sexual exploitation of children in common contracts with suppliers;
4. develop information and awareness-raising materials such as catalogues, brochures, posters, in-flight films, ticket slips, and home pages;
5. provide information to local "key persons" at the destinations; and
6. report annually on the implementation of these criteria.

The protection of women and children, along with efforts at creating greater self-esteem and social power, must continue to be an aim—and by-product—of the T&T industry.

## Wellness

Health care and wellness issues are at the forefront of policy dialogues around the globe. Discussions at the local, state, federal, and international levels are guiding business and providing opportunities for integrative solutions to one of society's greatest challenges.

In 1988, leading Minnesota business leaders developed the Buyers Health Care Action Group. This group is recognized throughout the United States for its innovative, leading-edge approach to health-care purchasing. The group's newest initiative, Bridges to Excellence, is a revolutionary pay-for-performance program providing bonuses to doctors meeting high standards of care.

The introduction of innovative wellness programs into the workplace demonstrates a company's commitment to employees and their lives.<sup>26</sup> This might be deemed social entrepreneurship by creating product offerings that drive increased traffic while addressing a public health issue. Innovative leaders should continue to find ways to approach and affect these kinds of social and economic challenges facing the world today.

## Environment

The T&T industry is not immune from the growing focus on global warming and the environmental impact of human actions and development. In fact, innovative leaders in the industry have long promoted socially responsible development practices, particularly in emerging markets.

Destinations around the world are under pressure to create carbon-neutral experiences. Tourism is not shrinking from its responsibilities, but rather is actually responding through proactive behavior changes, technology, and policy development.

Discussions at the 2008 annual meeting of the World Economic Forum spotlighted the efforts of the industry thus far on the issue of climate change. A set of proposed recommendations will be developed and shared within the Gleneagles Dialogue at the 34th G8 Summit in Tōyako, Japan, in July of 2008.<sup>27</sup> The goal of the industry is to put forth a business statement on how the G8 governments can work with business to reduce greenhouse gas emissions, thereby improving the global environment.

Travel companies are helping clients to address environmental issues by enabling travelers to make well-informed decisions concerning their carbon footprint.<sup>28</sup> A "carbon calculator" used at the time of booking allows business travelers to calculate and compare the carbon cost of transportation options. Post-trip reporting enables travel managers to track carbon dioxide emissions

and ultimately neutralize their impact through carbon offsetting.

Other examples of integrative thinking around the environment are reflected in Rezidor™'s Responsible Business Program.<sup>29</sup> In the Europe, Middle East, and Africa (EMEA) hotel market, Rezidor has pioneered solutions to the issues around responsible water consumption, decreased non-recyclable waste output, and reduced CO<sub>2</sub> emissions. In addition, companies such as Carlson and Rezidor are focusing on environmentally sound building practices when it comes to hotel construction.<sup>30</sup>

### The next integrated leaders

To move forward in an accelerated fashion, we must teach our future leaders how to think and act effectively across sectors. How can this be accomplished when, in fact, most educational systems around the world are separated by discipline? One may study business, public affairs, political science, nonprofit management, or social sciences. But, by and large, these are separate educational tracks with little exposure to each other, even though the problems with which they are concerned require an interdisciplinary solution. Think of it: poverty, climate change, terrorism, disease, and corruption cannot be neatly “ascribed” to any one discipline for study, nor can they be wholly “assigned” to government, business, or society to solve on its own.

As pointed out in a Booz Allen Hamilton study, “Leaders everywhere no longer express as much confidence about the future as they once did. . . . The methods and tools that helped them succeed in the past no longer work. The challenges they face—such as global competitiveness, health and environmental risks, or inadequate infrastructure—can no longer be solved by their organizations alone. And when they try to reach beyond the boundaries of their own corporation, government agency, or nongovernmental organization, there is no clear pathway to success.” The authors conclude that “the root cause of the challenges confronting these leaders is complexity: the growing density of linkages among people, organization and issues all across the world . . . the winners are those who understand how to intervene and influence others in a larger system they do not control. We call this type of larger system a ‘mega community’.”<sup>31</sup>

Those who are schooled and eventually employed in a particular sector, such as travel or hotel management, are often sorely unaware of the drivers, roles, and leverage of the other sectors within this mega community. Each graduate of these tracks emerges with his or her own model of thinking, interpretation, and problem solving; this model is not by nature aware or inclusive of other sectors—in fact, it might even be combative. The result is “model clash,” which is not helpful to new, innovative, collaborative solutions.

In his book, *The Opposable Mind: How Successful Leaders Win Through Integrative Thinking*, Roger Martin, dean at the Toronto School of Business, points out that “We often don’t know what to do with fundamentally opposing models. Our first impulse is to determine which is ‘right’ and by the process of elimination, which is ‘wrong.’ . . . by forcing a choice between the two, we disengage the opposable mind before it can seek a creative resolution.”<sup>32</sup>

Carlson has chosen to contribute to the development of a new kind of leader who can better affect these solutions through the Center for Integrative Leadership, a joint initiative between the Carlson School of Management and the Hubert H. Humphrey Institute of Public Affairs at the University of Minnesota in the United States. The Center is dedicated to examining and advancing a new vision for cross-sector leadership so that it can be understood, taught, and deployed to help solve some of the most challenging issues of our time.

To accomplish this, the Center convenes thought leaders and practitioners from diverse disciplines to consider and propose new models and methods for dealing with such complex issues as economic development, health care, social issues, and international terrorism.<sup>33</sup> The Center for Integrative Leadership seeks to develop a new model—one focused on the cross-boundary, coalition-building, and global approach to make a great contribution to the university, business and society at large.

In addition, a grant has been made to the innovative and integrated leadership training for the World Economic Program’s Young Global Leaders at the Harvard Kennedy School in the United States.

### Conclusion

In this increasingly complex and interrelated world, one must find a way to develop and engage the “opposable mind” in the problem solving of these challenges that demands intense and thoughtful cross-sector collaboration. As Rajat Gupta, former senior managing director of the global consulting firm McKinsey & Company and now a member of the Foundation Board at the World Economic Forum, has observed, “The very best solutions come when business, governments and civil society work together.”<sup>34</sup>

In the 21st century, a new vision of leadership is needed more than ever. Leaders from every sector must integrate knowledge and talent from individuals in the private, not-for-profit, and government sectors to advance the common good.

The importance of value-based leadership from the boardroom on down, and from the farthest reaches “in the field” and back up, is critical. The T&T industry has the great opportunity to enter communities once unknown and unappreciated and share them with the

world; at the same time it can improve the lives of those working in the industry. That is a privilege afforded few other industries and an opportunity that must not be wasted.

There are actions that the industry can take right now that are relevant to the challenges of today and will have an immediate effect; there are also actions that can be taken to ensure that the T&T industry remains effective and relevant for generations to come. The industry—and innovative global leaders—must take responsibility for what can be controlled and resolve to work intelligently across sectors to create new solutions to improve the common good.

Above all, integrative global citizenship in travel, tourism, and hospitality asks organizations to be mindful that actions today provide a window through which to glimpse the world of tomorrow. Certainly, the future always comes from the past and it will be here sooner than anyone dreamed possible.

## Notes

- 1 WTTC 2007.
- 2 WTTC 2007.
- 3 Schwab 2008.
- 4 Schafer 2005.
- 5 NCL 2006.
- 6 Schwab 2008.
- 7 De Cleene and Sonnenberg 2004.
- 8 Quoted in *B&T Magazine/Australia* 2007.
- 9 *B&T Magazine/Australia* 2007.
- 10 Alexis de Tocqueville, quoted in *Democracy in America*, 1835. Available at [http://xroads.virginia.edu/~HYPER/DETOC/toc\\_indx.html](http://xroads.virginia.edu/~HYPER/DETOC/toc_indx.html).
- 11 Schwab 2008.
- 12 Porter and Kramer 2006.
- 13 This model has been developed by Carlson and is the basis of the company's daily operations.
- 14 Big Brothers Big Sisters is the oldest youth mentoring program in the United States; KIPP is a nonprofit foundation with the mission of building a network of public schools that prepares students to succeed throughout their education and in the wider world.
- 15 Carlson is preparing young people for life, as well as preparing young people for jobs in the hospitality industry. The company also shares a commitment to teach the business leaders of tomorrow how to effectively collaborate across sectors with government and civil society for the common good.
- 16 Carlson, in this spirit, supports the following universities and institutions: Johnson & Wales University (US), Cornell University (US), the Conrad Hilton College and the University of Houston (US), Niagara University's College of Hospitality and Tourism Management, and the Tourism Center at the University of Minnesota. And in India, for example, Carlson is a major supporter of RHW Schools, a training university for hospitality in Delhi and Calcutta. The program—in its sixth year—is operated in conjunction with Brooks University in Oxford, United Kingdom, and has been named one of the top five programs in India. The nearly 300 students have a 100 percent placement record in the industry, 70 percent of which expands outside of India.
- 17 Carlson financially supports the US-based Academy of Hospitality & Tourism.

18 In Carlson's case, this has meant visible and active leadership in industry organizations from the firm's Chairman and CEO, Marilyn Carlson Nelson. Examples of her recent industry leadership roles include:

- Millennium Chair, Travel Industry Association of America;
- Chair, National Women's Business Council (advisory group to the US congress and president);
- Vice-Chair, Travel and Tourism Advisory Board to the US Department of Commerce;
- US presidential advisory panel concerning health care; and
- Co-founder of the World Childhood Foundation.

19 Attention to recruitment and retention has resulted in Carlson being named to the *Working Mother* magazine's (USA) 100 Best Companies annual list, with Marilyn Carlson Nelson being named "Family Champion." In a socially responsible company, a commitment to family and to caring is paramount.

20 UN Climate Change Conference in Bali, Indonesia, December 2007.

21 Women Leaders Programme, World Economic Forum; <http://www.weforum.org/en/Communities/Women%20Leaders/index.htm>.

22 This group's mission is to support, develop, and honor women leaders; inspire women to achieve their full potential, and create balance in leadership worldwide (see [www.athenafoundation.org](http://www.athenafoundation.org)).

23 The World Childhood Foundation was established in 1999 as a joint effort of Carlson and Her Majesty the Queen of Sweden.

24 See the World Childhood Foundation, available at [www.childhood.org](http://www.childhood.org).

25 The ECPAT Code of Conduct is available at [www.thecode.org](http://www.thecode.org).

26 Even within individual hospitality brands, one can see the impact of an innovative perspective on wellness. Carlson Restaurants Worldwide, for example, has found a way to be a part of the wellness/consumer choice discussion with the introduction of "Right Portion/Right Price." Through smaller portions with a value-added price cut for customers, restaurants such as T.G.I. Friday's can meet the needs of diners wishing to select healthier choices while not limiting those who want a more traditional, casual dining experience. Expanding menu items to include healthier items and smaller portions is part of a socially responsible and creative business approach to restaurant dining and consumer health.

27 See the Ministry of Foreign Affairs (Japan) G8 Tōyako Summit, available at <http://www.mofa.go.jp/policy/economy/summit/2008/index.html>.

28 Carlson Wagonlit Tours (CWT) introduced a carbon calculator in 2007.

29 See Rezidor, available at [www.rezidor.com](http://www.rezidor.com).

30 See International Tourism Partnership, available at [www.tourismpartnership.org](http://www.tourismpartnership.org).

31 Booz Allen Hamilton 2007.

32 Martin 2007.

33 See the Center for Integrative Leadership, University of Minnesota, available at [www.umn.edu](http://www.umn.edu).

34 Rajat Gupta in a speech to the UN General Assembly, September 14, 2005.

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## Too Hot to Handle? The Hospitality Industry Faces Up to Climate Change

**ALEX KYRIAKIDIS**, Global Managing Partner, Tourism, Hospitality & Leisure, Deloitte

**JULIA FELTON**, Director, Tourism, Hospitality & Leisure, Deloitte

When the world's political leaders gathered in Bali recently to tackle the weighty issue of global warming and to seek agreement on carbon consumption limits, there were heated exchanges about the responsibilities of governments, of businesses, and of individuals. Naturally, the long-haul flights that brought many delegates to the UN summit, plus their use of hotel accommodation, added to the ongoing debate about the impact travel is having on climate change.

While politicians consider the “urgent global response” they need to make—as defined by the 2006 Stern report<sup>1</sup>—it seems appropriate that this chapter should focus on the hospitality industry's own carbon footprint, and on the way green strategies will impact the way hotels operate in the future. We also consider how changes to the world's weather patterns will make some destinations much more popular, while others will see visitor numbers fall away.

### How tourism measures up

Tourism's contribution to human-induced climate change has never been comprehensively assessed, but the World Tourism Organization (UNWTO), in its paper “Climate Change and Tourism: Responding to the Global Challenges,” estimates that emissions from international and domestic tourism represented between 4 and 6 percent of global emissions in 2005. *Tourism*, in this instance, is defined as “the activities of persons traveling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited.”<sup>2</sup>

The Travel & Tourism industry comprises three elements: transport, accommodation, and activities. Although carbon dioxide (CO<sub>2</sub>) is the most frequently measured output, other greenhouse gases resulting from people's activities make a significant contribution to global warming. For example, transport—particularly aviation, which has a greater warming effect because of altitude—generates more emissions than accommodation, but hotels still account for 21 percent of emissions, as shown in Table 1. Here, we can see the carbon emissions from global tourism's three main components.

Transport of all kinds generated the largest proportion of CO<sub>2</sub> tourism emissions, at 75 percent. Air transport accounted for 40 percent, followed closely by cars at 32 percent. According to UNWTO estimates, an average tourist trip generates 0.25 metric tons of CO<sub>2</sub>, with long-haul flights being the major culprits.

Flights between the five major UNWTO regions represent only 2.7 percent of all tourism trips, yet they make up 17 percent of the global total.<sup>3</sup> Contrast this with coach and rail travel, which accounts for 34 percent of all journeys but contributes only 13 percent of CO<sub>2</sub> emissions. The simple message here is that if the world's

**Table 1: Emissions from global tourism in 2005**

Emission source	CO <sub>2</sub> (metric tons)	Percent
Transport subtotal	<b>985</b>	<b>75</b>
Air transport	517	40
Other transport	468	35
Accommodation	274	21
Activities	45	4
<b>TOTAL</b>	<b>1,307</b>	<b>100</b>
Total worldwide	26,400	—
Share (percent)	—	4.95

Source: UNWTO et al., 2007.

tourism industry wants to reduce its impact on the environment, consumers should be encouraged to visit neighboring countries rather than traverse the world. However, this strategy would probably not be popular with governments in Australia and New Zealand, who want to drive up international tourism, or with China and India, where emerging middle classes are getting ready to spread their wings.

### The winds of change

Weather is a defining factor when people choose their holiday destination—are they looking for winter sun, for instance, great skiing, or a cool climate as they wander through historic ruins—and temperature has a marked effect on the level of tourist spending. In many places, the natural environment is the main attraction; in others, a change in the weather can have a negative effect on visitor numbers for some time to come. For example, the lack of snow in Scotland and across the Alpine resorts during the winter of 2006–07 damaged that ski season’s profitability; if the changing weather patterns continue, these locations will need to seek out alternative activities in order to remain financially viable destinations.

Similarly, the rising number of hurricanes in the Caribbean and along the coast of North America not only has an immediate and disastrous impact on the resorts and the local population; these weather patterns are shifting traditional tourism demand. People who used to go on vacation in the “hurricane season” are now choosing to go in the milder shoulder period instead, when the weather is more predictable. Looking back to 1997, the massive flooding in Kenya caused by El Niño brought misery to the region and held back demand for safari vacations—a major source of income for the country—during the winter months.

If we look at weather patterns in more detail, the Intergovernmental Panel on Climate Change (IPCC) has “*very high confidence* that the global average net effect of human activities since 1750 has been one of warming” and that between 1900 to 2005, precipitation has increased significantly in eastern parts of North and South America, northern Europe, and northern and

central Asia but declined in the Sahel, the Mediterranean, southern Africa, and parts of southern Asia.<sup>4</sup> Heat waves and heavy precipitation are likely to become more frequent. Tropical cyclones (typhoons and hurricanes) will become more intense, with larger peak wind speeds and more heavy precipitation and subsequent flooding, as the sea surface temperature continues to increase. However, although some places will get warmer, others will become cooler and some will remain stable. We can therefore expect to see winners and losers across the world, depending on location, type of vacation the location can provide, and target consumer market.

Global warming is expected to have most impact on the Northern Hemisphere, leading to more temperate climates in Canada, the United Kingdom, Scandinavia, and Russia. These destinations could increasingly attract travelers seeking to escape the sweltering temperatures forecast for parts of continental Europe and the United States, and we may see more Northern Hemisphere “locals” taking their holidays closer to home or opting to visit places in the winter, rather than the summer, when they are simply too hot to handle.

The United Kingdom exemplifies this trend perfectly, as scientific evidence points to warmer, drier summers and milder, wetter winters with increased risk of severe flooding. Figure 1 reveals that annual temperatures have been rising in central England for over a century, but the pace of temperature change has quickened dramatically during the past 20 years. Figure 2 shows that the biggest increases have been recorded during the autumn and winter.

### Costa Del Scarborough

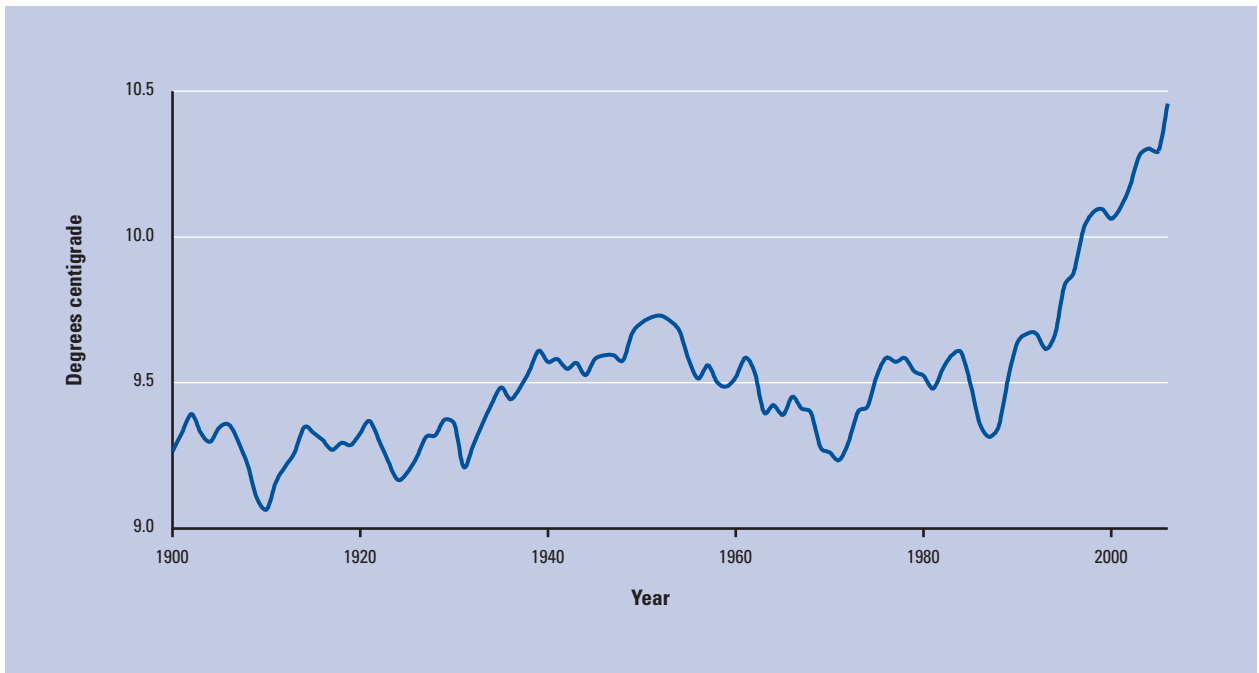
As the swing in temperatures is considerably larger in the United Kingdom than elsewhere, it offers the UK travel industry some interesting opportunities. For instance, British holiday makers traditionally follow the sun—so warmer weather domestically could keep many more Britons at home, where they might have to fight for space on the beaches with more continental Europeans seeking to escape the sweltering Mediterranean summers.

This shift in demand calls for significant investment in re-branding UK holiday resorts if “Costa Del Scarborough” is ever to become a reality. The upgrading of hotels, better restaurants, and improved facilities for the more discerning traveler will be vital. Rising temperatures could also change what activities are on offer. Skiing in Scotland, for example, may be replaced by mountain biking and walking holidays. Clearly, developers and operators must factor climate change into their business plans as they prepare for tomorrow’s consumers.

### Storm clouds over the Med

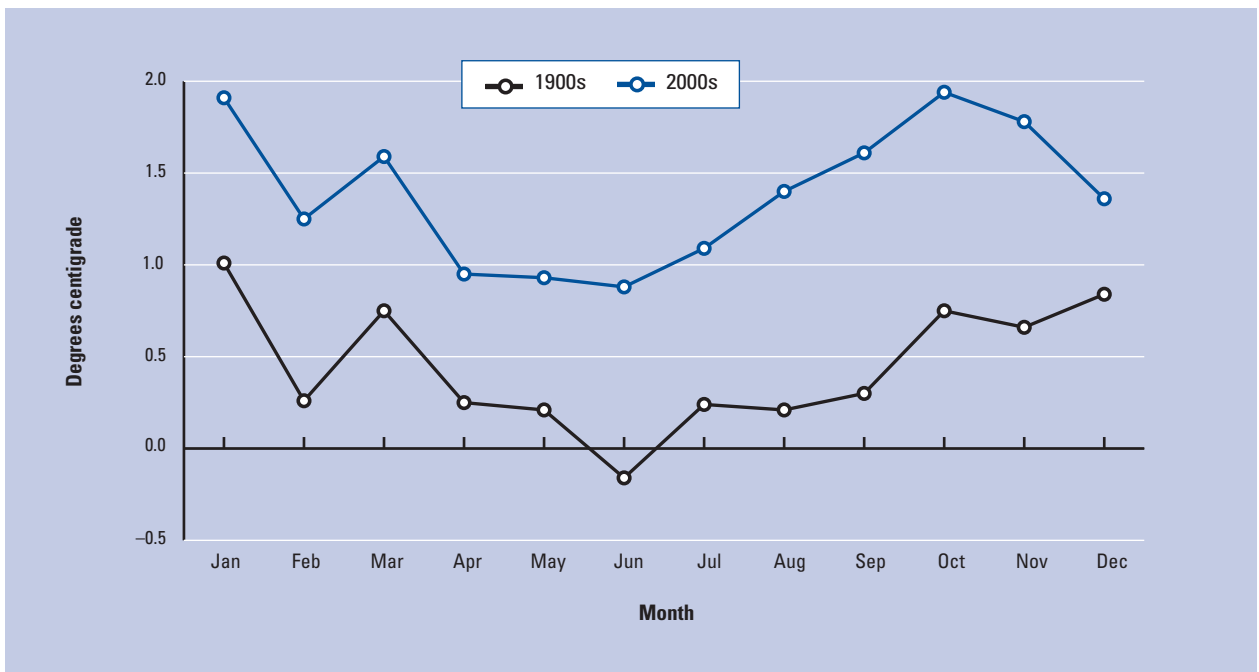
The good news for the United Kingdom’s tourism industry could come at the expense of overseas destinations traditionally popular with the British, such as Spain. Unless resorts along the Mediterranean coast create

Figure 1: Central England rolling 10-year average temperatures (1900–2006)



Source: HadCET, 2006.

Figure 2: Central England temperature variance by month, against a 1600s–1800s base level



Source: HadCET, 2006.



air-conditioned infrastructures to equal those in the Middle East, they will lose large numbers of holiday makers in the summer months.

Alternatively, Mediterranean resorts may have to adapt to much larger numbers of tourists arriving in the winter months, when temperatures are more pleasant. Florida and the Caribbean, meanwhile, could see a decline in tourists from the United Kingdom, who may see little sense in expensive, long-haul flights when the sea is just as inviting off the southern coast of Britain.

Warmer seas may tempt more swimmers, but these rising ocean temperatures, along with melting polar ice caps, are contributing to rising sea levels in many parts of the world, with disastrous consequences. Global average sea levels rose 1.8 millimeters per year in 1961, increasing to 3.1 millimeters per year by 1993, with projections for rises between 18 and 59 centimeters by the end of the 21st century, hitting many areas economically reliant on tourism.<sup>5</sup> Florida and the Caribbean are likely to suffer more frequent and severe hurricanes, similar to Hurricane Katrina that devastated New Orleans in 2005. Elsewhere, retreating shorelines and coastal flooding could lead to seaside property subsidence, while erosion in tourist hot spots—such as Venice—will exacerbate existing problems.

Climate change is also taking its toll on natural beauty and the attractions that bring tourists to a country in the first place. Australia's Great Barrier Reef, for instance, one of the world's most well known magnets for visitors, is experiencing increased temperatures that are bleaching the coral and killing it. Severe temperature swings could also damage biodiversity by killing off plants and animals that cannot cope with the changes. The IPCC believes that approximately 20 to 30 percent of plant and animal species could be threatened with extinction if the temperature increase exceeds 1.5 to 2.5 degrees Centigrade.<sup>6</sup> Large-scale and persistent changes in Meridional Overturning Circulation (MOC) will affect the marine ecosystem productivity, fisheries, ocean CO<sub>2</sub> uptake, and terrestrial vegetation.

Too much, or too little, water obviously affects agriculture and any potential lack of food and water will not only hit the local population, it will deter tourists; if shortages lead to political unrest, tourists will stay away.

Obviously, some regions are more vulnerable to climate change than others, with mountain, island, and coastal destinations, as well as nature-based tourism market segments, the most at risk. The Arctic region is heating up twice as fast as the rest of the globe, and sub-Saharan Africa—already facing considerable climate problems—will be particularly affected. Experts predict between 75 million and 250 million people across Africa will face water shortages by 2020; in some countries, yields from rain-fed agriculture could be reduced by 50 percent.<sup>7</sup>

While Africa has too little, Asia has too much. Some mega deltas are very vulnerable, including several densely

populated cities built on the edge of rivers. Flooding in Asia means an increase in water-borne diseases, with serious health implications for local communities. Since the hospitality industry relies heavily on local labor to staff its hotels, if illness depletes the pool of available people, hotel operations will suffer. Looking out to 2035, when temperatures globally could have increased by more than 2 degrees Centigrade, we expect a great deal of movement among regional populations. This regional movement will also challenge the recruitment practices of many hospitality companies.

### Seeing the green light

Quite clearly then, tourism businesses need to prepare for changes in climate. Tourists have the money, knowledge, and time to adapt their behavior and they can switch travel plans to alternative destinations or seasons, or simply stay at home. But operators with large investments in fixed assets such as hotels, resort complexes, and casinos don't have that same flexibility, and they have only a limited amount of influence on potential visitors. Their tactics should therefore be based on green and sustainable operations that will enable them to differentiate themselves from their competitors and appeal to environmentally aware tourists. This strategy is likely to be more successful as consumers become less focused on value for money and more concerned about being eco-friendly.

Looking at how best to do this, it is worth considering six Going Green areas, highlighted by the International Tourism Partnership, a program supported by the United Kingdom's Prince of Wales Business Leaders' Forum.<sup>8</sup> The program suggests that hotels can improve a "triple bottom line" of economic, social, and environmental management by working on these six elements. After all, being "good" is also good for business.

### Policy and framework

Reducing carbon emissions, first of all, needs commitment throughout the whole organization, ideally underpinned by a company environmental policy. A senior manager or executive should lead the program within the organization, heading a green team comprising a representative from each department. Staff will buy into the concept only if there are clear measurements in place.

For example, the chief financial officer and president of Continental European Lodging at Marriott, Arne Sorenson, is co-chair of the company's Green Council; at the United Kingdom-based Handpicked Hotels, each location has an Energy Action Notice Board that displays the weekly cost savings on energy bills. At one of their hotels, Nutfield Priory, the "Energy Police" have been introduced. Led by the head housekeeper and financial

controller, the team's role is to alert colleagues when PC monitors and other electrical equipment are left on. First-time offenders get a yellow warning, followed by a red sticker for second-time offenders and, finally, a "final caution." As a result, Nutfield Priory has managed to reduce its annual energy costs by 30 percent.<sup>9</sup>

### Staff awareness and training

No environmental policy will be successful unless staff understand the need for change and are committed to making it happen. Regular communications on how every employee can make a difference, as well as progress against targets, are essential in keeping staff engaged. Being an environmentally aware employer can also help recruit staff, as the Carbon Trust pointed out in April 2006, when it noted that "more than three quarters of UK employees consider it important to work for a company that has an active policy to reduce carbon emissions."<sup>10</sup> Marriott's head office in Bethesda, Maryland, in the United States, is a leader in this respect and has green ambassadors who train colleagues to adopt green office strategies. Car sharing and vehicles with low emissions are encouraged, with 30 designated parking spaces for those with hybrid vehicles.

### Energy management

Energy management is a big-ticket item for hospitality operators, as it encompasses biodiversity protection, hygiene, safety, indoor air quality, water and power usage, and waste management.

With a typical occupied hotel room soaking up 218 gallons (825 liters) of water every day, good water management is high on the list and can make considerable savings. The installation of water-efficient fixtures in rooms has helped Fairmont Hotels cut its use of water by an average of 31 percent;<sup>11</sup> Marriott Hotels has reduced spending by about 25 percent by opting for off-peak, cold-wash laundry;<sup>12</sup> and the Hilton Prague, in the Czech Republic, has installed an innovative hot water recovery system, which has reduced the energy needed to meet the domestic demand for hot water by 40 percent.<sup>13</sup>

Lighting is another key area that can be effective in helping hotels reduce their carbon footprint. In Australia, incandescent lights have been banned and hotels have switched to fluorescent lighting, which use less energy. Marriott estimates that its "Re-Lamp" campaign,<sup>14</sup> which replaced 450,000 light bulbs with fluorescent lighting in 2006, saved 65 percent overall on guest rooms' lighting costs. Additionally, replacing 4,500 outdoor signs with LED and fiber optic technology has yielded a 40 percent reduction in energy used for outdoor advertising. Starwood Hotels & Resorts estimate that changing the type of bulbs will cut energy used for lighting by 75 percent, which will save the company a considerable sum.<sup>15</sup>

Some hotels—including the Willard InterContinental and the Fairmont Washington, both in Washington DC—are considering using alternative energy sources, such as wind power, to generate electricity. Guests at the Gaia Napa Valley Hotel and Spa are encouraged to stay green by checking real time readings of the hotel's utility and carbon dioxide emissions on display in the lobby. This reminds guests to be environmentally aware, as surveys suggest 60 percent of travelers leave their green habits behind when they are away from home.<sup>16</sup> The hotel also installed an energy-efficient ventilation system at the cost of US\$800,000, but as this has cut costs by 26 percent and the noise reduction is making guests happier, the Gaia Napa believes the investment was worth it.

The French company, Accor Hotels, has become a green pioneer with its agreement with the country's Agency for Environment and Energy Management (ADEME).<sup>17</sup> With ADEME's backing, Accor intends to fit 100 new hotels with solar panels over the next three years. Already, ADEME has helped Accor install solar energy collectors to produce hot water in 24 hotels, as well as investing in a photovoltaic system for generating electricity in the Ibis, Porte de Clichy.

Another excellent example of smart thinking is the eco-friendly air-conditioning system at the InterContinental Thalasso Spa Bora Bora, which opened in May 2006 and is accessible only by boat. The system is fed by a 2,400-meter pipeline, at a depth of 915 meters, off the Bora Bora reef.

The pipe pumps extremely cold deep-sea water through a titanium heat exchanger, transferring it into a fresh water circuit that powers air-conditioning in the hotel. The system saves 90 percent of the hotel's electricity consumption for air-conditioning, or 2.5 million liters of oil per year.

The three Rs—reduce, re-use, and recycle—are particularly relevant within the hospitality sector, given that the average restaurant produces 22,727 kilos of garbage a year. Every night, the average diner produces about 1 kilogram of waste, mostly composed of beverage and paper products, accounting for 65 percent of all hotel waste. It is estimated that 95 percent of this could be recycled or composted, but most is simply thrown away.<sup>18</sup> One of the reasons for this volume of waste is that hotels built some years ago, just like our homes, are not equipped to have multiple garbage collection points so that paper, plastics, and glass can be segregated. Starwood Hotels & Resorts and InterContinental Hotel Group, however, are starting to encourage guests to recycle in the hotel as they would do at home, and are placing recycling bins in the guest bedrooms.

Fairmont Hotels and Resorts are providing china, cutlery, and linen napkins rather than disposable items and paper napkins, and have placed recycling stations in all its meeting rooms, where whiteboards have replaced paper flip charts. At the corporate head offices of some

hotel operators, central recycling points on each floor have replaced individual waste paper bins.

### Purchasing

Choosing local, seasonal produce will help hotels cut delivery costs, which will make an especially dramatic impact when it's estimated that, in the United States, the average calorie travels 1,000 miles between farm and plate.<sup>19</sup> Fairmont Hotels has introduced eco-cuisine menus that feature local, seasonal, and organically grown foods wherever possible; and in the United Kingdom, London hotel—One Aldwych—is doing its bit to celebrate locally sourced, seasonal food. Its Taste Britain promotions have proved very popular, and illustrate that organic foods grown without chemicals are a healthy alternative that helps the environment.

Both Hilton Hotel Group and Marriott International are being innovative in their choice of products to replace the ubiquitous Styrofoam cup. Hilton Garden Inns is replacing the 6.5 million nonrenewable Styrofoam cups it uses each year with the ecotainer™—an environmentally friendly coffee cup.<sup>20</sup> The cup is the only all-natural, hot-beverage paper cup to be coated with a corn plastic. Making it requires less energy and produces less greenhouse gases, while its corn-based coating means it can be composted rather than sent to land fill. Marriott plans to eliminate the 20 tons of Styrofoam and plastic utensils it sends to landfill each year by replacing them with products made of potato (Spudware™), sugarcane, and cornstarch, which are all fully biodegradable within 100 days.<sup>21</sup>

Hilton Garden Inns is also introducing 100 percent biodegradable packaging for its soaps and shower caps in guest rooms, and using a soy-based, 100 percent biodegradable ink to print on the cartons.<sup>22</sup>

### People and communities

Hotels are often integral parts of the local community, with local people making up the bulk of the workforce. Supporting projects and initiatives in the area therefore makes a good deal of sense, both as an employer and as an advocate for environmentally friendly behavior. In 2006, InterContinental Hotel Group signed an agreement with long-standing partner Empresas Bern to open the first Holiday Inn and School in Panama to help educate and train the local community. Accor too is helping to inform both guests and staff about energy conservation, with its practical guide that lists a few simple actions that everyone can take. The guide, in seven languages, is distributed throughout the Accor worldwide network of hotels. But the lead in this area is being taken by the environmental brand “1” hotel, which is being launched in 2008, by Starwood Capital. The company has pledged that 1 percent of revenue from each property will be donated to local environmental organizations.<sup>23</sup>

### Destination protection

Since the natural beauty of many destinations is the reason tourists visit, it is essential that the hospitality industry does not disturb the flora and fauna while hotels are being built and resorts developed. The building of the InterContinental Thalasso Spa in Bora Bora, mentioned earlier, is a good example of eco-friendly development. All construction materials were shipped in at high tide to keep disturbance to the coral reef to a minimum. Across the world, there are many examples of hotels using furniture that is locally sourced and made by local craftsman—which is another way of preserving the status quo. Using local art also supports the indigenous culture.

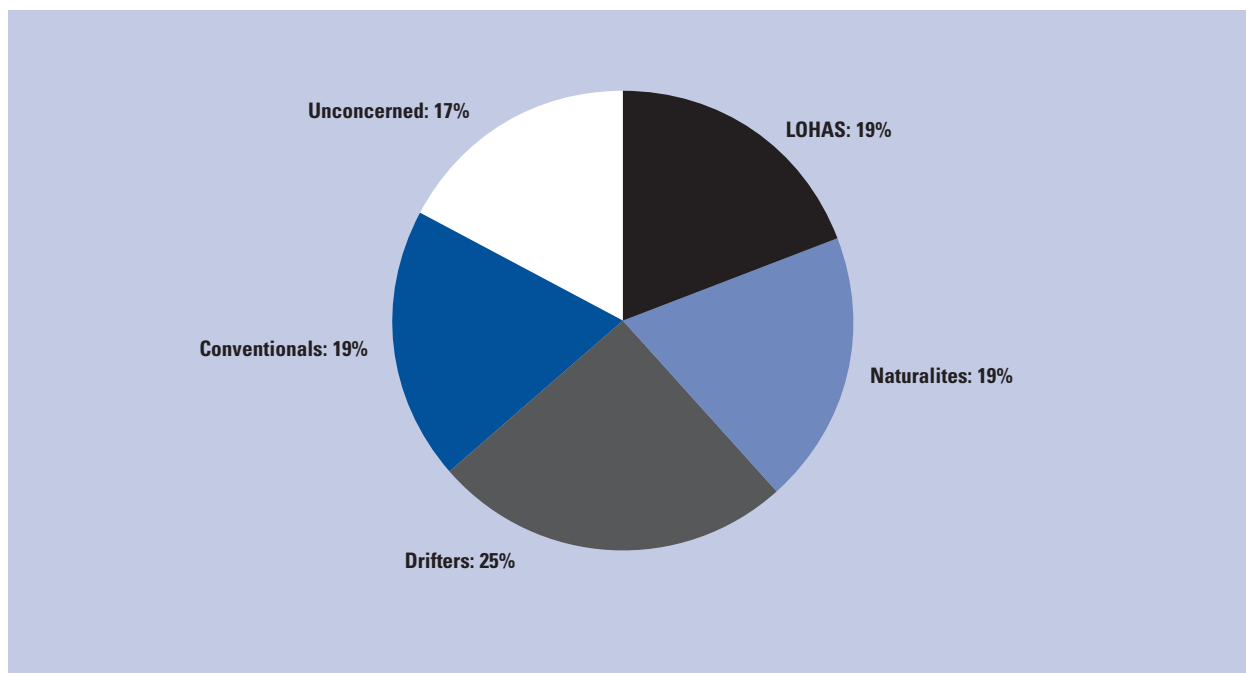
### Meeting customers' expectations

How green is my hotel? It is a question that more and more holiday makers are asking. In 2005, a survey for United States-based Kimpton Hotels & Restaurants found that 16 percent of guests choose to stay in its properties because of the company's environmental practices.<sup>24</sup> This research is backed by the Natural Marketing Institute, which has developed an innovative way to categorize consumers based on their attitudes toward health, wellness, and sustainability.

In 2007, 19 percent of the US population was said to have a “lifestyle of health and sustainability” (LOHAS) compared to the 17 percent who were not concerned and did not demonstrate any environmentally responsible behavior (see Figure 3). Other conscientious consumers, known as the “naturalites” (who are focused on natural/organic consumer packaged goods with a strong health focus), add to the growing number of people whose booking and buying habits are influenced by environmental attitudes. This market segment typically includes people from the higher socioeconomic groups, who have more disposable income and are therefore very attractive to hotels and other businesses.

Almost 90 percent of people who responded to a survey of 2,000 customers carried out in the United Kingdom by Travelodge believe that hotels and tourism companies have a responsibility to operate in a way that protects the environment. Interestingly, 54 percent of guests want to offset the carbon emissions from their next stay. One way they can do this is through the TravelGreen Mini Green Tags, but these are currently only available in the United States. The tags cost US\$1 and equate to 15.3 kilos of greenhouse gas emissions, representing 24 kilowatt hours of electricity supplied by new wind and solar power. This equals 100 percent of the energy consumed during one night in an average hotel.<sup>25</sup>

Leading Hotels of the World is another organization encouraging guests to support greener travel, through Sustainable Travel International (STI). The Leading Green Initiative is a carbon-neutral program whereby the company will directly absorb the cost to offset

**Figure 3: LOHAS consumer segmentation (2007)**

Source: Natural Marketing Institute, 2007.

guests' energy consumption for stays in any of its 440 hotels worldwide. For every night a guest stays in one of its properties, Leading Hotels will donate 50 US cents of the average room rate to STI.<sup>26</sup> This equates to 100 percent of one night's energy consumption at one of its hotels.

Once guests know about a hotel's environmental initiatives, they are keen to join in, according to the JD Power and Associates 2007 North America Hotel Guest Satisfaction Survey.<sup>27</sup> This survey found that 73 percent of hotel guests are willing to participate in a hotel's green program, so PR and marketing activities that raise awareness of environmental schemes are likely to bring in more customers. An example of this happening is the 86-room Orchard Garden Hotel in San Francisco. It opened in the late winter 2006 and incorporated environmental designs from day one. These included large recycling cans, designed to look like furniture and created from sustainably grown and harvested maple.

Although consumers seem to be keen to stay in environmentally friendly hotels, other research suggests that almost 60 percent of frequent travelers admit to dropping their "green routines" when away from home. Recent research by STUDYLOGIC for Starwood Hotels & Resorts confirmed that although 70 percent of people try to conserve water at home, only 18 percent do the same when they are in a hotel.<sup>28</sup> Similarly, 63 percent of people say they are more likely to leave a light on when they leave the room, and 70 percent of travelers open a new mini bottle of shampoo and conditioner each time

they shower. Encouraging guests to adopt an "eco-etiquette" when traveling is therefore essential for any hotel that wants to reduce its carbon footprint.

Focus areas for environmentally aware hotels include reminding guests to unplug electrical appliances, such as mobile phone chargers and laptops, when not in use and to keep an eye on heating or air-conditioning. Most hotels already offer guests the opportunity not to have linen and towels changed daily, and remind them to turn off the lights when they leave the room, but there is more that could be done.

### **New standards and new brands**

A recent survey of 200 hoteliers by *Hotels* magazine concluded that 51 percent of respondents had incorporated sustainable or green concepts into their recent building and renovation projects, and 33 percent intended to do so in the near future.<sup>29</sup> However, the straightforward driver here tends to be energy management. Key players, such as Marriott, Starwood, Hilton, and Wyndham, are therefore seeking to establish standards that incorporate the wider issue of environmental impact, so that new hotels are designed to be more eco-friendly and energy efficient.

Fortunately, there are already green building practices that cover the environmental impact of the initial construction, as well as the upkeep and maintenance throughout the life of the building, which the hotel industry can adopt. These have been defined by the

Leadership on Energy and Environmental Design (LEED), an organization of professionals who are skilled in developing environmentally friendly and sustainable buildings; Marriott has already built its first LEED-certified hotel.

The construction of The Inn & Conference Center by Marriott at the University of Maryland University College in Adelphi, Maryland, in the United States was overseen by three regional directors of energy and three architects certified by the US Green Building Council (USGBC) for LEED.

There is a perception across the hospitality industry, as in many other industries, that sustainable developments are more expensive. CoreNet and Jones Lang La Salle's survey revealed that 77 percent of real estate developers expected to see a premium charge for sustainability, which most of them thought would be around 5 percent.<sup>30</sup> In reality, the costs of incorporating sustainable designs are falling relative to conventional construction costs.

The USGBC estimates that the cost of going green in new building development can be negligible to neutral, if environmental concerns are part of the project from the outset. There are many ways to incorporate green practices into a development, including

- using energy efficient appliances;
- using sustainable building materials;
- using recycled materials for building;
- using materials manufactured with reduced or no toxic chemicals;
- using energy efficient light bulbs, such as compact fluorescent bulbs;
- implementing energy management systems that lower power use and maximize off-peak periods; and
- incorporating water-conserving devices.

These practices will all have been incorporated into the innovative hotel concept—announced in October 2006 by Starwood Capital Group's Barry Sternlicht—that breaks new ground in the hospitality industry. "1" Hotel and Residences is set to become the first luxury, eco-friendly hotel brand; and it will combine the best of sustainable architecture and interior design with impeccable service and luxurious comfort. "1" will meet green construction and operating principles and minimize the consumption of natural resources, in full compliance with LEED. And, as mentioned earlier, 1 percent of its revenue will support local environmental organizations.

The first "1" hotel should open in Seattle in late 2008, with other properties planned for Mammoth Mountain, California; Scottsdale, Arizona; and Fort Lauderdale, Florida. The initial properties will be new builds, which should make it easy to incorporate green design features. Perhaps the most challenging project for Starwood Capital in this new venture will be in Paris, where the company will be renovating an historic

building. It will be interesting to study the return on investment for older hotels being renovated in this way.

Starwood Hotels & Resorts is also incorporating a range of smart, environmentally friendly design features in its latest brand—ELEMENT—which is an extended-stay concept. These features include

- shampoo and conditioner dispensers, to eliminate multiple mini bottles and significant wastage;
- low-flow sink faucets and dual flush toilets;
- eco-friendly materials—for example, carpets and cushions made from recycled content, and works of art mounted on a base made from recycled tires;
- low VOC paints, to improve the air quality for both guests and staff;
- recycling bins placed in all guest bedrooms;
- compact florescent light bulbs that replace incandescent light bulbs—an energy saving of 75 percent; and
- biophilic design, to maximize natural light in the hotel, helping guests to connect with the outdoors.

These features are intended to make it easier for guests to maintain a greener lifestyle away from home, thus minimizing their impact on the environment. European hotels are also taking pioneering steps in the same direction. The Scandic Linköping City has been built in accordance to Scandics Standard for Environmental Refurbishment and Construction (SEREC), and Scandic has recently won the Sustainability Award at the European Hotel Design Awards for the chain's significant contribution to the environment.

Another green-aware hotel is the Radisson SAS Hotel in Tallinn, Estonia, which has been designed to minimize wastage and maximize resource efficiency. Meanwhile, United Kingdom-based Apex Hotels, which operates five city center properties, has employed an architect to ensure that all its hotels meet low carbon emission standards.

### The importance of benchmarking

As with any initiative, hoteliers won't know how much progress they are making without an accurate measurement system in place. Currently, most companies benchmarked their energy reduction progress against other hotels in their portfolio. For example, at Colorado-based Xanterra Park and Resorts, the company tracks energy reductions in terms of impact rather than costs. Its program, known as Ecometrix, uses utility and haulage bills to calculate its hazardous waste generation, resource consumption, greenhouse gas emissions, and other environmental measures. It then divides the total by the number of occupied rooms to find the annual environmental impact per guest, and this is compared across the group's 22 properties.

A number of the leading global hotel brands, including Marriott and Accor Economy Lodging, use United States-based Advantage IQ to develop detailed cost matrices that pinpoint the monthly running costs of an efficient building of any given size, age, and location. By identifying the best and worst performers, management can make informed decisions to save money.

Across Asia, some property managers at energy-efficient hotels have extended the benchmarking concept to compare energy usage in individual departments. Robert Allender of Hong Kong-based Energy Management Resources believes that, today, 25 percent of new construction in Asia includes submeter installations so that the energy consumption of various departments or even individual guest rooms can be measured.<sup>31</sup> The Washington, DC-based Alliance to Save Energy believes that submetering can save hotels between 5 and 10 percent of their annual energy costs.

Hotels can compare their waste volumes and their water and energy consumption and costs with that of their peers through [www.BenchmarkHotel.com](http://www.BenchmarkHotel.com), which is run by the International Tourism Partnership. This tool can be used in the three major climate zones, and enables hotels to generate reports showing locally adjusted key performance environmental indicators, comparing them with industry best practice. Hotel chains can generate companywide corporate reports by climate zone, hotel category, and country. This information can help their hotels make savings in water, waste, and energy.

Most hoteliers would like to do more—not only to reduce running costs, but also to improve their green credentials. A good place to go for advice is the online directory of environmentally oriented hotels: [www.EcoRooms.com](http://www.EcoRooms.com). The directory's board of advisors includes several green heroes of the hotel world, who have identified seven rigorous criteria that need to be met in order to gain a place in the directory. These criteria cover

- cleaning products;
- paper products;
- amenity products, such as soap, shampoo, and hair conditioner;
- linen and towel reuse program;
- recycling program;
- lighting; and
- high-efficiency plumbing fixtures.

The directory establishes consistency in what it means to be green, and also raises the bar across the worldwide hospitality industry. Initially, very few hotels are expected to meet the minimum criteria for inclusion, but the high standards will give many a goal to work toward. Consumers can also visit the website to find green hotels at their chosen destinations.

## Conclusion

There is no doubt that the issue of climate change is one that faces everyone—not just the world leaders in Bali, and not just the green parties, and not just those in countries where water shortage is already a problem. It will affect the hospitality industry on a number of different levels, which can be summarized in the following list:

- **Direct impacts.** Climate is the principal driver of global, seasonal demand, and it directly influences operating costs, including heating and cooling, snowmaking, irrigation, food and water supplies, and insurance costs. The weather influences the attractiveness of different locations, adding to the competition between destinations and—ultimately—profitability.
- **Indirect environmental change impacts.** These indirect impacts include changes in water availability, biodiversity loss, reduced landscape aesthetic, altered agricultural production, increased natural hazards, coastal erosion, damage to infrastructure, and increased incidence of vector-borne disease.
- **Indirect societal change impacts.** The Stern report concluded that unmitigated climate change could reduce consumption per capita by 20 percent by the late 21st century, which would reduce the discretionary wealth available to consumers and potentially affect their propensity to travel. Climate change could cause political unrest, particularly in countries where sources of food and water become threatened.
- **Destination vulnerability hotspots.** There will be winners and losers as new tourism destinations emerge in line with shifting weather patterns.
- **Destination-level adaptation.** Tourists have the most adaptive power in the relationship of tourist and destination because they can choose not to travel or to select another destination. Suppliers of tourism services and operators at the destination have less adaptive capability, although recent events have shown how resilient the industry can be to shattering events, such as terrorist bombings.

But what about the financial implications of climate change? The industry seems to be divided among those who believe green measures save them money, and others who see the green approach as an expensive one. The perception varies when the view taken is short or long term, and at the micro or macro level. If we take the macro level first, and look at the big issue of global warming leading to extreme weather, insurance premiums are bound to rise along with water levels. Volatile weather systems could throw umpteen problems at hotel

operators, including interrupted power supplies, IT systems failure, and the need to evacuate guests. All these call for stringent emergency procedures to be put in place and tested. Soaring temperatures will make air-conditioning a necessity rather than a luxury, and golf resorts will pay more for irrigation.

At the micro level, many environmental initiatives cut the costs of running a business while lessening its impact on the planet. Looking after the laundry is a good example. Today, only 75 percent of hotel guests expect to have their towels and linen changed daily, and reduced washing loads need less water and detergent, as well as less energy to run the washing machines. Fewer staff will need to spend time in the laundry and, if room attendants don't have to change the bed linen daily, they can service more rooms. Green appliances may cost more initially, but good design makes them less expensive to run, as demonstrated by the Gaia Napa Valley hotel's earth-friendly ventilation system, mentioned earlier.

In a recent Deloitte study, *Hospitality 2010*, we determined the five mega trends that would have the most impact on shareholder value—brands, emerging markets, people, technology, and the business model.<sup>32</sup> As research already mentioned in this paper proves, a green brand can be good for business, because environmentally aware travelers want to stay at hotels that care about their carbon emissions. Importantly, investors are increasingly adding businesses with green credentials to their share portfolios, while employees are keen to work for eco-friendly companies. The brand, or image, of a hotel operator can therefore influence guests, staff, and investors, and companies that are seen to be “good citizens” will benefit from their green strategies.

This message was reinforced in Deloitte's *Travel Industry Trends 2008*, which notes that many hospitality companies now understand the compelling financial, regulatory, risk mitigation, and broader marketplace opportunities of sustainability and are adapting their business models accordingly.<sup>33</sup> Environmental and social responsibility is becoming a core business strategy, which touches shareholders, consumers, retailers, suppliers, employees, and government and nongovernment organizations, as well as scientific and academic institutions.

Everyone engaged in tourism is anxious to see the industry grow and prosper. The number of international travelers reached a record 842 million in 2006 according to the UNWTO, thanks to strong global economies, governments investing massively in tourism infrastructure, and some excellent marketing campaigns; and there's no sign of a slowdown. People's desire to travel and to share new experiences is stronger than ever, but this has to be balanced with the need to protect the environment and reduce every traveler's carbon footprint.

While politicians debate the outcome of the UN summit and how best to match individual aspirations to see the world with the thorny issue of aviation emissions, the time is right for the hotel industry to make sure its

own house is in order. By establishing best practices and a system of benchmarking that ensures a uniform approach, travelers will be able to sleep well at night—knowing that the hotel they are staying in has built a sustainable future.

## Notes

- 1 Stern 2006.
- 2 UNWTO et al. 2007.
- 3 The five major UNWTO regions are Africa, the Americas, Asia and the Pacific, Europe, and the Middle East.
- 4 IPCC 2007, p. 4.
- 5 IPCC 2007, p. 2.
- 6 IPCC 2007, p. 9.
- 7 IPCC 2007, p. 10.
- 8 International Tourism Partnership 2007a.
- 9 Buildingtalk 2007.
- 10 Carbon Trust 2006.
- 11 Hotel News Resource 2007b.
- 12 Kirby 2007.
- 13 International Tourism Partnership 2007b.
- 14 Hotel News Resource 2007a.
- 15 Hotel News Resource 2007e.
- 16 Hotel News Resource 2007e.
- 17 Hotel News Resource 2007d.
- 18 Lee 2007.
- 19 Lee 2007.
- 20 Hotel News Resource 2007i.
- 21 Hotel News Resource 2007j.
- 22 Hotel News Resource 2007i.
- 23 PR Newswire 2007.
- 24 *New York Times* 2007.
- 25 Hotel News Resource 2007g.
- 26 Hotel News Resource 2007c.
- 27 Hotel News Resource 2007f.
- 28 Hotel News Resource 2007e.
- 29 Weinstein 2007.
- 30 Hotel News Resource 2007h.
- 31 Kirby 2007.
- 32 Deloitte & Touche 2006.
- 33 Deloitte & Touche 2007.

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## What Is Driving Travel Demand? Managing Travel's Climate Impacts

**BRIAN PEARCE**, Chief Economist, International Air Transport Association (IATA)

The focus of existing policy aimed toward reducing CO<sub>2</sub> emissions from air travel, with measures such as the United Kingdom's recent doubling of air passenger duty, has been on trying to manage air travel demand by raising the cost of travel for passengers. Even the recent debate on emissions trading in Europe has focused on the costs it will impose on airlines and their passengers. This paper presents new research that shows that policies aiming to reduce emissions by managing demand by raising the cost of air travel are likely to fail. Tourists are shown to be very sensitive to prices for air travel on competing airlines or to alternative destinations. However, at the national or pan-national level, these choices cancel each other out; the overall market is much less sensitive to the cost of air travel. It is economic growth and incomes that are found to be the key drivers of air travel demand, and those drivers are expected to remain particularly strong in the developing markets of Asia. Decoupling emissions from travel growth needs to focus not on demand management but on mechanisms to bring about emission reduction measures from technology, infrastructure, and operations.

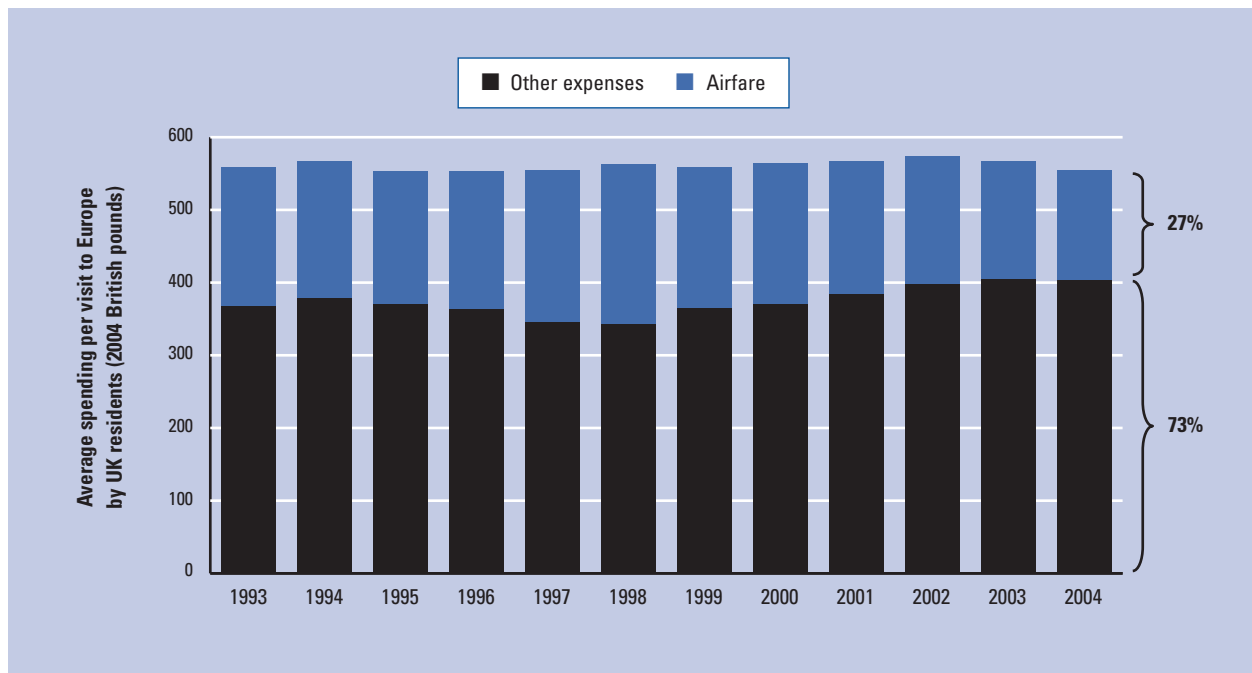
### The price sensitivity of airline passengers

In policy discussions about the sensitivity of airline passengers to the cost of travel there is an apparent paradox. On the one hand, the boom in low-cost travel, the transparency brought by the Internet, and the intense competition on deregulated markets all point to an increasing sensitivity of the passenger to price. On the other hand, increasingly lower airfares, in real terms, mean that the airfare is becoming a smaller and smaller part of the total spent on a typical journey, implying a reduction in passengers' sensitivity to price.

The proportion of total spending on an overseas visit by air will vary by country. In particular, airfares are likely to represent a higher proportion of travel spending in low-income countries that have air travel markets that have not been liberalized. However, for the bulk of air travel in liberalized Organisation for Economic Co-operation and Development (OECD) markets, the example in Figure 1 is probably representative. In this case, for UK residents traveling to Europe by air, the fare now represents only around one-quarter of the total cost of the visit.

Since travel for the purpose of tourism is not a necessity, there are good reasons for believing the statistical evidence that tourists are sensitive to the cost of travel. If travel costs rise sharply, tourists may well decide to take their holidays at home and not travel by air. Commonly used price elasticity estimates suggest that tourist arrivals will fall 15 percent for every 10 percent rise in the cost of travel.<sup>1</sup> That would certainly make sense if the cost of a typical visit to Europe by UK residents rose from £550 to £633, leading to a 10 percent fall in tourist numbers (Box 1).

Figure 1: Airfares represent a declining proportion of travel spending



Source: UK Office of National Statistics, International Passenger Survey 2005.

### Box 1: Defining the sensitivity of travel demand to changes in price and income

The term used by economists to measure the sensitivity of demand to price and income is *elasticity*. The price elasticity of demand is commonly expressed as a measure representing the percentage change in demand for a given percentage change in price. For instance, a price elasticity of air travel for leisure of  $-1.5$  implies that if prices rise 10 percent, then demand for air travel for leisure would fall 15 percent. Likewise an income elasticity of 1.8 implies that if incomes rise 10 percent, then demand for air travel will rise by 18 percent.

When demand is very sensitive to price—that is, when a 10 percent price rise causes a greater than 10 percent fall in demand, economists say that demand is *price elastic*. When demand is relatively insensitive with a price elasticity of less than  $-1$  (e.g.,  $-0.7$ ) demand is said to be *inelastic*. We use the terms *sensitivity* and *elasticity* interchangeably within the text.

However, that is the price sensitivity of air passengers to the total cost of travel. If the airfare component of that cost rose 15 percent from £150 to £173, that would represent a rise in the total cost of a visit to Europe of 4 percent. A 10 percent fall in passengers as a result of a 15 percent rise in the airfare (but a 4 percent rise in total travel cost) would therefore represent a travel demand price elasticity in respect of the total travel cost of  $-2.5$ . This looks implausibly high.

Yet everyone in the Travel & Tourism industry knows they are dealing with very price sensitive customers, and that changing fares and prices does produce a large demand response. How can this apparent paradox be resolved?

Box 2 sets out a rather technical explanation of why exactly the effect of airfares on passenger numbers should be expected to be much less at an aggregate or national level than at a route level.

Table 1 uses the same example to work through the effects.

The effect of a 10 percent fare increase on both routes (caused, for instance, by a rise in a national passenger tax) would be to reduce the total traffic in the market by 8 percent (the weighted average of the route net effects), which is exactly what is implied by the aggregate market price elasticity of  $-0.8$ . Using the weighted average price elasticity of  $-1.5$ , on the other hand, would incorrectly imply a 15 percent decrease in aggregate air travel.

### Box 2: Why price sensitivity is lower at the level of nationwide air travel

The relationship between the price sensitivity at the aggregate market level  $E$  and at destination-specific route levels (own-price elasticity  $E_{ii}$  and cross-price elasticity  $E_{ij}$ ) was very well described in a study carried out by the UK CAA,<sup>1</sup> where  $S_i$  is the traffic share of destination  $i$ :

$$E = \sum_i S_i (\sum_j E_{ij})$$

A hypothetical example will help illustrate the implications for policy. Assume there are just two routes for a national market, A and B, with own-price elasticities  $E_A = -1.5$  and  $E_B = -1.5$ . Own-price elasticities indicate, for instance, that a 10 percent rise in airfares just on route A would lead to a 15 percent decline in passengers on that route. Cross-price elasticities are, say,  $E_{AB} = 0.7$  and  $E_{BA} = 0.7$ . This means that, for example, the 10 percent rise in airfares just on route A would, as well as causing a 15 percent decline in passengers on route A, would boost passengers on route B by 7 percent. The price rise does not only suppress demand—it also diverts it, which clearly affects the overall net impact. If both routes have a market share  $S_i$  of 50 percent, then the weighted average national own-price price elasticity is  $-1.5$ . This might suggest that a policy that raises the cost of air travel nationwide by 10 percent would reduce air travel volumes by 15 percent. However, that conclusion would be wrong. To see why, using the expression for aggregate elasticity above:

$$E = S_A(E_A + E_{AB}) + S_B(E_B + E_{BA}) = 0.5(-1.5 + 0.7) + 0.5(-1.5 + 0.7) = -0.8$$

This shows that the aggregate price elasticity is not  $-1.5$  but  $-0.8$  in this example—that is, the reduction in passengers that result from a 10 percent rise in airfares is not 15 percent but 8 percent. This is a relatively inelastic or price insensitive response, in contrast to what seems to be the current view among many policymakers.

#### Note

<sup>1</sup> UK CAA 2005.

This example considers the impact on outbound leisure passengers, in which a rise in passenger tax will affect all destination choices. That is not the case for inbound tourists. The choice facing US residents in traveling to destination A, say the United Kingdom, or destination B, say Italy, will be significantly affected by national passenger taxes. For instance, the recent doubling of the UK passenger departure tax added roughly 4 percent to the cost of travel. This will have had a relatively small impact ( $-3.2$  percent) on UK residents

**Table 1: Impact of fare increases at the route and market level**

Change in airfare	Effect on route A (percent)	Effect on route B (percent)
10 percent rise in airfare A	-15	+7
10 percent rise in airfare B	+7	-15
Net effect	-8	-8

Source: UK Civil Aviation Authority, 2005.

departing on overseas holidays, for the reasons set out above. However, it will have led to a relatively large impact ( $-6$  percent) on the choice of US residents traveling to the United Kingdom. Many travelers (2.8 percent) will have been diverted to holiday in, say, Italy. In total, this demand response would significantly limit the effectiveness of national passenger taxes as a way of managing demand or limiting the rise of greenhouse gas emissions from air travel.

These of course are hypothetical elasticity examples, though the doubling of UK passenger duty was an actual policy decision. To see whether the theory is in evidence in practical market experience, economic consultants InterVISTAS, on behalf of IATA, undertook new econometric research into travel markets in the United States, Europe, Asia, and many other regions of the world, using a variety of airfare and passenger databases. What they found was indeed that the sensitivity of passengers to the level of airfares depends very much on the level of the market being considered. In short, at the level of competition between airlines or city-pair markets, sensitivity to price is very high. But at the national or regional level, air travel is relatively price insensitive. This has important implications for climate change policies aiming to manage demand by raising the cost of air travel.

A review of the existing literature of previous studies on price elasticities shows a number of consistent themes:

- All of the studies reviewed, spanning a period of over 25 years, found that there was a significant demand response to changes in airfares. The consistency of this result strongly indicates that any policy action that results in higher fares (e.g., passenger taxes, increased landing fees) will result in a decline of tourist numbers. Critically, however, the extent of that decline will depend on a number of factors, as discussed below.
- The review of studies also shows that, all other things being equal, business travelers are less sensitive to fare changes (less elastic) than leisure travelers. Intuitively, this result is plausible—business travelers generally have less flexibility and are less able to postpone or change their travel plans than leisure

travelers. Nevertheless, the studies do show that even business travel will decline in the face of fare increases, albeit to a lesser extent than leisure travel.

- Another consistent finding was that price elasticities on short-haul routes were generally higher than on long-haul routes. In part, this reflects the opportunity for intermodal substitution on short-haul routes (e.g., travelers can switch to rail or car in response to airfare increases).
- One of the key issues considered was whether price elasticities faced by individual airlines are higher than those faced by the whole market. This seems to be the case. For example, Oum et al. (1993) estimated firm-specific price elasticities in the United States and found values ranging from  $-1.24$  to  $-2.34$ —that is, they were highly price sensitive, while studies estimating market or route price elasticities ranged from  $-0.6$  to  $-1.8$ —that is, these were less price sensitive. Moreover, Alperovich and Machnes (1994) and Njegovan (2006) used national-level measures of air travel in Israel and the United Kingdom, respectively, and found even lower price elasticity values ( $-0.27$  in Israel and  $-0.7$  in the United Kingdom).

- Most of the studies also included income as an explanatory variable of air travel demand. Clearly the demand for air travel from individuals will depend not just on its price, but also on the individual's income. Virtually all of these studies estimated income elasticities above 1, generally between  $+1$  and  $+2$ . This indicates that, even without declining real airfares, air travel will increase at a higher rate than incomes or GDP. So, for example, with an income elasticity of 1.8, air travel demand will increase 18 percent for every 10 percent rise in incomes. This has important implications for climate change policies seeking to manage air travel demand by raising the cost of travel.

InterVISTAS then carried out an econometric analysis using three different datasets. The first was the US Department of Transportation's air travel database DB1A, which takes a 10 percent random sample of all tickets purchases in the United States for travel on US airlines. Data from 1994Q1 to 2005Q4 was used for the top 1,000 city-pair routes. The second dataset was the IATA PaxIS Plus database, which captures transactions data through IATA's Billing and Settlement Plan (BSP) and uses various estimates to address missing direct sales, low-cost carriers, charter flight operations, underrepresented BSP markets, and non-BSP markets. This gives traffic and fares for routes around the world but for a relatively short time series, from 2005. Finally, the UK

Office for National Statistics (ONS)'s International Passenger Survey provided a random sample of outbound leisure passengers from 2003Q2 to 2006Q2. Over 500 regression models were estimated on these datasets.

The literature review and econometric analysis demonstrated that price elasticities vary depending on a number of factors such as location, distance, and level of market aggregation. When addressing policy issues, determining the right price elasticity value to use depends on the type of question being asked. The traffic impact of higher travel costs on a given route that result from a rise in airport landing charges requires a different (higher) price elasticity than the traffic impact of an across-the-board travel cost increase that results from a passenger tax on all routes in a country, which requires a lower price elasticity.

The price elasticities in Table 2 were developed by InterVISTAS as a synthesis of the literature review and econometric analysis. The approach taken was to develop three base price elasticities to reflect the three levels of aggregation (route, national, and pan-national level). Multiplicative adjusters were then developed to adjust the price elasticities to reflect specific geographical markets.

Base price elasticities were estimated econometrically from a variety of databases:

- At the route level, estimates centered around a price elasticity of  $-1.4$ , suggesting a high sensitivity to price. The literature review found that price elasticities at the route or market level ranged from  $-1.2$  to  $-1.5$ . This was verified by InterVISTAS' own econometric analysis of the US DB1A where it was possible to capture the effects of route substitution. These regressions produced price elasticities in the region of  $-1.4$ .
- But at the national level, estimates showed that air travel demand is less responsive to price, with a relatively inelastic or insensitive  $-0.8$ . The econometric analysis of all three datasets found that, without the route substitution term, elasticities fell to around  $-0.8$ . This elasticity is essentially a combination of the route's own price elasticities (the sensitivity of route demand to price on that route) with cross-price elasticities (the sensitivity of route demand to prices on other routes), when all national routes have prices that vary in the same way. The less elastic or less price sensitive result is consistent with observations that part of the apparent market stimulation by low-cost carriers at secondary airports involves diversion from primary airports in the catchment area, or diversion from trips on other routes. When this is controlled for, low-cost carriers have a lower level of market stimulation, consistent with less elastic national price elasticities.

**Table 2: Estimated price elasticities of passenger demand**

Region	Route/market level		National level		Pan-national level	
	Short-haul route	Long-haul route	Short-haul route	Long-haul route	Short-haul route	Long-haul route
Within North America	-1.5	-1.4	-0.9	-0.8	-0.7	-0.6
Within Europe	-2.0	-2.0	-1.2	-1.1	-0.9	-0.8
Within Asia	-1.5	-1.3	-0.8	-0.8	-0.6	-0.6
Within sub-Saharan Africa	-0.9	-0.8	-0.5	-0.5	-0.4	-0.4
Within South America	-1.9	-1.8	-1.1	-1.0	-0.8	-0.8
Transatlantic	-1.9	-1.7	-1.1	-1.0	-0.8	-0.7
Transpacific	-0.9	-0.8	-0.5	-0.5	-0.4	-0.4
Europe-Asia	-1.4	-1.3	-0.8	-0.7	-0.6	-0.5

Source: Kincaid and Tretheway, 2007.

- At the pan-national level (e.g., the European Union), estimates show that air travel demand is even less sensitive to price, with a price elasticity of  $-0.6$ . This is because, as the number of routes covered expands, the number of choices for passengers to avoid any travel cost increase diminishes. There is less opportunity for traffic to be diverted.

So the route price elasticity described above applies to a situation where the price of an individual route changes. For example, higher airport charges at the Paris Charles de Gaulle Airport (CDG) would raise the cost of travel from London, diverting leisure traffic to a destination unaffected by the charge, such as Frankfurt. The national price elasticity applies to a situation such as the doubling of the UK passenger tax, affecting all UK departing routes equally but leaving the cost of travel from elsewhere in Europe unchanged. Pan-national price elasticities would apply, for example, to the travel cost impact of the proposed extension of the European Union (EU) Emissions Trading Scheme to air travel, showing a very limited impact on demand (though there would be other mechanisms influencing the supply response).

The econometric analysis of the IATA PaxIS Plus data found considerable differences between geographic air travel markets:

- **Within North America.** This is our reference point, with a price elasticity multiplier of 1. In other words, the estimated price elasticities are not adjusted in any way.
- **Within Europe.** The evidence points to traffic in this region being more sensitive to price, with a multiplier to be applied to the estimated price elasticity of 1.4. The reasons include shorter average travel distances, other transport modes being available as substitutes, and a traditionally high charter airline share now being converted to very low fare low-cost carriers, pointing to a more price-sensitive passenger.
- **Within Asia.** By contrast, the evidence suggests a less price sensitive demand in this region, with a multiplier of 0.95. Low-cost carriers are now emerging in Asia but average distances are longer, and the key middle class is still relatively small in many markets in this region.
- **Within sub-Saharan Africa.** This region shows a much lower sensitivity to price, with a multiplier of just 0.6. These economies have a much smaller middle class. Travel is concentrated with higher-income individuals who will be less price-sensitive.
- **Within South America.** At the more price sensitive end of the scale this region shows a multiplier of 1.25. There is an emerging middle class making the region more price elastic plus low-cost carriers are emerging in Brazil, Chile, and Mexico.
- **Transatlantic.** This market has long been developed by low-fare charter airlines and shows a more price-sensitive response than US domestic markets, with a multiplier of 1.2.
- **Transpacific.** In sharp contrast, markets across the Pacific Ocean show a much less sensitive response to travel cost and have an estimated multiplier of just 0.6. There are no transpacific charter services and there remain markets with less liberal pricing regulation. There are early signs of long-haul low-cost carriers emerging, but at present this market shows much less sensitivity to travel cost than the US domestic market or the transatlantic market, which serves a substantial middle class.
- **Europe-Asia.** This market shows a slightly less price sensitive passenger than the US domestic market, with a multiplier of 0.9.

The literature review also found research consistently showing that price elasticities on short-haul routes were higher than on long-haul routes. In part, this reflects the opportunity for intermodal substitution on short-haul routes (e.g., travelers can switch to rail or car in response to airfare increases). Although the geographical breakdowns capture some variation by length of haul, there is still considerable variation within each market.

On this basis, a multiplicative adjustor of 1.1 is estimated to be necessary to adjust price elasticities for short-haul markets. Note that this does not apply to the analysis of transatlantic or transpacific markets, which are entirely long haul with virtually no opportunity for modal substitution.

The following examples illustrate how the price elasticities in Table 2 were constructed and how they can be used for various policy choices:

- To look at the demand impacts of higher travel costs caused by extending the EU Emissions Trading Scheme just to intra-EU travel—that is, short-haul markets—the relevant price elasticity would be derived as follows:

Base price elasticity  $-0.6$  (pan-national) multiplied by  $1.4$  (intra-Europe geographic multiplier) multiplied by  $1.1$  (short-haul multiplier), which equals  $-0.92$ . So a 10 percent rise in intra-EU travel costs would lead to a relative inelastic 9.2 percent reduction in air travel.

- To look at the impact of the doubling of UK passenger tax on transatlantic traffic, the price elasticity would be derived as follows:

Base price elasticity  $-0.8$  (national) multiplied by  $1.2$  (transatlantic geographical multiplier), which equals  $-0.96$ . For outbound traffic from the United Kingdom, this implies the resulting 3.7 percent rise in the cost of long-haul travel will cut demand by 3.6 percent. For inbound traffic from North America, the United Kingdom represents only a 20 percent market share, so while the United Kingdom will lose inbound tourists, many will just be diverted to other destinations.

- To examine the impact of an increase in airport landing fees on a particular short-haul market in South America, the price elasticity would be derived as follows:

Base elasticity  $-1.4$  (market) multiplied by  $1.25$  (Intra-South America) multiplied by  $1.1$  (short-haul multiplier), which equals  $-1.93$ . A 10 percent rise in the airport landing fee would reduce passenger numbers on short-haul markets serving that airport by over 19 percent.

The full range of possible price elasticities is shown in Table 2. The route- or market-level price elasticities range from  $-0.8$  to  $-2$ , depending on the geographic market and length of haul. The national-level price elasticities range from  $-0.5$  to  $-1.2$ , while pan-national price elasticities range from  $-0.4$  to  $-0.9$ .

### How income growth drives travel demand

If passengers are relatively insensitive to price at a national aggregate market level, and even less so at a pan-national level, this strongly suggests that falling real airfares have not been the main driver of air travel growth.

Indeed, this is the conclusion reached in a recent study of the well-established no-frills sector in the United Kingdom where, since the mid-1990s, airfares have fallen substantially as a result of the increasing share of no-frills airlines. That study concludes that the no-frills sector had a major impact on the industry and took market share from incumbent airlines, but “[d]espite the spectacular growth of no-frills carriers in the UK, and the perceptions about the impact they have had on travel habits, there has been little change in long-term aggregate passenger traffic growth rates.”<sup>2</sup>

Falling real airfares have been critically important in passengers switching from one airline to another, and from one destination to another. However, airfares seem to have been much less important in driving aggregate national-level air travel or tourism growth.

There are a number of other non-price drivers of air travel, including market liberalization and globalization. However, the growth of incomes and wealth, often proxied by GDP, has been found to be the fundamental driver of the demand for air travel.

As expected, income elasticities—that is, the sensitivity of air travel demand to incomes—were consistently found to be positive and greater than 1. This suggests that, as households and individuals get more prosperous, they are likely to devote an increasing share of their incomes to discretionary spending such as air travel. The responsiveness of passenger demand to incomes is greatest for developing-country travel markets, where the average income elasticity is around 2. So for every 10 percent rise in GDP or incomes, air travel demand will increase 20 percent in developing-country markets, all other things being equal.

There is some evidence that income elasticities decline as countries become richer and markets mature. The evidence points to developed-country travel markets having income elasticities around 1.5—that is, travel demand rises 15 percent for every 10 percent rise in GDP.

However, there are variations around this average. For the US travel markets, income elasticities are higher, though not as high as for developing countries (Table 3). This suggests that many passengers view travel to and within the United States as more desirable and less

**Table 3: Estimated income elasticities of passenger demand**

Economy	Route/market level				National level			
	Short-haul route	Medium-haul route	Long-haul route	Ultra long-haul route	Short-haul route	Medium-haul route	Long-haul route	Ultra long-haul route
United States	1.8	1.9	2.0	2.2	1.6	1.7	1.8	2.0
Developed economies	1.5	1.6	1.7	2.4	1.3	1.4	1.5	2.2
Developing economies	2.0	2.0	2.2	2.7	1.8	1.8	2.0	2.5

Source: Kincaid and Trethaway, 2007.

budget-oriented than travel in Europe and other developed economies. There is also evidence that long-haul journeys are seen by passengers as different, and more desirable, than the more commoditized short-haul markets, and so income elasticities are higher for the former.

All together, the evidence on income elasticities suggests that the expansion of economic activity and incomes have been the principal drivers of air travel in the past. During the past 20 years, global passenger traffic has expanded 2.9 times, averaging an annual growth of 5.1 percent. During that same period, global GDP has risen just over 2 times, averaging 3.7 percent economic growth each year. That implies an average income elasticity of 1.4, which is close to the average estimated above for the developed economies, where most of the air travel growth has taken place.

The implication is that economic growth can explain virtually all of the expansion in air travel seen in the past 20 years. The fall in real airfares has played a part, but mostly in diverting travel between airlines and markets rather than significantly boosting overall travel volumes. And economic growth increasingly is taking place in developing economies where income elasticities are higher. As a result, the underlying drivers for overall air travel growth are likely to remain strong.

### Policy implications

The strong implication from this research is that policies that seek to reduce aviation's climate impacts by trying to manage demand, through raising the cost of travel, are likely to fail. At a national and pan-national level, air travel is relatively insensitive to the cost of travel. Falling real airfares seem to have played a relatively minor role in boosting air travel during the past two decades. Economic growth, particularly in the developing economies, will continue to be the major driver of increase demand for air travel.

Climate policies will need to focus on creating incentives where there can be effective investment in emissions reductions. The major potential would appear to be on decoupling emissions from travel growth through supply-side innovations, rather than trying to manage demand through raising the cost of travel.

IATA's four-pillar climate strategy,<sup>3</sup> which was endorsed by the Assembly of the International Civil

**Table 4: The effectiveness of existing economic instruments**

Emission cut measure	Player	Passenger tax	Emissions trading
Technology	Manufacturer	No impact	No impact
	Fuel company	No impact	No impact
Infrastructure	Government	No impact	No impact
	ANSP	No impact	No impact
	Airport	No impact	No impact
Operations/fleet	Airline	No impact	Impact
Reduced demand	Passenger	Minor impact	Minor impact
Cuts elsewhere	Other industry	No impact	Impact

Source: IATA.

Aviation Association this year, focuses action on emission reduction measures from technology, infrastructure, operations and those brought about by well-designed economic instruments (Table 4).

It is clear from the analysis in this paper that, to provide effective incentives to the various players along the air transport value chain who can invest in emissions reduction, we must look beyond simple economic instruments that seek to manage demand by raising the cost of travel for the passenger.

The research described shows how ineffective instruments such as passenger taxes are for reducing CO<sub>2</sub> emissions. This is not just because demand is relatively price insensitive at a national and pan-national level. It is also because raising the cost of travel for the passenger does nothing to provide incentives for the manufacturer to produce new airframes or engines, nothing to incentivize the fuel company to produce a clean fuel, nothing to incentivize the EU to implement a Single European Sky, nothing to incentivize air navigation service providers (ANSPs) to straighten routes and reduce stacking, nothing to incentivize airports to reduce taxiing emissions, and nothing to incentivize airlines to improve operations and renew their fleet.

Emissions trading can be more effective than passenger taxes or charges, if well designed. Because it is linked directly to emissions, it incentivizes operational and fleet improvements. If well designed to be open to trading with other industries and global, it allows the reduction of CO<sub>2</sub> emissions to take place in industries where reductions are most efficient. However, even



emissions trading has little impact on the key technology and infrastructure pillars.

Effectively decoupling emissions from air travel growth will require policymakers and the industry to look beyond simple economic instruments. Technology progress will require collaboration across the value chain and across countries. Governments will need to play a role in funding fundamental research. Political will is perhaps one of the most important mechanisms for delivering emissions reductions from infrastructure improvements. The lack of implementation of a Single European Sky is one glaring omission in policy action to reduce emissions from air travel. IATA is actively promoting collaborative efforts on technology and is lobbying hard for governments to improve infrastructure. On the operations front, there is a major initiative to spread best practice. More needs to be done in the face of the challenge of climate change, but the airline industry is already stepping up its efforts with a bold vision of zero emissions and an important future milestone of carbon-neutral growth.<sup>4</sup> The key lesson for both policymakers and the industry is to look beyond simple economic instruments for mechanisms to bring about an effective reduction in emissions from air travel.

## Notes

- 1 Gillen et al. 2003.
- 2 UK CAA 2006.
- 3 IATA 2007.
- 4 IATA 2007.

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## Measuring the Environmental Impact of Travel: Business Intelligence for Informed Travel Choice

**RICHARD H. FLY**, Strategic Communications Consultant, Travelport

With

**NIGEL COUZENS**, Marketing Manager for Global Markets, Travelport

**GORDON WILSON**, President and CEO, Travelport GDS

When you can measure what you are speaking about, and express it in numbers, you know something about it; but when you cannot measure it, when you cannot express it in numbers, your knowledge is of a meager and unsatisfactory kind.

—Lord Kelvin (1883)

It is common wisdom in business that you do what you measure. Benchmark data provide the foundation for well-designed goals and objectives, and regular measurement against those objectives tells you just how much you have achieved. It's all about generating greater business insight and intelligence.

When businesses venture into the realm of science—as they do when they seek to assess their impact on the environment—measurement becomes especially critical. Data lead to information, information leads to knowledge, and knowledge leads to action—or at least to the context for action.

One of the big challenges for businesses and consumers today is to gather more data and business intelligence about their impact on the environment, and especially—at a time when climate change has become the world's most urgent environmental issue—about their carbon footprint.

Measurement usually starts with direct emissions of carbon and other greenhouse gases—from energy use, manufacturing processes, and company-owned vehicles and aircraft, to name a few. But more and more companies, along with a growing number of consumers, want better information about the indirect emissions for which they are responsible, particularly the carbon emissions related to business and personal travel.

This desire for information has the potential to reshape the travel policies companies set and the choices companies and consumers make across a broad range of decisions: how they travel; when and where they travel; what airlines, hotels, and rental car companies they use; where they hold meetings and events—even *whether* they travel at all.

Companies are already demanding more data and greater transparency on the environmental impact of their travel from their suppliers and travel management companies. Many of them need that information for corporate reporting on greenhouse gas emissions as well as to evaluate the impact of specific travel practices, patterns, and policies.

Cost and convenience are still the key factors in travel decisions, but the environmental impact of travel—which will carry increasing costs of its own if carbon taxes and other levies proliferate—is becoming an important third factor for companies and individuals alike.

It's an equally large challenge for the Travel & Tourism (T&T) industry. The industry cannot advance environmentally sustainable travel without a detailed understanding of its impact on the environment today—

particularly the impact of air travel. And it cannot serve its customers without providing the data and the measurement and business intelligence tools they need to make informed travel choices.

The stakes are high both for the industry and the many countries that depend heavily on the economic benefits of Travel & Tourism. The United Nations World Tourism Organization (UNWTO) estimated that there were nearly 900 million international arrivals in 2007, and predicted that arrivals will grow to 1.5 billion by 2020. Worldwide receipts from international tourism reached US\$733 billion in 2006, according to the UNWTO, and approximately 75 countries earned at least US\$1 billion from international tourism.<sup>1</sup>

At the Second International Conference on Climate Change and Tourism in October 2007, sponsored by the UNWTO and other organizations, delegates agreed that “the tourism sector must rapidly respond to climate change, within the evolving UN framework and progressively reduce its Greenhouse Gas (GHG) contribution if it is to grow in a sustainable manner. This will require action to:

- mitigate its GHG emissions, derived especially from transport and accommodation activities;
- adapt tourism businesses and destinations to changing climate conditions;
- apply existing and new technology to improve energy efficiency;
- secure financial resources to help poor regions and countries.”<sup>2</sup>

Effective action to reduce GHG emissions has to start with accurate measurement.

### Demand for information

Demand is growing from businesses and travel management companies around the world for tools to help them measure their carbon emissions that result from travel—and for good reason. On average, business travel accounts for 15 to 20 percent of a company’s total emissions; for services companies this can reach as high as 80 percent. Companies increasingly recognize that environmental sustainability is good for business, and they need accurate data gathering, calculation, and reporting to help them manage their carbon footprint.

The importance of this information was evident in a survey of corporate travel managers conducted in 2007 by Galileo, a leading global distribution system owned by Travelport. The survey found that:

- 78 percent of corporations say their company will have a formal environmental policy for business travel by 2009,
- 84 percent say their organization will be measuring its business travel carbon footprint by 2009, and

- over the next few years, corporations will give greater consideration to the carbon implications of choosing suppliers.

In part, these findings recognize the growing pressure from government and the public to reduce GHG emissions. “At the moment, unless you’re a very large industrial manufacturer, you’re not necessarily regulated on the amount of emissions you can deliver in the course of a year,” says Hugo Kimber, CEO of the Carbon Consultancy in the United Kingdom. “But that’s changing, and everybody has an eye on legislation in this area.”

At the same time, more businesses are putting pressure on their suppliers. “More forward-thinking international companies are going to start buying and informing their purchasing choices not just on quality and price but also on carbon,” says Kimber, whose organization is working with Travelport on a carbon-reporting tool. The most aggressive companies, he says, are telling their travel management companies to provide carbon reporting or lose their business.

Public opinion plays a role as well. A recent Carbon Consultancy report for the International Institute for Environment and Development cited a 2006 YouGov poll conducted by the British Air Transport Associate on attitudes toward aviation and the environment. The poll found that “56 percent of respondents were concerned about the impact of their flying on the environment, whilst 82 percent were prepared to pay the environmental cost of flying, preferably through an international scheme to control aviation emissions.”<sup>3</sup>

### The baseline

Governments, nongovernmental organizations (NGOs), online travel sites such as Expedia and Orbitz, and many other groups now make carbon calculators available to help consumers figure out their carbon footprint and to provide advice on how to reduce their emissions or where to purchase carbon offsets. To make them easy to use, the calculators understandably limit the number of variables involved.

That approach may work for individuals and households, but companies need more sophisticated business intelligence to accurately measure and report their emissions—not only from air travel but also from the hotels they book, the resorts they use for meetings and events, and the cars they rent.

### Aviation

Several international organizations have developed estimates of the scale of aviation emissions. The Intergovernmental Panel on Climate Change (IPCC) estimated in 1999 that aviation produced 1.6 percent of total world greenhouse gas emissions.<sup>4</sup> Carbon dioxide is the largest component of these emissions, which also

include water vapor, nitrous oxide, and sulfur dioxide. The International Air Transport Association (IATA) estimates that today aviation produces 2 percent of the world's carbon emissions. That compares to 23 percent for the transportation sector as a whole.

These numbers are higher in individual countries that have the highest levels of air travel. According to the US Environmental Protection Agency, aviation accounted for 3 percent of carbon emissions in the United States in 2005.<sup>5</sup> The UK Department of Environment, Food and Rural Affairs (Defra) reported that aviation represented 6.3 percent of UK GHG emissions in 2005.<sup>6</sup>

Although these numbers are small compared with the emissions from power-generating facilities and vehicles, the rapid growth of travel means that aviation is a growing contributor to GHG emissions. The IPCC estimates that aircraft fuel efficiency is growing about 1 to 2 percent a year, while annual air traffic is growing at 5 percent. This results in growth of 3 to 4 percent a year in CO<sub>2</sub> emissions.<sup>7</sup>

Adding to the complexity of measuring aviation emissions is a factor known as *radiative forcing*, which takes into account the fact that aircraft emissions take place at higher altitudes and therefore have a greater impact. The IPCC estimates the multiplier effect at 1.9 to 4.0. But the effect of radiative forcing is not well understood, so it is currently left out of most calculations of aviation emissions.

One important factor in aviation emissions today is inefficiency in air traffic control systems. Europe, for example, has 35 different air traffic control organizations, making it difficult to optimize air routing and to reduce the number of aircraft forced into holding patterns, a practice that leads to more fuel consumption and increased carbon emissions. In the United States, new air traffic control technology is needed to support more efficient routing, spacing, and landing of aircraft. The IATA predicts that carbon emissions from aircraft could be reduced by 12 percent with more efficient air traffic control.

There are two leading standards for measuring aircraft emissions: Defra for the United Kingdom, and the GHG Protocol Corporate Accounting and Reporting Standard, which is widely used internationally. The annexes to the *Defra Company Reporting Guidelines* were originally issued in 2005 and revised in 2007. The GHG Protocol Initiative is a partnership of businesses, NGOs, governments, and other groups convened by the World Resources Institute and the World Business Council for Sustainable Development. Its standards were first published in 2001 and were updated in 2004.

Both organizations provide emissions factors for air travel and other forms of transportation based on a range of distances, the most commonly used aircraft on those routes, and typical load factors. Defra, for example, provides the number of grams of CO<sub>2</sub> per passenger

kilometer for domestic flights, short-haul international flights (less than 2,000 nautical miles), and long-haul international flights (more than 2,000 nautical miles). The GHG protocol provides similar calculations for short, medium, and long flights.

Carbon calculators based on these standards provide reliable guidance to users. But, according to a report by the Carbon Consultancy, a large number of carbon offset companies offer calculators using their own datasets, and some employ radiative forcing. "Calculations from carbon calculators have been found to show variances of 300% between the lowest and highest values," the Consultancy reports. "Such a variance in results does not facilitate assessment of emissions and damages consumer/user confidence."<sup>8</sup>

### Other transportation

The Defra standards and GHG protocols also provide guidelines and calculators for automobiles based on engine type (gasoline, diesel, and hybrid) and vehicle size, as well as for rail and bus transportation. That may suffice when setting broad, national standards, but more detailed information will be needed by companies who want to know the carbon emissions of the cars they rent or lease.

### Hotels

There are no standards today for rating the carbon emissions of hotels. A wide variety of groups—from Audubon International to hotel associations and online travel sites such as Expedia and Orbitz—are beginning to assess and identify eco-friendly hotels. Orbitz, for example, is now researching hotels with eco-friendly policies based on whether they:

- use a natural source of energy (i.e., wind, water, solar, bio-fuel);
- use environmentally friendly and safe products;
- contribute money from each hotel reservation to an environmental organization; and
- use energy-conserving devices.

And Audubon International's Green Leaf Eco-Rating Program takes into account energy efficiency, resource conservation, pollution prevention, and environmental management.

While many of these criteria affect carbon emissions—the use of recycled paper and plastic versus new products, or local sourcing of foods and materials versus long-distance sourcing—there is little information today on the actual carbon emissions of hotels and resorts. "If you look at a major hotel group for example, they may have 40 different environmental pledges," says Kimber, "but in many cases they're aspirational because there are no measurements or carbon values attached to them to demonstrate achievement."

Companies and consumers need to have more confidence in these ratings, and that means more accurate

and transparent measurement of carbon emissions. And hotels need better and more transparent measurement to compete for the growing number of guests who are making environmental sustainability a key factor in their hotel choices.

### **Improving the measurement and accuracy of carbon reporting**

Standard measurement tools such as those provided by Defra and the GHG Protocols are good and getting better. But standards, by their very nature, build on averages. Individual companies need more detailed and accurate data to measure the carbon footprint from their business travel.

Global Distribution Systems (GDS) are ideally situated to provide that kind of tool. The three largest GDS companies process over a billion flight bookings and tens of millions of hotel reservations and car rental bookings annually around the world. They power all of the major online travel agencies, the major corporate travel management companies, and the self-booking tools used by many corporations.

“Travel agencies and corporations use the GDS for a wide array of information that enables them to make informed choices about their travel, including schedules, fares and rates as well as the facilities offered by travel suppliers as part of the booking process,” says Gordon Wilson, CEO of Travelport GDS. “Adding data on the carbon emissions of various travel options is a relatively simple and straightforward exercise, but also one that is highly valuable.”

With that information available prior to booking, travelers would be able to select airline A over airline B, for example, based on the relative carbon emissions of each option. The emissions will vary based on the route taken, aircraft and engine type, and flying time (which would generally make a direct flight more carbon efficient than a flight with connections), as well as other factors.

“Corporations need this data not only to calculate their own carbon footprint but to influence individual traveler behavior at the point of booking,” says Wilson. “This would significantly benefit every party involved in the process by enabling informed travel choice not only about routes and fares but about environmental impact as well.”

Travelport GDS—which operates both the Galileo and Worldspan brands—has been working with senior industry leaders in the field of carbon management on a carbon emission-reporting tool that could be easily integrated into the existing GDS systems. To meet the demands of corporate travel managers, the core data and calculation logic must be robust, proven, and reliable—and the tool must interface with a variety of carbon-offset schemes deployed around the world.

Such GDS-based tools will serve the demand for post-trip reporting, and will also show emissions data at the point of sale, when demand from travelers is stronger. The goal will be not only to focus on air travel, but also to measure automobile, railroad, and hotel emissions.

Companies would have the option to receive Defra or GHG Protocol Initiative values, which are based on national averages, for corporate reporting. The more detailed, refined values would be based upon a greater number of datasets than the national averages, enabling companies to receive more “real world” emissions data. For cars, the emissions would be based on each individual vehicle type rather than an average for engine sizes and fuel types.

The formula used to calculate emissions should provide detailed air segment calculations, including distance, airline, seating configurations, class, aircraft type, and load factor. These factors help calculate emissions per flown seat based on airline- and aircraft-specific data. It will also be important to show comparison emissions data for both rail and auto on appropriate routes to help customers determine the “carbon opportunity cost” of their travel choices. For one traveler, for example, a single flight from London Heathrow to Edinburgh might produce 87 kilograms of CO<sub>2</sub> while the same trip by rail would have produced 33 kilograms, and by car 115 kilograms. (This comparison is based on current Defra values.) Where two people are traveling together, the car would be more efficient than the aircraft, while rail would be the optimal carbon choice in both cases.

A carbon-reporting tool with that level of detail would allow customers to drill down on post-trip reporting to produce reports on carbon emissions by company, division, traveler, route, and airline.

“More and more companies also want pre-trip reporting, which could be enabled via a GDS. With that information, they can make more informed choices about routes, airlines, and aircraft and adapt their travel policies to balance cost, convenience, and carbon emissions,” says Nigel Couzens, Marketing Manager for Global Markets, Travelport.

High-quality calculations and the introduction of additional variables will give companies the information they need to make their travel policies even more effective. A company could set a policy, for example, that prevents employees from traveling between New York and Boston by air. And it could choose locations for meetings and events based on the aggregate CO<sub>2</sub> emissions of all the attendees flying to the event.

“Ultimately, it’s up to companies to decide what to do with the data,” says Couzens, “but more accurate and more transparent carbon-reporting tools will provide them with far more options than they have today and a foundation for making more informed choices about environmentally sustainable travel.”

### The future of measurement

The Holy Grail of measurement will be the ability to get accurate data on carbon values per airline seat, hotel room, meeting room, rail seat, and auto. That will take more data than are currently available.

Kimber says that achieving that kind of precision in aviation emissions requires knowledge of an aircraft's exact fuel use under actual operating conditions. "If the airlines were to report the amount of fuel they use on certain routes and flights, all the questions of fuel consumption methodology would go out the window. When you know the fuel use, you can get precise emissions calculations." Baggage, cargo, and passenger load also have an impact on fuel use, so it will be difficult to calculate emissions down to the last gram.

More and more companies are beginning to ask this question: If carbon emissions are important, do I need to work with more environmentally efficient suppliers—newer fleets, higher load factors, more seats per plane—in order to reduce my carbon footprint per passenger?

"In all areas of emissions reduction, including aviation, behavioral change is a key element in achieving objectives," the Carbon Consultancy reports. "Consumers are currently faced with a choice of flying or not flying as a response to environmental concerns. The absence of reliable and industrywide information on carbon emissions values deprives consumers of the opportunity to influence supply by focusing demand on the most carbon efficient suppliers."<sup>9</sup>

Work is underway by the Carbon Consultancy and others to create hotel carbon values based on Scope 1 and Scope 2 emissions. These are emissions over which businesses have direct control. *Scope 1* emissions refer to the direct combustion of fuel for boilers and vehicles. *Scope 2* emissions are those from purchased electricity, steam, or heat. The goal is to calculate an emissions value per lodging room and meeting room by subtype. With that kind of information, hotels could be rated on the emissions per room as well as the emission reduction initiatives they have in place.

Travelers would also benefit from knowing the carbon values for the individual makes and models in a car rental fleet in order to make the most informed and efficient choices. It is no coincidence that more rental car companies are marketing the availability of hybrid cars.

### Business intelligence

Integrating carbon-reporting tools with booking information from the GDS is just one example of the kind of business intelligence that is becoming more and more important to the travel industry. Travelport's Shepherd Business Intelligence, for example, assists airlines and travel agents around the world with data processing and analytical tools that help them improve their fleet

planning strategies, pricing policies, distribution, and sales and commercial relationships.

"It's an extremely competitive market, and airlines have very thin margins," says Chris Colaco, Shepherd's senior vice president. "They can't afford to make bad decisions, and that means they need more information at their fingertips."

Recent data, for example, show that the growth in traffic flows is strongest in emerging markets in Africa, the Middle East, Latin America, and Asia. Growth is particularly strong in the BRIC nations—Brazil, Russia, India, and China. Dig a little deeper into travel data on those four countries and you find significant growth in routes between China and Africa, between India and the European Union, and between Russia and the Middle East.

The more data airlines and travel consumers have—whether they are route information or carbon emissions—the more informed decisions they can make.

### Measurement and action

Measurement, of course, is just a means to an end. Data do not change anything; action based on data does.

The risk for the industry—airlines, hoteliers, car rental companies, tour operators, and travel agents alike—is that people will begin to regard travel as a major discretionary emissions source. There are already calls for people and companies to cut back on flying, for governments to halt construction and expansion of airports, and for tourists to stay closer to home. In the absence of alternatives, those voices will only grow louder.

It is up to the industry to demonstrate its commitment to environmentally sustainable Travel & Tourism, and to communicate the importance of tourism to economic development, cultural understanding, and peace among nations. Environmental sustainability is as much an opportunity as it is a challenge. As more and more people make purchasing decisions that incorporate environmental concerns, carbon efficiency has the potential to be a competitive advantage for suppliers at all levels of the T&T industry.

The Travel & Tourism industry is nearing a tipping point where the combination of sophisticated measurement and reporting tools and growing customer demand for more sustainable travel choices are going to accelerate the industry's progress toward reducing carbon and other GHG emissions. That's good for the planet, good for the industry, and good for travelers.

### Notes

- 1 UNWTO 2007a.
- 2 UNWTO 2007b.
- 3 Kimber 2007.
- 4 IPCC 1999.

- 5 US EPA 200.
- 6 Defra 2007.
- 7 IPCC 2007.
- 8 Kimber 2007.
- 9 Kimber 2007.

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# Part 2

## Country/Economy Profiles and Data Presentation





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# 2.1

## Country/Economy Profiles



# How to Read the Country/Economy Profiles

This section presents two-page profiles for all the 130 economies included in the *Travel & Tourism Competitiveness Report 2008*.

## Left-hand page

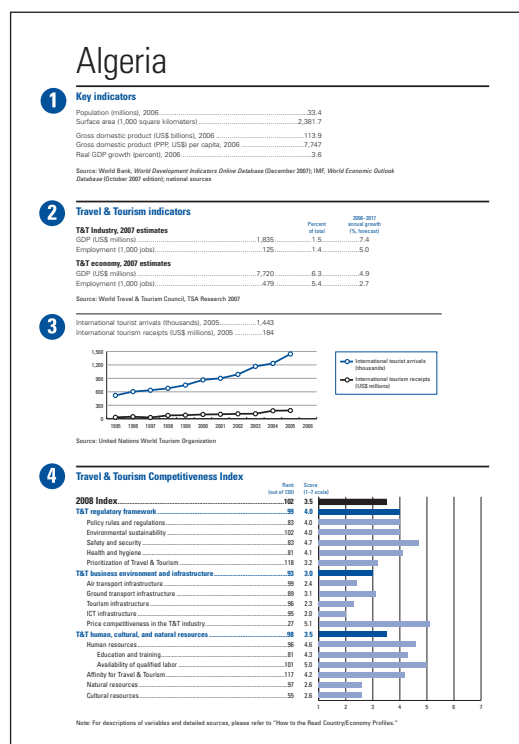
### 1 Key indicators

The first section presents several key indicators that give a sense of the size of the country and its economy. Population and surface area figures are from the World Bank's *World Development Indicators Online Database*. GDP numbers are from the International Monetary Fund (IMF)'s *World Economic Outlook Online Database*.

### Travel & Tourism indicators

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

- The first part presents data from the Tourism Satellite Accounting Research carried out annually by the World Travel & Tourism Council (WTTC). Developed by the United Nations World Tourism Organization (UNWTO), the Organisation for Economic Co-operation and Development (OECD), and Eurostat, the Tourism Satellite Accounting (TSA) framework is a statistical tool—including concepts, definitions, aggregates, classifications, and tables—that is compatible with international national accounting guidelines and allows for valid international comparisons. The TSA also makes these estimates comparable with other internationally recognized macroeconomic aggregates and compilations. Using the TSA approach, WTTC estimates the current and projected future economic contribution of Travel & Tourism in terms of an economy's GDP and employment. WTTC defines the **T&T industry** as a narrow perspective of T&T activity that captures the production-side industry contribution (that is, direct impact only). The **T&T economy** is a broader perspective of Travel & Tourism that takes into consideration the direct as well as the indirect contributions by traditional travel service providers and industry suppliers within the resident economy.



This latter perspective is used when one wants to understand the total impact of Travel & Tourism on the resident economy. More information regarding WTTC's TSA Research, along with details on the methodology and data, are available at [www.wttc.org/tsa1.htm](http://www.wttc.org/tsa1.htm).

- The second part of the T&T indicators presents data on international tourist arrivals and international tourism receipts over the period 1995 to 2006. In some cases data are missing for particular years. The graph shows all available data during this period for each economy. The data for these indicators were provided by the UNWTO.

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

number of persons. The same person who makes several trips to a given country during a given period will be counted as a new arrival each time.

**International tourism receipts**, expressed in millions of current US\$, are the receipts earned by a destination country from inbound tourism and cover all tourism receipts resulting from expenditures made by visitors from abroad, on, for instance, lodging, food and drinks, fuel, transport in the country, entertainment, shopping, and so on. This measure includes receipts generated by overnight as well as by same-day trips. Receipts from same-day trips can be substantial, as in the case of countries where a lot of shopping for goods and services takes place by visitors from neighboring countries.

#### 4 Travel & Tourism Competitiveness Index

The third section of the page presents the economy's performance on the Travel & Tourism Competitiveness Index (TTCI) and its various components. For further analysis, the Data Tables at the end of the *Report* provide detailed rankings and scores for each of the variables included in the TTCI.

### Right-hand page

#### 5 Travel & Tourism competitiveness index in detail

This page presents the rank achieved by a country on each of the indicators entering the composition of the GCI. Indicators are organized by pillar. Please refer to Appendix A of Chapter 1.1 for the detailed structure of the TTCI.

Next to the rank, a colored square indicates whether the indicator constitutes an advantage (blue square) or a disadvantage (black square) for the country. In order to identify variables as advantage or disadvantages, the following rules are applied:

- For the top 10 economies in the overall TTCI, any variables on which the economy is ranked 10th or higher are considered to be advantages. Any variables ranked below 10 are considered to be disadvantages. For example, Spain, ranked 5th overall, has the indicator “number of operating airlines” (ranked 7th) listed as an advantage, while the indicator “stringency of environmental regulation” (42nd) is considered a disadvantage.

5		Algeria	
The Travel & Tourism Competitiveness Index in detail			
INDICATOR		ADVANTAGE	DISADVANTAGE
<b>1st pillar: Policy rules and regulations</b>			
1.01	Prevalence of foreign ownership	107	■
1.02	Freedom rights	74	■
1.03	Business impact of rules on FDI	81	■
1.04	Visa requirements	107	■
1.05	Openness of bilateral Air Service Agreements*	102	■
1.06	Transparency of government policymaking	90	■
1.07	Time required to start a business*	52	■
1.08	Cost to start a business*	62	■
<b>2nd pillar: Environmental sustainability</b>			
2.01	Stringency of environmental regulation	74	■
2.02	Enforcement of environmental regulation	74	■
2.03	Sustainability of T&T industry development	91	■
2.04	Carbon dioxide emissions*	74	■
2.05	Particulate matter concentration*	101	■
2.06	Threatened species*	94	■
2.07	Environmental treaty ratification*	63	■
<b>3rd pillar: Safety and security</b>			
3.01	Business costs of terrorism	117	■
3.02	Reliability of police services	39	■
3.03	Business costs of crime and violence	77	■
3.04	Road traffic accidents*	93	■
<b>4th pillar: Health and hygiene</b>			
4.01	Phyiscal density*	83	■
4.02	Access to improved sanitation*	52	■
4.03	Access to improved drinking water*	81	■
4.04	Hospital beds*	85	■
<b>5th pillar: Privatization of Travel &amp; Tourism</b>			
5.01	Government privatization of the T&T industry	108	■
5.02	T&T government expenditure*	113	■
5.03	Efficiency of marketing and branding	110	■
5.04	T&T fair attendance*	76	■
<b>6th pillar: Air transport infrastructure</b>			
6.01	Quality of air transport infrastructure	96	■
6.02	Available seat kilometers*	74	■
6.03	Densities per 1,000 population*	81	■
6.04	Airport density*	53	■
6.05	Number of operating airlines*	83	■
6.06	International air transport network	104	■
<b>7th pillar: Ground transport infrastructure</b>			
7.01	Quality of roads	81	■
7.02	Quality of railroad infrastructure	68	■
7.03	Quality of port infrastructure	96	■
7.04	Quality of domestic transport network	75	■
7.05	Road density*	105	■
<b>8th pillar: Tourism infrastructure</b>			
8.01	Hotel rooms*	96	■
8.02	Presence of major car rental companies*	99	■
8.03	ATMs accepting Visa cards*	124	■
<b>9th pillar: ICT infrastructure</b>			
9.01	Extent of business internet use	129	■
9.02	Internet users*	94	■
9.03	Telephone lines*	91	■
9.04	Broadband internet subscribers*	75	■
9.05	Mobile telephone subscribers*	69	■
<b>10th pillar: Price competitiveness in the T&amp;T industry</b>			
10.01	Ticket taxes and airport charges*	60	■
10.02	Purchasing power parity*	53	■
10.03	Extent and effect of season*	43	■
10.04	Fuel price levels*	7	■
10.05	House price index*	98	■
<b>11th pillar: Human resources</b>			
11.01	Primary education enrollment*	22	■
11.02	Primary education enrollment*	74	■
11.03	Quality of the educational system	103	■
11.04	Local availability of research and training services	106	■
11.05	Extent of staff training	112	■
11.06	Hiring and firing practices	88	■
11.07	Ease of hiring foreign labor	121	■
11.08	HIV prevalence*	24	■
11.09	Business impact of HIV/AIDS	53	■
11.10	Life expectancy*	68	■
<b>12th pillar: Affinity for Travel &amp; Tourism</b>			
12.01	Tourism openness*	119	■
12.02	Attitude of population toward foreign visitors	100	■
12.03	Extension of business trips recommended	83	■
<b>13th pillar: Natural resources</b>			
13.01	Number of World Heritage natural sites*	29	■
13.02	Nationally protected areas*	89	■
13.03	Quality of the natural environment	98	■
13.04	Total known species*	73	■
<b>14th pillar: Cultural resources</b>			
14.01	Number of World Heritage cultural sites*	22	■
14.02	Sports stadiums*	87	■
14.03	Number of international fairs and exhibitions*	113	■

- For those economies ranked from 11th to 50th on the overall TTCI, any variables with a higher rank than the economy's overall rank are considered to be advantages. Any variables ranked equal to, or lower than, the economy's overall rank are disadvantages. For example, Croatia ranks 34th overall. Thus, “airport density,” on which the country ranks 26th, is an advantage, while the “hotel price index” (74th) and “nationally protected areas” (78th) both constitute disadvantages.
- For economies with an overall rank on the TTCI lower than 50, any variables for which the economy has a rank of 50 or higher are considered to be advantages. Any variables ranked below 50 are considered to be disadvantages. For example, ranked 92nd overall, Albania has the variable “carbon dioxide emissions” (33rd) listed as an advantage, while the variable “quality of roads” (114th) is a disadvantage.

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Cameroon	144	Libya	232	Suriname	320
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Colombia	154	Malaysia	242	Tajikistan	330
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Dominican Republic	166	Moldova	254	Uganda	342
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El Salvador	172	Morocco	260	United Kingdom	348
Estonia	174	Mozambique	262	United States	350
Ethiopia	176	Namibia	264	Uruguay	352
Finland	178	Nepal	266	Uzbekistan	354
France	180	Netherlands	268	Venezuela	356
Gambia, The	182	New Zealand	270	Vietnam	358
Georgia	184	Nicaragua	272	Zambia	360
Germany	186	Nigeria	274	Zimbabwe	362
Greece	188	Norway	276		
Guatemala	190	Oman	278		

# Albania

## Key indicators

Population (millions), 2006 .....	3.1
Surface area (1,000 square kilometers) .....	28.8
Gross domestic product (US\$ billions), 2006 .....	9.1
Gross domestic product (PPP, US\$) per capita, 2006 .....	5,727
Real GDP growth (percent), 2006 .....	5.0

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

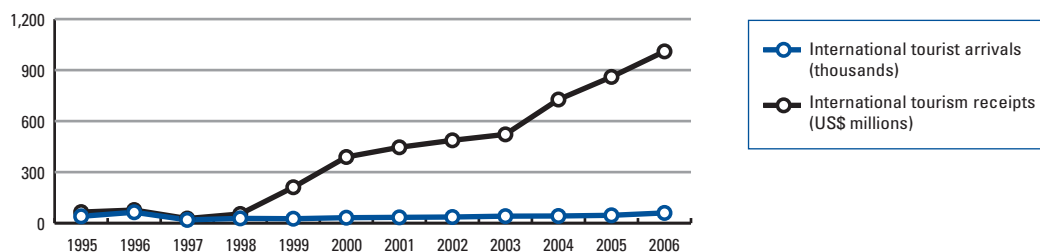
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	4.5	5.3
Employment (1,000 jobs) .....	3.6	2.2

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	1,401	13.8	5.5
Employment (1,000 jobs) .....	137	11.2	2.4

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	60
International tourism receipts (US\$ millions), 2006 .....	1,010



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>92</b>	<b>3.6</b>
<b>T&amp;T regulatory framework</b> .....	<b>81</b>	<b>4.2</b>
Policy rules and regulations .....	104	3.7
Environmental sustainability .....	93	4.1
Safety and security .....	71	4.9
Health and hygiene .....	59	4.8
Prioritization of Travel & Tourism .....	104	3.6
<b>T&amp;T business environment and infrastructure</b> .....	<b>105</b>	<b>2.8</b>
Air transport infrastructure .....	112	2.2
Ground transport infrastructure .....	116	2.5
Tourism infrastructure .....	86	2.5
ICT infrastructure .....	86	2.2
Price competitiveness in the T&T industry .....	90	4.3
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>71</b>	<b>3.8</b>
Human resources .....	58	5.0
Education and training .....	95	4.2
Availability of qualified labor .....	9	5.9
Affinity for Travel & Tourism .....	6	6.3
Natural resources .....	130	1.9
Cultural resources .....	75	2.2

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	106 ...■	8.01 Hotel rooms* .....	84 ...■
1.02 Property rights .....	123 ...■	8.02 Presence of major car rental companies* .....	74 ...■
1.03 Business impact of rules on FDI .....	111 ...■	8.03 ATMs accepting Visa cards* .....	82 ...■
1.04 Visa requirements* .....	76 ...■		
1.05 Openness of bilateral Air Service Agreements* .....	68 ...■	<b>9th pillar: ICT infrastructure</b>	
1.06 Transparency of government policymaking .....	122 ...■	9.01 Extent of business Internet use .....	117 ...■
1.07 Time required to start a business* .....	87 ...■	9.02 Internet users* .....	68 ...■
1.08 Cost to start a business* .....	74 ...■	9.03 Telephone lines* .....	82 ...■
		9.04 Broadband Internet subscribers* .....	110 ...■
		9.05 Mobile telephone subscribers* .....	83 ...■
<b>2nd pillar: Environmental sustainability</b>		<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.01 Stringency of environmental regulation .....	128 ...■	10.01 Ticket taxes and airport charges* .....	94 ...■
2.02 Enforcement of environmental regulation .....	128 ...■	10.02 Purchasing power parity* .....	63 ...■
2.03 Sustainability of T&T industry development .....	123 ...■	10.03 Extent and effect of taxation .....	82 ...■
2.04 Carbon dioxide emissions* .....	33 ...■	10.04 Fuel price levels* .....	109 ...■
2.05 Particulate matter concentration* .....	78 ...■	10.05 Hotel price index* .....	52 ...■
2.06 Threatened species* .....	24 ...■		
2.07 Environmental treaty ratification* .....	88 ...■	<b>11th pillar: Human resources</b>	
		11.01 Primary education enrollment* .....	54 ...■
<b>3rd pillar: Safety and security</b>		11.02 2ndary education enrollment* .....	84 ...■
3.01 Business costs of terrorism .....	99 ...■	11.03 Quality of the educational system .....	89 ...■
3.02 Reliability of police services .....	75 ...■	11.04 Local availability of research and training services .....	126 ...■
3.03 Business costs of crime and violence .....	89 ...■	11.05 Extent of staff training .....	100 ...■
3.04 Road traffic accidents* .....	7 ...■	11.06 Hiring and firing practices .....	31 ...■
		11.07 Ease of hiring foreign labor .....	4 ...■
		11.08 HIV prevalence* .....	24 ...■
		11.09 Business impact of HIV/AIDS .....	69 ...■
		11.10 Life expectancy* .....	40 ...■
<b>4th pillar: Health and hygiene</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
4.01 Physician density* .....	76 ...■	12.01 Tourism openness* .....	2 ...■
4.02 Access to improved sanitation* .....	54 ...■	12.02 Attitude of population toward foreign visitors .....	53 ...■
4.03 Access to improved drinking water* .....	51 ...■	12.03 Extension of business trips recommended .....	74 ...■
4.04 Hospital beds* .....	58 ...■		
		<b>13th pillar: Natural resources</b>	
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		13.01 Number of World Heritage natural sites* .....	70 ...■
5.01 Government prioritization of the T&T industry .....	90 ...■	13.02 Nationally protected areas* .....	102 ...■
5.02 T&T government expenditure* .....	50 ...■	13.03 Quality of the natural environment .....	129 ...■
5.03 Effectiveness of marketing and branding .....	124 ...■	13.04 Total known species* .....	91 ...■
5.04 T&T fair attendance* .....	76 ...■		
		<b>14th pillar: Cultural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		14.01 Number of World Heritage cultural sites* .....	69 ...■
6.01 Quality of air transport infrastructure .....	102 ...■	14.02 Sports stadiums* .....	41 ...■
6.02 Available seat kilometers* .....	114 ...■	14.03 Number of international fairs and exhibitions* .....	105 ...■
6.03 Departures per 1,000 population* .....	82 ...■		
6.04 Airport density* .....	104 ...■		
6.05 Number of operating airlines* .....	91 ...■		
6.06 International air transport network .....	103 ...■		
<b>7th pillar: Ground transport infrastructure</b>			
7.01 Quality of roads .....	114 ...■		
7.02 Quality of railroad infrastructure .....	111 ...■		
7.03 Quality of port infrastructure .....	126 ...■		
7.04 Quality of domestic transport network .....	123 ...■		
7.05 Road density* .....	40 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# Algeria

## Key indicators

Population (millions), 2006 .....	33.4
Surface area (1,000 square kilometers) .....	2,381.7
Gross domestic product (US\$ billions), 2006 .....	113.9
Gross domestic product (PPP, US\$) per capita, 2006 .....	7,747
Real GDP growth (percent), 2006 .....	3.6

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

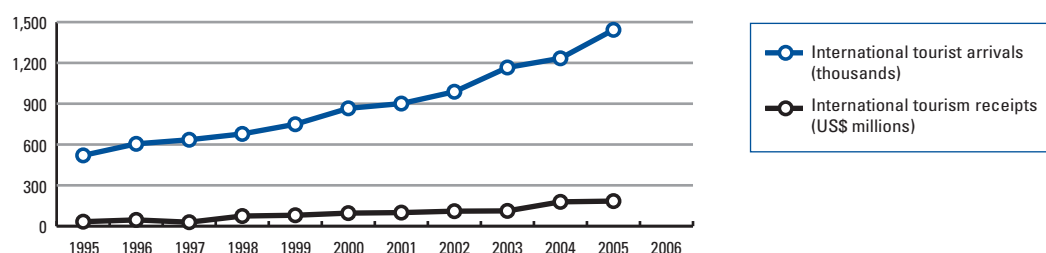
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	1.5	7.4
Employment (1,000 jobs) .....	1.4	5.0

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	6.3	4.9
Employment (1,000 jobs) .....	5.4	2.7

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2005 .....	1,443
International tourism receipts (US\$ millions), 2005 .....	184



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>102</b>	<b>3.5</b>
<b>T&amp;T regulatory framework</b> .....	<b>99</b>	<b>4.0</b>
Policy rules and regulations .....	83	4.0
Environmental sustainability .....	102	4.0
Safety and security .....	83	4.7
Health and hygiene .....	81	4.1
Prioritization of Travel & Tourism .....	118	3.2
<b>T&amp;T business environment and infrastructure</b> .....	<b>93</b>	<b>3.0</b>
Air transport infrastructure .....	99	2.4
Ground transport infrastructure .....	89	3.1
Tourism infrastructure .....	96	2.3
ICT infrastructure .....	95	2.0
Price competitiveness in the T&T industry .....	27	5.1
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>98</b>	<b>3.5</b>
Human resources .....	96	4.6
Education and training .....	81	4.3
Availability of qualified labor .....	101	5.0
Affinity for Travel & Tourism .....	117	4.2
Natural resources .....	97	2.6
Cultural resources .....	55	2.6

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....107...■	8.01	Hotel rooms* .....n/a...■
1.02	Property rights .....74...■	8.02	Presence of major car rental companies* .....89...■
1.03	Business impact of rules on FDI .....81...■	8.03	ATMs accepting Visa cards* .....124...■
1.04	Visa requirements* .....107...■	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....102...■	9.01	Extent of business Internet use .....129...■
1.06	Transparency of government policymaking .....90...■	9.02	Internet users* .....94...■
1.07	Time required to start a business* .....52...■	9.03	Telephone lines* .....91...■
1.08	Cost to start a business* .....62...■	9.04	Broadband Internet subscribers* .....75...■
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....69...■
2.01	Stringency of environmental regulation .....74...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....74...■	10.01	Ticket taxes and airport charges* .....60...■
2.03	Sustainability of T&T industry development .....91...■	10.02	Purchasing power parity* .....53...■
2.04	Carbon dioxide emissions* .....74...■	10.03	Extent and effect of taxation .....43...■
2.05	Particulate matter concentration* .....101...■	10.04	Fuel price levels* .....7...■
2.06	Threatened species* .....84...■	10.05	Hotel price index* .....98...■
2.07	Environmental treaty ratification* .....63...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....32...■
3.01	Business costs of terrorism .....117...■	11.02	2ndary education enrollment* .....74...■
3.02	Reliability of police services .....39...■	11.03	Quality of the educational system .....103...■
3.03	Business costs of crime and violence .....77...■	11.04	Local availability of research and training services .....105...■
3.04	Road traffic accidents* .....93...■	11.05	Extent of staff training .....112...■
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....88...■
4.01	Physician density* .....83...■	11.07	Ease of hiring foreign labor .....121...■
4.02	Access to improved sanitation* .....52...■	11.08	HIV prevalence* .....24...■
4.03	Access to improved drinking water* .....81...■	11.09	Business impact of HIV/AIDS .....53...■
4.04	Hospital beds* .....85...■	11.10	Life expectancy* .....68...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....108...■	12.01	Tourism openness* .....119...■
5.02	T&T government expenditure* .....113...■	12.02	Attitude of population toward foreign visitors .....100...■
5.03	Effectiveness of marketing and branding .....110...■	12.03	Extension of business trips recommended .....93...■
5.04	T&T fair attendance* .....76...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....39...■
6.01	Quality of air transport infrastructure .....96...■	13.02	Nationally protected areas* .....89...■
6.02	Available seat kilometers* .....74...■	13.03	Quality of the natural environment .....98...■
6.03	Departures per 1,000 population* .....81...■	13.04	Total known species* .....73...■
6.04	Airport density* .....53...■	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....83...■	14.01	Number of World Heritage cultural sites* .....23...■
6.06	International air transport network .....104...■	14.02	Sports stadiums* .....87...■
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....113...■
7.01	Quality of roads .....81...■		
7.02	Quality of railroad infrastructure .....68...■		
7.03	Quality of port infrastructure .....90...■		
7.04	Quality of domestic transport network .....75...■		
7.05	Road density* .....105...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Argentina

## Key indicators

Population (millions), 2006 .....	39.1
Surface area (1,000 square kilometers) .....	2,780.4
Gross domestic product (US\$ billions), 2006 .....	212.6
Gross domestic product (PPP, US\$) per capita, 2006 .....	16,080
Real GDP growth (percent), 2006 .....	8.5

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

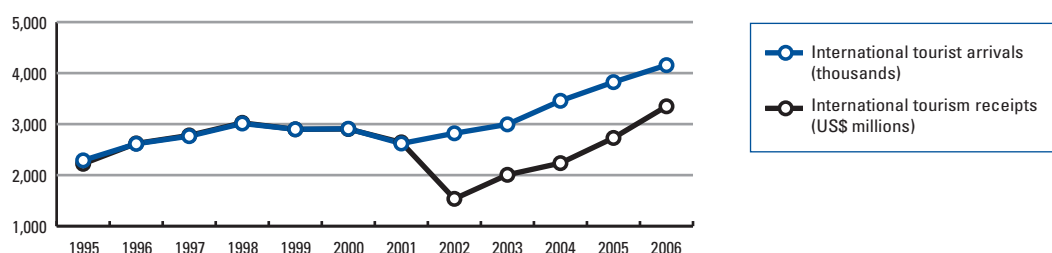
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	2.8	3.1
Employment (1,000 jobs) .....	4.0	1.4

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	8.4	3.6
Employment (1,000 jobs) .....	9.8	1.8

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	4,156
International tourism receipts (US\$ millions), 2006 .....	3,349



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>58</b>	<b>4.2</b>
<b>T&amp;T regulatory framework</b> .....	<b>65</b>	<b>4.4</b>
Policy rules and regulations .....	91	3.9
Environmental sustainability .....	107	3.9
Safety and security .....	98	4.4
Health and hygiene .....	40	5.6
Prioritization of Travel & Tourism .....	70	4.2
<b>T&amp;T business environment and infrastructure</b> .....	<b>64</b>	<b>3.6</b>
Air transport infrastructure .....	67	2.9
Ground transport infrastructure .....	90	3.0
Tourism infrastructure .....	53	3.9
ICT infrastructure .....	54	3.0
Price competitiveness in the T&T industry .....	41	4.9
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>27</b>	<b>4.5</b>
Human resources .....	60	5.0
Education and training .....	56	4.7
Availability of qualified labor .....	71	5.3
Affinity for Travel & Tourism .....	74	4.7
Natural resources .....	12	5.0
Cultural resources .....	41	3.3

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	88 ...■	8.01 Hotel rooms* .....	49 ...■
1.02 Property rights .....	127 ...■	8.02 Presence of major car rental companies* .....	33 ...■
1.03 Business impact of rules on FDI .....	119 ...■	8.03 ATMs accepting Visa cards* .....	58 ...■
1.04 Visa requirements* .....	20 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	78 ...■	9.01 Extent of business Internet use .....	74 ...■
1.06 Transparency of government policymaking .....	127 ...■	9.02 Internet users* .....	54 ...■
1.07 Time required to start a business* .....	71 ...■	9.03 Telephone lines* .....	55 ...■
1.08 Cost to start a business* .....	55 ...■	9.04 Broadband Internet subscribers* .....	48 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	46 ...■
2.01 Stringency of environmental regulation .....	111 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	120 ...■	10.01 Ticket taxes and airport charges* .....	64 ...■
2.03 Sustainability of T&T industry development .....	99 ...■	10.02 Purchasing power parity* .....	30 ...■
2.04 Carbon dioxide emissions* .....	62 ...■	10.03 Extent and effect of taxation .....	128 ...■
2.05 Particulate matter concentration* .....	98 ...■	10.04 Fuel price levels* .....	20 ...■
2.06 Threatened species* .....	94 ...■	10.05 Hotel price index* .....	42 ...■
2.07 Environmental treaty ratification* .....	45 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	10 ...■
3.01 Business costs of terrorism .....	12 ...■	11.02 2ndary education enrollment* .....	67 ...■
3.02 Reliability of police services .....	124 ...■	11.03 Quality of the educational system .....	105 ...■
3.03 Business costs of crime and violence .....	106 ...■	11.04 Local availability of research and training services .....	45 ...■
3.04 Road traffic accidents* .....	88 ...■	11.05 Extent of staff training .....	75 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	119 ...■
4.01 Physician density* .....	29 ...■	11.07 Ease of hiring foreign labor .....	24 ...■
4.02 Access to improved sanitation* .....	54 ...■	11.08 HIV prevalence* .....	83 ...■
4.03 Access to improved drinking water* .....	51 ...■	11.09 Business impact of HIV/AIDS .....	54 ...■
4.04 Hospital beds* .....	44 ...■	11.10 Life expectancy* .....	40 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	83 ...■	12.01 Tourism openness* .....	84 ...■
5.02 T&T government expenditure* .....	84 ...■	12.02 Attitude of population toward foreign visitors .....	104 ...■
5.03 Effectiveness of marketing and branding .....	78 ...■	12.03 Extension of business trips recommended .....	27 ...■
5.04 T&T fair attendance* .....	32 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	10 ...■
6.01 Quality of air transport infrastructure .....	113 ...■	13.02 Nationally protected areas* .....	79 ...■
6.02 Available seat kilometers* .....	29 ...■	13.03 Quality of the natural environment .....	39 ...■
6.03 Departures per 1,000 population* .....	68 ...■	13.04 Total known species* .....	14 ...■
6.04 Airport density* .....	37 ...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	46 ...■	14.01 Number of World Heritage cultural sites* .....	46 ...■
6.06 International air transport network .....	78 ...■	14.02 Sports stadiums* .....	35 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	37 ...■
7.01 Quality of roads .....	84 ...■		
7.02 Quality of railroad infrastructure .....	76 ...■		
7.03 Quality of port infrastructure .....	94 ...■		
7.04 Quality of domestic transport network .....	72 ...■		
7.05 Road density* .....	77 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Armenia

## Key indicators

Population (millions), 2006.....	3.0
Surface area (1,000 square kilometers).....	29.8
Gross domestic product (US\$ billions), 2006.....	6.4
Gross domestic product (PPP, US\$) per capita, 2006.....	5,177
Real GDP growth (percent), 2006.....	13.3

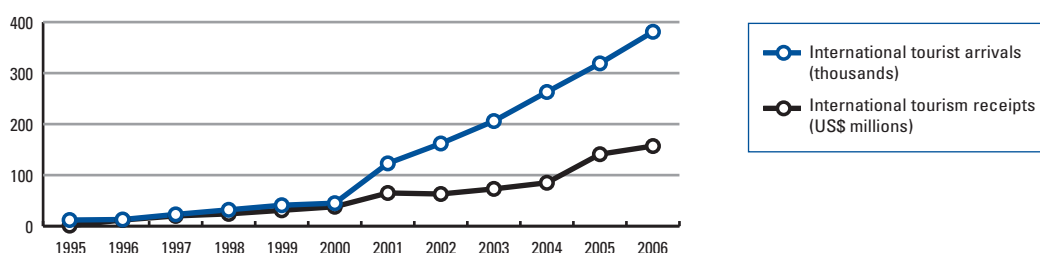
Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

		Percent of total	2008–2017 annual growth (% forecast)
<b>T&amp;T Industry, 2007 estimates</b>			
GDP (US\$ millions).....	145	2.1	5.1
Employment (1,000 jobs).....	19	1.7	0.1
<b>T&amp;T economy, 2007 estimates</b>			
GDP (US\$ millions).....	673	10.0	5.1
Employment (1,000 jobs).....	90	8.1	0.1

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006.....	381
International tourism receipts (US\$ millions), 2006.....	157



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index.....</b>	<b>89</b>	<b>3.6</b>
<b>T&amp;T regulatory framework.....57 4.6</b>		
Policy rules and regulations.....	63	4.3
Environmental sustainability.....	112	3.9
Safety and security.....	45	5.4
Health and hygiene.....	39	5.6
Prioritization of Travel & Tourism.....	105	3.5
<b>T&amp;T business environment and infrastructure.....108 2.7</b>		
Air transport infrastructure.....	97	2.5
Ground transport infrastructure.....	100	2.8
Tourism infrastructure.....	118	1.6
ICT infrastructure.....	101	1.9
Price competitiveness in the T&T industry.....	42	4.9
<b>T&amp;T human, cultural, and natural resources.....94 3.6</b>		
Human resources.....	79	4.9
Education and training.....	103	4.0
Availability of qualified labor.....	15	5.8
Affinity for Travel & Tourism.....	43	5.0
Natural resources.....	107	2.4
Cultural resources.....	79	2.1

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....76...■	8.01	Hotel rooms* .....93...■
1.02	Property rights .....69...■	8.02	Presence of major car rental companies* .....117...■
1.03	Business impact of rules on FDI .....77...■	8.03	ATMs accepting Visa cards* .....87...■
1.04	Visa requirements* .....101...■	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....88...■	9.01	Extent of business Internet use .....111...■
1.06	Transparency of government policymaking .....104...■	9.02	Internet users* .....100...■
1.07	Time required to start a business* .....39...■	9.03	Telephone lines* .....62...■
1.08	Cost to start a business* .....31...■	9.04	Broadband Internet subscribers* .....99...■
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....118...■
2.01	Stringency of environmental regulation .....116...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....124...■	10.01	Ticket taxes and airport charges* .....53...■
2.03	Sustainability of T&T industry development .....97...■	10.02	Purchasing power parity* .....42...■
2.04	Carbon dioxide emissions* .....37...■	10.03	Extent and effect of taxation .....72...■
2.05	Particulate matter concentration* .....88...■	10.04	Fuel price levels* .....54...■
2.06	Threatened species* .....86...■	10.05	Hotel price index* .....50...■
2.07	Environmental treaty ratification* .....97...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....108...■
3.01	Business costs of terrorism .....40...■	11.02	2ndary education enrollment* .....59...■
3.02	Reliability of police services .....92...■	11.03	Quality of the educational system .....94...■
3.03	Business costs of crime and violence .....35...■	11.04	Local availability of research and training services .....111...■
3.04	Road traffic accidents* .....23...■	11.05	Extent of staff training .....113...■
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....40...■
4.01	Physician density* .....11...■	11.07	Ease of hiring foreign labor .....2...■
4.02	Access to improved sanitation* .....67...■	11.08	HIV prevalence* .....24...■
4.03	Access to improved drinking water* .....66...■	11.09	Business impact of HIV/AIDS .....59...■
4.04	Hospital beds* .....41...■	11.10	Life expectancy* .....58...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....65...■	12.01	Tourism openness* .....64...■
5.02	T&T government expenditure* .....52...■	12.02	Attitude of population toward foreign visitors .....50...■
5.03	Effectiveness of marketing and branding .....107...■	12.03	Extension of business trips recommended .....8...■
5.04	T&T fair attendance* .....111...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....70...■
6.01	Quality of air transport infrastructure .....88...■	13.02	Nationally protected areas* .....58...■
6.02	Available seat kilometers* .....98...■	13.03	Quality of the natural environment .....120...■
6.03	Departures per 1,000 population* .....72...■	13.04	Total known species* .....97...■
6.04	Airport density* .....66...■	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....54...■	14.01	Number of World Heritage cultural sites* .....54...■
6.06	International air transport network .....108...■	14.02	Sports stadiums* .....59...■
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....105...■
7.01	Quality of roads .....75...■		
7.02	Quality of railroad infrastructure .....80...■		
7.03	Quality of port infrastructure .....104...■		
7.04	Quality of domestic transport network .....114...■		
7.05	Road density* .....61...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Australia

## Key indicators

Population (millions), 2006 .....	20.4
Surface area (1,000 square kilometers) .....	7,741.2
Gross domestic product (US\$ billions), 2006 .....	755.7
Gross domestic product (PPP, US\$) per capita, 2006 .....	33,037
Real GDP growth (percent), 2006 .....	2.7

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

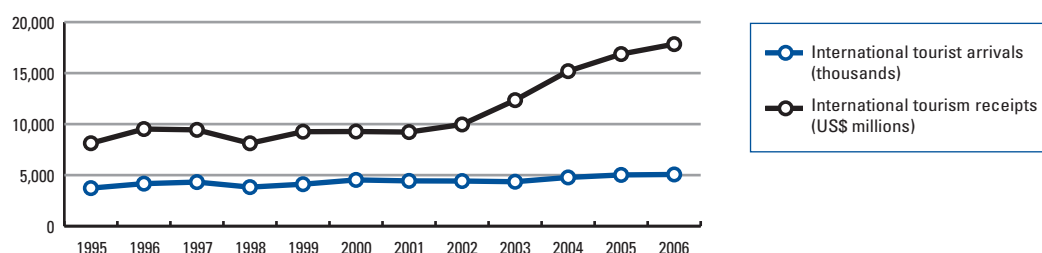
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	40,172	5.1
Employment (1,000 jobs) .....	560	5.4

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	93,954	11.9
Employment (1,000 jobs) .....	1,249	12.1

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	5,064
International tourism receipts (US\$ millions), 2006 .....	17,840



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>4</b>	<b>5.3</b>
<b>T&amp;T regulatory framework</b> .....	<b>30</b>	<b>5.2</b>
Policy rules and regulations .....	27	5.0
Environmental sustainability .....	53	4.6
Safety and security .....	21	5.8
Health and hygiene .....	37	5.7
Prioritization of Travel & Tourism .....	32	4.9
<b>T&amp;T business environment and infrastructure</b> .....	<b>11</b>	<b>5.2</b>
Air transport infrastructure .....	3	5.8
Ground transport infrastructure .....	43	4.5
Tourism infrastructure .....	12	6.3
ICT infrastructure .....	14	5.2
Price competitiveness in the T&T industry .....	111	4.0
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>1</b>	<b>5.6</b>
Human resources .....	14	5.7
Education and training .....	17	5.8
Availability of qualified labor .....	30	5.6
Affinity for Travel & Tourism .....	63	4.8
Natural resources .....	4	5.7
Cultural resources .....	5	6.2

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	25... <span style="color: #808080;">■</span>	8.01 Hotel rooms* .....	19... <span style="color: #808080;">■</span>
1.02 Property rights .....	8... <span style="color: #0056b3;">■</span>	8.02 Presence of major car rental companies* .....	1... <span style="color: #0056b3;">■</span>
1.03 Business impact of rules on FDI .....	54... <span style="color: #808080;">■</span>	8.03 ATMs accepting Visa cards* .....	10... <span style="color: #0056b3;">■</span>
1.04 Visa requirements* .....	120... <span style="color: #808080;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	75... <span style="color: #808080;">■</span>	9.01 Extent of business Internet use .....	18... <span style="color: #808080;">■</span>
1.06 Transparency of government policymaking .....	12... <span style="color: #808080;">■</span>	9.02 Internet users* .....	4... <span style="color: #0056b3;">■</span>
1.07 Time required to start a business* .....	1... <span style="color: #0056b3;">■</span>	9.03 Telephone lines* .....	18... <span style="color: #808080;">■</span>
1.08 Cost to start a business* .....	6... <span style="color: #0056b3;">■</span>	9.04 Broadband Internet subscribers* .....	18... <span style="color: #808080;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	33... <span style="color: #808080;">■</span>
2.01 Stringency of environmental regulation .....	16... <span style="color: #808080;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	13... <span style="color: #808080;">■</span>	10.01 Ticket taxes and airport charges* .....	116... <span style="color: #808080;">■</span>
2.03 Sustainability of T&T industry development .....	12... <span style="color: #808080;">■</span>	10.02 Purchasing power parity* .....	114... <span style="color: #808080;">■</span>
2.04 Carbon dioxide emissions* .....	118... <span style="color: #808080;">■</span>	10.03 Extent and effect of taxation .....	75... <span style="color: #808080;">■</span>
2.05 Particulate matter concentration* .....	8... <span style="color: #0056b3;">■</span>	10.04 Fuel price levels* .....	75... <span style="color: #808080;">■</span>
2.06 Threatened species* .....	121... <span style="color: #808080;">■</span>	10.05 Hotel price index* .....	64... <span style="color: #808080;">■</span>
2.07 Environmental treaty ratification* .....	18... <span style="color: #808080;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	33... <span style="color: #808080;">■</span>
3.01 Business costs of terrorism .....	79... <span style="color: #808080;">■</span>	11.02 2ndary education enrollment* .....	1... <span style="color: #0056b3;">■</span>
3.02 Reliability of police services .....	12... <span style="color: #808080;">■</span>	11.03 Quality of the educational system .....	8... <span style="color: #0056b3;">■</span>
3.03 Business costs of crime and violence .....	26... <span style="color: #808080;">■</span>	11.04 Local availability of research and training services .....	16... <span style="color: #808080;">■</span>
3.04 Road traffic accidents* .....	64... <span style="color: #808080;">■</span>	11.05 Extent of staff training .....	20... <span style="color: #808080;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	63... <span style="color: #808080;">■</span>
4.01 Physician density* .....	38... <span style="color: #808080;">■</span>	11.07 Ease of hiring foreign labor .....	82... <span style="color: #808080;">■</span>
4.02 Access to improved sanitation* .....	1... <span style="color: #0056b3;">■</span>	11.08 HIV prevalence* .....	24... <span style="color: #808080;">■</span>
4.03 Access to improved drinking water* .....	1... <span style="color: #0056b3;">■</span>	11.09 Business impact of HIV/AIDS .....	37... <span style="color: #808080;">■</span>
4.04 Hospital beds* .....	45... <span style="color: #808080;">■</span>	11.10 Life expectancy* .....	3... <span style="color: #0056b3;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	26... <span style="color: #808080;">■</span>	12.01 Tourism openness* .....	78... <span style="color: #808080;">■</span>
5.02 T&T government expenditure* .....	59... <span style="color: #808080;">■</span>	12.02 Attitude of population toward foreign visitors .....	19... <span style="color: #808080;">■</span>
5.03 Effectiveness of marketing and branding .....	17... <span style="color: #808080;">■</span>	12.03 Extension of business trips recommended .....	57... <span style="color: #808080;">■</span>
5.04 T&T fair attendance* .....	32... <span style="color: #808080;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	1... <span style="color: #0056b3;">■</span>
6.01 Quality of air transport infrastructure .....	14... <span style="color: #808080;">■</span>	13.02 Nationally protected areas* .....	35... <span style="color: #808080;">■</span>
6.02 Available seat kilometers* .....	8... <span style="color: #0056b3;">■</span>	13.03 Quality of the natural environment .....	13... <span style="color: #808080;">■</span>
6.03 Departures per 1,000 population* .....	21... <span style="color: #808080;">■</span>	13.04 Total known species* .....	21... <span style="color: #808080;">■</span>
6.04 Airport density* .....	4... <span style="color: #0056b3;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	21... <span style="color: #808080;">■</span>	14.01 Number of World Heritage cultural sites* .....	30... <span style="color: #808080;">■</span>
6.06 International air transport network .....	21... <span style="color: #808080;">■</span>	14.02 Sports stadiums* .....	8... <span style="color: #0056b3;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	8... <span style="color: #0056b3;">■</span>
7.01 Quality of roads .....	25... <span style="color: #808080;">■</span>		
7.02 Quality of railroad infrastructure .....	22... <span style="color: #808080;">■</span>		
7.03 Quality of port infrastructure .....	29... <span style="color: #808080;">■</span>		
7.04 Quality of domestic transport network .....	39... <span style="color: #808080;">■</span>		
7.05 Road density* .....	86... <span style="color: #808080;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# Austria

## Key indicators

Population (millions), 2006 .....	8.2
Surface area (1,000 square kilometers) .....	83.9
Gross domestic product (US\$ billions), 2006 .....	323.8
Gross domestic product (PPP, US\$) per capita, 2006 .....	36,368
Real GDP growth (percent), 2006 .....	3.3

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

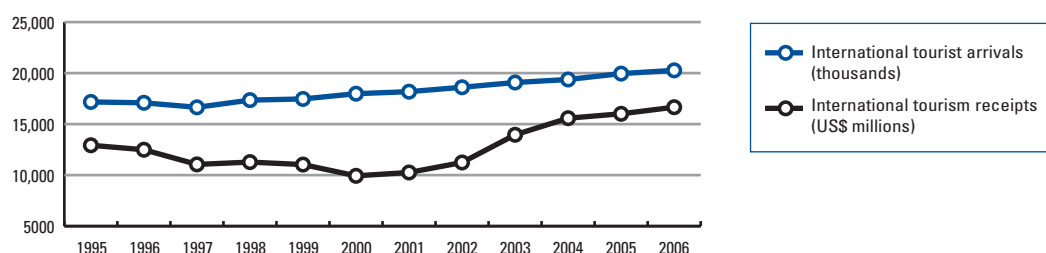
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	21,560	6.1
Employment (1,000 jobs) .....	300	7.2

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	59,540	16.7	1.9
Employment (1,000 jobs) .....	807	19.3	1.0

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	20,269
International tourism receipts (US\$ millions), 2006 .....	16,658



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>2</b>	<b>5.4</b>
<b>T&amp;T regulatory framework</b> .....	<b>4</b>	<b>5.9</b>
Policy rules and regulations .....	22	5.2
Environmental sustainability .....	8	5.6
Safety and security .....	3	6.4
Health and hygiene .....	4	6.8
Prioritization of Travel & Tourism .....	19	5.4
<b>T&amp;T business environment and infrastructure</b> .....	<b>8</b>	<b>5.3</b>
Air transport infrastructure .....	29	4.2
Ground transport infrastructure .....	10	6.0
Tourism infrastructure .....	1	7.0
ICT infrastructure .....	20	4.9
Price competitiveness in the T&T industry .....	104	4.2
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>7</b>	<b>5.2</b>
Human resources .....	19	5.6
Education and training .....	11	6.0
Availability of qualified labor .....	64	5.3
Affinity for Travel & Tourism .....	23	5.4
Natural resources .....	37	4.0
Cultural resources .....	11	5.6

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....17... <span style="color: #808080;">■</span>	8.01	Hotel rooms* .....3... <span style="color: #0056b3;">■</span>
1.02	Property rights .....4... <span style="color: #0056b3;">■</span>	8.02	Presence of major car rental companies* .....1... <span style="color: #0056b3;">■</span>
1.03	Business impact of rules on FDI .....19... <span style="color: #808080;">■</span>	8.03	ATMs accepting Visa cards* .....4... <span style="color: #0056b3;">■</span>
1.04	Visa requirements* .....30... <span style="color: #808080;">■</span>	<hr/>	
1.05	Openness of bilateral Air Service Agreements* .....53... <span style="color: #808080;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.06	Transparency of government policymaking .....15... <span style="color: #808080;">■</span>	9.01	Extent of business Internet use .....16... <span style="color: #808080;">■</span>
1.07	Time required to start a business* .....65... <span style="color: #808080;">■</span>	9.02	Internet users* .....21... <span style="color: #808080;">■</span>
1.08	Cost to start a business* .....34... <span style="color: #808080;">■</span>	9.03	Telephone lines* .....24... <span style="color: #808080;">■</span>
<hr/>		9.04	Broadband Internet subscribers* .....21... <span style="color: #808080;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....13... <span style="color: #808080;">■</span>
2.01	Stringency of environmental regulation .....10... <span style="color: #0056b3;">■</span>	<hr/>	
2.02	Enforcement of environmental regulation .....5... <span style="color: #0056b3;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.03	Sustainability of T&T industry development .....3... <span style="color: #0056b3;">■</span>	10.01	Ticket taxes and airport charges* .....74... <span style="color: #808080;">■</span>
2.04	Carbon dioxide emissions* .....95... <span style="color: #808080;">■</span>	10.02	Purchasing power parity* .....111... <span style="color: #808080;">■</span>
2.05	Particulate matter concentration* .....51... <span style="color: #808080;">■</span>	10.03	Extent and effect of taxation .....37... <span style="color: #808080;">■</span>
2.06	Threatened species* .....26... <span style="color: #808080;">■</span>	10.04	Fuel price levels* .....104... <span style="color: #808080;">■</span>
2.07	Environmental treaty ratification* .....28... <span style="color: #808080;">■</span>	10.05	Hotel price index* .....57... <span style="color: #808080;">■</span>
<hr/>		<hr/>	
<b>3rd pillar: Safety and security</b>		<b>11th pillar: Human resources</b>	
3.01	Business costs of terrorism .....8... <span style="color: #0056b3;">■</span>	11.01	Primary education enrollment* .....30... <span style="color: #808080;">■</span>
3.02	Reliability of police services .....9... <span style="color: #0056b3;">■</span>	11.02	2ndary education enrollment* .....23... <span style="color: #808080;">■</span>
3.03	Business costs of crime and violence .....8... <span style="color: #0056b3;">■</span>	11.03	Quality of the educational system .....14... <span style="color: #808080;">■</span>
3.04	Road traffic accidents* .....48... <span style="color: #808080;">■</span>	11.04	Local availability of research and training services .....15... <span style="color: #808080;">■</span>
<hr/>		11.05	Extent of staff training .....6... <span style="color: #0056b3;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....79... <span style="color: #808080;">■</span>
4.01	Physician density* .....16... <span style="color: #808080;">■</span>	11.07	Ease of hiring foreign labor .....120... <span style="color: #808080;">■</span>
4.02	Access to improved sanitation* .....1... <span style="color: #0056b3;">■</span>	11.08	HIV prevalence* .....63... <span style="color: #808080;">■</span>
4.03	Access to improved drinking water* .....1... <span style="color: #0056b3;">■</span>	11.09	Business impact of HIV/AIDS .....3... <span style="color: #0056b3;">■</span>
4.04	Hospital beds* .....10... <span style="color: #0056b3;">■</span>	11.10	Life expectancy* .....16... <span style="color: #808080;">■</span>
<hr/>		<hr/>	
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....18... <span style="color: #808080;">■</span>	12.01	Tourism openness* .....34... <span style="color: #808080;">■</span>
5.02	T&T government expenditure* .....36... <span style="color: #808080;">■</span>	12.02	Attitude of population toward foreign visitors .....3... <span style="color: #0056b3;">■</span>
5.03	Effectiveness of marketing and branding .....4... <span style="color: #0056b3;">■</span>	12.03	Extension of business trips recommended .....6... <span style="color: #0056b3;">■</span>
5.04	T&T fair attendance* .....22... <span style="color: #808080;">■</span>	<hr/>	
<hr/>		<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....70... <span style="color: #808080;">■</span>
6.01	Quality of air transport infrastructure .....21... <span style="color: #808080;">■</span>	13.02	Nationally protected areas* .....13... <span style="color: #808080;">■</span>
6.02	Available seat kilometers* .....36... <span style="color: #808080;">■</span>	13.03	Quality of the natural environment .....4... <span style="color: #0056b3;">■</span>
6.03	Departures per 1,000 population* .....19... <span style="color: #808080;">■</span>	13.04	Total known species* .....83... <span style="color: #808080;">■</span>
6.04	Airport density* .....62... <span style="color: #808080;">■</span>	<hr/>	
6.05	Number of operating airlines* .....18... <span style="color: #808080;">■</span>	<b>14th pillar: Cultural resources</b>	
6.06	International air transport network .....20... <span style="color: #808080;">■</span>	14.01	Number of World Heritage cultural sites* .....19... <span style="color: #808080;">■</span>
<hr/>		14.02	Sports stadiums* .....29... <span style="color: #808080;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....9... <span style="color: #0056b3;">■</span>
7.01	Quality of roads .....7... <span style="color: #0056b3;">■</span>	<hr/>	
7.02	Quality of railroad infrastructure .....16... <span style="color: #808080;">■</span>		
7.03	Quality of port infrastructure .....31... <span style="color: #808080;">■</span>		
7.04	Quality of domestic transport network .....11... <span style="color: #808080;">■</span>		
7.05	Road density* .....16... <span style="color: #808080;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Azerbaijan

## Key indicators

Population (millions), 2006 .....	8.5
Surface area (1,000 square kilometers) .....	86.6
Gross domestic product (US\$ billions), 2006 .....	19.8
Gross domestic product (PPP, US\$) per capita, 2006 .....	6,476
Real GDP growth (percent), 2006 .....	31.0

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

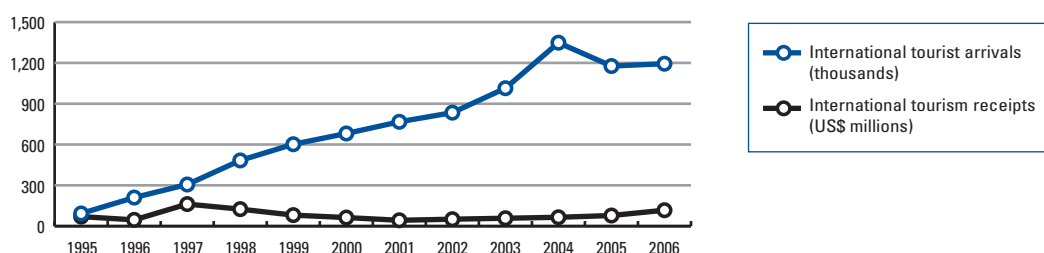
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	1.3	7.5
Employment (1,000 jobs) .....	1.0	2.6

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	2,960	10.5	6.4
Employment (1,000 jobs) .....	348	8.6	1.6

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	1,194
International tourism receipts (US\$ millions), 2006 .....	117



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>79</b>	<b>3.7</b>
<b>T&amp;T regulatory framework</b> .....	<b>62</b>	<b>4.5</b>
Policy rules and regulations .....	72	4.1
Environmental sustainability .....	101	4.0
Safety and security .....	43	5.5
Health and hygiene .....	49	5.2
Prioritization of Travel & Tourism .....	101	3.6
<b>T&amp;T business environment and infrastructure</b> .....	<b>79</b>	<b>3.2</b>
Air transport infrastructure .....	79	2.7
Ground transport infrastructure .....	52	4.1
Tourism infrastructure .....	92	2.4
ICT infrastructure .....	84	2.3
Price competitiveness in the T&T industry .....	62	4.7
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>105</b>	<b>3.4</b>
Human resources .....	54	5.0
Education and training .....	82	4.3
Availability of qualified labor .....	14	5.8
Affinity for Travel & Tourism .....	69	4.8
Natural resources .....	110	2.3
Cultural resources .....	99	1.7

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	53 ...■	8.01 Hotel rooms* .....	87 ...■
1.02 Property rights .....	103 ...■	8.02 Presence of major car rental companies* .....	89 ...■
1.03 Business impact of rules on FDI .....	85 ...■	8.03 ATMs accepting Visa cards* .....	73 ...■
1.04 Visa requirements* .....	106 ...■		
1.05 Openness of bilateral Air Service Agreements* .....	48 ...■	<b>9th pillar: ICT infrastructure</b>	
1.06 Transparency of government policymaking .....	97 ...■	9.01 Extent of business Internet use .....	63 ...■
1.07 Time required to start a business* .....	70 ...■	9.02 Internet users* .....	84 ...■
1.08 Cost to start a business* .....	40 ...■	9.03 Telephone lines* .....	76 ...■
		9.04 Broadband Internet subscribers* .....	105 ...■
		9.05 Mobile telephone subscribers* .....	86 ...■
<b>2nd pillar: Environmental sustainability</b>		<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.01 Stringency of environmental regulation .....	93 ...■	10.01 Ticket taxes and airport charges* .....	113 ...■
2.02 Enforcement of environmental regulation .....	81 ...■	10.02 Purchasing power parity* .....	37 ...■
2.03 Sustainability of T&T industry development .....	94 ...■	10.03 Extent and effect of taxation .....	56 ...■
2.04 Carbon dioxide emissions* .....	63 ...■	10.04 Fuel price levels* .....	14 ...■
2.05 Particulate matter concentration* .....	80 ...■	10.05 Hotel price index* .....	102 ...■
2.06 Threatened species* .....	92 ...■		
2.07 Environmental treaty ratification* .....	97 ...■	<b>11th pillar: Human resources</b>	
		11.01 Primary education enrollment* .....	102 ...■
<b>3rd pillar: Safety and security</b>		11.02 2ndary education enrollment* .....	72 ...■
3.01 Business costs of terrorism .....	73 ...■	11.03 Quality of the educational system .....	98 ...■
3.02 Reliability of police services .....	71 ...■	11.04 Local availability of research and training services .....	77 ...■
3.03 Business costs of crime and violence .....	27 ...■	11.05 Extent of staff training .....	85 ...■
3.04 Road traffic accidents* .....	34 ...■	11.06 Hiring and firing practices .....	6 ...■
		11.07 Ease of hiring foreign labor .....	42 ...■
		11.08 HIV prevalence* .....	24 ...■
		11.09 Business impact of HIV/AIDS .....	65 ...■
		11.10 Life expectancy* .....	68 ...■
<b>4th pillar: Health and hygiene</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
4.01 Physician density* .....	13 ...■	12.01 Tourism openness* .....	104 ...■
4.02 Access to improved sanitation* .....	94 ...■	12.02 Attitude of population toward foreign visitors .....	54 ...■
4.03 Access to improved drinking water* .....	98 ...■	12.03 Extension of business trips recommended .....	14 ...■
4.04 Hospital beds* .....	6 ...■		
		<b>13th pillar: Natural resources</b>	
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		13.01 Number of World Heritage natural sites* .....	70 ...■
5.01 Government prioritization of the T&T industry .....	95 ...■	13.02 Nationally protected areas* .....	73 ...■
5.02 T&T government expenditure* .....	67 ...■	13.03 Quality of the natural environment .....	109 ...■
5.03 Effectiveness of marketing and branding .....	104 ...■	13.04 Total known species* .....	105 ...■
5.04 T&T fair attendance* .....	76 ...■		
		<b>14th pillar: Cultural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		14.01 Number of World Heritage cultural sites* .....	69 ...■
6.01 Quality of air transport infrastructure .....	50 ...■	14.02 Sports stadiums* .....	84 ...■
6.02 Available seat kilometers* .....	91 ...■	14.03 Number of international fairs and exhibitions* .....	105 ...■
6.03 Departures per 1,000 population* .....	78 ...■		
6.04 Airport density* .....	100 ...■		
6.05 Number of operating airlines* .....	64 ...■		
6.06 International air transport network .....	72 ...■		
<b>7th pillar: Ground transport infrastructure</b>			
7.01 Quality of roads .....	66 ...■		
7.02 Quality of railroad infrastructure .....	32 ...■		
7.03 Quality of port infrastructure .....	47 ...■		
7.04 Quality of domestic transport network .....	83 ...■		
7.05 Road density* .....	35 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Bahrain

## Key indicators

Population (millions), 2006 .....	0.7
Surface area (1,000 square kilometers) .....	0.7
Gross domestic product (US\$ billions), 2006 .....	15.4
Gross domestic product (PPP, US\$) per capita, 2006 .....	24,067
Real GDP growth (percent), 2006 .....	7.6

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

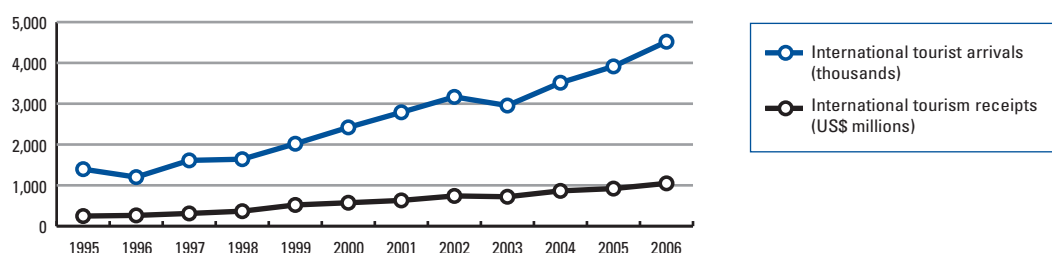
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	1,172	7.6	6.8
Employment (1,000 jobs) .....	41	10.0	4.3

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	3,083	20.0	5.6
Employment (1,000 jobs) .....	93	23.0	3.5

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	4,519
International tourism receipts (US\$ millions), 2006 .....	1,048



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>48</b>	<b>4.3</b>
<b>T&amp;T regulatory framework</b> .....	<b>68</b>	<b>4.4</b>
Policy rules and regulations .....	62	4.4
Environmental sustainability .....	125	3.5
Safety and security .....	39	5.6
Health and hygiene .....	76	4.2
Prioritization of Travel & Tourism .....	75	4.1
<b>T&amp;T business environment and infrastructure</b> .....	<b>28</b>	<b>4.6</b>
Air transport infrastructure .....	28	4.3
Ground transport infrastructure .....	18	5.5
Tourism infrastructure .....	37	4.4
ICT infrastructure .....	43	3.4
Price competitiveness in the T&T industry .....	4	5.6
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>69</b>	<b>3.9</b>
Human resources .....	49	5.1
Education and training .....	49	4.9
Availability of qualified labor .....	79	5.2
Affinity for Travel & Tourism .....	32	5.3
Natural resources .....	127	2.0
Cultural resources .....	43	3.2

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	20 ...■	8.01 Hotel rooms* .....	30 ...■
1.02 Property rights .....	35 ...■	8.02 Presence of major car rental companies* .....	33 ...■
1.03 Business impact of rules on FDI .....	8 ...■	8.03 ATMs accepting Visa cards* .....	54 ...■
1.04 Visa requirements* .....	113 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	57 ...■	9.01 Extent of business Internet use .....	84 ...■
1.06 Transparency of government policymaking .....	33 ...■	9.02 Internet users* .....	52 ...■
1.07 Time required to start a business* .....	n/a .....	9.03 Telephone lines* .....	50 ...■
1.08 Cost to start a business* .....	n/a .....	9.04 Broadband Internet subscribers* .....	42 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	8 ...■
2.01 Stringency of environmental regulation .....	64 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	66 ...■	10.01 Ticket taxes and airport charges* .....	7 ...■
2.03 Sustainability of T&T industry development .....	82 ...■	10.02 Purchasing power parity* .....	100 ...■
2.04 Carbon dioxide emissions* .....	123 ...■	10.03 Extent and effect of taxation .....	1 ...■
2.05 Particulate matter concentration* .....	n/a .....	10.04 Fuel price levels* .....	4 ...■
2.06 Threatened species* .....	44 ...■	10.05 Hotel price index* .....	91 ...■
2.07 Environmental treaty ratification* .....	115 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	29 ...■
3.01 Business costs of terrorism .....	88 ...■	11.02 2ndary education enrollment* .....	29 ...■
3.02 Reliability of police services .....	40 ...■	11.03 Quality of the educational system .....	67 ...■
3.03 Business costs of crime and violence .....	33 ...■	11.04 Local availability of research and training services .....	91 ...■
3.04 Road traffic accidents* .....	9 ...■	11.05 Extent of staff training .....	59 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	96 ...■
4.01 Physician density* .....	86 ...■	11.07 Ease of hiring foreign labor .....	79 ...■
4.02 Access to improved sanitation* .....	1 ...■	11.08 HIV prevalence* .....	49 ...■
4.03 Access to improved drinking water* .....	n/a .....	11.09 Business impact of HIV/AIDS .....	30 ...■
4.04 Hospital beds* .....	64 ...■	11.10 Life expectancy* .....	40 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	62 ...■	12.01 Tourism openness* .....	21 ...■
5.02 T&T government expenditure* .....	47 ...■	12.02 Attitude of population toward foreign visitors .....	56 ...■
5.03 Effectiveness of marketing and branding .....	93 ...■	12.03 Extension of business trips recommended .....	89 ...■
5.04 T&T fair attendance* .....	56 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	70 ...■
6.01 Quality of air transport infrastructure .....	27 ...■	13.02 Nationally protected areas* .....	118 ...■
6.02 Available seat kilometers* .....	56 ...■	13.03 Quality of the natural environment .....	68 ...■
6.03 Departures per 1,000 population* .....	7 ...■	13.04 Total known species* .....	127 ...■
6.04 Airport density* .....	36 ...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	55 ...■	14.01 Number of World Heritage cultural sites* .....	83 ...■
6.06 International air transport network .....	23 ...■	14.02 Sports stadiums* .....	3 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	91 ...■
7.01 Quality of roads .....	33 ...■		
7.02 Quality of railroad infrastructure .....	n/a .....		
7.03 Quality of port infrastructure .....	27 ...■		
7.04 Quality of domestic transport network .....	40 ...■		
7.05 Road density* .....	n/a .....		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Bangladesh

## Key indicators

Population (millions), 2006 .....	144.4
Surface area (1,000 square kilometers) .....	144.0
Gross domestic product (US\$ billions), 2006 .....	64.9
Gross domestic product (PPP, US\$) per capita, 2006 .....	2,130
Real GDP growth (percent), 2006 .....	6.4

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

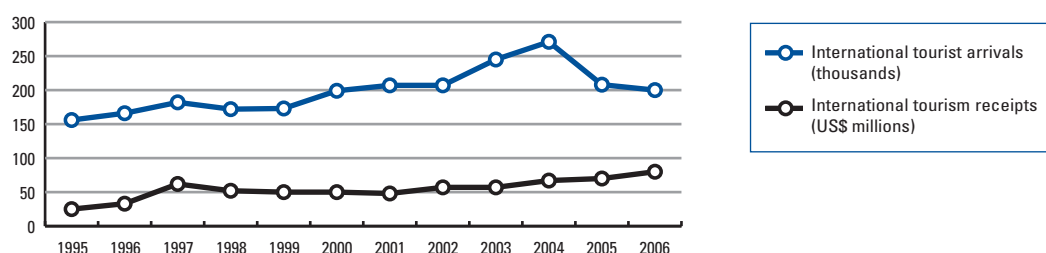
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	1.5	5.0
Employment (1,000 jobs) .....	1.2	2.6

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	2,601	3.9	5.5
Employment (1,000 jobs) .....	2,024	3.1	3.0

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	200
International tourism receipts (US\$ millions), 2006 .....	80



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>127</b>	<b>2.9</b>
<b>T&amp;T regulatory framework</b> .....	<b>129</b>	<b>2.9</b>
Policy rules and regulations .....	114	3.3
Environmental sustainability .....	121	3.7
Safety and security .....	129	2.8
Health and hygiene .....	117	2.1
Prioritization of Travel & Tourism .....	122	2.8
<b>T&amp;T business environment and infrastructure</b> .....	<b>103</b>	<b>2.8</b>
Air transport infrastructure .....	116	2.1
Ground transport infrastructure .....	69	3.6
Tourism infrastructure .....	122	1.3
ICT infrastructure .....	122	1.5
Price competitiveness in the T&T industry .....	10	5.4
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>126</b>	<b>3.1</b>
Human resources .....	107	4.3
Education and training .....	110	3.5
Availability of qualified labor .....	100	5.0
Affinity for Travel & Tourism .....	125	4.0
Natural resources .....	100	2.6
Cultural resources .....	109	1.4

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....74...■	8.01	Hotel rooms* .....119...■
1.02	Property rights .....106...■	8.02	Presence of major car rental companies* .....117...■
1.03	Business impact of rules on FDI .....34...■	8.03	ATMs accepting Visa cards* .....119...■
1.04	Visa requirements* .....95...■	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....106...■	9.01	Extent of business Internet use .....112...■
1.06	Transparency of government policymaking .....102...■	9.02	Internet users* .....128...■
1.07	Time required to start a business* .....114...■	9.03	Telephone lines* .....119...■
1.08	Cost to start a business* .....98...■	9.04	Broadband Internet subscribers* .....120...■
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....114...■
2.01	Stringency of environmental regulation .....118...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....123...■	10.01	Ticket taxes and airport charges* .....90...■
2.03	Sustainability of T&T industry development .....124...■	10.02	Purchasing power parity* .....8...■
2.04	Carbon dioxide emissions* .....15...■	10.03	Extent and effect of taxation .....38...■
2.05	Particulate matter concentration* .....118...■	10.04	Fuel price levels* .....16...■
2.06	Threatened species* .....102...■	10.05	Hotel price index* .....16...■
2.07	Environmental treaty ratification* .....45...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....52...■
3.01	Business costs of terrorism .....119...■	11.02	2ndary education enrollment* .....109...■
3.02	Reliability of police services .....125...■	11.03	Quality of the educational system .....107...■
3.03	Business costs of crime and violence .....105...■	11.04	Local availability of research and training services .....128...■
3.04	Road traffic accidents* .....118...■	11.05	Extent of staff training .....126...■
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....33...■
4.01	Physician density* .....108...■	11.07	Ease of hiring foreign labor .....124...■
4.02	Access to improved sanitation* .....109...■	11.08	HIV prevalence* .....1...■
4.03	Access to improved drinking water* .....103...■	11.09	Business impact of HIV/AIDS .....80...■
4.04	Hospital beds* .....115...■	11.10	Life expectancy* .....103...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....117...■	12.01	Tourism openness* .....120...■
5.02	T&T government expenditure* .....93...■	12.02	Attitude of population toward foreign visitors .....86...■
5.03	Effectiveness of marketing and branding .....125...■	12.03	Extension of business trips recommended .....122...■
5.04	T&T fair attendance* .....111...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....39...■
6.01	Quality of air transport infrastructure .....121...■	13.02	Nationally protected areas* .....116...■
6.02	Available seat kilometers* .....61...■	13.03	Quality of the natural environment .....123...■
6.03	Departures per 1,000 population* .....119...■	13.04	Total known species* .....43...■
6.04	Airport density* .....130...■	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....78...■	14.01	Number of World Heritage cultural sites* .....69...■
6.06	International air transport network .....93...■	14.02	Sports stadiums* .....125...■
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....83...■
7.01	Quality of roads .....83...■		
7.02	Quality of railroad infrastructure .....70...■		
7.03	Quality of port infrastructure .....121...■		
7.04	Quality of domestic transport network .....128...■		
7.05	Road density* .....9...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# Barbados

## Key indicators

Population (millions), 2006.....	0.3
Surface area (1,000 square kilometers).....	0.4
Gross domestic product (US\$ billions), 2006.....	3.4
Gross domestic product (PPP, US\$) per capita, 2006.....	19,274
Real GDP growth (percent), 2006.....	3.9

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

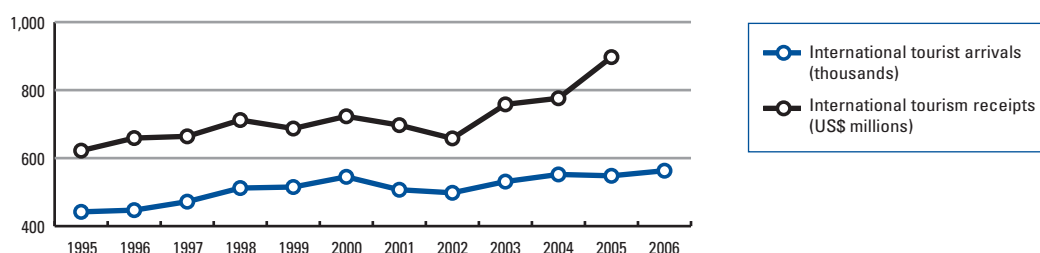
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions).....	539.....14.1	4.7
Employment (1,000 jobs).....	24.....17.8	2.6

### T&T economy, 2007 estimates

GDP (US\$ millions).....	1,655.....43.4	4.2
Employment (1,000 jobs).....	66.....49.6	2.3

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006.....	563
International tourism receipts (US\$ millions), 2005.....	897



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>29</b>	<b>4.8</b>
<b>T&amp;T regulatory framework</b> .....	<b>16</b>	<b>5.5</b>
Policy rules and regulations.....	29	5.0
Environmental sustainability.....	26	5.1
Safety and security.....	27	5.7
Health and hygiene.....	31	5.9
Prioritization of Travel & Tourism.....	13	5.6
<b>T&amp;T business environment and infrastructure</b> .....	<b>32</b>	<b>4.6</b>
Air transport infrastructure.....	30	4.2
Ground transport infrastructure.....	21	5.2
Tourism infrastructure.....	40	4.3
ICT infrastructure.....	29	4.3
Price competitiveness in the T&T industry.....	48	4.8
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>46</b>	<b>4.3</b>
Human resources.....	38	5.3
Education and training.....	31	5.3
Availability of qualified labor.....	82	5.2
Affinity for Travel & Tourism.....	2	6.6
Natural resources.....	117	2.2
Cultural resources.....	46	3.0

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....44...■	8.01	Hotel rooms* .....7...■
1.02	Property rights .....33...■	8.02	Presence of major car rental companies* .....103...■
1.03	Business impact of rules on FDI .....36...■	8.03	ATMs accepting Visa cards* .....47...■
1.04	Visa requirements* .....5...■	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....22...■	9.01	Extent of business Internet use .....67...■
1.06	Transparency of government policymaking .....18...■	9.02	Internet users* .....14...■
1.07	Time required to start a business* .....n/a.....	9.03	Telephone lines* .....16...■
1.08	Cost to start a business* .....n/a.....	9.04	Broadband Internet subscribers* .....30...■
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....51...■
2.01	Stringency of environmental regulation .....60...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....57...■	10.01	Ticket taxes and airport charges* .....46...■
2.03	Sustainability of T&T industry development .....8...■	10.02	Purchasing power parity* .....82...■
2.04	Carbon dioxide emissions* .....70...■	10.03	Extent and effect of taxation .....41...■
2.05	Particulate matter concentration* .....n/a.....	10.04	Fuel price levels* .....59...■
2.06	Threatened species* .....1...■	10.05	Hotel price index* .....n/a.....
2.07	Environmental treaty ratification* .....72...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....25...■
3.01	Business costs of terrorism .....62...■	11.02	2ndary education enrollment* .....7...■
3.02	Reliability of police services .....24...■	11.03	Quality of the educational system .....20...■
3.03	Business costs of crime and violence .....61...■	11.04	Local availability of research and training services .....80...■
3.04	Road traffic accidents* .....2...■	11.05	Extent of staff training .....42...■
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....65...■
4.01	Physician density* .....80...■	11.07	Ease of hiring foreign labor .....111...■
4.02	Access to improved sanitation* .....1...■	11.08	HIV prevalence* .....105...■
4.03	Access to improved drinking water* .....1...■	11.09	Business impact of HIV/AIDS .....116...■
4.04	Hospital beds* .....16...■	11.10	Life expectancy* .....40...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....2...■	12.01	Tourism openness* .....1...■
5.02	T&T government expenditure* .....4...■	12.02	Attitude of population toward foreign visitors .....15...■
5.03	Effectiveness of marketing and branding .....6...■	12.03	Extension of business trips recommended .....23...■
5.04	T&T fair attendance* .....93...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....70...■
6.01	Quality of air transport infrastructure .....18...■	13.02	Nationally protected areas* .....128...■
6.02	Available seat kilometers* .....76...■	13.03	Quality of the natural environment .....26...■
6.03	Departures per 1,000 population* .....n/a.....	13.04	Total known species* .....118...■
6.04	Airport density* .....15...■	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....93...■	14.01	Number of World Heritage cultural sites* .....108...■
6.06	International air transport network .....30...■	14.02	Sports stadiums* .....6...■
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....91...■
7.01	Quality of roads .....41...■		
7.02	Quality of railroad infrastructure .....n/a.....		
7.03	Quality of port infrastructure .....23...■		
7.04	Quality of domestic transport network .....69...■		
7.05	Road density* .....n/a.....		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Belgium

## Key indicators

Population (millions), 2006 .....	10.4
Surface area (1,000 square kilometers) .....	32.5
Gross domestic product (US\$ billions), 2006 .....	394.5
Gross domestic product (PPP, US\$) per capita, 2006 .....	34,749
Real GDP growth (percent), 2006 .....	3.0

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

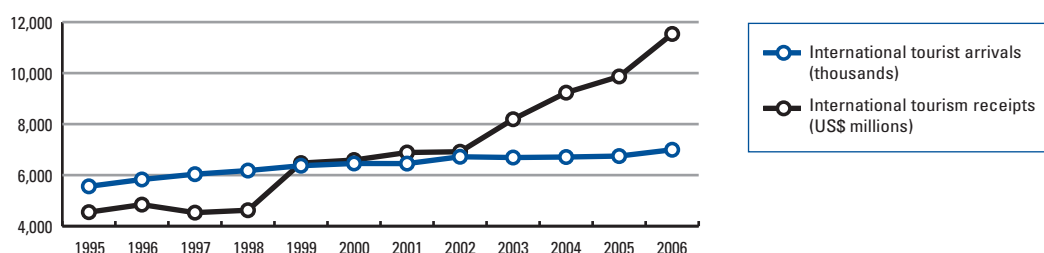
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	14,423	3.3	2.5
Employment (1,000 jobs) .....	161	3.7	1.1

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	48,148	11.1	3.0
Employment (1,000 jobs) .....	524	12.0	1.6

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	6,995
International tourism receipts (US\$ millions), 2006 .....	11,535



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>27</b>	<b>4.8</b>
<b>T&amp;T regulatory framework</b> .....	<b>21</b>	<b>5.4</b>
Policy rules and regulations .....	16	5.3
Environmental sustainability .....	11	5.5
Safety and security .....	29	5.7
Health and hygiene .....	14	6.5
Prioritization of Travel & Tourism .....	91	3.8
<b>T&amp;T business environment and infrastructure</b> .....	<b>31</b>	<b>4.6</b>
Air transport infrastructure .....	38	4.0
Ground transport infrastructure .....	7	6.4
Tourism infrastructure .....	41	4.3
ICT infrastructure .....	24	4.6
Price competitiveness in the T&T industry .....	122	3.8
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>22</b>	<b>4.6</b>
Human resources .....	18	5.6
Education and training .....	3	6.1
Availability of qualified labor .....	88	5.1
Affinity for Travel & Tourism .....	44	5.0
Natural resources .....	119	2.2
Cultural resources .....	15	5.4

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	8 ..■	8.01 Hotel rooms* .....	42 ...■
1.02 Property rights .....	19 ...■	8.02 Presence of major car rental companies* .....	33 ...■
1.03 Business impact of rules on FDI .....	21 ...■	8.03 ATMs accepting Visa cards* .....	44 ...■
1.04 Visa requirements* .....	30 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	32 ...■	9.01 Extent of business Internet use .....	26 ...■
1.06 Transparency of government policymaking .....	50 ...■	9.02 Internet users* .....	27 ...■
1.07 Time required to start a business* .....	3 ..■	9.03 Telephone lines* .....	21 ...■
1.08 Cost to start a business* .....	32 ...■	9.04 Broadband Internet subscribers* .....	19 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	37 ...■
2.01 Stringency of environmental regulation .....	9 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	15 ...■	10.01 Ticket taxes and airport charges* .....	48 ...■
2.03 Sustainability of T&T industry development .....	43 ...■	10.02 Purchasing power parity* .....	110 ...■
2.04 Carbon dioxide emissions* .....	104 ...■	10.03 Extent and effect of taxation .....	129 ...■
2.05 Particulate matter concentration* .....	32 ...■	10.04 Fuel price levels* .....	116 ...■
2.06 Threatened species* .....	20 ...■	10.05 Hotel price index* .....	66 ...■
2.07 Environmental treaty ratification* .....	18 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	12 ...■
3.01 Business costs of terrorism .....	72 ...■	11.02 2ndary education enrollment* .....	11 ...■
3.02 Reliability of police services .....	30 ...■	11.03 Quality of the educational system .....	5 ...■
3.03 Business costs of crime and violence .....	30 ...■	11.04 Local availability of research and training services .....	8 ...■
3.04 Road traffic accidents* .....	57 ...■	11.05 Extent of staff training .....	12 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	124 ...■
4.01 Physician density* .....	6 ...■	11.07 Ease of hiring foreign labor .....	85 ...■
4.02 Access to improved sanitation* .....	1 ...■	11.08 HIV prevalence* .....	63 ...■
4.03 Access to improved drinking water* .....	1 ...■	11.09 Business impact of HIV/AIDS .....	25 ...■
4.04 Hospital beds* .....	32 ...■	11.10 Life expectancy* .....	16 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	96 ...■	12.01 Tourism openness* .....	38 ...■
5.02 T&T government expenditure* .....	64 ...■	12.02 Attitude of population toward foreign visitors .....	23 ...■
5.03 Effectiveness of marketing and branding .....	76 ...■	12.03 Extension of business trips recommended .....	83 ...■
5.04 T&T fair attendance* .....	76 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	70 ...■
6.01 Quality of air transport infrastructure .....	20 ...■	13.02 Nationally protected areas* .....	101 ...■
6.02 Available seat kilometers* .....	46 ...■	13.03 Quality of the natural environment .....	89 ...■
6.03 Departures per 1,000 population* .....	24 ...■	13.04 Total known species* .....	104 ...■
6.04 Airport density* .....	95 ...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	19 ...■	14.01 Number of World Heritage cultural sites* .....	17 ...■
6.06 International air transport network .....	31 ...■	14.02 Sports stadiums* .....	26 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	19 ...■
7.01 Quality of roads .....	10 ...■		
7.02 Quality of railroad infrastructure .....	6 ...■		
7.03 Quality of port infrastructure .....	6 ...■		
7.04 Quality of domestic transport network .....	16 ...■		
7.05 Road density* .....	1 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Benin

## Key indicators

Population (millions), 2006 .....	8.7
Surface area (1,000 square kilometers) .....	112.6
Gross domestic product (US\$ billions), 2006 .....	4.7
Gross domestic product (PPP, US\$) per capita, 2006 .....	1,404
Real GDP growth (percent), 2006 .....	3.8

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

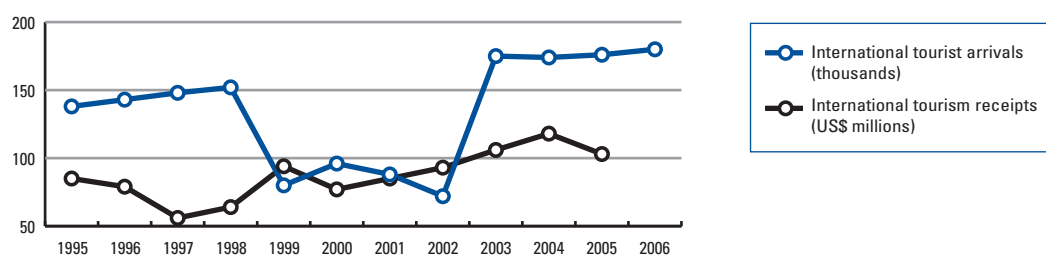
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	3.0	4.9
Employment (1,000 jobs) .....	2.4	3.6

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	6.1	4.7
Employment (1,000 jobs) .....	5.0	3.4

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	180
International tourism receipts (US\$ millions), 2005 .....	103



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>120</b>	<b>3.2</b>
<b>T&amp;T regulatory framework</b> .....	<b>115</b>	<b>3.6</b>
Policy rules and regulations .....	117	3.2
Environmental sustainability .....	30	5.0
Safety and security .....	77	4.9
Health and hygiene .....	121	1.7
Prioritization of Travel & Tourism .....	112	3.4
<b>T&amp;T business environment and infrastructure</b> .....	<b>121</b>	<b>2.6</b>
Air transport infrastructure .....	122	2.0
Ground transport infrastructure .....	128	2.3
Tourism infrastructure .....	87	2.5
ICT infrastructure .....	114	1.6
Price competitiveness in the T&T industry .....	81	4.4
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>115</b>	<b>3.4</b>
Human resources .....	110	4.1
Education and training .....	117	3.3
Availability of qualified labor .....	105	4.9
Affinity for Travel & Tourism .....	83	4.6
Natural resources .....	54	3.3
Cultural resources .....	114	1.4

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....89...■	8.01	Hotel rooms* .....102...■
1.02	Property rights .....104...■	8.02	Presence of major car rental companies* .....56...■
1.03	Business impact of rules on FDI .....104...■	8.03	ATMs accepting Visa cards* .....116...■
1.04	Visa requirements* .....94...■	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....119...■	9.01	Extent of business Internet use .....106...■
1.06	Transparency of government policymaking .....81...■	9.02	Internet users* .....88...■
1.07	Time required to start a business* .....71...■	9.03	Telephone lines* .....116...■
1.08	Cost to start a business* .....122...■	9.04	Broadband Internet subscribers* .....115...■
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....115...■
2.01	Stringency of environmental regulation .....69...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....80...■	10.01	Ticket taxes and airport charges* .....107...■
2.03	Sustainability of T&T industry development .....77...■	10.02	Purchasing power parity* .....54...■
2.04	Carbon dioxide emissions* .....15...■	10.03	Extent and effect of taxation .....120...■
2.05	Particulate matter concentration* .....66...■	10.04	Fuel price levels* .....61...■
2.06	Threatened species* .....15...■	10.05	Hotel price index* .....n/a.....
2.07	Environmental treaty ratification* .....45...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....110...■
3.01	Business costs of terrorism .....77...■	11.02	2ndary education enrollment* .....115...■
3.02	Reliability of police services .....66...■	11.03	Quality of the educational system .....96...■
3.03	Business costs of crime and violence .....103...■	11.04	Local availability of research and training services .....92...■
3.04	Road traffic accidents* .....70...■	11.05	Extent of staff training .....116...■
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....45...■
4.01	Physician density* .....123...■	11.07	Ease of hiring foreign labor .....35...■
4.02	Access to improved sanitation* .....114...■	11.08	HIV prevalence* .....110...■
4.03	Access to improved drinking water* .....104...■	11.09	Business impact of HIV/AIDS .....111...■
4.04	Hospital beds* .....113...■	11.10	Life expectancy* .....112...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....93...■	12.01	Tourism openness* .....96...■
5.02	T&T government expenditure* .....68...■	12.02	Attitude of population toward foreign visitors .....57...■
5.03	Effectiveness of marketing and branding .....80...■	12.03	Extension of business trips recommended .....60...■
5.04	T&T fair attendance* .....122...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....70...■
6.01	Quality of air transport infrastructure .....104...■	13.02	Nationally protected areas* .....20...■
6.02	Available seat kilometers* .....117...■	13.03	Quality of the natural environment .....119...■
6.03	Departures per 1,000 population* .....115...■	13.04	Total known species* .....49...■
6.04	Airport density* .....124...■	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....103...■	14.01	Number of World Heritage cultural sites* .....83...■
6.06	International air transport network .....114...■	14.02	Sports stadiums* .....98...■
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....105...■
7.01	Quality of roads .....93...■		
7.02	Quality of railroad infrastructure .....98...■		
7.03	Quality of port infrastructure .....101...■		
7.04	Quality of domestic transport network .....129...■		
7.05	Road density* .....74...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Bolivia

## Key indicators

Population (millions), 2006 .....	9.4
Surface area (1,000 square kilometers) .....	1,098.6
Gross domestic product (US\$ billions), 2006 .....	11.2
Gross domestic product (PPP, US\$) per capita, 2006 .....	2,931
Real GDP growth (percent), 2006 .....	4.6

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

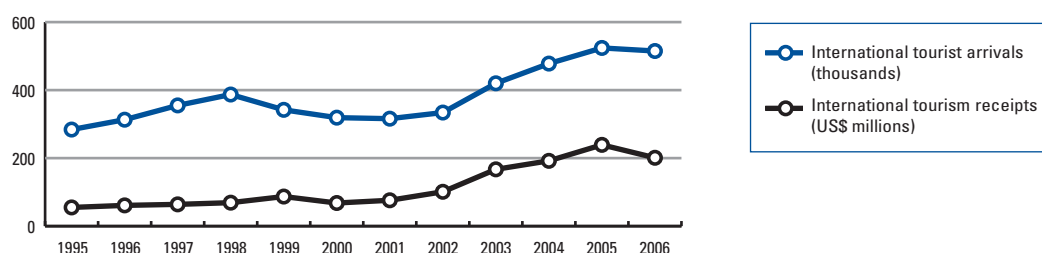
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	319	3.0	4.1
Employment (1,000 jobs) .....	98	2.4	2.9

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	877	8.2	4.1
Employment (1,000 jobs) .....	271	6.7	2.9

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	515
International tourism receipts (US\$ millions), 2006 .....	201



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>106</b>	<b>3.4</b>
<b>T&amp;T regulatory framework</b> .....	<b>122</b>	<b>3.5</b>
Policy rules and regulations .....	127	2.9
Environmental sustainability .....	104	4.0
Safety and security .....	92	4.5
Health and hygiene .....	102	3.1
Prioritization of Travel & Tourism .....	121	2.8
<b>T&amp;T business environment and infrastructure</b> .....	<b>101</b>	<b>2.8</b>
Air transport infrastructure .....	108	2.3
Ground transport infrastructure .....	114	2.6
Tourism infrastructure .....	99	2.2
ICT infrastructure .....	106	1.8
Price competitiveness in the T&T industry .....	14	5.3
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>60</b>	<b>4.0</b>
Human resources .....	98	4.6
Education and training .....	98	4.1
Availability of qualified labor .....	96	5.1
Affinity for Travel & Tourism .....	116	4.2
Natural resources .....	15	4.9
Cultural resources .....	62	2.4

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	117 ...■	8.01 Hotel rooms* .....	73 ...■
1.02 Property rights .....	124 ...■	8.02 Presence of major car rental companies* .....	89 ...■
1.03 Business impact of rules on FDI .....	127 ...■	8.03 ATMs accepting Visa cards* .....	95 ...■
1.04 Visa requirements* .....	76 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	66 ...■	9.01 Extent of business Internet use .....	116 ...■
1.06 Transparency of government policymaking .....	120 ...■	9.02 Internet users* .....	99 ...■
1.07 Time required to start a business* .....	103 ...■	9.03 Telephone lines* .....	96 ...■
1.08 Cost to start a business* .....	118 ...■	9.04 Broadband Internet subscribers* .....	94 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	96 ...■
2.01 Stringency of environmental regulation .....	88 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	113 ...■	10.01 Ticket taxes and airport charges* .....	93 ...■
2.03 Sustainability of T&T industry development .....	128 ...■	10.02 Purchasing power parity* .....	41 ...■
2.04 Carbon dioxide emissions* .....	27 ...■	10.03 Extent and effect of taxation .....	63 ...■
2.05 Particulate matter concentration* .....	99 ...■	10.04 Fuel price levels* .....	19 ...■
2.06 Threatened species* .....	46 ...■	10.05 Hotel price index* .....	4 ...■
2.07 Environmental treaty ratification* .....	63 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	48 ...■
3.01 Business costs of terrorism .....	64 ...■	11.02 2ndary education enrollment* .....	55 ...■
3.02 Reliability of police services .....	128 ...■	11.03 Quality of the educational system .....	125 ...■
3.03 Business costs of crime and violence .....	95 ...■	11.04 Local availability of research and training services .....	110 ...■
3.04 Road traffic accidents* .....	61 ...■	11.05 Extent of staff training .....	123 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	82 ...■
4.01 Physician density* .....	79 ...■	11.07 Ease of hiring foreign labor .....	55 ...■
4.02 Access to improved sanitation* .....	102 ...■	11.08 HIV prevalence* .....	24 ...■
4.03 Access to improved drinking water* .....	81 ...■	11.09 Business impact of HIV/AIDS .....	85 ...■
4.04 Hospital beds* .....	97 ...■	11.10 Life expectancy* .....	100 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	128 ...■	12.01 Tourism openness* .....	71 ...■
5.02 T&T government expenditure* .....	65 ...■	12.02 Attitude of population toward foreign visitors .....	122 ...■
5.03 Effectiveness of marketing and branding .....	130 ...■	12.03 Extension of business trips recommended .....	121 ...■
5.04 T&T fair attendance* .....	93 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	39 ...■
6.01 Quality of air transport infrastructure .....	118 ...■	13.02 Nationally protected areas* .....	24 ...■
6.02 Available seat kilometers* .....	83 ...■	13.03 Quality of the natural environment .....	23 ...■
6.03 Departures per 1,000 population* .....	60 ...■	13.04 Total known species* .....	9 ...■
6.04 Airport density* .....	35 ...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	110 ...■	14.01 Number of World Heritage cultural sites* .....	38 ...■
6.06 International air transport network .....	125 ...■	14.02 Sports stadiums* .....	70 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	77 ...■
7.01 Quality of roads .....	125 ...■		
7.02 Quality of railroad infrastructure .....	97 ...■		
7.03 Quality of port infrastructure .....	87 ...■		
7.04 Quality of domestic transport network .....	97 ...■		
7.05 Road density* .....	102 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# Bosnia and Herzegovina

## Key indicators

Population (millions), 2006.....	3.9
Surface area (1,000 square kilometers).....	51.2
Gross domestic product (US\$ billions), 2006.....	11.4
Gross domestic product (PPP, US\$) per capita, 2006.....	9,253
Real GDP growth (percent), 2006.....	6.0

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

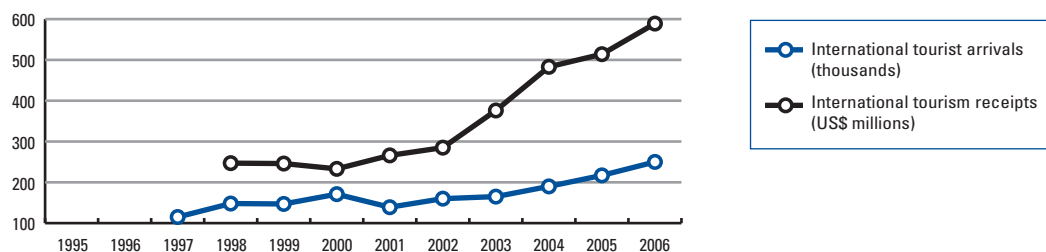
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions).....	400.....3.3	4.6
Employment (1,000 jobs).....	30.....2.6	0.1

### T&T economy, 2007 estimates

GDP (US\$ millions).....	1,427.....11.7	5.3
Employment (1,000 jobs).....	107.....9.5	0.9

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006.....	250
International tourism receipts (US\$ millions), 2006.....	589



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index.....</b>	<b>105</b>	<b>3.4</b>
<b>T&amp;T regulatory framework.....</b>	<b>98</b>	<b>4.0</b>
Policy rules and regulations.....	109	3.5
Environmental sustainability.....	113	3.9
Safety and security.....	57	5.1
Health and hygiene.....	55	4.9
Prioritization of Travel & Tourism.....	124	2.7
<b>T&amp;T business environment and infrastructure.....</b>	<b>91</b>	<b>3.0</b>
Air transport infrastructure.....	124	2.0
Ground transport infrastructure.....	115	2.6
Tourism infrastructure.....	59	3.6
ICT infrastructure.....	62	2.7
Price competitiveness in the T&T industry.....	107	4.1
<b>T&amp;T human, cultural, and natural resources.....</b>	<b>117</b>	<b>3.3</b>
Human resources.....	106	4.3
Education and training.....	120	3.3
Availability of qualified labor.....	65	5.3
Affinity for Travel & Tourism.....	93	4.5
Natural resources.....	120	2.2
Cultural resources.....	70	2.4

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

# Bosnia and Herzegovina

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....96...■	8.01	Hotel rooms* .....69...■
1.02	Property rights .....120...■	8.02	Presence of major car rental companies* .....1...■
1.03	Business impact of rules on FDI .....124...■	8.03	ATMs accepting Visa cards* .....74...■
1.04	Visa requirements* .....65...■	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....72...■	9.01	Extent of business Internet use .....83...■
1.06	Transparency of government policymaking .....117...■	9.02	Internet users* .....49...■
1.07	Time required to start a business* .....105...■	9.03	Telephone lines* .....52...■
1.08	Cost to start a business* .....88...■	9.04	Broadband Internet subscribers* .....66...■
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....84...■
2.01	Stringency of environmental regulation .....125...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....114...■	10.01	Ticket taxes and airport charges* .....105...■
2.03	Sustainability of T&T industry development .....127...■	10.02	Purchasing power parity* .....25...■
2.04	Carbon dioxide emissions* .....72...■	10.03	Extent and effect of taxation .....127...■
2.05	Particulate matter concentration* .....16...■	10.04	Fuel price levels* .....102...■
2.06	Threatened species* .....51...■	10.05	Hotel price index* .....n/a.....
2.07	Environmental treaty ratification* .....123...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....n/a.....
3.01	Business costs of terrorism .....9...■	11.02	2ndary education enrollment* .....110...■
3.02	Reliability of police services .....106...■	11.03	Quality of the educational system .....85...■
3.03	Business costs of crime and violence .....78...■	11.04	Local availability of research and training services .....98...■
3.04	Road traffic accidents* .....14...■	11.05	Extent of staff training .....108...■
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....67...■
4.01	Physician density* .....73...■	11.07	Ease of hiring foreign labor .....102...■
4.02	Access to improved sanitation* .....45...■	11.08	HIV prevalence* .....1...■
4.03	Access to improved drinking water* .....45...■	11.09	Business impact of HIV/AIDS .....38...■
4.04	Hospital beds* .....58...■	11.10	Life expectancy* .....50...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....121...■	12.01	Tourism openness* .....44...■
5.02	T&T government expenditure* .....114...■	12.02	Attitude of population toward foreign visitors .....84...■
5.03	Effectiveness of marketing and branding .....123...■	12.03	Extension of business trips recommended .....126...■
5.04	T&T fair attendance* .....93...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....70...■
6.01	Quality of air transport infrastructure .....126...■	13.02	Nationally protected areas* .....124...■
6.02	Available seat kilometers* .....126...■	13.03	Quality of the natural environment .....57...■
6.03	Departures per 1,000 population* .....84...■	13.04	Total known species* .....102...■
6.04	Airport density* .....57...■	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....106...■	14.01	Number of World Heritage cultural sites* .....69...■
6.06	International air transport network .....126...■	14.02	Sports stadiums* .....30...■
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....91...■
7.01	Quality of roads .....127...■		
7.02	Quality of railroad infrastructure .....96...■		
7.03	Quality of port infrastructure .....128...■		
7.04	Quality of domestic transport network .....77...■		
7.05	Road density* .....46...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Botswana

## Key indicators

Population (millions), 2006 .....	1.8
Surface area (1,000 square kilometers) .....	581.7
Gross domestic product (US\$ billions), 2006 .....	10.6
Gross domestic product (PPP, US\$) per capita, 2006 .....	15,692
Real GDP growth (percent), 2006 .....	2.6

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

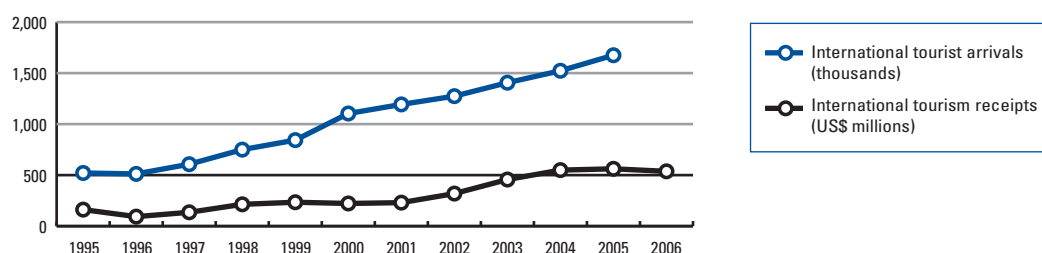
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	337	3.3	4.2
Employment (1,000 jobs) .....	14	4.6	0.4

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	760	7.5	4.2
Employment (1,000 jobs) .....	28	9.2	0.4

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2005 .....	1,675
International tourism receipts (US\$ millions), 2006 .....	537



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>87</b>	<b>3.7</b>
<b>T&amp;T regulatory framework</b> .....	<b>82</b>	<b>4.2</b>
Policy rules and regulations .....	74	4.1
Environmental sustainability .....	68	4.4
Safety and security .....	50	5.3
Health and hygiene .....	97	3.2
Prioritization of Travel & Tourism .....	82	4.0
<b>T&amp;T business environment and infrastructure</b> .....	<b>76</b>	<b>3.3</b>
Air transport infrastructure .....	77	2.7
Ground transport infrastructure .....	72	3.5
Tourism infrastructure .....	78	2.8
ICT infrastructure .....	92	2.0
Price competitiveness in the T&T industry .....	6	5.5
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>103</b>	<b>3.4</b>
Human resources .....	124	3.4
Education and training .....	83	4.3
Availability of qualified labor .....	128	2.4
Affinity for Travel & Tourism .....	58	4.9
Natural resources .....	31	4.2
Cultural resources .....	113	1.4

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....42...■	8.01	Hotel rooms* .....71...■
1.02	Property rights .....57...■	8.02	Presence of major car rental companies* .....74...■
1.03	Business impact of rules on FDI .....63...■	8.03	ATMs accepting Visa cards* .....70...■
1.04	Visa requirements* .....21...■	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....100...■	9.01	Extent of business Internet use .....104...■
1.06	Transparency of government policymaking .....42...■	9.02	Internet users* .....112...■
1.07	Time required to start a business* .....121...■	9.03	Telephone lines* .....95...■
1.08	Cost to start a business* .....56...■	9.04	Broadband Internet subscribers* .....96...■
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....71...■
2.01	Stringency of environmental regulation .....76...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....71...■	10.01	Ticket taxes and airport charges* .....14...■
2.03	Sustainability of T&T industry development .....30...■	10.02	Purchasing power parity* .....47...■
2.04	Carbon dioxide emissions* .....53...■	10.03	Extent and effect of taxation .....17...■
2.05	Particulate matter concentration* .....88...■	10.04	Fuel price levels* .....49...■
2.06	Threatened species* .....13...■	10.05	Hotel price index* .....n/a.....
2.07	Environmental treaty ratification* .....109...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....103...■
3.01	Business costs of terrorism .....33...■	11.02	2ndary education enrollment* .....88...■
3.02	Reliability of police services .....65...■	11.03	Quality of the educational system .....56...■
3.03	Business costs of crime and violence .....87...■	11.04	Local availability of research and training services .....106...■
3.04	Road traffic accidents* .....21...■	11.05	Extent of staff training .....64...■
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....86...■
4.01	Physician density* .....102...■	11.07	Ease of hiring foreign labor .....119...■
4.02	Access to improved sanitation* .....108...■	11.08	HIV prevalence* .....129...■
4.03	Access to improved drinking water* .....55...■	11.09	Business impact of HIV/AIDS .....125...■
4.04	Hospital beds* .....73...■	11.10	Life expectancy* .....129...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....29...■	12.01	Tourism openness* .....39...■
5.02	T&T government expenditure* .....88...■	12.02	Attitude of population toward foreign visitors .....108...■
5.03	Effectiveness of marketing and branding .....46...■	12.03	Extension of business trips recommended .....78...■
5.04	T&T fair attendance* .....93...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....70...■
6.01	Quality of air transport infrastructure .....94...■	13.02	Nationally protected areas* .....10...■
6.02	Available seat kilometers* .....128...■	13.03	Quality of the natural environment .....28...■
6.03	Departures per 1,000 population* .....51...■	13.04	Total known species* .....44...■
6.04	Airport density* .....20...■	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....127...■	14.01	Number of World Heritage cultural sites* .....83...■
6.06	International air transport network .....99...■	14.02	Sports stadiums* .....96...■
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....113...■
7.01	Quality of roads .....47...■		
7.02	Quality of railroad infrastructure .....43...■		
7.03	Quality of port infrastructure .....57...■		
7.04	Quality of domestic transport network .....102...■		
7.05	Road density* .....108...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Brazil

## Key indicators

Population (millions), 2006 .....	188.9
Surface area (1,000 square kilometers) .....	8,514.9
Gross domestic product (US\$ billions), 2006 .....	1,067.7
Gross domestic product (PPP, US\$) per capita, 2006 .....	10,073
Real GDP growth (percent), 2006 .....	3.7

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

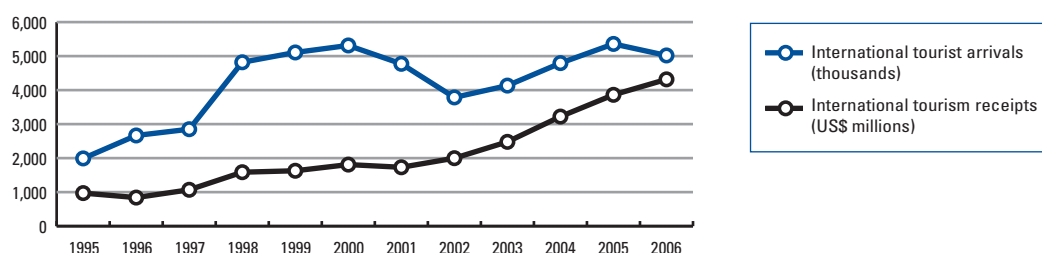
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	25,283	2.6
Employment (1,000 jobs) .....	2,333	2.6

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	65,075	6.8
Employment (1,000 jobs) .....	5,876	6.4

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	5,019
International tourism receipts (US\$ millions), 2006 .....	4,316



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>49</b>	<b>4.3</b>
<b>T&amp;T regulatory framework</b> .....	<b>84</b>	<b>4.1</b>
Policy rules and regulations .....	95	3.8
Environmental sustainability .....	37	4.9
Safety and security .....	128	3.1
Health and hygiene .....	69	4.5
Prioritization of Travel & Tourism .....	68	4.2
<b>T&amp;T business environment and infrastructure</b> .....	<b>67</b>	<b>3.6</b>
Air transport infrastructure .....	45	3.6
Ground transport infrastructure .....	95	2.9
Tourism infrastructure .....	47	4.2
ICT infrastructure .....	58	2.8
Price competitiveness in the T&T industry .....	92	4.3
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>6</b>	<b>5.2</b>
Human resources .....	66	5.0
Education and training .....	41	5.0
Availability of qualified labor .....	103	5.0
Affinity for Travel & Tourism .....	94	4.5
Natural resources .....	3	5.8
Cultural resources .....	12	5.6

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....95... <span style="color: #808080;">■</span>	8.01	Hotel rooms* .....n/a... <span style="color: #808080;">■</span>
1.02	Property rights .....70... <span style="color: #808080;">■</span>	8.02	Presence of major car rental companies* .....33... <span style="color: #0056b3;">■</span>
1.03	Business impact of rules on FDI .....96... <span style="color: #808080;">■</span>	8.03	ATMs accepting Visa cards* .....68... <span style="color: #808080;">■</span>
1.04	Visa requirements* .....58... <span style="color: #808080;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....36... <span style="color: #0056b3;">■</span>	9.01	Extent of business Internet use .....28... <span style="color: #0056b3;">■</span>
1.06	Transparency of government policymaking .....107... <span style="color: #808080;">■</span>	9.02	Internet users* .....63... <span style="color: #808080;">■</span>
1.07	Time required to start a business* .....123... <span style="color: #808080;">■</span>	9.03	Telephone lines* .....59... <span style="color: #808080;">■</span>
1.08	Cost to start a business* .....57... <span style="color: #808080;">■</span>	9.04	Broadband Internet subscribers* .....55... <span style="color: #808080;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....85... <span style="color: #808080;">■</span>
2.01	Stringency of environmental regulation .....46... <span style="color: #0056b3;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....54... <span style="color: #808080;">■</span>	10.01	Ticket taxes and airport charges* .....92... <span style="color: #808080;">■</span>
2.03	Sustainability of T&T industry development .....100... <span style="color: #808080;">■</span>	10.02	Purchasing power parity* .....80... <span style="color: #808080;">■</span>
2.04	Carbon dioxide emissions* .....46... <span style="color: #0056b3;">■</span>	10.03	Extent and effect of taxation .....130... <span style="color: #808080;">■</span>
2.05	Particulate matter concentration* .....38... <span style="color: #0056b3;">■</span>	10.04	Fuel price levels* .....62... <span style="color: #808080;">■</span>
2.06	Threatened species* .....100... <span style="color: #808080;">■</span>	10.05	Hotel price index* .....38... <span style="color: #0056b3;">■</span>
2.07	Environmental treaty ratification* .....28... <span style="color: #0056b3;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....44... <span style="color: #0056b3;">■</span>
3.01	Business costs of terrorism .....10... <span style="color: #0056b3;">■</span>	11.02	2ndary education enrollment* .....21... <span style="color: #0056b3;">■</span>
3.02	Reliability of police services .....119... <span style="color: #808080;">■</span>	11.03	Quality of the educational system .....120... <span style="color: #808080;">■</span>
3.03	Business costs of crime and violence .....121... <span style="color: #808080;">■</span>	11.04	Local availability of research and training services .....32... <span style="color: #0056b3;">■</span>
3.04	Road traffic accidents* .....120... <span style="color: #808080;">■</span>	11.05	Extent of staff training .....45... <span style="color: #0056b3;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....120... <span style="color: #808080;">■</span>
4.01	Physician density* .....53... <span style="color: #808080;">■</span>	11.07	Ease of hiring foreign labor .....69... <span style="color: #808080;">■</span>
4.02	Access to improved sanitation* .....73... <span style="color: #808080;">■</span>	11.08	HIV prevalence* .....76... <span style="color: #808080;">■</span>
4.03	Access to improved drinking water* .....72... <span style="color: #808080;">■</span>	11.09	Business impact of HIV/AIDS .....61... <span style="color: #808080;">■</span>
4.04	Hospital beds* .....66... <span style="color: #808080;">■</span>	11.10	Life expectancy* .....73... <span style="color: #808080;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....113... <span style="color: #808080;">■</span>	12.01	Tourism openness* .....117... <span style="color: #808080;">■</span>
5.02	T&T government expenditure* .....74... <span style="color: #808080;">■</span>	12.02	Attitude of population toward foreign visitors .....70... <span style="color: #808080;">■</span>
5.03	Effectiveness of marketing and branding .....95... <span style="color: #808080;">■</span>	12.03	Extension of business trips recommended .....47... <span style="color: #0056b3;">■</span>
5.04	T&T fair attendance* .....13... <span style="color: #0056b3;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....6... <span style="color: #0056b3;">■</span>
6.01	Quality of air transport infrastructure .....87... <span style="color: #808080;">■</span>	13.02	Nationally protected areas* .....28... <span style="color: #0056b3;">■</span>
6.02	Available seat kilometers* .....12... <span style="color: #0056b3;">■</span>	13.03	Quality of the natural environment .....71... <span style="color: #808080;">■</span>
6.03	Departures per 1,000 population* .....61... <span style="color: #808080;">■</span>	13.04	Total known species* .....1... <span style="color: #0056b3;">■</span>
6.04	Airport density* .....81... <span style="color: #808080;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....33... <span style="color: #0056b3;">■</span>	14.01	Number of World Heritage cultural sites* .....16... <span style="color: #0056b3;">■</span>
6.06	International air transport network .....64... <span style="color: #808080;">■</span>	14.02	Sports stadiums* .....56... <span style="color: #808080;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....12... <span style="color: #0056b3;">■</span>
7.01	Quality of roads .....110... <span style="color: #808080;">■</span>		
7.02	Quality of railroad infrastructure .....87... <span style="color: #808080;">■</span>		
7.03	Quality of port infrastructure .....116... <span style="color: #808080;">■</span>		
7.04	Quality of domestic transport network .....50... <span style="color: #808080;">■</span>		
7.05	Road density* .....66... <span style="color: #808080;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Bulgaria

## Key indicators

Population (millions), 2006 .....	7.7
Surface area (1,000 square kilometers) .....	111.0
Gross domestic product (US\$ billions), 2006 .....	31.5
Gross domestic product (PPP, US\$) per capita, 2006 .....	10,022
Real GDP growth (percent), 2006 .....	6.1

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

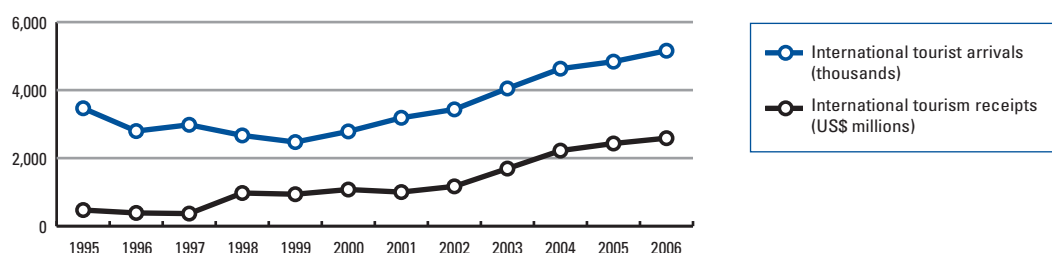
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	1,489	4.1	3.7
Employment (1,000 jobs) .....	106	3.5	-1.6

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	5,260	14.5	4.5
Employment (1,000 jobs) .....	371	12.3	-0.9

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	5,158
International tourism receipts (US\$ millions), 2006 .....	2,586



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>43</b>	<b>4.4</b>
<b>T&amp;T regulatory framework</b> .....	<b>50</b>	<b>4.7</b>
Policy rules and regulations .....	85	4.0
Environmental sustainability .....	73	4.4
Safety and security .....	90	4.6
Health and hygiene .....	12	6.6
Prioritization of Travel & Tourism .....	65	4.3
<b>T&amp;T business environment and infrastructure</b> .....	<b>52</b>	<b>3.8</b>
Air transport infrastructure .....	101	2.4
Ground transport infrastructure .....	77	3.4
Tourism infrastructure .....	22	5.4
ICT infrastructure .....	44	3.4
Price competitiveness in the T&T industry .....	69	4.6
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>31</b>	<b>4.5</b>
Human resources .....	59	5.0
Education and training .....	67	4.6
Availability of qualified labor .....	47	5.4
Affinity for Travel & Tourism .....	16	5.7
Natural resources .....	59	3.2
Cultural resources .....	29	4.0

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	109 ...■	8.01 Hotel rooms* .....	n/a .....
1.02 Property rights .....	98 ...■	8.02 Presence of major car rental companies* .....	33 ...■
1.03 Business impact of rules on FDI .....	118 ...■	8.03 ATMs accepting Visa cards* .....	28 ...■
1.04 Visa requirements* .....	56 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	97 ...■	9.01 Extent of business Internet use .....	88 ...■
1.06 Transparency of government policymaking .....	110 ...■	9.02 Internet users* .....	48 ...■
1.07 Time required to start a business* .....	76 ...■	9.03 Telephone lines* .....	37 ...■
1.08 Cost to start a business* .....	46 ...■	9.04 Broadband Internet subscribers* .....	44 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	20 ...■
2.01 Stringency of environmental regulation .....	96 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	93 ...■	10.01 Ticket taxes and airport charges* .....	19 ...■
2.03 Sustainability of T&T industry development .....	104 ...■	10.02 Purchasing power parity* .....	48 ...■
2.04 Carbon dioxide emissions* .....	79 ...■	10.03 Extent and effect of taxation .....	90 ...■
2.05 Particulate matter concentration* .....	76 ...■	10.04 Fuel price levels* .....	86 ...■
2.06 Threatened species* .....	71 ...■	10.05 Hotel price index* .....	71 ...■
2.07 Environmental treaty ratification* .....	18 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	57 ...■
3.01 Business costs of terrorism .....	103 ...■	11.02 2ndary education enrollment* .....	19 ...■
3.02 Reliability of police services .....	105 ...■	11.03 Quality of the educational system .....	76 ...■
3.03 Business costs of crime and violence .....	97 ...■	11.04 Local availability of research and training services .....	76 ...■
3.04 Road traffic accidents* .....	51 ...■	11.05 Extent of staff training .....	118 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	50 ...■
4.01 Physician density* .....	12 ...■	11.07 Ease of hiring foreign labor .....	84 ...■
4.02 Access to improved sanitation* .....	37 ...■	11.08 HIV prevalence* .....	1 ...■
4.03 Access to improved drinking water* .....	39 ...■	11.09 Business impact of HIV/AIDS .....	62 ...■
4.04 Hospital beds* .....	21 ...■	11.10 Life expectancy* .....	58 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	85 ...■	12.01 Tourism openness* .....	13 ...■
5.02 T&T government expenditure* .....	63 ...■	12.02 Attitude of population toward foreign visitors .....	96 ...■
5.03 Effectiveness of marketing and branding .....	85 ...■	12.03 Extension of business trips recommended .....	44 ...■
5.04 T&T fair attendance* .....	32 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	21 ...■
6.01 Quality of air transport infrastructure .....	106 ...■	13.02 Nationally protected areas* .....	59 ...■
6.02 Available seat kilometers* .....	82 ...■	13.03 Quality of the natural environment .....	84 ...■
6.03 Departures per 1,000 population* .....	83 ...■	13.04 Total known species* .....	72 ...■
6.04 Airport density* .....	94 ...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	51 ...■	14.01 Number of World Heritage cultural sites* .....	23 ...■
6.06 International air transport network .....	102 ...■	14.02 Sports stadiums* .....	18 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	55 ...■
7.01 Quality of roads .....	105 ...■		
7.02 Quality of railroad infrastructure .....	46 ...■		
7.03 Quality of port infrastructure .....	76 ...■		
7.04 Quality of domestic transport network .....	81 ...■		
7.05 Road density* .....	47 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# Burkina Faso

## Key indicators

Population (millions), 2006 .....	13.6
Surface area (1,000 square kilometers) .....	274.0
Gross domestic product (US\$ billions), 2006 .....	6.0
Gross domestic product (PPP, US\$) per capita, 2006 .....	1,406
Real GDP growth (percent), 2006 .....	5.9

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

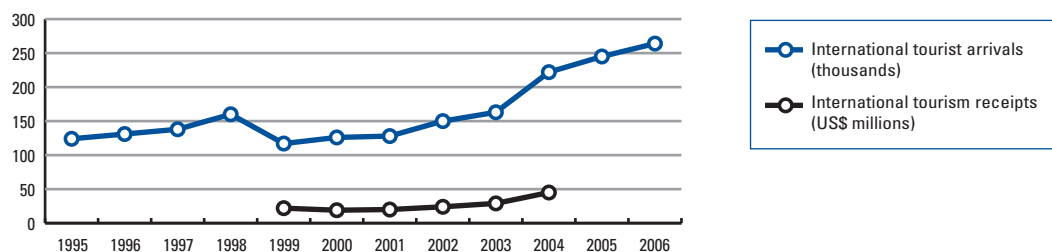
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	89	1.2	4.9
Employment (1,000 jobs) .....	38	1.0	3.2

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	242	3.4	4.6
Employment (1,000 jobs) .....	107	2.7	3.0

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	264
International tourism receipts (US\$ millions), 2004 .....	45



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>124</b>	<b>3.0</b>
<b>T&amp;T regulatory framework</b> .....	<b>121</b>	<b>3.6</b>
Policy rules and regulations .....	107	3.6
Environmental sustainability .....	64	4.5
Safety and security .....	82	4.8
Health and hygiene .....	124	1.5
Prioritization of Travel & Tourism .....	108	3.5
<b>T&amp;T business environment and infrastructure</b> .....	<b>123</b>	<b>2.6</b>
Air transport infrastructure .....	126	1.9
Ground transport infrastructure .....	102	2.8
Tourism infrastructure .....	94	2.3
ICT infrastructure .....	121	1.5
Price competitiveness in the T&T industry .....	101	4.2
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>127</b>	<b>3.0</b>
Human resources .....	123	3.4
Education and training .....	129	2.3
Availability of qualified labor .....	116	4.5
Affinity for Travel & Tourism .....	104	4.4
Natural resources .....	67	3.1
Cultural resources .....	127	1.1

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....65...■	8.01	Hotel rooms* .....n/a.....
1.02	Property rights .....71...■	8.02	Presence of major car rental companies* .....89...■
1.03	Business impact of rules on FDI .....66...■	8.03	ATMs accepting Visa cards* .....113...■
1.04	Visa requirements* .....97...■	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....124...■	9.01	Extent of business Internet use .....100...■
1.06	Transparency of government policymaking .....40...■	9.02	Internet users* .....124...■
1.07	Time required to start a business* .....39...■	9.03	Telephone lines* .....120...■
1.08	Cost to start a business* .....111...■	9.04	Broadband Internet subscribers* .....109...■
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....121...■
2.01	Stringency of environmental regulation .....75...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....70...■	10.01	Ticket taxes and airport charges* .....120...■
2.03	Sustainability of T&T industry development .....36...■	10.02	Purchasing power parity* .....27...■
2.04	Carbon dioxide emissions* .....5...■	10.03	Extent and effect of taxation .....78...■
2.05	Particulate matter concentration* .....102...■	10.04	Fuel price levels* .....92...■
2.06	Threatened species* .....9...■	10.05	Hotel price index* .....n/a.....
2.07	Environmental treaty ratification* .....72...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....125...■
3.01	Business costs of terrorism .....80...■	11.02	2ndary education enrollment* .....126...■
3.02	Reliability of police services .....54...■	11.03	Quality of the educational system .....113...■
3.03	Business costs of crime and violence .....93...■	11.04	Local availability of research and training services .....88...■
3.04	Road traffic accidents* .....90...■	11.05	Extent of staff training .....119...■
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....70...■
4.01	Physician density* .....120...■	11.07	Ease of hiring foreign labor .....46...■
4.02	Access to improved sanitation* .....120...■	11.08	HIV prevalence* .....112...■
4.03	Access to improved drinking water* .....108...■	11.09	Business impact of HIV/AIDS .....113...■
4.04	Hospital beds* .....n/a.....	11.10	Life expectancy* .....117...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....52...■	12.01	Tourism openness* .....122...■
5.02	T&T government expenditure* .....101...■	12.02	Attitude of population toward foreign visitors .....7...■
5.03	Effectiveness of marketing and branding .....41...■	12.03	Extension of business trips recommended .....76...■
5.04	T&T fair attendance* .....122...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....70...■
6.01	Quality of air transport infrastructure .....109...■	13.02	Nationally protected areas* .....39...■
6.02	Available seat kilometers* .....121...■	13.03	Quality of the natural environment .....82...■
6.03	Departures per 1,000 population* .....113...■	13.04	Total known species* .....53...■
6.04	Airport density* .....120...■	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....112...■	14.01	Number of World Heritage cultural sites* .....108...■
6.06	International air transport network .....116...■	14.02	Sports stadiums* .....104...■
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....99...■
7.01	Quality of roads .....108...■		
7.02	Quality of railroad infrastructure .....81...■		
7.03	Quality of port infrastructure .....67...■		
7.04	Quality of domestic transport network .....105...■		
7.05	Road density* .....102...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Burundi

## Key indicators

Population (millions), 2006 .....	7.8
Surface area (1,000 square kilometers) .....	27.8
Gross domestic product (US\$ billions), 2006 .....	0.9
Gross domestic product (PPP, US\$) per capita, 2006 .....	677
Real GDP growth (percent), 2006 .....	5.1

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

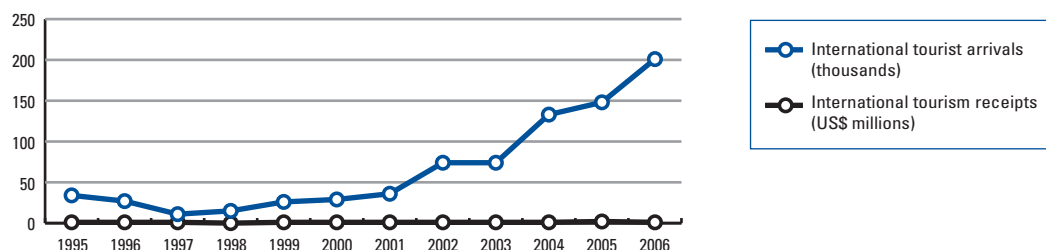
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	16	1.8	5.1
Employment (1,000 jobs) .....	23	1.4	2.6

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	36	4.0	4.9
Employment (1,000 jobs) .....	52	3.1	2.4

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	201
International tourism receipts (US\$ millions), 2006 .....	1



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>128</b>	<b>2.9</b>
<b>T&amp;T regulatory framework</b> .....	<b>128</b>	<b>3.1</b>
Policy rules and regulations .....	125	2.9
Environmental sustainability .....	88	4.1
Safety and security .....	96	4.5
Health and hygiene .....	116	2.2
Prioritization of Travel & Tourism .....	130	2.0
<b>T&amp;T business environment and infrastructure</b> .....	<b>127</b>	<b>2.4</b>
Air transport infrastructure .....	127	1.8
Ground transport infrastructure .....	92	2.9
Tourism infrastructure .....	123	1.3
ICT infrastructure .....	129	1.3
Price competitiveness in the T&T industry .....	74	4.6
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>122</b>	<b>3.2</b>
Human resources .....	125	3.3
Education and training .....	130	2.3
Availability of qualified labor .....	120	4.3
Affinity for Travel & Tourism .....	17	5.6
Natural resources .....	83	2.9
Cultural resources .....	128	1.0

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....122 ...■	8.01	Hotel rooms* .....120 ...■
1.02	Property rights .....119 ...■	8.02	Presence of major car rental companies* .....117 ...■
1.03	Business impact of rules on FDI .....106 ...■	8.03	ATMs accepting Visa cards* .....124 ...■
1.04	Visa requirements* .....117 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....110 ...■	9.01	Extent of business Internet use .....128 ...■
1.06	Transparency of government policymaking .....82 ...■	9.02	Internet users* .....122 ...■
1.07	Time required to start a business* .....94 ...■	9.03	Telephone lines* .....124 ...■
1.08	Cost to start a business* .....123 ...■	9.04	Broadband Internet subscribers* .....120 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....129 ...■
2.01	Stringency of environmental regulation .....123 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....121 ...■	10.01	Ticket taxes and airport charges* .....50 ...■
2.03	Sustainability of T&T industry development .....121 ...■	10.02	Purchasing power parity* .....5 ...■
2.04	Carbon dioxide emissions* .....1 ...■	10.03	Extent and effect of taxation .....105 ...■
2.05	Particulate matter concentration* .....57 ...■	10.04	Fuel price levels* .....98 ...■
2.06	Threatened species* .....35 ...■	10.05	Hotel price index* .....n/a .....
2.07	Environmental treaty ratification* .....115 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....123 ...■
3.01	Business costs of terrorism .....118 ...■	11.02	2ndary education enrollment* .....128 ...■
3.02	Reliability of police services .....94 ...■	11.03	Quality of the educational system .....110 ...■
3.03	Business costs of crime and violence .....96 ...■	11.04	Local availability of research and training services .....130 ...■
3.04	Road traffic accidents* .....66 ...■	11.05	Extent of staff training .....129 ...■
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....57 ...■
4.01	Physician density* .....125 ...■	11.07	Ease of hiring foreign labor .....73 ...■
4.02	Access to improved sanitation* .....111 ...■	11.08	HIV prevalence* .....116 ...■
4.03	Access to improved drinking water* .....94 ...■	11.09	Business impact of HIV/AIDS .....117 ...■
4.04	Hospital beds* .....105 ...■	11.10	Life expectancy* .....122 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....126 ...■	12.01	Tourism openness* .....11 ...■
5.02	T&T government expenditure* .....119 ...■	12.02	Attitude of population toward foreign visitors .....83 ...■
5.03	Effectiveness of marketing and branding .....129 ...■	12.03	Extension of business trips recommended .....85 ...■
5.04	T&T fair attendance* .....128 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....70 ...■
6.01	Quality of air transport infrastructure .....123 ...■	13.02	Nationally protected areas* .....85 ...■
6.02	Available seat kilometers* .....129 ...■	13.03	Quality of the natural environment .....61 ...■
6.03	Departures per 1,000 population* .....n/a .....	13.04	Total known species* .....42 ...■
6.04	Airport density* .....123 ...■	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....124 ...■	14.01	Number of World Heritage cultural sites* .....108 ...■
6.06	International air transport network .....128 ...■	14.02	Sports stadiums* .....120 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....119 ...■
7.01	Quality of roads .....122 ...■		
7.02	Quality of railroad infrastructure .....n/a .....		
7.03	Quality of port infrastructure .....98 ...■		
7.04	Quality of domestic transport network .....119 ...■		
7.05	Road density* .....44 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Cambodia

## Key indicators

Population (millions), 2006 .....	14.4
Surface area (1,000 square kilometers) .....	181.0
Gross domestic product (US\$ billions), 2006 .....	7.3
Gross domestic product (PPP, US\$) per capita, 2006 .....	3,374
Real GDP growth (percent), 2006 .....	10.8

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

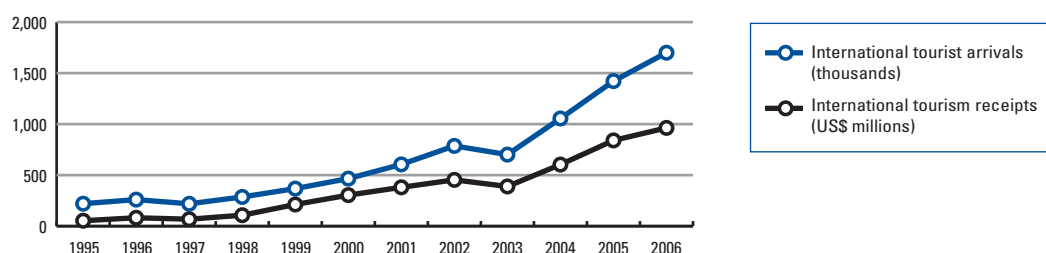
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	9.3	5.7
Employment (1,000 jobs) .....	7.2	3.0

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	20.3	5.6
Employment (1,000 jobs) .....	15.8	2.9

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	1,700
International tourism receipts (US\$ millions), 2006 .....	963



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>112</b>	<b>3.3</b>
<b>T&amp;T regulatory framework</b> .....	<b>116</b>	<b>3.6</b>
Policy rules and regulations .....	126	2.9
Environmental sustainability .....	92	4.1
Safety and security .....	95	4.5
Health and hygiene .....	128	1.1
Prioritization of Travel & Tourism .....	17	5.5
<b>T&amp;T business environment and infrastructure</b> .....	<b>116</b>	<b>2.7</b>
Air transport infrastructure .....	100	2.4
Ground transport infrastructure .....	99	2.8
Tourism infrastructure .....	125	1.2
ICT infrastructure .....	123	1.5
Price competitiveness in the T&T industry .....	15	5.3
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>86</b>	<b>3.7</b>
Human resources .....	108	4.3
Education and training .....	107	3.7
Availability of qualified labor .....	110	4.8
Affinity for Travel & Tourism .....	11	5.8
Natural resources .....	53	3.4
Cultural resources .....	120	1.3

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	85 ...■	8.01 Hotel rooms* .....	77 ...■
1.02 Property rights .....	111 ...■	8.02 Presence of major car rental companies* .....	123 ...■
1.03 Business impact of rules on FDI .....	78 ...■	8.03 ATMs accepting Visa cards* .....	111 ...■
1.04 Visa requirements* .....	116 ...■		
1.05 Openness of bilateral Air Service Agreements* .....	85 ...■	<b>9th pillar: ICT infrastructure</b>	
1.06 Transparency of government policymaking .....	58 ...■	9.01 Extent of business Internet use .....	101 ...■
1.07 Time required to start a business* .....	117 ...■	9.02 Internet users* .....	127 ...■
1.08 Cost to start a business* .....	121 ...■	9.03 Telephone lines* .....	128 ...■
		9.04 Broadband Internet subscribers* .....	111 ...■
		9.05 Mobile telephone subscribers* .....	120 ...■
<b>2nd pillar: Environmental sustainability</b>		<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.01 Stringency of environmental regulation .....	99 ...■	10.01 Ticket taxes and airport charges* .....	70 ...■
2.02 Enforcement of environmental regulation .....	103 ...■	10.02 Purchasing power parity* .....	3 ...■
2.03 Sustainability of T&T industry development .....	61 ...■	10.03 Extent and effect of taxation .....	34 ...■
2.04 Carbon dioxide emissions* .....	1 ...■	10.04 Fuel price levels* .....	56 ...■
2.05 Particulate matter concentration* .....	81 ...■	10.05 Hotel price index* .....	21 ...■
2.06 Threatened species* .....	106 ...■		
2.07 Environmental treaty ratification* .....	97 ...■	<b>11th pillar: Human resources</b>	
		11.01 Primary education enrollment* .....	9 ...■
<b>3rd pillar: Safety and security</b>		11.02 2ndary education enrollment* .....	117 ...■
3.01 Business costs of terrorism .....	94 ...■	11.03 Quality of the educational system .....	95 ...■
3.02 Reliability of police services .....	108 ...■	11.04 Local availability of research and training services .....	107 ...■
3.03 Business costs of crime and violence .....	90 ...■	11.05 Extent of staff training .....	99 ...■
3.04 Road traffic accidents* .....	79 ...■	11.06 Hiring and firing practices .....	69 ...■
		11.07 Ease of hiring foreign labor .....	68 ...■
		11.08 HIV prevalence* .....	108 ...■
		11.09 Business impact of HIV/AIDS .....	107 ...■
		11.10 Life expectancy* .....	108 ...■
<b>4th pillar: Health and hygiene</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
4.01 Physician density* .....	112 ...■	12.01 Tourism openness* .....	10 ...■
4.02 Access to improved sanitation* .....	119 ...■	12.02 Attitude of population toward foreign visitors .....	79 ...■
4.03 Access to improved drinking water* .....	120 ...■	12.03 Extension of business trips recommended .....	70 ...■
4.04 Hospital beds* .....	110 ...■		
		<b>13th pillar: Natural resources</b>	
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		13.01 Number of World Heritage natural sites* .....	70 ...■
5.01 Government prioritization of the T&T industry .....	22 ...■	13.02 Nationally protected areas* .....	21 ...■
5.02 T&T government expenditure* .....	10 ...■	13.03 Quality of the natural environment .....	101 ...■
5.03 Effectiveness of marketing and branding .....	54 ...■	13.04 Total known species* .....	46 ...■
5.04 T&T fair attendance* .....	45 ...■		
		<b>14th pillar: Cultural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		14.01 Number of World Heritage cultural sites* .....	83 ...■
6.01 Quality of air transport infrastructure .....	83 ...■	14.02 Sports stadiums* .....	118 ...■
6.02 Available seat kilometers* .....	88 ...■	14.03 Number of international fairs and exhibitions* .....	89 ...■
6.03 Departures per 1,000 population* .....	111 ...■		
6.04 Airport density* .....	111 ...■		
6.05 Number of operating airlines* .....	71 ...■		
6.06 International air transport network .....	83 ...■		
<b>7th pillar: Ground transport infrastructure</b>			
7.01 Quality of roads .....	80 ...■		
7.02 Quality of railroad infrastructure .....	92 ...■		
7.03 Quality of port infrastructure .....	84 ...■		
7.04 Quality of domestic transport network .....	113 ...■		
7.05 Road density* .....	65 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Cameroon

## Key indicators

Population (millions), 2006 .....	16.6
Surface area (1,000 square kilometers) .....	475.4
Gross domestic product (US\$ billions), 2006 .....	18.3
Gross domestic product (PPP, US\$) per capita, 2006 .....	2,188
Real GDP growth (percent), 2006 .....	3.8

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

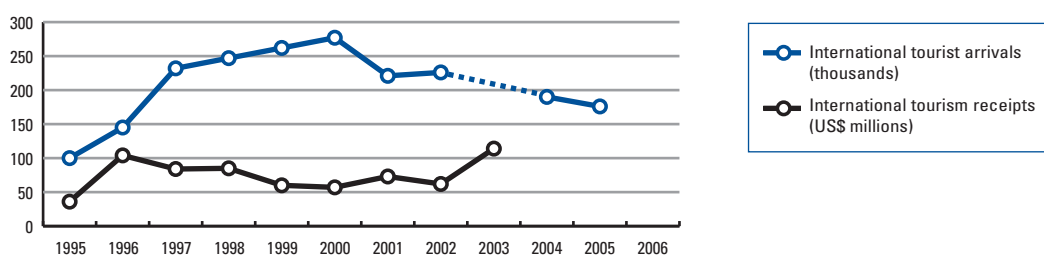
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	329	1.6
Employment (1,000 jobs) .....	49	1.3

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	969	4.7
Employment (1,000 jobs) .....	145	3.9

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2005 .....	176
International tourism receipts (US\$ millions), 2003 .....	114



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>126</b>	<b>3.0</b>
<b>T&amp;T regulatory framework</b> .....	<b>125</b>	<b>3.4</b>
Policy rules and regulations .....	112	3.3
Environmental sustainability .....	109	3.9
Safety and security .....	86	4.6
Health and hygiene .....	114	2.4
Prioritization of Travel & Tourism .....	126	2.7
<b>T&amp;T business environment and infrastructure</b> .....	<b>129</b>	<b>2.3</b>
Air transport infrastructure .....	125	2.0
Ground transport infrastructure .....	124	2.4
Tourism infrastructure .....	114	1.7
ICT infrastructure .....	126	1.5
Price competitiveness in the T&T industry .....	110	4.0
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>120</b>	<b>3.3</b>
Human resources .....	117	3.8
Education and training .....	121	3.2
Availability of qualified labor .....	117	4.5
Affinity for Travel & Tourism .....	121	4.1
Natural resources .....	38	3.9
Cultural resources .....	123	1.2

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	68 ...■	8.01 Hotel rooms* .....	86 ...■
1.02 Property rights .....	102 ...■	8.02 Presence of major car rental companies* .....	103 ...■
1.03 Business impact of rules on FDI .....	99 ...■	8.03 ATMs accepting Visa cards* .....	121 ...■
1.04 Visa requirements* .....	113 ...■		
1.05 Openness of bilateral Air Service Agreements* .....	62 ...■	<b>9th pillar: ICT infrastructure</b>	
1.06 Transparency of government policymaking .....	84 ...■	9.01 Extent of business Internet use .....	126 ...■
1.07 Time required to start a business* .....	88 ...■	9.02 Internet users* .....	117 ...■
1.08 Cost to start a business* .....	116 ...■	9.03 Telephone lines* .....	122 ...■
		9.04 Broadband Internet subscribers* .....	116 ...■
		9.05 Mobile telephone subscribers* .....	113 ...■
<b>2nd pillar: Environmental sustainability</b>			
2.01 Stringency of environmental regulation .....	120 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	122 ...■	10.01 Ticket taxes and airport charges* .....	121 ...■
2.03 Sustainability of T&T industry development .....	116 ...■	10.02 Purchasing power parity* .....	56 ...■
2.04 Carbon dioxide emissions* .....	12 ...■	10.03 Extent and effect of taxation .....	123 ...■
2.05 Particulate matter concentration* .....	81 ...■	10.04 Fuel price levels* .....	85 ...■
2.06 Threatened species* .....	105 ...■	10.05 Hotel price index* .....	76 ...■
2.07 Environmental treaty ratification* .....	72 ...■		
<b>3rd pillar: Safety and security</b>			
3.01 Business costs of terrorism .....	45 ...■	<b>11th pillar: Human resources</b>	
3.02 Reliability of police services .....	88 ...■	11.01 Primary education enrollment* .....	n/a ...■
3.03 Business costs of crime and violence .....	99 ...■	11.02 2ndary education enrollment* .....	111 ...■
3.04 Road traffic accidents* .....	92 ...■	11.03 Quality of the educational system .....	84 ...■
		11.04 Local availability of research and training services .....	103 ...■
		11.05 Extent of staff training .....	114 ...■
		11.06 Hiring and firing practices .....	38 ...■
		11.07 Ease of hiring foreign labor .....	50 ...■
		11.08 HIV prevalence* .....	119 ...■
		11.09 Business impact of HIV/AIDS .....	109 ...■
		11.10 Life expectancy* .....	120 ...■
<b>4th pillar: Health and hygiene</b>			
4.01 Physician density* .....	110 ...■	<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
4.02 Access to improved sanitation* .....	97 ...■	12.01 Tourism openness* .....	122 ...■
4.03 Access to improved drinking water* .....	105 ...■	12.02 Attitude of population toward foreign visitors .....	106 ...■
4.04 Hospital beds* .....	n/a ...■	12.03 Extension of business trips recommended .....	99 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>			
5.01 Government prioritization of the T&T industry .....	123 ...■	<b>13th pillar: Natural resources</b>	
5.02 T&T government expenditure* .....	102 ...■	13.01 Number of World Heritage natural sites* .....	39 ...■
5.03 Effectiveness of marketing and branding .....	119 ...■	13.02 Nationally protected areas* .....	64 ...■
5.04 T&T fair attendance* .....	111 ...■	13.03 Quality of the natural environment .....	86 ...■
		13.04 Total known species* .....	15 ...■
<b>6th pillar: Air transport infrastructure</b>			
6.01 Quality of air transport infrastructure .....	127 ...■	<b>14th pillar: Cultural resources</b>	
6.02 Available seat kilometers* .....	99 ...■	14.01 Number of World Heritage cultural sites* .....	108 ...■
6.03 Departures per 1,000 population* .....	98 ...■	14.02 Sports stadiums* .....	93 ...■
6.04 Airport density* .....	98 ...■	14.03 Number of international fairs and exhibitions* .....	85 ...■
6.05 Number of operating airlines* .....	95 ...■		
6.06 International air transport network .....	118 ...■		
<b>7th pillar: Ground transport infrastructure</b>			
7.01 Quality of roads .....	120 ...■		
7.02 Quality of railroad infrastructure .....	79 ...■		
7.03 Quality of port infrastructure .....	118 ...■		
7.04 Quality of domestic transport network .....	117 ...■		
7.05 Road density* .....	86 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# Canada

## Key indicators

Population (millions), 2006 .....	32.6
Surface area (1,000 square kilometers) .....	9,984.7
Gross domestic product (US\$ billions), 2006 .....	1,275.3
Gross domestic product (PPP, US\$) per capita, 2006 .....	35,514
Real GDP growth (percent), 2006 .....	2.8

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

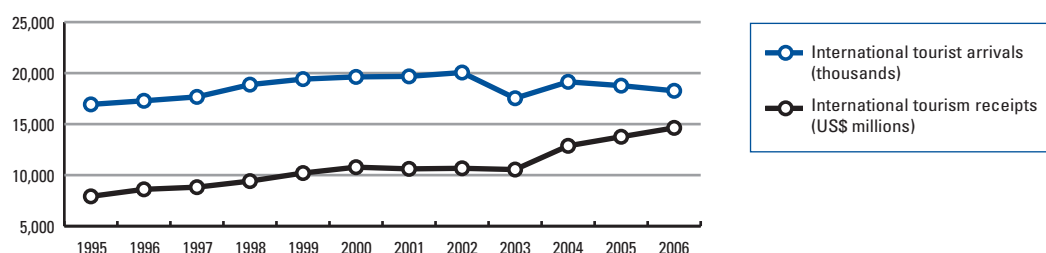
	Percent of total	2008-2017 annual growth (% forecast)
GDP (US\$ millions) .....	43,395	3.4
Employment (1,000 jobs) .....	671	4.0

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	140,133	11.0	3.4
Employment (1,000 jobs) .....	1,927	11.6	0.9

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	18,265
International tourism receipts (US\$ millions), 2006 .....	14,632



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1-7 scale)
<b>2008 Index</b> .....	<b>9</b>	<b>5.3</b>
<b>T&amp;T regulatory framework</b> .....	<b>23</b>	<b>5.3</b>
Policy rules and regulations .....	8	5.4
Environmental sustainability .....	36	4.9
Safety and security .....	32	5.7
Health and hygiene .....	45	5.5
Prioritization of Travel & Tourism .....	26	5.0
<b>T&amp;T business environment and infrastructure</b> .....	<b>4</b>	<b>5.4</b>
Air transport infrastructure .....	1	6.6
Ground transport infrastructure .....	26	5.0
Tourism infrastructure .....	17	6.1
ICT infrastructure .....	12	5.3
Price competitiveness in the T&T industry .....	114	3.9
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>10</b>	<b>5.1</b>
Human resources .....	10	5.8
Education and training .....	9	6.0
Availability of qualified labor .....	26	5.6
Affinity for Travel & Tourism .....	68	4.8
Natural resources .....	16	4.8
Cultural resources .....	21	5.0

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....28...■	8.01	Hotel rooms* .....18...■
1.02	Property rights .....15...■	8.02	Presence of major car rental companies* .....1...■
1.03	Business impact of rules on FDI .....50...■	8.03	ATMs accepting Visa cards* .....17...■
1.04	Visa requirements* .....66...■	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....10...■	9.01	Extent of business Internet use .....11...■
1.06	Transparency of government policymaking .....23...■	9.02	Internet users* .....9...■
1.07	Time required to start a business* .....2...■	9.03	Telephone lines* .....4...■
1.08	Cost to start a business* .....10...■	9.04	Broadband Internet subscribers* .....10...■
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....77...■
2.01	Stringency of environmental regulation .....17...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....18...■	10.01	Ticket taxes and airport charges* .....122...■
2.03	Sustainability of T&T industry development .....25...■	10.02	Purchasing power parity* .....113...■
2.04	Carbon dioxide emissions* .....119...■	10.03	Extent and effect of taxation .....79...■
2.05	Particulate matter concentration* .....16...■	10.04	Fuel price levels* .....56...■
2.06	Threatened species* .....49...■	10.05	Hotel price index* .....72...■
2.07	Environmental treaty ratification* .....45...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....2...■
3.01	Business costs of terrorism .....87...■	11.02	2ndary education enrollment* .....12...■
3.02	Reliability of police services .....11...■	11.03	Quality of the educational system .....11...■
3.03	Business costs of crime and violence .....39...■	11.04	Local availability of research and training services .....10...■
3.04	Road traffic accidents* .....78...■	11.05	Extent of staff training .....25...■
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....43...■
4.01	Physician density* .....49...■	11.07	Ease of hiring foreign labor .....97...■
4.02	Access to improved sanitation* .....1...■	11.08	HIV prevalence* .....63...■
4.03	Access to improved drinking water* .....1...■	11.09	Business impact of HIV/AIDS .....47...■
4.04	Hospital beds* .....51...■	11.10	Life expectancy* .....8...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....56...■	12.01	Tourism openness* .....93...■
5.02	T&T government expenditure* .....45...■	12.02	Attitude of population toward foreign visitors .....12...■
5.03	Effectiveness of marketing and branding .....38...■	12.03	Extension of business trips recommended .....52...■
5.04	T&T fair attendance* .....13...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....4...■
6.01	Quality of air transport infrastructure .....16...■	13.02	Nationally protected areas* .....76...■
6.02	Available seat kilometers* .....9...■	13.03	Quality of the natural environment .....15...■
6.03	Departures per 1,000 population* .....11...■	13.04	Total known species* .....37...■
6.04	Airport density* .....3...■	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....8...■	14.01	Number of World Heritage cultural sites* .....30...■
6.06	International air transport network .....12...■	14.02	Sports stadiums* .....42...■
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....13...■
7.01	Quality of roads .....11...■		
7.02	Quality of railroad infrastructure .....15...■		
7.03	Quality of port infrastructure .....14...■		
7.04	Quality of domestic transport network .....15...■		
7.05	Road density* .....77...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Chad

## Key indicators

Population (millions), 2006 .....	10.0
Surface area (1,000 square kilometers) .....	1,284.0
Gross domestic product (US\$ billions), 2006 .....	6.4
Gross domestic product (PPP, US\$) per capita, 2006 .....	1,749
Real GDP growth (percent), 2006 .....	0.5

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

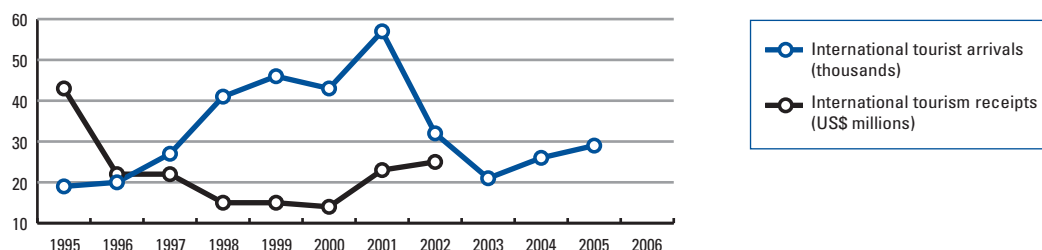
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	75	1.0
Employment (1,000 jobs) .....	14	0.8

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	550	7.6
Employment (1,000 jobs) .....	109	6.2

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2005 .....	29
International tourism receipts (US\$ millions), 2002 .....	25



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>130</b>	<b>2.5</b>
<b>T&amp;T regulatory framework</b> .....	<b>130</b>	<b>2.7</b>
Policy rules and regulations .....	130	2.5
Environmental sustainability .....	124	3.6
Safety and security .....	116	3.9
Health and hygiene .....	129	1.0
Prioritization of Travel & Tourism .....	127	2.7
<b>T&amp;T business environment and infrastructure</b> .....	<b>130</b>	<b>2.0</b>
Air transport infrastructure .....	130	1.7
Ground transport infrastructure .....	129	2.3
Tourism infrastructure .....	121	1.3
ICT infrastructure .....	130	1.3
Price competitiveness in the T&T industry .....	126	3.5
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>129</b>	<b>2.7</b>
Human resources .....	126	3.2
Education and training .....	128	2.3
Availability of qualified labor .....	122	4.1
Affinity for Travel & Tourism .....	129	3.8
Natural resources .....	91	2.7
Cultural resources .....	129	1.0

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....111 ...■	8.01	Hotel rooms* .....116 ...■
1.02	Property rights .....128 ...■	8.02	Presence of major car rental companies* .....117 ...■
1.03	Business impact of rules on FDI .....125 ...■	8.03	ATMs accepting Visa cards* .....124 ...■
1.04	Visa requirements* .....124 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....69 ...■	9.01	Extent of business Internet use .....130 ...■
1.06	Transparency of government policymaking .....114 ...■	9.02	Internet users* .....123 ...■
1.07	Time required to start a business* .....115 ...■	9.03	Telephone lines* .....129 ...■
1.08	Cost to start a business* .....120 ...■	9.04	Broadband Internet subscribers* .....120 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....125 ...■
2.01	Stringency of environmental regulation .....127 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....125 ...■	10.01	Ticket taxes and airport charges* .....128 ...■
2.03	Sustainability of T&T industry development .....112 ...■	10.02	Purchasing power parity* .....46 ...■
2.04	Carbon dioxide emissions* .....1 ...■	10.03	Extent and effect of taxation .....112 ...■
2.05	Particulate matter concentration* .....113 ...■	10.04	Fuel price levels* .....95 ...■
2.06	Threatened species* .....28 ...■	10.05	Hotel price index* .....58 ...■
2.07	Environmental treaty ratification* .....109 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....122 ...■
3.01	Business costs of terrorism .....115 ...■	11.02	2ndary education enrollment* .....124 ...■
3.02	Reliability of police services .....129 ...■	11.03	Quality of the educational system .....128 ...■
3.03	Business costs of crime and violence .....122 ...■	11.04	Local availability of research and training services .....113 ...■
3.04	Road traffic accidents* .....81 ...■	11.05	Extent of staff training .....130 ...■
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....78 ...■
4.01	Physician density* .....124 ...■	11.07	Ease of hiring foreign labor .....105 ...■
4.02	Access to improved sanitation* .....122 ...■	11.08	HIV prevalence* .....117 ...■
4.03	Access to improved drinking water* .....119 ...■	11.09	Business impact of HIV/AIDS .....123 ...■
4.04	Hospital beds* .....114 ...■	11.10	Life expectancy* .....123 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....124 ...■	12.01	Tourism openness* .....122 ...■
5.02	T&T government expenditure* .....49 ...■	12.02	Attitude of population toward foreign visitors .....118 ...■
5.03	Effectiveness of marketing and branding .....122 ...■	12.03	Extension of business trips recommended .....119 ...■
5.04	T&T fair attendance* .....128 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....70 ...■
6.01	Quality of air transport infrastructure .....125 ...■	13.02	Nationally protected areas* .....60 ...■
6.02	Available seat kilometers* .....124 ...■	13.03	Quality of the natural environment .....113 ...■
6.03	Departures per 1,000 population* .....116 ...■	13.04	Total known species* .....49 ...■
6.04	Airport density* .....126 ...■	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....128 ...■	14.01	Number of World Heritage cultural sites* .....108 ...■
6.06	International air transport network .....127 ...■	14.02	Sports stadiums* .....123 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....n/a ...■
7.01	Quality of roads .....130 ...■		
7.02	Quality of railroad infrastructure .....n/a ...■		
7.03	Quality of port infrastructure .....105 ...■		
7.04	Quality of domestic transport network .....122 ...■		
7.05	Road density* .....111 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Chile

## Key indicators

Population (millions), 2006 .....	16.5
Surface area (1,000 square kilometers) .....	756.6
Gross domestic product (US\$ billions), 2006 .....	145.8
Gross domestic product (PPP, US\$) per capita, 2006 .....	12,811
Real GDP growth (percent), 2006 .....	4.0

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

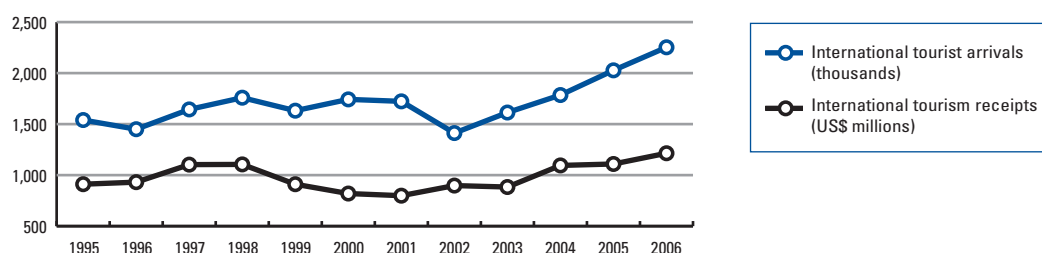
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	1.9	3.9
Employment (1,000 jobs) .....	2.2	1.7

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	5.1	4.0
Employment (1,000 jobs) .....	5.3	1.8

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	2,253
International tourism receipts (US\$ millions), 2006 .....	1,214



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>51</b>	<b>4.3</b>
<b>T&amp;T regulatory framework</b> .....	<b>45</b>	<b>4.9</b>
Policy rules and regulations .....	18	5.2
Environmental sustainability .....	62	4.5
Safety and security .....	36	5.6
Health and hygiene .....	63	4.5
Prioritization of Travel & Tourism .....	58	4.4
<b>T&amp;T business environment and infrastructure</b> .....	<b>54</b>	<b>3.8</b>
Air transport infrastructure .....	50	3.4
Ground transport infrastructure .....	53	4.1
Tourism infrastructure .....	64	3.4
ICT infrastructure .....	47	3.3
Price competitiveness in the T&T industry .....	45	4.9
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>54</b>	<b>4.1</b>
Human resources .....	36	5.3
Education and training .....	47	4.9
Availability of qualified labor .....	19	5.7
Affinity for Travel & Tourism .....	96	4.5
Natural resources .....	52	3.5
Cultural resources .....	39	3.3

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	12... <span style="color: #0056b3;">■</span>	8.01 Hotel rooms* .....	61... <span style="color: #808080;">■</span>
1.02 Property rights .....	40... <span style="color: #0056b3;">■</span>	8.02 Presence of major car rental companies* .....	56... <span style="color: #808080;">■</span>
1.03 Business impact of rules on FDI .....	16... <span style="color: #0056b3;">■</span>	8.03 ATMs accepting Visa cards* .....	62... <span style="color: #808080;">■</span>
1.04 Visa requirements* .....	13... <span style="color: #0056b3;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	12... <span style="color: #0056b3;">■</span>	9.01 Extent of business Internet use .....	27... <span style="color: #0056b3;">■</span>
1.06 Transparency of government policymaking .....	19... <span style="color: #0056b3;">■</span>	9.02 Internet users* .....	46... <span style="color: #0056b3;">■</span>
1.07 Time required to start a business* .....	62... <span style="color: #808080;">■</span>	9.03 Telephone lines* .....	60... <span style="color: #808080;">■</span>
1.08 Cost to start a business* .....	50... <span style="color: #0056b3;">■</span>	9.04 Broadband Internet subscribers* .....	37... <span style="color: #0056b3;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	52... <span style="color: #808080;">■</span>
2.01 Stringency of environmental regulation .....	40... <span style="color: #0056b3;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	35... <span style="color: #0056b3;">■</span>	10.01 Ticket taxes and airport charges* .....	49... <span style="color: #0056b3;">■</span>
2.03 Sustainability of T&T industry development .....	90... <span style="color: #808080;">■</span>	10.02 Purchasing power parity* .....	86... <span style="color: #808080;">■</span>
2.04 Carbon dioxide emissions* .....	64... <span style="color: #808080;">■</span>	10.03 Extent and effect of taxation .....	36... <span style="color: #0056b3;">■</span>
2.05 Particulate matter concentration* .....	74... <span style="color: #808080;">■</span>	10.04 Fuel price levels* .....	65... <span style="color: #808080;">■</span>
2.06 Threatened species* .....	117... <span style="color: #808080;">■</span>	10.05 Hotel price index* .....	36... <span style="color: #0056b3;">■</span>
2.07 Environmental treaty ratification* .....	18... <span style="color: #0056b3;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	78... <span style="color: #808080;">■</span>
3.01 Business costs of terrorism .....	28... <span style="color: #0056b3;">■</span>	11.02 2ndary education enrollment* .....	53... <span style="color: #808080;">■</span>
3.02 Reliability of police services .....	26... <span style="color: #0056b3;">■</span>	11.03 Quality of the educational system .....	78... <span style="color: #808080;">■</span>
3.03 Business costs of crime and violence .....	65... <span style="color: #808080;">■</span>	11.04 Local availability of research and training services .....	34... <span style="color: #0056b3;">■</span>
3.04 Road traffic accidents* .....	75... <span style="color: #808080;">■</span>	11.05 Extent of staff training .....	40... <span style="color: #0056b3;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	62... <span style="color: #808080;">■</span>
4.01 Physician density* .....	85... <span style="color: #808080;">■</span>	11.07 Ease of hiring foreign labor .....	27... <span style="color: #0056b3;">■</span>
4.02 Access to improved sanitation* .....	54... <span style="color: #808080;">■</span>	11.08 HIV prevalence* .....	63... <span style="color: #808080;">■</span>
4.03 Access to improved drinking water* .....	55... <span style="color: #808080;">■</span>	11.09 Business impact of HIV/AIDS .....	43... <span style="color: #0056b3;">■</span>
4.04 Hospital beds* .....	68... <span style="color: #808080;">■</span>	11.10 Life expectancy* .....	28... <span style="color: #0056b3;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	106... <span style="color: #808080;">■</span>	12.01 Tourism openness* .....	111... <span style="color: #808080;">■</span>
5.02 T&T government expenditure* .....	43... <span style="color: #0056b3;">■</span>	12.02 Attitude of population toward foreign visitors .....	81... <span style="color: #808080;">■</span>
5.03 Effectiveness of marketing and branding .....	89... <span style="color: #808080;">■</span>	12.03 Extension of business trips recommended .....	68... <span style="color: #808080;">■</span>
5.04 T&T fair attendance* .....	22... <span style="color: #0056b3;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	70... <span style="color: #808080;">■</span>
6.01 Quality of air transport infrastructure .....	31... <span style="color: #0056b3;">■</span>	13.02 Nationally protected areas* .....	22... <span style="color: #0056b3;">■</span>
6.02 Available seat kilometers* .....	38... <span style="color: #0056b3;">■</span>	13.03 Quality of the natural environment .....	64... <span style="color: #808080;">■</span>
6.03 Departures per 1,000 population* .....	44... <span style="color: #0056b3;">■</span>	13.04 Total known species* .....	51... <span style="color: #808080;">■</span>
6.04 Airport density* .....	42... <span style="color: #0056b3;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	74... <span style="color: #808080;">■</span>	14.01 Number of World Heritage cultural sites* .....	38... <span style="color: #0056b3;">■</span>
6.06 International air transport network .....	19... <span style="color: #0056b3;">■</span>	14.02 Sports stadiums* .....	51... <span style="color: #808080;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	36... <span style="color: #0056b3;">■</span>
7.01 Quality of roads .....	22... <span style="color: #0056b3;">■</span>		
7.02 Quality of railroad infrastructure .....	65... <span style="color: #808080;">■</span>		
7.03 Quality of port infrastructure .....	34... <span style="color: #0056b3;">■</span>		
7.04 Quality of domestic transport network .....	20... <span style="color: #0056b3;">■</span>		
7.05 Road density* .....	86... <span style="color: #808080;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# China

## Key indicators

Population (millions), 2006 .....	1,323.6
Surface area (1,000 square kilometers) .....	9,598.1
Gross domestic product (US\$ billions), 2006 .....	2,644.6
Gross domestic product (PPP, US\$) per capita, 2006 .....	7,722
Real GDP growth (percent), 2006 .....	11.1

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

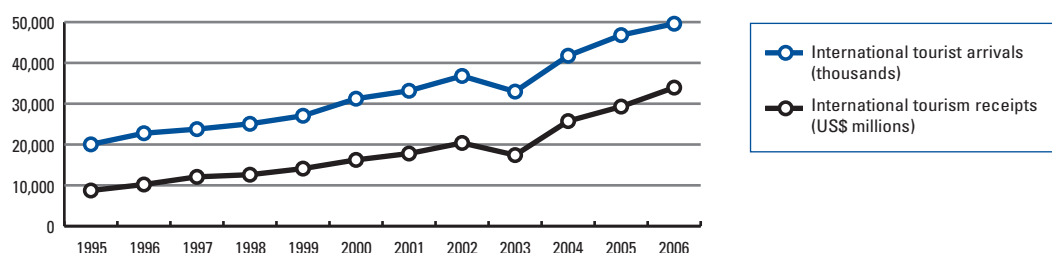
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	2.5	9.1
Employment (1,000 jobs) .....	2.1	0.9

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	12.2	8.3
Employment (1,000 jobs) .....	9.4	0.4

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	49,600
International tourism receipts (US\$ millions), 2006 .....	33,949



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>62</b>	<b>4.1</b>
<b>T&amp;T regulatory framework</b> .....	<b>103</b>	<b>3.9</b>
Policy rules and regulations .....	89	4.0
Environmental sustainability .....	110	3.9
Safety and security .....	121	3.6
Health and hygiene .....	99	3.2
Prioritization of Travel & Tourism .....	36	4.9
<b>T&amp;T business environment and infrastructure</b> .....	<b>70</b>	<b>3.4</b>
Air transport infrastructure .....	36	4.0
Ground transport infrastructure .....	61	3.8
Tourism infrastructure .....	119	1.5
ICT infrastructure .....	66	2.6
Price competitiveness in the T&T industry .....	17	5.3
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>13</b>	<b>4.8</b>
Human resources .....	48	5.1
Education and training .....	66	4.7
Availability of qualified labor .....	34	5.5
Affinity for Travel & Tourism .....	126	3.9
Natural resources .....	8	5.3
Cultural resources .....	19	5.0

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....103... <span style="color: #808080;">■</span>	8.01	Hotel rooms* .....95... <span style="color: #808080;">■</span>
1.02	Property rights .....76... <span style="color: #808080;">■</span>	8.02	Presence of major car rental companies* .....117... <span style="color: #808080;">■</span>
1.03	Business impact of rules on FDI .....60... <span style="color: #808080;">■</span>	8.03	ATMs accepting Visa cards* .....90... <span style="color: #808080;">■</span>
1.04	Visa requirements* .....120... <span style="color: #808080;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....109... <span style="color: #808080;">■</span>	9.01	Extent of business Internet use .....61... <span style="color: #808080;">■</span>
1.06	Transparency of government policymaking .....88... <span style="color: #808080;">■</span>	9.02	Internet users* .....81... <span style="color: #808080;">■</span>
1.07	Time required to start a business* .....84... <span style="color: #808080;">■</span>	9.03	Telephone lines* .....45... <span style="color: #0056b3;">■</span>
1.08	Cost to start a business* .....46... <span style="color: #0056b3;">■</span>	9.04	Broadband Internet subscribers* .....49... <span style="color: #0056b3;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....89... <span style="color: #808080;">■</span>
2.01	Stringency of environmental regulation .....87... <span style="color: #808080;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....73... <span style="color: #808080;">■</span>	10.01	Ticket taxes and airport charges* .....20... <span style="color: #0056b3;">■</span>
2.03	Sustainability of T&T industry development .....80... <span style="color: #808080;">■</span>	10.02	Purchasing power parity* .....18... <span style="color: #0056b3;">■</span>
2.04	Carbon dioxide emissions* .....59... <span style="color: #808080;">■</span>	10.03	Extent and effect of taxation .....47... <span style="color: #0056b3;">■</span>
2.05	Particulate matter concentration* .....90... <span style="color: #808080;">■</span>	10.04	Fuel price levels* .....32... <span style="color: #0056b3;">■</span>
2.06	Threatened species* .....119... <span style="color: #808080;">■</span>	10.05	Hotel price index* .....47... <span style="color: #0056b3;">■</span>
2.07	Environmental treaty ratification* .....45... <span style="color: #0056b3;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....49... <span style="color: #0056b3;">■</span>
3.01	Business costs of terrorism .....109... <span style="color: #808080;">■</span>	11.02	2ndary education enrollment* .....91... <span style="color: #808080;">■</span>
3.02	Reliability of police services .....59... <span style="color: #808080;">■</span>	11.03	Quality of the educational system .....73... <span style="color: #808080;">■</span>
3.03	Business costs of crime and violence .....73... <span style="color: #808080;">■</span>	11.04	Local availability of research and training services .....39... <span style="color: #0056b3;">■</span>
3.04	Road traffic accidents* .....125... <span style="color: #808080;">■</span>	11.05	Extent of staff training .....61... <span style="color: #808080;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....41... <span style="color: #0056b3;">■</span>
4.01	Physician density* .....61... <span style="color: #808080;">■</span>	11.07	Ease of hiring foreign labor .....60... <span style="color: #808080;">■</span>
4.02	Access to improved sanitation* .....104... <span style="color: #808080;">■</span>	11.08	HIV prevalence* .....24... <span style="color: #0056b3;">■</span>
4.03	Access to improved drinking water* .....98... <span style="color: #808080;">■</span>	11.09	Business impact of HIV/AIDS .....56... <span style="color: #808080;">■</span>
4.04	Hospital beds* .....73... <span style="color: #808080;">■</span>	11.10	Life expectancy* .....68... <span style="color: #808080;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....66... <span style="color: #808080;">■</span>	12.01	Tourism openness* .....102... <span style="color: #808080;">■</span>
5.02	T&T government expenditure* .....48... <span style="color: #0056b3;">■</span>	12.02	Attitude of population toward foreign visitors .....121... <span style="color: #808080;">■</span>
5.03	Effectiveness of marketing and branding .....69... <span style="color: #808080;">■</span>	12.03	Extension of business trips recommended .....123... <span style="color: #808080;">■</span>
5.04	T&T fair attendance* .....13... <span style="color: #0056b3;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....3... <span style="color: #0056b3;">■</span>
6.01	Quality of air transport infrastructure .....86... <span style="color: #808080;">■</span>	13.02	Nationally protected areas* .....40... <span style="color: #0056b3;">■</span>
6.02	Available seat kilometers* .....2... <span style="color: #0056b3;">■</span>	13.03	Quality of the natural environment .....126... <span style="color: #808080;">■</span>
6.03	Departures per 1,000 population* .....90... <span style="color: #808080;">■</span>	13.04	Total known species* .....6... <span style="color: #0056b3;">■</span>
6.04	Airport density* .....125... <span style="color: #808080;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....11... <span style="color: #0056b3;">■</span>	14.01	Number of World Heritage cultural sites* .....5... <span style="color: #0056b3;">■</span>
6.06	International air transport network .....82... <span style="color: #808080;">■</span>	14.02	Sports stadiums* .....124... <span style="color: #808080;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....10... <span style="color: #0056b3;">■</span>
7.01	Quality of roads .....53... <span style="color: #808080;">■</span>		
7.02	Quality of railroad infrastructure .....33... <span style="color: #0056b3;">■</span>		
7.03	Quality of port infrastructure .....66... <span style="color: #808080;">■</span>		
7.04	Quality of domestic transport network .....71... <span style="color: #808080;">■</span>		
7.05	Road density* .....68... <span style="color: #808080;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# Colombia

## Key indicators

Population (millions), 2006 .....	46.3
Surface area (1,000 square kilometers) .....	1,138.9
Gross domestic product (US\$ billions), 2006 .....	135.9
Gross domestic product (PPP, US\$) per capita, 2006 .....	8,260
Real GDP growth (percent), 2006 .....	6.8

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

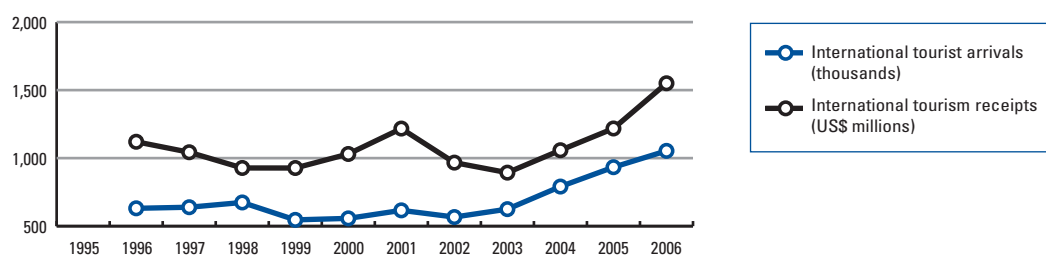
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	2.1	3.3
Employment (1,000 jobs) .....	2.0	2.0

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	6.3	3.4
Employment (1,000 jobs) .....	5.7	2.1

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	1,053
International tourism receipts (US\$ millions), 2006 .....	1,550



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>71</b>	<b>3.9</b>
<b>T&amp;T regulatory framework</b> .....	<b>95</b>	<b>4.0</b>
Policy rules and regulations .....	60	4.4
Environmental sustainability .....	87	4.2
Safety and security .....	118	3.8
Health and hygiene .....	78	4.2
Prioritization of Travel & Tourism .....	99	3.7
<b>T&amp;T business environment and infrastructure</b> .....	<b>83</b>	<b>3.2</b>
Air transport infrastructure .....	63	3.1
Ground transport infrastructure .....	101	2.8
Tourism infrastructure .....	81	2.8
ICT infrastructure .....	70	2.6
Price competitiveness in the T&T industry .....	55	4.8
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>38</b>	<b>4.4</b>
Human resources .....	67	5.0
Education and training .....	73	4.5
Availability of qualified labor .....	37	5.5
Affinity for Travel & Tourism .....	89	4.6
Natural resources .....	5	5.5
Cultural resources .....	68	2.4

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	75 ...■	8.01 Hotel rooms* .....	80 ...■
1.02 Property rights .....	68 ...■	8.02 Presence of major car rental companies* .....	74 ...■
1.03 Business impact of rules on FDI .....	70 ...■	8.03 ATMs accepting Visa cards* .....	65 ...■
1.04 Visa requirements* .....	28 ...■		
1.05 Openness of bilateral Air Service Agreements* .....	40 ...■	<b>9th pillar: ICT infrastructure</b>	
1.06 Transparency of government policymaking .....	51 ...■	9.01 Extent of business Internet use .....	75 ...■
1.07 Time required to start a business* .....	93 ...■	9.02 Internet users* .....	70 ...■
1.08 Cost to start a business* .....	71 ...■	9.03 Telephone lines* .....	68 ...■
		9.04 Broadband Internet subscribers* .....	64 ...■
		9.05 Mobile telephone subscribers* .....	66 ...■
<b>2nd pillar: Environmental sustainability</b>		<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.01 Stringency of environmental regulation .....	52 ...■	10.01 Ticket taxes and airport charges* .....	117 ...■
2.02 Enforcement of environmental regulation .....	68 ...■	10.02 Purchasing power parity* .....	32 ...■
2.03 Sustainability of T&T industry development .....	71 ...■	10.03 Extent and effect of taxation .....	109 ...■
2.04 Carbon dioxide emissions* .....	41 ...■	10.04 Fuel price levels* .....	28 ...■
2.05 Particulate matter concentration* .....	27 ...■	10.05 Hotel price index* .....	22 ...■
2.06 Threatened species* .....	116 ...■		
2.07 Environmental treaty ratification* .....	121 ...■	<b>11th pillar: Human resources</b>	
		11.01 Primary education enrollment* .....	94 ...■
<b>3rd pillar: Safety and security</b>		11.02 2ndary education enrollment* .....	83 ...■
3.01 Business costs of terrorism .....	128 ...■	11.03 Quality of the educational system .....	59 ...■
3.02 Reliability of police services .....	69 ...■	11.04 Local availability of research and training services .....	71 ...■
3.03 Business costs of crime and violence .....	112 ...■	11.05 Extent of staff training .....	69 ...■
3.04 Road traffic accidents* .....	106 ...■	11.06 Hiring and firing practices .....	64 ...■
		11.07 Ease of hiring foreign labor .....	41 ...■
		11.08 HIV prevalence* .....	83 ...■
		11.09 Business impact of HIV/AIDS .....	76 ...■
		11.10 Life expectancy* .....	58 ...■
<b>4th pillar: Health and hygiene</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
4.01 Physician density* .....	71 ...■	12.01 Tourism openness* .....	106 ...■
4.02 Access to improved sanitation* .....	64 ...■	12.02 Attitude of population toward foreign visitors .....	59 ...■
4.03 Access to improved drinking water* .....	60 ...■	12.03 Extension of business trips recommended .....	63 ...■
4.04 Hospital beds* .....	92 ...■		
		<b>13th pillar: Natural resources</b>	
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		13.01 Number of World Heritage natural sites* .....	21 ...■
5.01 Government prioritization of the T&T industry .....	78 ...■	13.02 Nationally protected areas* .....	7 ...■
5.02 T&T government expenditure* .....	98 ...■	13.03 Quality of the natural environment .....	63 ...■
5.03 Effectiveness of marketing and branding .....	62 ...■	13.04 Total known species* .....	2 ...■
5.04 T&T fair attendance* .....	93 ...■		
		<b>14th pillar: Cultural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		14.01 Number of World Heritage cultural sites* .....	46 ...■
6.01 Quality of air transport infrastructure .....	62 ...■	14.02 Sports stadiums* .....	77 ...■
6.02 Available seat kilometers* .....	45 ...■	14.03 Number of international fairs and exhibitions* .....	46 ...■
6.03 Departures per 1,000 population* .....	54 ...■		
6.04 Airport density* .....	41 ...■		
6.05 Number of operating airlines* .....	65 ...■		
6.06 International air transport network .....	57 ...■		
<b>7th pillar: Ground transport infrastructure</b>			
7.01 Quality of roads .....	94 ...■		
7.02 Quality of railroad infrastructure .....	108 ...■		
7.03 Quality of port infrastructure .....	108 ...■		
7.04 Quality of domestic transport network .....	49 ...■		
7.05 Road density* .....	93 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Costa Rica

## Key indicators

Population (millions), 2006 .....	4.4
Surface area (1,000 square kilometers) .....	51.1
Gross domestic product (US\$ billions), 2006 .....	21.5
Gross domestic product (PPP, US\$) per capita, 2006 .....	11,862
Real GDP growth (percent), 2006 .....	8.2

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

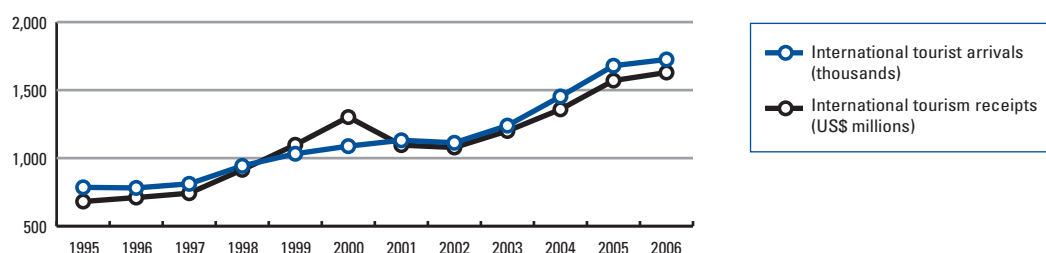
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	6.3	4.7
Employment (1,000 jobs) .....	6.5	3.6

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	15.1	4.7
Employment (1,000 jobs) .....	14.7	3.6

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	1,725
International tourism receipts (US\$ millions), 2006 .....	1,629



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>44</b>	<b>4.3</b>
<b>T&amp;T regulatory framework</b> .....	<b>48</b>	<b>4.8</b>
Policy rules and regulations .....	54	4.5
Environmental sustainability .....	32	5.0
Safety and security .....	66	5.0
Health and hygiene .....	67	4.5
Prioritization of Travel & Tourism .....	35	4.9
<b>T&amp;T business environment and infrastructure</b> .....	<b>56</b>	<b>3.8</b>
Air transport infrastructure .....	43	3.8
Ground transport infrastructure .....	113	2.6
Tourism infrastructure .....	29	4.9
ICT infrastructure .....	60	2.8
Price competitiveness in the T&T industry .....	50	4.8
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>24</b>	<b>4.5</b>
Human resources .....	27	5.4
Education and training .....	38	5.0
Availability of qualified labor .....	11	5.9
Affinity for Travel & Tourism .....	21	5.5
Natural resources .....	7	5.4
Cultural resources .....	92	1.8

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	15 ...■	8.01 Hotel rooms* .....	31 ...■
1.02 Property rights .....	65 ...■	8.02 Presence of major car rental companies* .....	1 ...■
1.03 Business impact of rules on FDI .....	30 ...■	8.03 ATMs accepting Visa cards* .....	46 ...■
1.04 Visa requirements* .....	9 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	9 ...■	9.01 Extent of business Internet use .....	72 ...■
1.06 Transparency of government policymaking .....	83 ...■	9.02 Internet users* .....	45 ...■
1.07 Time required to start a business* .....	116 ...■	9.03 Telephone lines* .....	38 ...■
1.08 Cost to start a business* .....	76 ...■	9.04 Broadband Internet subscribers* .....	65 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	91 ...■
2.01 Stringency of environmental regulation .....	37 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	39 ...■	10.01 Ticket taxes and airport charges* .....	62 ...■
2.03 Sustainability of T&T industry development .....	50 ...■	10.02 Purchasing power parity* .....	52 ...■
2.04 Carbon dioxide emissions* .....	45 ...■	10.03 Extent and effect of taxation .....	49 ...■
2.05 Particulate matter concentration* .....	57 ...■	10.04 Fuel price levels* .....	42 ...■
2.06 Threatened species* .....	95 ...■	10.05 Hotel price index* .....	89 ...■
2.07 Environmental treaty ratification* .....	45 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	74 ...■
3.01 Business costs of terrorism .....	37 ...■	11.02 2ndary education enrollment* .....	82 ...■
3.02 Reliability of police services .....	79 ...■	11.03 Quality of the educational system .....	36 ...■
3.03 Business costs of crime and violence .....	108 ...■	11.04 Local availability of research and training services .....	36 ...■
3.04 Road traffic accidents* .....	46 ...■	11.05 Extent of staff training .....	27 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	29 ...■
4.01 Physician density* .....	74 ...■	11.07 Ease of hiring foreign labor .....	33 ...■
4.02 Access to improved sanitation* .....	52 ...■	11.08 HIV prevalence* .....	63 ...■
4.03 Access to improved drinking water* .....	45 ...■	11.09 Business impact of HIV/AIDS .....	77 ...■
4.04 Hospital beds* .....	88 ...■	11.10 Life expectancy* .....	16 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	36 ...■	12.01 Tourism openness* .....	22 ...■
5.02 T&T government expenditure* .....	22 ...■	12.02 Attitude of population toward foreign visitors .....	38 ...■
5.03 Effectiveness of marketing and branding .....	33 ...■	12.03 Extension of business trips recommended .....	22 ...■
5.04 T&T fair attendance* .....	56 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	15 ...■
6.01 Quality of air transport infrastructure .....	66 ...■	13.02 Nationally protected areas* .....	18 ...■
6.02 Available seat kilometers* .....	71 ...■	13.03 Quality of the natural environment .....	25 ...■
6.03 Departures per 1,000 population* .....	37 ...■	13.04 Total known species* .....	19 ...■
6.04 Airport density* .....	14 ...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	80 ...■	14.01 Number of World Heritage cultural sites* .....	108 ...■
6.06 International air transport network .....	44 ...■	14.02 Sports stadiums* .....	49 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	61 ...■
7.01 Quality of roads .....	121 ...■		
7.02 Quality of railroad infrastructure .....	105 ...■		
7.03 Quality of port infrastructure .....	125 ...■		
7.04 Quality of domestic transport network .....	120 ...■		
7.05 Road density* .....	38 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Croatia

## Key indicators

Population (millions), 2006 .....	4.6
Surface area (1,000 square kilometers) .....	56.5
Gross domestic product (US\$ billions), 2006 .....	42.9
Gross domestic product (PPP, US\$) per capita, 2006 .....	14,523
Real GDP growth (percent), 2006 .....	4.8

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

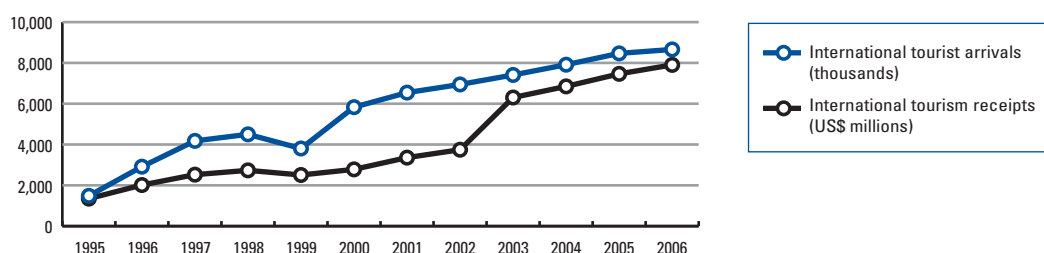
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	4,029	8.5
Employment (1,000 jobs) .....	112	9.7

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	8,978	19.0	8.9
Employment (1,000 jobs) .....	249	21.6	4.7

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	8,659
International tourism receipts (US\$ millions), 2006 .....	7,902



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>34</b>	<b>4.6</b>
<b>T&amp;T regulatory framework</b> .....	<b>39</b>	<b>5.0</b>
Policy rules and regulations .....	66	4.3
Environmental sustainability .....	41	4.8
Safety and security .....	41	5.5
Health and hygiene .....	28	6.0
Prioritization of Travel & Tourism .....	51	4.5
<b>T&amp;T business environment and infrastructure</b> .....	<b>38</b>	<b>4.3</b>
Air transport infrastructure .....	66	3.0
Ground transport infrastructure .....	54	4.0
Tourism infrastructure .....	10	6.6
ICT infrastructure .....	37	3.7
Price competitiveness in the T&T industry .....	98	4.3
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>32</b>	<b>4.4</b>
Human resources .....	50	5.0
Education and training .....	53	4.8
Availability of qualified labor .....	52	5.3
Affinity for Travel & Tourism .....	7	6.2
Natural resources .....	68	3.1
Cultural resources .....	37	3.3

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	82 ... <span style="color: #808080;">■</span>	8.01 Hotel rooms* .....	11 ... <span style="color: #0056b3;">■</span>
1.02 Property rights .....	78 ... <span style="color: #808080;">■</span>	8.02 Presence of major car rental companies* .....	1 ... <span style="color: #0056b3;">■</span>
1.03 Business impact of rules on FDI .....	102 ... <span style="color: #808080;">■</span>	8.03 ATMs accepting Visa cards* .....	19 ... <span style="color: #0056b3;">■</span>
1.04 Visa requirements* .....	26 ... <span style="color: #0056b3;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	45 ... <span style="color: #808080;">■</span>	9.01 Extent of business Internet use .....	66 ... <span style="color: #808080;">■</span>
1.06 Transparency of government policymaking .....	80 ... <span style="color: #808080;">■</span>	9.02 Internet users* .....	36 ... <span style="color: #808080;">■</span>
1.07 Time required to start a business* .....	92 ... <span style="color: #808080;">■</span>	9.03 Telephone lines* .....	32 ... <span style="color: #0056b3;">■</span>
1.08 Cost to start a business* .....	61 ... <span style="color: #808080;">■</span>	9.04 Broadband Internet subscribers* .....	41 ... <span style="color: #808080;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	31 ... <span style="color: #0056b3;">■</span>
2.01 Stringency of environmental regulation .....	49 ... <span style="color: #808080;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	53 ... <span style="color: #808080;">■</span>	10.01 Ticket taxes and airport charges* .....	54 ... <span style="color: #808080;">■</span>
2.03 Sustainability of T&T industry development .....	67 ... <span style="color: #808080;">■</span>	10.02 Purchasing power parity* .....	83 ... <span style="color: #808080;">■</span>
2.04 Carbon dioxide emissions* .....	76 ... <span style="color: #808080;">■</span>	10.03 Extent and effect of taxation .....	86 ... <span style="color: #808080;">■</span>
2.05 Particulate matter concentration* .....	44 ... <span style="color: #808080;">■</span>	10.04 Fuel price levels* .....	98 ... <span style="color: #808080;">■</span>
2.06 Threatened species* .....	65 ... <span style="color: #808080;">■</span>	10.05 Hotel price index* .....	74 ... <span style="color: #808080;">■</span>
2.07 Environmental treaty ratification* .....	45 ... <span style="color: #808080;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	90 ... <span style="color: #808080;">■</span>
3.01 Business costs of terrorism .....	19 ... <span style="color: #0056b3;">■</span>	11.02 2ndary education enrollment* .....	57 ... <span style="color: #808080;">■</span>
3.02 Reliability of police services .....	63 ... <span style="color: #808080;">■</span>	11.03 Quality of the educational system .....	61 ... <span style="color: #808080;">■</span>
3.03 Business costs of crime and violence .....	62 ... <span style="color: #808080;">■</span>	11.04 Local availability of research and training services .....	38 ... <span style="color: #808080;">■</span>
3.04 Road traffic accidents* .....	41 ... <span style="color: #808080;">■</span>	11.05 Extent of staff training .....	60 ... <span style="color: #808080;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	74 ... <span style="color: #808080;">■</span>
4.01 Physician density* .....	41 ... <span style="color: #808080;">■</span>	11.07 Ease of hiring foreign labor .....	95 ... <span style="color: #808080;">■</span>
4.02 Access to improved sanitation* .....	1 ... <span style="color: #0056b3;">■</span>	11.08 HIV prevalence* .....	1 ... <span style="color: #0056b3;">■</span>
4.03 Access to improved drinking water* .....	1 ... <span style="color: #0056b3;">■</span>	11.09 Business impact of HIV/AIDS .....	19 ... <span style="color: #0056b3;">■</span>
4.04 Hospital beds* .....	31 ... <span style="color: #0056b3;">■</span>	11.10 Life expectancy* .....	37 ... <span style="color: #808080;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	41 ... <span style="color: #808080;">■</span>	12.01 Tourism openness* .....	4 ... <span style="color: #0056b3;">■</span>
5.02 T&T government expenditure* .....	108 ... <span style="color: #808080;">■</span>	12.02 Attitude of population toward foreign visitors .....	33 ... <span style="color: #0056b3;">■</span>
5.03 Effectiveness of marketing and branding .....	52 ... <span style="color: #808080;">■</span>	12.03 Extension of business trips recommended .....	94 ... <span style="color: #808080;">■</span>
5.04 T&T fair attendance* .....	22 ... <span style="color: #0056b3;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	39 ... <span style="color: #808080;">■</span>
6.01 Quality of air transport infrastructure .....	75 ... <span style="color: #808080;">■</span>	13.02 Nationally protected areas* .....	78 ... <span style="color: #808080;">■</span>
6.02 Available seat kilometers* .....	90 ... <span style="color: #808080;">■</span>	13.03 Quality of the natural environment .....	14 ... <span style="color: #0056b3;">■</span>
6.03 Departures per 1,000 population* .....	48 ... <span style="color: #808080;">■</span>	13.04 Total known species* .....	89 ... <span style="color: #808080;">■</span>
6.04 Airport density* .....	26 ... <span style="color: #0056b3;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	60 ... <span style="color: #808080;">■</span>	14.01 Number of World Heritage cultural sites* .....	38 ... <span style="color: #808080;">■</span>
6.06 International air transport network .....	92 ... <span style="color: #808080;">■</span>	14.02 Sports stadiums* .....	31 ... <span style="color: #0056b3;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	41 ... <span style="color: #808080;">■</span>
7.01 Quality of roads .....	36 ... <span style="color: #808080;">■</span>		
7.02 Quality of railroad infrastructure .....	50 ... <span style="color: #808080;">■</span>		
7.03 Quality of port infrastructure .....	89 ... <span style="color: #808080;">■</span>		
7.04 Quality of domestic transport network .....	41 ... <span style="color: #808080;">■</span>		
7.05 Road density* .....	43 ... <span style="color: #808080;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Cyprus

## Key indicators

Population (millions), 2006 .....	0.8
Surface area (1,000 square kilometers) .....	9.3
Gross domestic product (US\$ billions), 2006 .....	18.2
Gross domestic product (PPP, US\$) per capita, 2006 .....	29,870
Real GDP growth (percent), 2006 .....	3.8

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

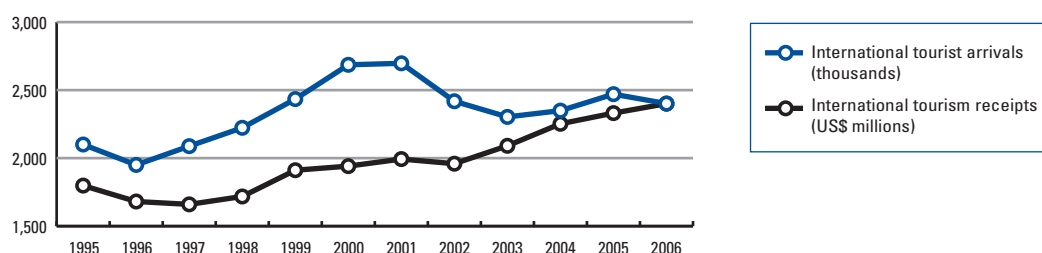
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	1,983	9.8	3.8
Employment (1,000 jobs) .....	55	13.7	0.4

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	4,366	21.5	3.9
Employment (1,000 jobs) .....	110	27.4	0.4

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	2,401
International tourism receipts (US\$ millions), 2006 .....	2,400



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>24</b>	<b>4.9</b>
<b>T&amp;T regulatory framework</b> .....	<b>27</b>	<b>5.2</b>
Policy rules and regulations .....	69	4.2
Environmental sustainability .....	47	4.7
Safety and security .....	23	5.8
Health and hygiene .....	43	5.5
Prioritization of Travel & Tourism .....	3	5.9
<b>T&amp;T business environment and infrastructure</b> .....	<b>17</b>	<b>5.0</b>
Air transport infrastructure .....	25	4.5
Ground transport infrastructure .....	17	5.5
Tourism infrastructure .....	3	7.0
ICT infrastructure .....	34	4.0
Price competitiveness in the T&T industry .....	95	4.3
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>40</b>	<b>4.3</b>
Human resources .....	63	5.0
Education and training .....	32	5.2
Availability of qualified labor .....	112	4.7
Affinity for Travel & Tourism .....	5	6.4
Natural resources .....	106	2.4
Cultural resources .....	32	3.7

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....77... <span style="color: #808080;">■</span>	8.01	Hotel rooms* .....1... <span style="color: #0056b3;">■</span>
1.02	Property rights .....36... <span style="color: #808080;">■</span>	8.02	Presence of major car rental companies* .....1... <span style="color: #0056b3;">■</span>
1.03	Business impact of rules on FDI .....56... <span style="color: #808080;">■</span>	8.03	ATMs accepting Visa cards* .....14... <span style="color: #0056b3;">■</span>
1.04	Visa requirements* .....46... <span style="color: #808080;">■</span>		
1.05	Openness of bilateral Air Service Agreements* .....115... <span style="color: #808080;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.06	Transparency of government policymaking .....44... <span style="color: #808080;">■</span>	9.01	Extent of business Internet use .....49... <span style="color: #808080;">■</span>
1.07	Time required to start a business* .....n/a.....	9.02	Internet users* .....30... <span style="color: #808080;">■</span>
1.08	Cost to start a business* .....n/a.....	9.03	Telephone lines* .....19... <span style="color: #0056b3;">■</span>
		9.04	Broadband Internet subscribers* .....38... <span style="color: #808080;">■</span>
		9.05	Mobile telephone subscribers* .....38... <span style="color: #808080;">■</span>
<b>2nd pillar: Environmental sustainability</b>		<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.01	Stringency of environmental regulation .....61... <span style="color: #808080;">■</span>	10.01	Ticket taxes and airport charges* .....99... <span style="color: #808080;">■</span>
2.02	Enforcement of environmental regulation .....55... <span style="color: #808080;">■</span>	10.02	Purchasing power parity* .....94... <span style="color: #808080;">■</span>
2.03	Sustainability of T&T industry development .....47... <span style="color: #808080;">■</span>	10.03	Extent and effect of taxation .....19... <span style="color: #0056b3;">■</span>
2.04	Carbon dioxide emissions* .....106... <span style="color: #808080;">■</span>	10.04	Fuel price levels* .....95... <span style="color: #808080;">■</span>
2.05	Particulate matter concentration* .....n/a.....	10.05	Hotel price index* .....94... <span style="color: #808080;">■</span>
2.06	Threatened species* .....25... <span style="color: #808080;">■</span>		
2.07	Environmental treaty ratification* .....28... <span style="color: #808080;">■</span>	<b>11th pillar: Human resources</b>	
		11.01	Primary education enrollment* .....5... <span style="color: #0056b3;">■</span>
<b>3rd pillar: Safety and security</b>		11.02	2ndary education enrollment* .....33... <span style="color: #808080;">■</span>
3.01	Business costs of terrorism .....50... <span style="color: #808080;">■</span>	11.03	Quality of the educational system .....23... <span style="color: #0056b3;">■</span>
3.02	Reliability of police services .....35... <span style="color: #808080;">■</span>	11.04	Local availability of research and training services .....70... <span style="color: #808080;">■</span>
3.03	Business costs of crime and violence .....23... <span style="color: #0056b3;">■</span>	11.05	Extent of staff training .....72... <span style="color: #808080;">■</span>
3.04	Road traffic accidents* .....17... <span style="color: #0056b3;">■</span>	11.06	Hiring and firing practices .....95... <span style="color: #808080;">■</span>
		11.07	Ease of hiring foreign labor .....101... <span style="color: #808080;">■</span>
		11.08	HIV prevalence* .....n/a.....
<b>4th pillar: Health and hygiene</b>		11.09	Business impact of HIV/AIDS .....24... <span style="color: #808080;">■</span>
4.01	Physician density* .....42... <span style="color: #808080;">■</span>	11.10	Life expectancy* .....16... <span style="color: #0056b3;">■</span>
4.02	Access to improved sanitation* .....1... <span style="color: #0056b3;">■</span>		
4.03	Access to improved drinking water* .....1... <span style="color: #0056b3;">■</span>	<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
4.04	Hospital beds* .....53... <span style="color: #808080;">■</span>	12.01	Tourism openness* .....6... <span style="color: #0056b3;">■</span>
		12.02	Attitude of population toward foreign visitors .....18... <span style="color: #0056b3;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		12.03	Extension of business trips recommended .....32... <span style="color: #808080;">■</span>
5.01	Government prioritization of the T&T industry .....11... <span style="color: #0056b3;">■</span>		
5.02	T&T government expenditure* .....11... <span style="color: #0056b3;">■</span>	<b>13th pillar: Natural resources</b>	
5.03	Effectiveness of marketing and branding .....29... <span style="color: #808080;">■</span>	13.01	Number of World Heritage natural sites* .....70... <span style="color: #808080;">■</span>
5.04	T&T fair attendance* .....22... <span style="color: #0056b3;">■</span>	13.02	Nationally protected areas* .....93... <span style="color: #808080;">■</span>
		13.03	Quality of the natural environment .....41... <span style="color: #808080;">■</span>
<b>6th pillar: Air transport infrastructure</b>		13.04	Total known species* .....115... <span style="color: #808080;">■</span>
6.01	Quality of air transport infrastructure .....55... <span style="color: #808080;">■</span>		
6.02	Available seat kilometers* .....67... <span style="color: #808080;">■</span>	<b>14th pillar: Cultural resources</b>	
6.03	Departures per 1,000 population* .....13... <span style="color: #0056b3;">■</span>	14.01	Number of World Heritage cultural sites* .....54... <span style="color: #808080;">■</span>
6.04	Airport density* .....13... <span style="color: #0056b3;">■</span>	14.02	Sports stadiums* .....14... <span style="color: #0056b3;">■</span>
6.05	Number of operating airlines* .....40... <span style="color: #808080;">■</span>	14.03	Number of international fairs and exhibitions* .....53... <span style="color: #808080;">■</span>
6.06	International air transport network .....54... <span style="color: #808080;">■</span>		
<b>7th pillar: Ground transport infrastructure</b>			
7.01	Quality of roads .....23... <span style="color: #0056b3;">■</span>		
7.02	Quality of railroad infrastructure .....n/a.....		
7.03	Quality of port infrastructure .....39... <span style="color: #808080;">■</span>		
7.04	Quality of domestic transport network .....34... <span style="color: #808080;">■</span>		
7.05	Road density* .....n/a.....		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# Czech Republic

## Key indicators

Population (millions), 2006 .....	10.2
Surface area (1,000 square kilometers) .....	78.9
Gross domestic product (US\$ billions), 2006 .....	142.5
Gross domestic product (PPP, US\$) per capita, 2006 .....	23,399
Real GDP growth (percent), 2006 .....	6.4

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

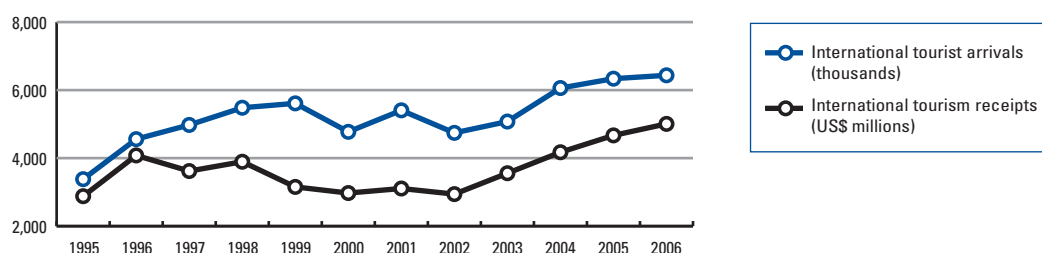
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	3,395	2.0
Employment (1,000 jobs) .....	105	2.2

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	21,068	12.7
Employment (1,000 jobs) .....	569	11.7

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	6,435
International tourism receipts (US\$ millions), 2006 .....	5,007



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>30</b>	<b>4.8</b>
<b>T&amp;T regulatory framework</b> .....	<b>20</b>	<b>5.4</b>
Policy rules and regulations .....	38	4.8
Environmental sustainability .....	21	5.1
Safety and security .....	44	5.5
Health and hygiene .....	6	6.8
Prioritization of Travel & Tourism .....	39	4.8
<b>T&amp;T business environment and infrastructure</b> .....	<b>37</b>	<b>4.4</b>
Air transport infrastructure .....	52	3.4
Ground transport infrastructure .....	22	5.1
Tourism infrastructure .....	25	5.0
ICT infrastructure .....	31	4.2
Price competitiveness in the T&T industry .....	108	4.1
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>25</b>	<b>4.5</b>
Human resources .....	30	5.4
Education and training .....	30	5.3
Availability of qualified labor .....	49	5.4
Affinity for Travel & Tourism .....	61	4.8
Natural resources .....	82	2.9
Cultural resources .....	20	5.0

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	30...■	8.01 Hotel rooms* .....	28...■
1.02 Property rights .....	66...■	8.02 Presence of major car rental companies* .....	1...■
1.03 Business impact of rules on FDI .....	26...■	8.03 ATMs accepting Visa cards* .....	42...■
1.04 Visa requirements* .....	46...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	31...■	9.01 Extent of business Internet use .....	20...■
1.06 Transparency of government policymaking .....	95...■	9.02 Internet users* .....	35...■
1.07 Time required to start a business* .....	37...■	9.03 Telephone lines* .....	36...■
1.08 Cost to start a business* .....	58...■	9.04 Broadband Internet subscribers* .....	32...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	9...■
2.01 Stringency of environmental regulation .....	18...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	29...■	10.01 Ticket taxes and airport charges* .....	79...■
2.03 Sustainability of T&T industry development .....	81...■	10.02 Purchasing power parity* .....	76...■
2.04 Carbon dioxide emissions* .....	112...■	10.03 Extent and effect of taxation .....	88...■
2.05 Particulate matter concentration* .....	27...■	10.04 Fuel price levels* .....	109...■
2.06 Threatened species* .....	29...■	10.05 Hotel price index* .....	87...■
2.07 Environmental treaty ratification* .....	28...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	66...■
3.01 Business costs of terrorism .....	16...■	11.02 2ndary education enrollment* .....	39...■
3.02 Reliability of police services .....	87...■	11.03 Quality of the educational system .....	33...■
3.03 Business costs of crime and violence .....	42...■	11.04 Local availability of research and training services .....	25...■
3.04 Road traffic accidents* .....	53...■	11.05 Extent of staff training .....	35...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	103...■
4.01 Physician density* .....	15...■	11.07 Ease of hiring foreign labor .....	37...■
4.02 Access to improved sanitation* .....	40...■	11.08 HIV prevalence* .....	24...■
4.03 Access to improved drinking water* .....	1...■	11.09 Business impact of HIV/AIDS .....	44...■
4.04 Hospital beds* .....	4...■	11.10 Life expectancy* .....	37...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	92...■	12.01 Tourism openness* .....	52...■
5.02 T&T government expenditure* .....	54...■	12.02 Attitude of population toward foreign visitors .....	97...■
5.03 Effectiveness of marketing and branding .....	83...■	12.03 Extension of business trips recommended .....	54...■
5.04 T&T fair attendance* .....	3...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	70...■
6.01 Quality of air transport infrastructure .....	48...■	13.02 Nationally protected areas* .....	38...■
6.02 Available seat kilometers* .....	57...■	13.03 Quality of the natural environment .....	88...■
6.03 Departures per 1,000 population* .....	41...■	13.04 Total known species* .....	86...■
6.04 Airport density* .....	83...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	29...■	14.01 Number of World Heritage cultural sites* .....	12...■
6.06 International air transport network .....	38...■	14.02 Sports stadiums* .....	36...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	24...■
7.01 Quality of roads .....	68...■		
7.02 Quality of railroad infrastructure .....	25...■		
7.03 Quality of port infrastructure .....	53...■		
7.04 Quality of domestic transport network .....	27...■		
7.05 Road density* .....	14...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Denmark

## Key indicators

Population (millions), 2006 .....	5.4
Surface area (1,000 square kilometers) .....	43.1
Gross domestic product (US\$ billions), 2006 .....	276.4
Gross domestic product (PPP, US\$) per capita, 2006 .....	36,920
Real GDP growth (percent), 2006 .....	3.5

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

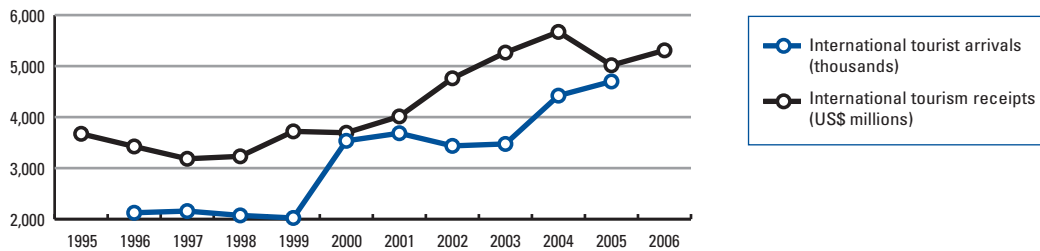
		Percent of total	2008-2017 annual growth (% forecast)
GDP (US\$ millions) .....	12,096	3.9	2.0
Employment (1,000 jobs) .....	110	4.0	-0.4

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	30,650	10.0	2.0
Employment (1,000 jobs) .....	285	10.3	-0.4

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2005.....4,699  
 International tourism receipts (US\$ millions), 2006 .....5,309



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1-7 scale)
<b>2008 Index</b> .....	<b>13</b>	<b>5.1</b>
<b>T&amp;T regulatory framework</b> .....	<b>10</b>	<b>5.6</b>
Policy rules and regulations .....	4	5.6
Environmental sustainability .....	3	5.9
Safety and security .....	4	6.4
Health and hygiene .....	34	5.8
Prioritization of Travel & Tourism .....	62	4.4
<b>T&amp;T business environment and infrastructure</b> .....	<b>10</b>	<b>5.2</b>
Air transport infrastructure .....	12	5.0
Ground transport infrastructure .....	6	6.5
Tourism infrastructure .....	23	5.3
ICT infrastructure .....	5	5.8
Price competitiveness in the T&T industry .....	128	3.4
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>28</b>	<b>4.5</b>
Human resources .....	3	6.1
Education and training .....	1	6.2
Availability of qualified labor .....	6	6.0
Affinity for Travel & Tourism .....	84	4.6
Natural resources .....	63	3.1
Cultural resources .....	27	4.1

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....23... <span style="color: #808080;">■</span>	8.01	Hotel rooms* .....35... <span style="color: #808080;">■</span>
1.02	Property rights .....2... <span style="color: #0056b3;">■</span>	8.02	Presence of major car rental companies* .....33... <span style="color: #808080;">■</span>
1.03	Business impact of rules on FDI .....27... <span style="color: #808080;">■</span>	8.03	ATMs accepting Visa cards* .....21... <span style="color: #808080;">■</span>
1.04	Visa requirements* .....45... <span style="color: #808080;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....17... <span style="color: #808080;">■</span>	9.01	Extent of business Internet use .....7... <span style="color: #0056b3;">■</span>
1.06	Transparency of government policymaking .....2... <span style="color: #0056b3;">■</span>	9.02	Internet users* .....16... <span style="color: #808080;">■</span>
1.07	Time required to start a business* .....6... <span style="color: #0056b3;">■</span>	9.03	Telephone lines* .....8... <span style="color: #0056b3;">■</span>
1.08	Cost to start a business* .....1... <span style="color: #0056b3;">■</span>	9.04	Broadband Internet subscribers* .....1... <span style="color: #0056b3;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....21... <span style="color: #808080;">■</span>
2.01	Stringency of environmental regulation .....2... <span style="color: #0056b3;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....1... <span style="color: #0056b3;">■</span>	10.01	Ticket taxes and airport charges* .....83... <span style="color: #808080;">■</span>
2.03	Sustainability of T&T industry development .....26... <span style="color: #808080;">■</span>	10.02	Purchasing power parity* .....125... <span style="color: #808080;">■</span>
2.04	Carbon dioxide emissions* .....106... <span style="color: #808080;">■</span>	10.03	Extent and effect of taxation .....110... <span style="color: #808080;">■</span>
2.05	Particulate matter concentration* .....22... <span style="color: #808080;">■</span>	10.04	Fuel price levels* .....123... <span style="color: #808080;">■</span>
2.06	Threatened species* .....5... <span style="color: #0056b3;">■</span>	10.05	Hotel price index* .....77... <span style="color: #808080;">■</span>
2.07	Environmental treaty ratification* .....5... <span style="color: #0056b3;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....43... <span style="color: #808080;">■</span>
3.01	Business costs of terrorism .....51... <span style="color: #808080;">■</span>	11.02	2ndary education enrollment* .....2... <span style="color: #0056b3;">■</span>
3.02	Reliability of police services .....2... <span style="color: #0056b3;">■</span>	11.03	Quality of the educational system .....4... <span style="color: #0056b3;">■</span>
3.03	Business costs of crime and violence .....5... <span style="color: #0056b3;">■</span>	11.04	Local availability of research and training services .....11... <span style="color: #0056b3;">■</span>
3.04	Road traffic accidents* .....36... <span style="color: #808080;">■</span>	11.05	Extent of staff training .....1... <span style="color: #0056b3;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....3... <span style="color: #0056b3;">■</span>
4.01	Physician density* .....31... <span style="color: #808080;">■</span>	11.07	Ease of hiring foreign labor .....45... <span style="color: #808080;">■</span>
4.02	Access to improved sanitation* .....1... <span style="color: #0056b3;">■</span>	11.08	HIV prevalence* .....49... <span style="color: #808080;">■</span>
4.03	Access to improved drinking water* .....1... <span style="color: #0056b3;">■</span>	11.09	Business impact of HIV/AIDS .....4... <span style="color: #0056b3;">■</span>
4.04	Hospital beds* .....48... <span style="color: #808080;">■</span>	11.10	Life expectancy* .....28... <span style="color: #808080;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....63... <span style="color: #808080;">■</span>	12.01	Tourism openness* .....67... <span style="color: #808080;">■</span>
5.02	T&T government expenditure* .....85... <span style="color: #808080;">■</span>	12.02	Attitude of population toward foreign visitors .....51... <span style="color: #808080;">■</span>
5.03	Effectiveness of marketing and branding .....32... <span style="color: #808080;">■</span>	12.03	Extension of business trips recommended .....103... <span style="color: #808080;">■</span>
5.04	T&T fair attendance* .....45... <span style="color: #808080;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....39... <span style="color: #808080;">■</span>
6.01	Quality of air transport infrastructure .....6... <span style="color: #0056b3;">■</span>	13.02	Nationally protected areas* .....75... <span style="color: #808080;">■</span>
6.02	Available seat kilometers* .....39... <span style="color: #808080;">■</span>	13.03	Quality of the natural environment .....9... <span style="color: #0056b3;">■</span>
6.03	Departures per 1,000 population* .....12... <span style="color: #0056b3;">■</span>	13.04	Total known species* .....106... <span style="color: #808080;">■</span>
6.04	Airport density* .....25... <span style="color: #808080;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....25... <span style="color: #808080;">■</span>	14.01	Number of World Heritage cultural sites* .....54... <span style="color: #808080;">■</span>
6.06	International air transport network .....8... <span style="color: #0056b3;">■</span>	14.02	Sports stadiums* .....21... <span style="color: #808080;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....23... <span style="color: #808080;">■</span>
7.01	Quality of roads .....5... <span style="color: #0056b3;">■</span>		
7.02	Quality of railroad infrastructure .....8... <span style="color: #0056b3;">■</span>		
7.03	Quality of port infrastructure .....5... <span style="color: #0056b3;">■</span>		
7.04	Quality of domestic transport network .....4... <span style="color: #0056b3;">■</span>		
7.05	Road density* .....13... <span style="color: #808080;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Dominican Republic

## Key indicators

Population (millions), 2006 .....	9.0
Surface area (1,000 square kilometers) .....	48.7
Gross domestic product (US\$ billions), 2006 .....	31.6
Gross domestic product (PPP, US\$) per capita, 2006 .....	9,377
Real GDP growth (percent), 2006 .....	10.7

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

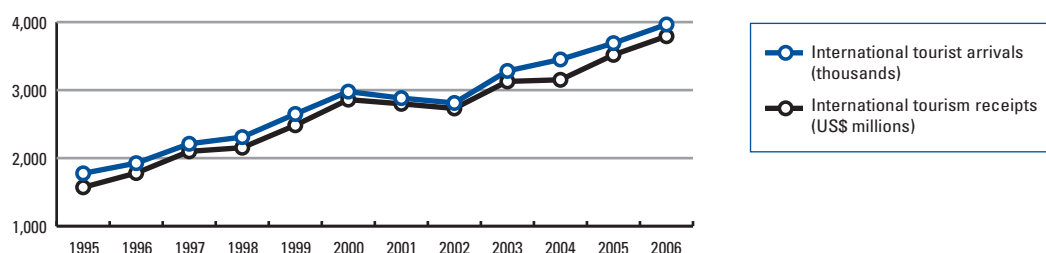
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	2,012	6.3	3.7
Employment (1,000 jobs) .....	195	5.6	3.1

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	6,229	19.6	3.7
Employment (1,000 jobs) .....	593	17.0	3.1

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	3,965
International tourism receipts (US\$ millions), 2006 .....	3,792



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>63</b>	<b>4.0</b>
<b>T&amp;T regulatory framework</b> .....	<b>54</b>	<b>4.6</b>
Policy rules and regulations .....	47	4.6
Environmental sustainability .....	108	3.9
Safety and security .....	89	4.6
Health and hygiene .....	65	4.5
Prioritization of Travel & Tourism .....	14	5.6
<b>T&amp;T business environment and infrastructure</b> .....	<b>63</b>	<b>3.6</b>
Air transport infrastructure .....	46	3.5
Ground transport infrastructure .....	80	3.3
Tourism infrastructure .....	45	4.2
ICT infrastructure .....	75	2.4
Price competitiveness in the T&T industry .....	76	4.5
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>67</b>	<b>3.9</b>
Human resources .....	86	4.8
Education and training .....	104	3.9
Availability of qualified labor .....	23	5.6
Affinity for Travel & Tourism .....	15	5.7
Natural resources .....	50	3.5
Cultural resources .....	102	1.6

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	34 ...■	8.01 Hotel rooms* .....	38 ...■
1.02 Property rights .....	81 ...■	8.02 Presence of major car rental companies* .....	1 ...■
1.03 Business impact of rules on FDI .....	45 ...■	8.03 ATMs accepting Visa cards* .....	67 ...■
1.04 Visa requirements* .....	110 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	4 ...■	9.01 Extent of business Internet use .....	73 ...■
1.06 Transparency of government policymaking .....	91 ...■	9.02 Internet users* .....	50 ...■
1.07 Time required to start a business* .....	48 ...■	9.03 Telephone lines* .....	88 ...■
1.08 Cost to start a business* .....	90 ...■	9.04 Broadband Internet subscribers* .....	71 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	81 ...■
2.01 Stringency of environmental regulation .....	86 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	105 ...■	10.01 Ticket taxes and airport charges* .....	125 ...■
2.03 Sustainability of T&T industry development .....	74 ...■	10.02 Purchasing power parity* .....	49 ...■
2.04 Carbon dioxide emissions* .....	54 ...■	10.03 Extent and effect of taxation .....	119 ...■
2.05 Particulate matter concentration* .....	42 ...■	10.04 Fuel price levels* .....	51 ...■
2.06 Threatened species* .....	125 ...■	10.05 Hotel price index* .....	23 ...■
2.07 Environmental treaty ratification* .....	88 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	88 ...■
3.01 Business costs of terrorism .....	34 ...■	11.02 2ndary education enrollment* .....	92 ...■
3.02 Reliability of police services .....	117 ...■	11.03 Quality of the educational system .....	127 ...■
3.03 Business costs of crime and violence .....	110 ...■	11.04 Local availability of research and training services .....	97 ...■
3.04 Road traffic accidents* .....	71 ...■	11.05 Extent of staff training .....	91 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	24 ...■
4.01 Physician density* .....	60 ...■	11.07 Ease of hiring foreign labor .....	8 ...■
4.02 Access to improved sanitation* .....	71 ...■	11.08 HIV prevalence* .....	99 ...■
4.03 Access to improved drinking water* .....	55 ...■	11.09 Business impact of HIV/AIDS .....	103 ...■
4.04 Hospital beds* .....	73 ...■	11.10 Life expectancy* .....	91 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	35 ...■	12.01 Tourism openness* .....	17 ...■
5.02 T&T government expenditure* .....	1 ...■	12.02 Attitude of population toward foreign visitors .....	28 ...■
5.03 Effectiveness of marketing and branding .....	37 ...■	12.03 Extension of business trips recommended .....	64 ...■
5.04 T&T fair attendance* .....	45 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	70 ...■
6.01 Quality of air transport infrastructure .....	37 ...■	13.02 Nationally protected areas* .....	6 ...■
6.02 Available seat kilometers* .....	51 ...■	13.03 Quality of the natural environment .....	87 ...■
6.03 Departures per 1,000 population* .....	n/a .....	13.04 Total known species* .....	112 ...■
6.04 Airport density* .....	66 ...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	47 ...■	14.01 Number of World Heritage cultural sites* .....	83 ...■
6.06 International air transport network .....	33 ...■	14.02 Sports stadiums* .....	83 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	63 ...■
7.01 Quality of roads .....	57 ...■		
7.02 Quality of railroad infrastructure .....	114 ...■		
7.03 Quality of port infrastructure .....	74 ...■		
7.04 Quality of domestic transport network .....	36 ...■		
7.05 Road density* .....	62 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Ecuador

## Key indicators

Population (millions), 2006 .....	13.4
Surface area (1,000 square kilometers) .....	283.6
Gross domestic product (US\$ billions), 2006 .....	41.4
Gross domestic product (PPP, US\$) per capita, 2006 .....	4,835
Real GDP growth (percent), 2006 .....	3.9

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

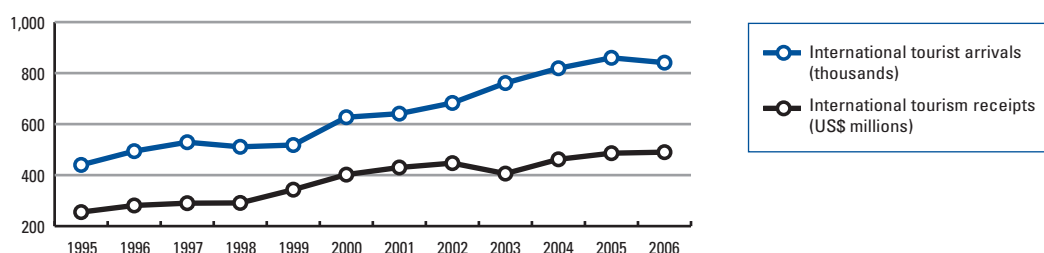
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	1.8	4.0
Employment (1,000 jobs) .....	1.6	3.2

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	3,305	7.8	3.4
Employment (1,000 jobs) .....	361	6.7	2.7

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	841
International tourism receipts (US\$ millions), 2006 .....	490



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>86</b>	<b>3.7</b>
<b>T&amp;T regulatory framework</b> .....	<b>101</b>	<b>4.0</b>
Policy rules and regulations .....	111	3.4
Environmental sustainability .....	82	4.2
Safety and security .....	97	4.5
Health and hygiene .....	73	4.4
Prioritization of Travel & Tourism .....	110	3.4
<b>T&amp;T business environment and infrastructure</b> .....	<b>95</b>	<b>2.9</b>
Air transport infrastructure .....	84	2.6
Ground transport infrastructure .....	119	2.5
Tourism infrastructure .....	89	2.5
ICT infrastructure .....	81	2.3
Price competitiveness in the T&T industry .....	53	4.8
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>58</b>	<b>4.1</b>
Human resources .....	100	4.5
Education and training .....	102	4.0
Availability of qualified labor .....	93	5.1
Affinity for Travel & Tourism .....	103	4.4
Natural resources .....	14	4.9
Cultural resources .....	69	2.4

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	112 ...■	8.01 Hotel rooms* .....	60 ...■
1.02 Property rights .....	116 ...■	8.02 Presence of major car rental companies* .....	89 ...■
1.03 Business impact of rules on FDI .....	120 ...■	8.03 ATMs accepting Visa cards* .....	79 ...■
1.04 Visa requirements* .....	57 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	33 ...■	9.01 Extent of business Internet use .....	109 ...■
1.06 Transparency of government policymaking .....	128 ...■	9.02 Internet users* .....	79 ...■
1.07 Time required to start a business* .....	110 ...■	9.03 Telephone lines* .....	78 ...■
1.08 Cost to start a business* .....	86 ...■	9.04 Broadband Internet subscribers* .....	89 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	67 ...■
2.01 Stringency of environmental regulation .....	104 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	116 ...■	10.01 Ticket taxes and airport charges* .....	123 ...■
2.03 Sustainability of T&T industry development .....	107 ...■	10.02 Purchasing power parity* .....	79 ...■
2.04 Carbon dioxide emissions* .....	48 ...■	10.03 Extent and effect of taxation .....	76 ...■
2.05 Particulate matter concentration* .....	32 ...■	10.04 Fuel price levels* .....	11 ...■
2.06 Threatened species* .....	115 ...■	10.05 Hotel price index* .....	17 ...■
2.07 Environmental treaty ratification* .....	45 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	24 ...■
3.01 Business costs of terrorism .....	61 ...■	11.02 2ndary education enrollment* .....	101 ...■
3.02 Reliability of police services .....	120 ...■	11.03 Quality of the educational system .....	122 ...■
3.03 Business costs of crime and violence .....	107 ...■	11.04 Local availability of research and training services .....	101 ...■
3.04 Road traffic accidents* .....	67 ...■	11.05 Extent of staff training .....	115 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	113 ...■
4.01 Physician density* .....	67 ...■	11.07 Ease of hiring foreign labor .....	98 ...■
4.02 Access to improved sanitation* .....	59 ...■	11.08 HIV prevalence* .....	63 ...■
4.03 Access to improved drinking water* .....	59 ...■	11.09 Business impact of HIV/AIDS .....	79 ...■
4.04 Hospital beds* .....	88 ...■	11.10 Life expectancy* .....	40 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	116 ...■	12.01 Tourism openness* .....	103 ...■
5.02 T&T government expenditure* .....	51 ...■	12.02 Attitude of population toward foreign visitors .....	105 ...■
5.03 Effectiveness of marketing and branding .....	100 ...■	12.03 Extension of business trips recommended .....	77 ...■
5.04 T&T fair attendance* .....	93 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	21 ...■
6.01 Quality of air transport infrastructure .....	76 ...■	13.02 Nationally protected areas* .....	26 ...■
6.02 Available seat kilometers* .....	63 ...■	13.03 Quality of the natural environment .....	80 ...■
6.03 Departures per 1,000 population* .....	65 ...■	13.04 Total known species* .....	5 ...■
6.04 Airport density* .....	49 ...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	80 ...■	14.01 Number of World Heritage cultural sites* .....	69 ...■
6.06 International air transport network .....	87 ...■	14.02 Sports stadiums* .....	39 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	58 ...■
7.01 Quality of roads .....	85 ...■		
7.02 Quality of railroad infrastructure .....	115 ...■		
7.03 Quality of port infrastructure .....	103 ...■		
7.04 Quality of domestic transport network .....	118 ...■		
7.05 Road density* .....	75 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# Egypt

## Key indicators

Population (millions), 2006 .....	75.4
Surface area (1,000 square kilometers) .....	1,001.5
Gross domestic product (US\$ billions), 2006 .....	107.4
Gross domestic product (PPP, US\$) per capita, 2006 .....	4,895
Real GDP growth (percent), 2006 .....	6.8

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

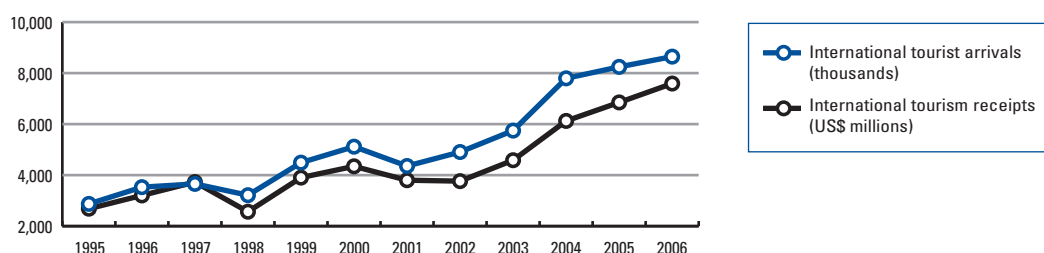
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	8.7	3.7
Employment (1,000 jobs) .....	7.3	1.2

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	18,160	16.3	5.1
Employment (1,000 jobs) .....	2,816	13.7	2.5

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	8,646
International tourism receipts (US\$ millions), 2006 .....	7,591



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>66</b>	<b>4.0</b>
<b>T&amp;T regulatory framework</b> .....	<b>58</b>	<b>4.5</b>
Policy rules and regulations .....	70	4.2
Environmental sustainability .....	81	4.2
Safety and security .....	84	4.7
Health and hygiene .....	86	3.9
Prioritization of Travel & Tourism .....	12	5.7
<b>T&amp;T business environment and infrastructure</b> .....	<b>69</b>	<b>3.5</b>
Air transport infrastructure .....	62	3.1
Ground transport infrastructure .....	75	3.4
Tourism infrastructure .....	79	2.8
ICT infrastructure .....	87	2.2
Price competitiveness in the T&T industry .....	2	5.9
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>70</b>	<b>3.9</b>
Human resources .....	82	4.8
Education and training .....	78	4.4
Availability of qualified labor .....	80	5.2
Affinity for Travel & Tourism .....	31	5.3
Natural resources .....	86	2.8
Cultural resources .....	58	2.5

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....93...■	8.01	Hotel rooms* .....68...■
1.02	Property rights .....51...■	8.02	Presence of major car rental companies* .....56...■
1.03	Business impact of rules on FDI .....98...■	8.03	ATMs accepting Visa cards* .....96...■
1.04	Visa requirements* .....101...■	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....66...■	9.01	Extent of business Internet use .....58...■
1.06	Transparency of government policymaking .....92...■	9.02	Internet users* .....89...■
1.07	Time required to start a business* .....16...■	9.03	Telephone lines* .....75...■
1.08	Cost to start a business* .....85...■	9.04	Broadband Internet subscribers* .....82...■
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....104...■
2.01	Stringency of environmental regulation .....85...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....102...■	10.01	Ticket taxes and airport charges* .....32...■
2.03	Sustainability of T&T industry development .....38...■	10.02	Purchasing power parity* .....26...■
2.04	Carbon dioxide emissions* .....50...■	10.03	Extent and effect of taxation .....33...■
2.05	Particulate matter concentration* .....117...■	10.04	Fuel price levels* .....3...■
2.06	Threatened species* .....60...■	10.05	Hotel price index* .....5...■
2.07	Environmental treaty ratification* .....28...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....56...■
3.01	Business costs of terrorism .....106...■	11.02	2ndary education enrollment* .....65...■
3.02	Reliability of police services .....57...■	11.03	Quality of the educational system .....119...■
3.03	Business costs of crime and violence .....49...■	11.04	Local availability of research and training services .....83...■
3.04	Road traffic accidents* .....108...■	11.05	Extent of staff training .....81...■
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....105...■
4.01	Physician density* .....97...■	11.07	Ease of hiring foreign labor .....34...■
4.02	Access to improved sanitation* .....78...■	11.08	HIV prevalence* .....1...■
4.03	Access to improved drinking water* .....44...■	11.09	Business impact of HIV/AIDS .....41...■
4.04	Hospital beds* .....73...■	11.10	Life expectancy* .....73...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....31...■	12.01	Tourism openness* .....24...■
5.02	T&T government expenditure* .....20...■	12.02	Attitude of population toward foreign visitors .....91...■
5.03	Effectiveness of marketing and branding .....42...■	12.03	Extension of business trips recommended .....41...■
5.04	T&T fair attendance* .....1...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....39...■
6.01	Quality of air transport infrastructure .....59...■	13.02	Nationally protected areas* .....48...■
6.02	Available seat kilometers* .....35...■	13.03	Quality of the natural environment .....128...■
6.03	Departures per 1,000 population* .....100...■	13.04	Total known species* .....65...■
6.04	Airport density* .....117...■	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....26...■	14.01	Number of World Heritage cultural sites* .....30...■
6.06	International air transport network .....63...■	14.02	Sports stadiums* .....108...■
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....54...■
7.01	Quality of roads .....71...■		
7.02	Quality of railroad infrastructure .....56...■		
7.03	Quality of port infrastructure .....79...■		
7.04	Quality of domestic transport network .....37...■		
7.05	Road density* .....95...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# El Salvador

## Key indicators

Population (millions), 2006 .....	7.0
Surface area (1,000 square kilometers) .....	21.0
Gross domestic product (US\$ billions), 2006 .....	18.7
Gross domestic product (PPP, US\$) per capita, 2006 .....	5,600
Real GDP growth (percent), 2006 .....	4.2

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

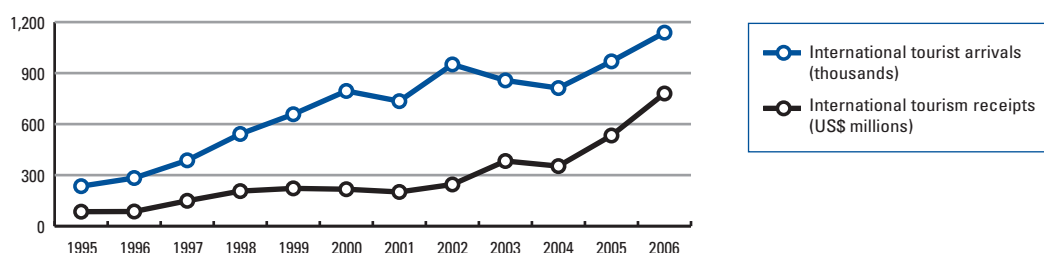
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	3.4	2.7
Employment (1,000 jobs) .....	3.0	2.5

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	8.2	3.0
Employment (1,000 jobs) .....	7.1	2.7

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	1,138
International tourism receipts (US\$ millions), 2006 .....	780



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>97</b>	<b>3.6</b>
<b>T&amp;T regulatory framework</b> .....	<b>85</b>	<b>4.1</b>
Policy rules and regulations .....	45	4.6
Environmental sustainability .....	55	4.6
Safety and security .....	109	4.1
Health and hygiene .....	94	3.4
Prioritization of Travel & Tourism .....	89	3.8
<b>T&amp;T business environment and infrastructure</b> .....	<b>73</b>	<b>3.4</b>
Air transport infrastructure .....	75	2.8
Ground transport infrastructure .....	62	3.8
Tourism infrastructure .....	83	2.7
ICT infrastructure .....	78	2.4
Price competitiveness in the T&T industry .....	32	5.1
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>121</b>	<b>3.2</b>
Human resources .....	64	5.0
Education and training .....	85	4.3
Availability of qualified labor .....	18	5.7
Affinity for Travel & Tourism .....	102	4.4
Natural resources .....	122	2.1
Cultural resources .....	106	1.5

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....57...■	8.01	Hotel rooms* .....98...■
1.02	Property rights .....72...■	8.02	Presence of major car rental companies* .....56...■
1.03	Business impact of rules on FDI .....32...■	8.03	ATMs accepting Visa cards* .....83...■
1.04	Visa requirements* .....13...■		
1.05	Openness of bilateral Air Service Agreements* .....1...■	<b>9th pillar: ICT infrastructure</b>	
1.06	Transparency of government policymaking .....48...■	9.01	Extent of business Internet use .....69...■
1.07	Time required to start a business* .....57...■	9.02	Internet users* .....86...■
1.08	Cost to start a business* .....106...■	9.03	Telephone lines* .....73...■
		9.04	Broadband Internet subscribers* .....72...■
		9.05	Mobile telephone subscribers* .....73...■
<b>2nd pillar: Environmental sustainability</b>			
2.01	Stringency of environmental regulation .....77...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....98...■	10.01	Ticket taxes and airport charges* .....111...■
2.03	Sustainability of T&T industry development .....78...■	10.02	Purchasing power parity* .....58...■
2.04	Carbon dioxide emissions* .....33...■	10.03	Extent and effect of taxation .....25...■
2.05	Particulate matter concentration* .....51...■	10.04	Fuel price levels* .....60...■
2.06	Threatened species* .....16...■	10.05	Hotel price index* .....13...■
2.07	Environmental treaty ratification* .....109...■		
		<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....61...■
3.01	Business costs of terrorism .....116...■	11.02	2ndary education enrollment* .....100...■
3.02	Reliability of police services .....97...■	11.03	Quality of the educational system .....87...■
3.03	Business costs of crime and violence .....130...■	11.04	Local availability of research and training services .....84...■
3.04	Road traffic accidents* .....68...■	11.05	Extent of staff training .....68...■
		11.06	Hiring and firing practices .....28...■
		11.07	Ease of hiring foreign labor .....14...■
		11.08	HIV prevalence* .....93...■
		11.09	Business impact of HIV/AIDS .....97...■
		11.10	Life expectancy* .....73...■
<b>4th pillar: Health and hygiene</b>			
4.01	Physician density* .....78...■	<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
4.02	Access to improved sanitation* .....86...■	12.01	Tourism openness* .....65...■
4.03	Access to improved drinking water* .....85...■	12.02	Attitude of population toward foreign visitors .....101...■
4.04	Hospital beds* .....100...■	12.03	Extension of business trips recommended .....118...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>13th pillar: Natural resources</b>	
5.01	Government prioritization of the T&T industry .....50...■	13.01	Number of World Heritage natural sites* .....70...■
5.02	T&T government expenditure* .....81...■	13.02	Nationally protected areas* .....120...■
5.03	Effectiveness of marketing and branding .....67...■	13.03	Quality of the natural environment .....127...■
5.04	T&T fair attendance* .....93...■	13.04	Total known species* .....47...■
<b>6th pillar: Air transport infrastructure</b>		<b>14th pillar: Cultural resources</b>	
6.01	Quality of air transport infrastructure .....34...■	14.01	Number of World Heritage cultural sites* .....83...■
6.02	Available seat kilometers* .....81...■	14.02	Sports stadiums* .....89...■
6.03	Departures per 1,000 population* .....56...■	14.03	Number of international fairs and exhibitions* .....77...■
6.04	Airport density* .....121...■		
6.05	Number of operating airlines* .....112...■		
6.06	International air transport network .....36...■		
<b>7th pillar: Ground transport infrastructure</b>			
7.01	Quality of roads .....31...■		
7.02	Quality of railroad infrastructure .....107...■		
7.03	Quality of port infrastructure .....81...■		
7.04	Quality of domestic transport network .....25...■		
7.05	Road density* .....44...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Estonia

## Key indicators

Population (millions), 2006 .....	1.3
Surface area (1,000 square kilometers) .....	45.2
Gross domestic product (US\$ billions), 2006 .....	16.6
Gross domestic product (PPP, US\$) per capita, 2006 .....	19,692
Real GDP growth (percent), 2006 .....	11.2

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

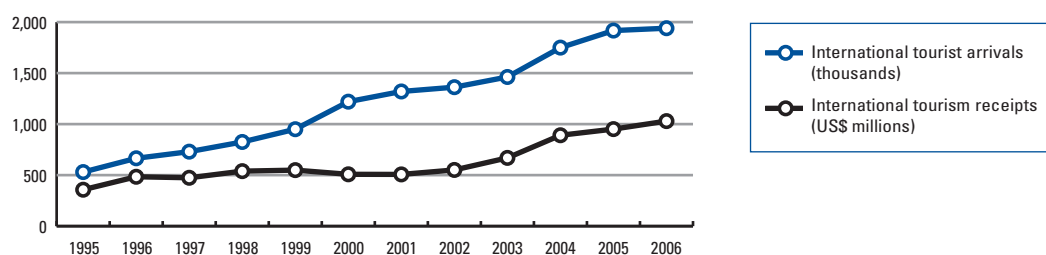
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	3.0	5.0
Employment (1,000 jobs) .....	2.7	-0.6

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	3,328	17.6	5.5
Employment (1,000 jobs) .....	95	15.2	-0.1

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	1,940
International tourism receipts (US\$ millions), 2006 .....	1,029



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>26</b>	<b>4.8</b>
<b>T&amp;T regulatory framework</b> .....	<b>18</b>	<b>5.4</b>
Policy rules and regulations .....	26	5.1
Environmental sustainability .....	43	4.8
Safety and security .....	26	5.7
Health and hygiene .....	20	6.3
Prioritization of Travel & Tourism .....	23	5.1
<b>T&amp;T business environment and infrastructure</b> .....	<b>18</b>	<b>4.9</b>
Air transport infrastructure .....	55	3.3
Ground transport infrastructure .....	25	5.0
Tourism infrastructure .....	11	6.4
ICT infrastructure .....	17	5.1
Price competitiveness in the T&T industry .....	60	4.7
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>49</b>	<b>4.2</b>
Human resources .....	33	5.3
Education and training .....	25	5.4
Availability of qualified labor .....	76	5.2
Affinity for Travel & Tourism .....	18	5.6
Natural resources .....	43	3.8
Cultural resources .....	74	2.2

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	33... <span style="color: #808080;">■</span>	8.01 Hotel rooms* .....	16... <span style="color: #0056b3;">■</span>
1.02 Property rights .....	26... <span style="color: #808080;">■</span>	8.02 Presence of major car rental companies* .....	1... <span style="color: #0056b3;">■</span>
1.03 Business impact of rules on FDI .....	7... <span style="color: #0056b3;">■</span>	8.03 ATMs accepting Visa cards* .....	16... <span style="color: #0056b3;">■</span>
1.04 Visa requirements* .....	46... <span style="color: #808080;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	121... <span style="color: #808080;">■</span>	9.01 Extent of business Internet use .....	2... <span style="color: #0056b3;">■</span>
1.06 Transparency of government policymaking .....	28... <span style="color: #808080;">■</span>	9.02 Internet users* .....	17... <span style="color: #0056b3;">■</span>
1.07 Time required to start a business* .....	9... <span style="color: #0056b3;">■</span>	9.03 Telephone lines* .....	31... <span style="color: #808080;">■</span>
1.08 Cost to start a business* .....	15... <span style="color: #0056b3;">■</span>	9.04 Broadband Internet subscribers* .....	22... <span style="color: #0056b3;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	5... <span style="color: #0056b3;">■</span>
2.01 Stringency of environmental regulation .....	32... <span style="color: #808080;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	30... <span style="color: #808080;">■</span>	10.01 Ticket taxes and airport charges* .....	34... <span style="color: #808080;">■</span>
2.03 Sustainability of T&T industry development .....	52... <span style="color: #808080;">■</span>	10.02 Purchasing power parity* .....	85... <span style="color: #808080;">■</span>
2.04 Carbon dioxide emissions* .....	116... <span style="color: #808080;">■</span>	10.03 Extent and effect of taxation .....	12... <span style="color: #0056b3;">■</span>
2.05 Particulate matter concentration* .....	8... <span style="color: #0056b3;">■</span>	10.04 Fuel price levels* .....	98... <span style="color: #808080;">■</span>
2.06 Threatened species* .....	22... <span style="color: #0056b3;">■</span>	10.05 Hotel price index* .....	68... <span style="color: #808080;">■</span>
2.07 Environmental treaty ratification* .....	88... <span style="color: #808080;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	45... <span style="color: #808080;">■</span>
3.01 Business costs of terrorism .....	27... <span style="color: #808080;">■</span>	11.02 2ndary education enrollment* .....	31... <span style="color: #808080;">■</span>
3.02 Reliability of police services .....	44... <span style="color: #808080;">■</span>	11.03 Quality of the educational system .....	35... <span style="color: #808080;">■</span>
3.03 Business costs of crime and violence .....	36... <span style="color: #808080;">■</span>	11.04 Local availability of research and training services .....	27... <span style="color: #808080;">■</span>
3.04 Road traffic accidents* .....	16... <span style="color: #0056b3;">■</span>	11.05 Extent of staff training .....	30... <span style="color: #808080;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	55... <span style="color: #808080;">■</span>
4.01 Physician density* .....	24... <span style="color: #0056b3;">■</span>	11.07 Ease of hiring foreign labor .....	106... <span style="color: #808080;">■</span>
4.02 Access to improved sanitation* .....	42... <span style="color: #808080;">■</span>	11.08 HIV prevalence* .....	102... <span style="color: #808080;">■</span>
4.03 Access to improved drinking water* .....	1... <span style="color: #0056b3;">■</span>	11.09 Business impact of HIV/AIDS .....	73... <span style="color: #808080;">■</span>
4.04 Hospital beds* .....	28... <span style="color: #808080;">■</span>	11.10 Life expectancy* .....	58... <span style="color: #808080;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	68... <span style="color: #808080;">■</span>	12.01 Tourism openness* .....	18... <span style="color: #0056b3;">■</span>
5.02 T&T government expenditure* .....	14... <span style="color: #0056b3;">■</span>	12.02 Attitude of population toward foreign visitors .....	45... <span style="color: #808080;">■</span>
5.03 Effectiveness of marketing and branding .....	44... <span style="color: #808080;">■</span>	12.03 Extension of business trips recommended .....	16... <span style="color: #0056b3;">■</span>
5.04 T&T fair attendance* .....	45... <span style="color: #808080;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	70... <span style="color: #808080;">■</span>
6.01 Quality of air transport infrastructure .....	53... <span style="color: #808080;">■</span>	13.02 Nationally protected areas* .....	8... <span style="color: #0056b3;">■</span>
6.02 Available seat kilometers* .....	110... <span style="color: #808080;">■</span>	13.03 Quality of the natural environment .....	18... <span style="color: #0056b3;">■</span>
6.03 Departures per 1,000 population* .....	43... <span style="color: #808080;">■</span>	13.04 Total known species* .....	113... <span style="color: #808080;">■</span>
6.04 Airport density* .....	19... <span style="color: #0056b3;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	88... <span style="color: #808080;">■</span>	14.01 Number of World Heritage cultural sites* .....	69... <span style="color: #808080;">■</span>
6.06 International air transport network .....	62... <span style="color: #808080;">■</span>	14.02 Sports stadiums* .....	57... <span style="color: #808080;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	51... <span style="color: #808080;">■</span>
7.01 Quality of roads .....	55... <span style="color: #808080;">■</span>		
7.02 Quality of railroad infrastructure .....	37... <span style="color: #808080;">■</span>		
7.03 Quality of port infrastructure .....	26... <span style="color: #808080;">■</span>		
7.04 Quality of domestic transport network .....	24... <span style="color: #0056b3;">■</span>		
7.05 Road density* .....	22... <span style="color: #0056b3;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Ethiopia

## Key indicators

Population (millions), 2006 .....	79.3
Surface area (1,000 square kilometers) .....	1,104.3
Gross domestic product (US\$ billions), 2006 .....	13.3
Gross domestic product (PPP, US\$) per capita, 2006 .....	1,123
Real GDP growth (percent), 2006 .....	9.0

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

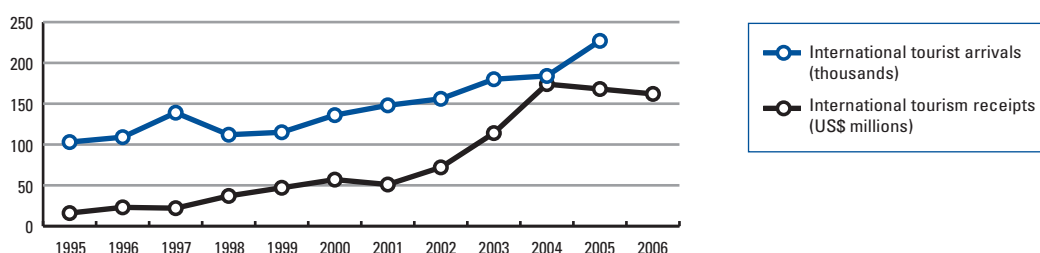
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	703	4.5
Employment (1,000 jobs) .....	672	3.5

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	1,426	9.2	3.5
Employment (1,000 jobs) .....	1,388	7.1	1.0

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2005 .....	227
International tourism receipts (US\$ millions), 2006 .....	162



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>121</b>	<b>3.2</b>
<b>T&amp;T regulatory framework</b> .....	<b>126</b>	<b>3.2</b>
Policy rules and regulations .....	96	3.8
Environmental sustainability .....	114	3.8
Safety and security .....	111	4.0
Health and hygiene .....	130	1.0
Prioritization of Travel & Tourism .....	111	3.4
<b>T&amp;T business environment and infrastructure</b> .....	<b>110</b>	<b>2.7</b>
Air transport infrastructure .....	89	2.6
Ground transport infrastructure .....	106	2.7
Tourism infrastructure .....	117	1.6
ICT infrastructure .....	127	1.4
Price competitiveness in the T&T industry .....	16	5.3
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>92</b>	<b>3.6</b>
Human resources .....	122	3.5
Education and training .....	125	2.8
Availability of qualified labor .....	121	4.3
Affinity for Travel & Tourism .....	107	4.3
Natural resources .....	34	4.1
Cultural resources .....	65	2.4

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....124... <span style="color: #808080;">■</span>	8.01	Hotel rooms* .....118... <span style="color: #808080;">■</span>
1.02	Property rights .....83... <span style="color: #808080;">■</span>	8.02	Presence of major car rental companies* .....103... <span style="color: #808080;">■</span>
1.03	Business impact of rules on FDI .....90... <span style="color: #808080;">■</span>	8.03	ATMs accepting Visa cards* .....123... <span style="color: #808080;">■</span>
1.04	Visa requirements* .....119... <span style="color: #808080;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....55... <span style="color: #808080;">■</span>	9.01	Extent of business Internet use .....108... <span style="color: #808080;">■</span>
1.06	Transparency of government policymaking .....93... <span style="color: #808080;">■</span>	9.02	Internet users* .....130... <span style="color: #808080;">■</span>
1.07	Time required to start a business* .....34... <span style="color: #0056b3;">■</span>	9.03	Telephone lines* .....115... <span style="color: #808080;">■</span>
1.08	Cost to start a business* .....95... <span style="color: #808080;">■</span>	9.04	Broadband Internet subscribers* .....119... <span style="color: #808080;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....130... <span style="color: #808080;">■</span>
2.01	Stringency of environmental regulation .....108... <span style="color: #808080;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....96... <span style="color: #808080;">■</span>	10.01	Ticket taxes and airport charges* .....26... <span style="color: #0056b3;">■</span>
2.03	Sustainability of T&T industry development .....102... <span style="color: #808080;">■</span>	10.02	Purchasing power parity* .....4... <span style="color: #0056b3;">■</span>
2.04	Carbon dioxide emissions* .....5... <span style="color: #0056b3;">■</span>	10.03	Extent and effect of taxation .....50... <span style="color: #0056b3;">■</span>
2.05	Particulate matter concentration* .....95... <span style="color: #808080;">■</span>	10.04	Fuel price levels* .....34... <span style="color: #0056b3;">■</span>
2.06	Threatened species* .....75... <span style="color: #808080;">■</span>	10.05	Hotel price index* .....54... <span style="color: #808080;">■</span>
2.07	Environmental treaty ratification* .....115... <span style="color: #808080;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....121... <span style="color: #808080;">■</span>
3.01	Business costs of terrorism .....68... <span style="color: #808080;">■</span>	11.02	2ndary education enrollment* .....116... <span style="color: #808080;">■</span>
3.02	Reliability of police services .....68... <span style="color: #808080;">■</span>	11.03	Quality of the educational system .....97... <span style="color: #808080;">■</span>
3.03	Business costs of crime and violence .....59... <span style="color: #808080;">■</span>	11.04	Local availability of research and training services .....112... <span style="color: #808080;">■</span>
3.04	Road traffic accidents* .....116... <span style="color: #808080;">■</span>	11.05	Extent of staff training .....122... <span style="color: #808080;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....66... <span style="color: #808080;">■</span>
4.01	Physician density* .....126... <span style="color: #808080;">■</span>	11.07	Ease of hiring foreign labor .....99... <span style="color: #808080;">■</span>
4.02	Access to improved sanitation* .....120... <span style="color: #808080;">■</span>	11.08	HIV prevalence* .....98... <span style="color: #808080;">■</span>
4.03	Access to improved drinking water* .....121... <span style="color: #808080;">■</span>	11.09	Business impact of HIV/AIDS .....119... <span style="color: #808080;">■</span>
4.04	Hospital beds* .....116... <span style="color: #808080;">■</span>	11.10	Life expectancy* .....125... <span style="color: #808080;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....110... <span style="color: #808080;">■</span>	12.01	Tourism openness* .....107... <span style="color: #808080;">■</span>
5.02	T&T government expenditure* .....87... <span style="color: #808080;">■</span>	12.02	Attitude of population toward foreign visitors .....77... <span style="color: #808080;">■</span>
5.03	Effectiveness of marketing and branding .....105... <span style="color: #808080;">■</span>	12.03	Extension of business trips recommended .....102... <span style="color: #808080;">■</span>
5.04	T&T fair attendance* .....76... <span style="color: #808080;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....39... <span style="color: #0056b3;">■</span>
6.01	Quality of air transport infrastructure .....57... <span style="color: #808080;">■</span>	13.02	Nationally protected areas* .....34... <span style="color: #0056b3;">■</span>
6.02	Available seat kilometers* .....69... <span style="color: #808080;">■</span>	13.03	Quality of the natural environment .....69... <span style="color: #808080;">■</span>
6.03	Departures per 1,000 population* .....105... <span style="color: #808080;">■</span>	13.04	Total known species* .....25... <span style="color: #0056b3;">■</span>
6.04	Airport density* .....108... <span style="color: #808080;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....98... <span style="color: #808080;">■</span>	14.01	Number of World Heritage cultural sites* .....23... <span style="color: #0056b3;">■</span>
6.06	International air transport network .....60... <span style="color: #808080;">■</span>	14.02	Sports stadiums* .....126... <span style="color: #808080;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....85... <span style="color: #808080;">■</span>
7.01	Quality of roads .....103... <span style="color: #808080;">■</span>		
7.02	Quality of railroad infrastructure .....109... <span style="color: #808080;">■</span>		
7.03	Quality of port infrastructure .....56... <span style="color: #808080;">■</span>		
7.04	Quality of domestic transport network .....106... <span style="color: #808080;">■</span>		
7.05	Road density* .....108... <span style="color: #808080;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# Finland

## Key indicators

Population (millions), 2006 .....	5.3
Surface area (1,000 square kilometers) .....	338.2
Gross domestic product (US\$ billions), 2006 .....	209.8
Gross domestic product (PPP, US\$) per capita, 2006 .....	35,559
Real GDP growth (percent), 2006 .....	5.0

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

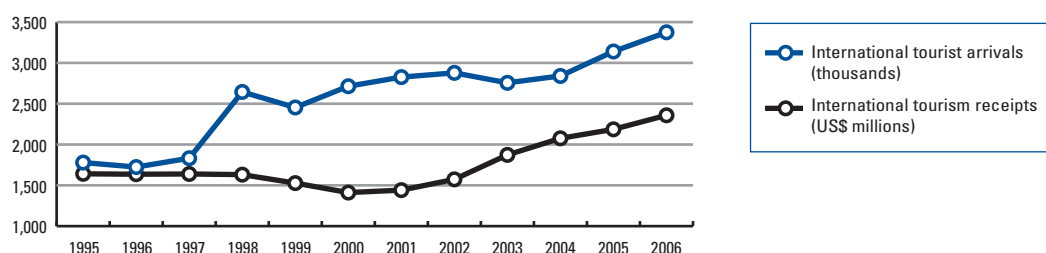
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	7,942	3.4	2.4
Employment (1,000 jobs) .....	88	3.5	0.5

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	23,461	9.9	3.2
Employment (1,000 jobs) .....	268	10.9	1.3

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	3,375
International tourism receipts (US\$ millions), 2006 .....	2,358



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>12</b>	<b>5.1</b>
<b>T&amp;T regulatory framework</b> .....	<b>5</b>	<b>5.7</b>
Policy rules and regulations .....	7	5.5
Environmental sustainability .....	7	5.6
Safety and security .....	1	6.7
Health and hygiene .....	18	6.4
Prioritization of Travel & Tourism .....	49	4.5
<b>T&amp;T business environment and infrastructure</b> .....	<b>23</b>	<b>4.8</b>
Air transport infrastructure .....	18	4.8
Ground transport infrastructure .....	20	5.3
Tourism infrastructure .....	30	4.8
ICT infrastructure .....	16	5.1
Price competitiveness in the T&T industry .....	117	3.9
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>14</b>	<b>4.8</b>
Human resources .....	6	5.9
Education and training .....	2	6.2
Availability of qualified labor .....	24	5.6
Affinity for Travel & Tourism .....	100	4.4
Natural resources .....	57	3.2
Cultural resources .....	13	5.6

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	9... <span style="color: #0056b3;">■</span>	8.01 Hotel rooms* .....	24... <span style="color: #808080;">■</span>
1.02 Property rights .....	7... <span style="color: #0056b3;">■</span>	8.02 Presence of major car rental companies* .....	33... <span style="color: #808080;">■</span>
1.03 Business impact of rules on FDI .....	15... <span style="color: #808080;">■</span>	8.03 ATMs accepting Visa cards* .....	40... <span style="color: #808080;">■</span>
1.04 Visa requirements* .....	30... <span style="color: #808080;">■</span>	<hr/>	
1.05 Openness of bilateral Air Service Agreements* .....	34... <span style="color: #808080;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.06 Transparency of government policymaking .....	3... <span style="color: #0056b3;">■</span>	9.01 Extent of business Internet use .....	13... <span style="color: #808080;">■</span>
1.07 Time required to start a business* .....	28... <span style="color: #808080;">■</span>	9.02 Internet users* .....	19... <span style="color: #808080;">■</span>
1.08 Cost to start a business* .....	12... <span style="color: #808080;">■</span>	9.03 Telephone lines* .....	34... <span style="color: #808080;">■</span>
<hr/>		9.04 Broadband Internet subscribers* .....	7... <span style="color: #0056b3;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	19... <span style="color: #808080;">■</span>
2.01 Stringency of environmental regulation .....	4... <span style="color: #0056b3;">■</span>	<hr/>	
2.02 Enforcement of environmental regulation .....	8... <span style="color: #0056b3;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.03 Sustainability of T&T industry development .....	28... <span style="color: #808080;">■</span>	10.01 Ticket taxes and airport charges* .....	39... <span style="color: #808080;">■</span>
2.04 Carbon dioxide emissions* .....	115... <span style="color: #808080;">■</span>	10.02 Purchasing power parity* .....	119... <span style="color: #808080;">■</span>
2.05 Particulate matter concentration* .....	16... <span style="color: #808080;">■</span>	10.03 Extent and effect of taxation .....	115... <span style="color: #808080;">■</span>
2.06 Threatened species* .....	11... <span style="color: #0056b3;">■</span>	10.04 Fuel price levels* .....	104... <span style="color: #808080;">■</span>
2.07 Environmental treaty ratification* .....	5... <span style="color: #0056b3;">■</span>	10.05 Hotel price index* .....	63... <span style="color: #808080;">■</span>
<hr/>		<hr/>	
<b>3rd pillar: Safety and security</b>		<b>11th pillar: Human resources</b>	
3.01 Business costs of terrorism .....	1... <span style="color: #0056b3;">■</span>	11.01 Primary education enrollment* .....	21... <span style="color: #808080;">■</span>
3.02 Reliability of police services .....	1... <span style="color: #0056b3;">■</span>	11.02 2ndary education enrollment* .....	10... <span style="color: #0056b3;">■</span>
3.03 Business costs of crime and violence .....	2... <span style="color: #0056b3;">■</span>	11.03 Quality of the educational system .....	2... <span style="color: #0056b3;">■</span>
3.04 Road traffic accidents* .....	33... <span style="color: #808080;">■</span>	11.04 Local availability of research and training services .....	9... <span style="color: #0056b3;">■</span>
<hr/>		11.05 Extent of staff training .....	13... <span style="color: #808080;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	94... <span style="color: #808080;">■</span>
4.01 Physician density* .....	37... <span style="color: #808080;">■</span>	11.07 Ease of hiring foreign labor .....	15... <span style="color: #808080;">■</span>
4.02 Access to improved sanitation* .....	1... <span style="color: #0056b3;">■</span>	11.08 HIV prevalence* .....	24... <span style="color: #808080;">■</span>
4.03 Access to improved drinking water* .....	1... <span style="color: #0056b3;">■</span>	11.09 Business impact of HIV/AIDS .....	6... <span style="color: #0056b3;">■</span>
4.04 Hospital beds* .....	17... <span style="color: #808080;">■</span>	11.10 Life expectancy* .....	16... <span style="color: #808080;">■</span>
<hr/>		<hr/>	
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	99... <span style="color: #808080;">■</span>	12.01 Tourism openness* .....	95... <span style="color: #808080;">■</span>
5.02 T&T government expenditure* .....	72... <span style="color: #808080;">■</span>	12.02 Attitude of population toward foreign visitors .....	48... <span style="color: #808080;">■</span>
5.03 Effectiveness of marketing and branding .....	71... <span style="color: #808080;">■</span>	12.03 Extension of business trips recommended .....	109... <span style="color: #808080;">■</span>
5.04 T&T fair attendance* .....	13... <span style="color: #808080;">■</span>	<hr/>	
<hr/>		<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	39... <span style="color: #808080;">■</span>
6.01 Quality of air transport infrastructure .....	8... <span style="color: #0056b3;">■</span>	13.02 Nationally protected areas* .....	70... <span style="color: #808080;">■</span>
6.02 Available seat kilometers* .....	47... <span style="color: #808080;">■</span>	13.03 Quality of the natural environment .....	1... <span style="color: #0056b3;">■</span>
6.03 Departures per 1,000 population* .....	15... <span style="color: #808080;">■</span>	13.04 Total known species* .....	109... <span style="color: #808080;">■</span>
6.04 Airport density* .....	11... <span style="color: #0056b3;">■</span>	<hr/>	
6.05 Number of operating airlines* .....	62... <span style="color: #808080;">■</span>	<b>14th pillar: Cultural resources</b>	
6.06 International air transport network .....	9... <span style="color: #0056b3;">■</span>	14.01 Number of World Heritage cultural sites* .....	30... <span style="color: #808080;">■</span>
<hr/>		14.02 Sports stadiums* .....	12... <span style="color: #808080;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	21... <span style="color: #808080;">■</span>
7.01 Quality of roads .....	18... <span style="color: #808080;">■</span>	<hr/>	
7.02 Quality of railroad infrastructure .....	7... <span style="color: #0056b3;">■</span>		
7.03 Quality of port infrastructure .....	7... <span style="color: #0056b3;">■</span>		
7.04 Quality of domestic transport network .....	2... <span style="color: #0056b3;">■</span>		
7.05 Road density* .....	62... <span style="color: #808080;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# France

## Key indicators

Population (millions), 2006 .....	60.7
Surface area (1,000 square kilometers) .....	551.5
Gross domestic product (US\$ billions), 2006 .....	2,252.2
Gross domestic product (PPP, US\$) per capita, 2006 .....	31,825
Real GDP growth (percent), 2006 .....	2.0

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

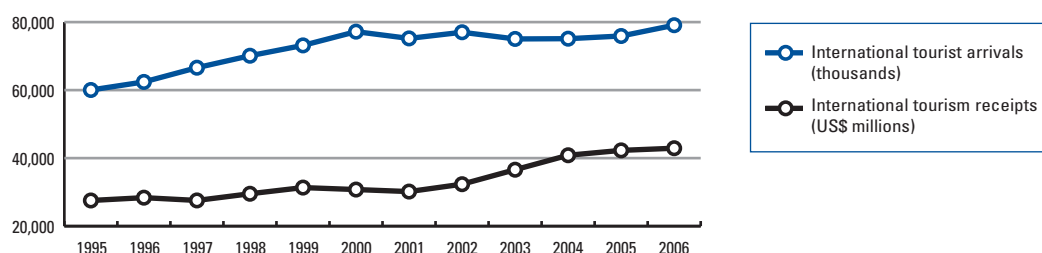
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	4.1	2.4
Employment (1,000 jobs) .....	5.2	1.9

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	10.9	2.8
Employment (1,000 jobs) .....	13.2	2.2

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	79,083
International tourism receipts (US\$ millions), 2006 .....	42,910



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>10</b>	<b>5.2</b>
<b>T&amp;T regulatory framework</b> .....	<b>12</b>	<b>5.6</b>
Policy rules and regulations .....	24	5.2
Environmental sustainability .....	5	5.7
Safety and security .....	54	5.2
Health and hygiene .....	7	6.8
Prioritization of Travel & Tourism .....	29	5.0
<b>T&amp;T business environment and infrastructure</b> .....	<b>7</b>	<b>5.3</b>
Air transport infrastructure .....	6	5.5
Ground transport infrastructure .....	4	6.6
Tourism infrastructure .....	15	6.2
ICT infrastructure .....	19	4.9
Price competitiveness in the T&T industry .....	130	3.3
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>12</b>	<b>4.8</b>
Human resources .....	25	5.5
Education and training .....	18	5.8
Availability of qualified labor .....	86	5.2
Affinity for Travel & Tourism .....	85	4.6
Natural resources .....	47	3.6
Cultural resources .....	10	5.7

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....49... <span style="color: #808080;">■</span>	8.01	Hotel rooms* .....26... <span style="color: #808080;">■</span>
1.02	Property rights .....17... <span style="color: #808080;">■</span>	8.02	Presence of major car rental companies* .....1... <span style="color: #0056b3;">■</span>
1.03	Business impact of rules on FDI .....52... <span style="color: #808080;">■</span>	8.03	ATMs accepting Visa cards* .....9... <span style="color: #0056b3;">■</span>
1.04	Visa requirements* .....30... <span style="color: #808080;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....71... <span style="color: #808080;">■</span>	9.01	Extent of business Internet use .....23... <span style="color: #808080;">■</span>
1.06	Transparency of government policymaking .....26... <span style="color: #808080;">■</span>	9.02	Internet users* .....23... <span style="color: #808080;">■</span>
1.07	Time required to start a business* .....9... <span style="color: #0056b3;">■</span>	9.03	Telephone lines* .....11... <span style="color: #808080;">■</span>
1.08	Cost to start a business* .....13... <span style="color: #808080;">■</span>	9.04	Broadband Internet subscribers* .....12... <span style="color: #808080;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....43... <span style="color: #808080;">■</span>
2.01	Stringency of environmental regulation .....15... <span style="color: #808080;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....16... <span style="color: #808080;">■</span>	10.01	Ticket taxes and airport charges* .....103... <span style="color: #808080;">■</span>
2.03	Sustainability of T&T industry development .....20... <span style="color: #808080;">■</span>	10.02	Purchasing power parity* .....118... <span style="color: #808080;">■</span>
2.04	Carbon dioxide emissions* .....84... <span style="color: #808080;">■</span>	10.03	Extent and effect of taxation .....95... <span style="color: #808080;">■</span>
2.05	Particulate matter concentration* .....5... <span style="color: #0056b3;">■</span>	10.04	Fuel price levels* .....114... <span style="color: #808080;">■</span>
2.06	Threatened species* .....52... <span style="color: #808080;">■</span>	10.05	Hotel price index* .....110... <span style="color: #808080;">■</span>
2.07	Environmental treaty ratification* .....1... <span style="color: #0056b3;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....14... <span style="color: #808080;">■</span>
3.01	Business costs of terrorism .....74... <span style="color: #808080;">■</span>	11.02	2ndary education enrollment* .....9... <span style="color: #0056b3;">■</span>
3.02	Reliability of police services .....16... <span style="color: #808080;">■</span>	11.03	Quality of the educational system .....27... <span style="color: #808080;">■</span>
3.03	Business costs of crime and violence .....52... <span style="color: #808080;">■</span>	11.04	Local availability of research and training services .....12... <span style="color: #808080;">■</span>
3.04	Road traffic accidents* .....107... <span style="color: #808080;">■</span>	11.05	Extent of staff training .....24... <span style="color: #808080;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....126... <span style="color: #808080;">■</span>
4.01	Physician density* .....18... <span style="color: #808080;">■</span>	11.07	Ease of hiring foreign labor .....83... <span style="color: #808080;">■</span>
4.02	Access to improved sanitation* .....1... <span style="color: #0056b3;">■</span>	11.08	HIV prevalence* .....72... <span style="color: #808080;">■</span>
4.03	Access to improved drinking water* .....1... <span style="color: #0056b3;">■</span>	11.09	Business impact of HIV/AIDS .....51... <span style="color: #808080;">■</span>
4.04	Hospital beds* .....12... <span style="color: #808080;">■</span>	11.10	Life expectancy* .....8... <span style="color: #0056b3;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....43... <span style="color: #808080;">■</span>	12.01	Tourism openness* .....86... <span style="color: #808080;">■</span>
5.02	T&T government expenditure* .....71... <span style="color: #808080;">■</span>	12.02	Attitude of population toward foreign visitors .....119... <span style="color: #808080;">■</span>
5.03	Effectiveness of marketing and branding .....26... <span style="color: #808080;">■</span>	12.03	Extension of business trips recommended .....12... <span style="color: #808080;">■</span>
5.04	T&T fair attendance* .....13... <span style="color: #808080;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....21... <span style="color: #808080;">■</span>
6.01	Quality of air transport infrastructure .....5... <span style="color: #0056b3;">■</span>	13.02	Nationally protected areas* .....52... <span style="color: #808080;">■</span>
6.02	Available seat kilometers* .....6... <span style="color: #0056b3;">■</span>	13.03	Quality of the natural environment .....37... <span style="color: #808080;">■</span>
6.03	Departures per 1,000 population* .....29... <span style="color: #808080;">■</span>	13.04	Total known species* .....62... <span style="color: #808080;">■</span>
6.04	Airport density* .....46... <span style="color: #808080;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....3... <span style="color: #0056b3;">■</span>	14.01	Number of World Heritage cultural sites* .....4... <span style="color: #0056b3;">■</span>
6.06	International air transport network .....6... <span style="color: #0056b3;">■</span>	14.02	Sports stadiums* .....47... <span style="color: #808080;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....5... <span style="color: #0056b3;">■</span>
7.01	Quality of roads .....1... <span style="color: #0056b3;">■</span>		
7.02	Quality of railroad infrastructure .....3... <span style="color: #0056b3;">■</span>		
7.03	Quality of port infrastructure .....10... <span style="color: #0056b3;">■</span>		
7.04	Quality of domestic transport network .....10... <span style="color: #0056b3;">■</span>		
7.05	Road density* .....12... <span style="color: #808080;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Gambia, The

## Key indicators

Population (millions), 2006 .....	1.6
Surface area (1,000 square kilometers) .....	11.3
Gross domestic product (US\$ billions), 2006 .....	0.3
Gross domestic product (PPP, US\$) per capita, 2006 .....	2,245
Real GDP growth (percent), 2006 .....	6.5

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

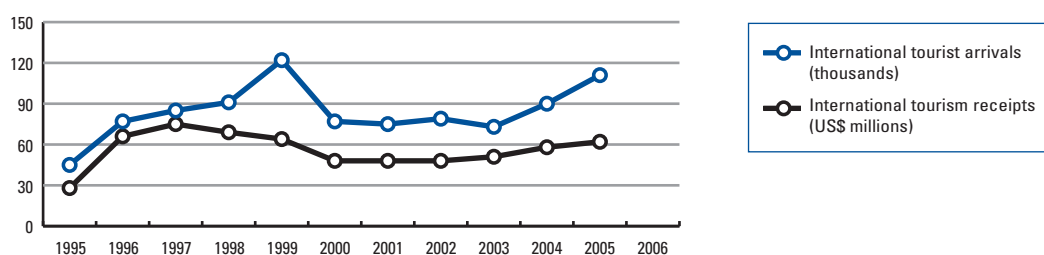
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	45	8.1
Employment (1,000 jobs) .....	38	6.4

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	98	17.6	3.5
Employment (1,000 jobs) .....	85	14.2	2.2

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2005 .....	111
International tourism receipts (US\$ millions), 2005 .....	62



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>84</b>	<b>3.7</b>
<b>T&amp;T regulatory framework</b> .....	<b>67</b>	<b>4.4</b>
Policy rules and regulations .....	93	3.9
Environmental sustainability .....	59	4.6
Safety and security .....	38	5.6
Health and hygiene .....	107	2.7
Prioritization of Travel & Tourism .....	22	5.2
<b>T&amp;T business environment and infrastructure</b> .....	<b>87</b>	<b>3.1</b>
Air transport infrastructure .....	90	2.6
Ground transport infrastructure .....	64	3.8
Tourism infrastructure .....	102	2.1
ICT infrastructure .....	107	1.8
Price competitiveness in the T&T industry .....	18	5.3
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>97</b>	<b>3.5</b>
Human resources .....	104	4.4
Education and training .....	108	3.7
Availability of qualified labor .....	102	5.0
Affinity for Travel & Tourism .....	19	5.6
Natural resources .....	95	2.7
Cultural resources .....	104	1.5

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....26...■	8.01	Hotel rooms* .....75...■
1.02	Property rights .....73...■	8.02	Presence of major car rental companies* .....89...■
1.03	Business impact of rules on FDI .....29...■	8.03	ATMs accepting Visa cards* .....124...■
1.04	Visa requirements* .....74...■	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....75...■	9.01	Extent of business Internet use .....87...■
1.06	Transparency of government policymaking .....38...■	9.02	Internet users* .....110...■
1.07	Time required to start a business* .....76...■	9.03	Telephone lines* .....107...■
1.08	Cost to start a business* .....124...■	9.04	Broadband Internet subscribers* .....112...■
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....98...■
2.01	Stringency of environmental regulation .....55...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....42...■	10.01	Ticket taxes and airport charges* .....102...■
2.03	Sustainability of T&T industry development .....11...■	10.02	Purchasing power parity* .....2...■
2.04	Carbon dioxide emissions* .....12...■	10.03	Extent and effect of taxation .....39...■
2.05	Particulate matter concentration* .....103...■	10.04	Fuel price levels* .....80...■
2.06	Threatened species* .....17...■	10.05	Hotel price index* .....1...■
2.07	Environmental treaty ratification* .....88...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....113...■
3.01	Business costs of terrorism .....31...■	11.02	2ndary education enrollment* .....107...■
3.02	Reliability of police services .....58...■	11.03	Quality of the educational system .....51...■
3.03	Business costs of crime and violence .....47...■	11.04	Local availability of research and training services .....109...■
3.04	Road traffic accidents* .....29...■	11.05	Extent of staff training .....78...■
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....39...■
4.01	Physician density* .....116...■	11.07	Ease of hiring foreign labor .....43...■
4.02	Access to improved sanitation* .....95...■	11.08	HIV prevalence* .....113...■
4.03	Access to improved drinking water* .....89...■	11.09	Business impact of HIV/AIDS .....101...■
4.04	Hospital beds* .....104...■	11.10	Life expectancy* .....108...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....10...■	12.01	Tourism openness* .....14...■
5.02	T&T government expenditure* .....9...■	12.02	Attitude of population toward foreign visitors .....34...■
5.03	Effectiveness of marketing and branding .....14...■	12.03	Extension of business trips recommended .....96...■
5.04	T&T fair attendance* .....111...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....70...■
6.01	Quality of air transport infrastructure .....74...■	13.02	Nationally protected areas* .....92...■
6.02	Available seat kilometers* .....127...■	13.03	Quality of the natural environment .....45...■
6.03	Departures per 1,000 population* .....n/a.....	13.04	Total known species* .....54...■
6.04	Airport density* .....72...■	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....120...■	14.01	Number of World Heritage cultural sites* .....69...■
6.06	International air transport network .....95...■	14.02	Sports stadiums* .....105...■
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....99...■
7.01	Quality of roads .....63...■		
7.02	Quality of railroad infrastructure .....n/a.....		
7.03	Quality of port infrastructure .....58...■		
7.04	Quality of domestic transport network .....88...■		
7.05	Road density* .....49...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Georgia

## Key indicators

Population (millions), 2006 .....	4.4
Surface area (1,000 square kilometers) .....	69.7
Gross domestic product (US\$ billions), 2006 .....	7.8
Gross domestic product (PPP, US\$) per capita, 2006 .....	3,642
Real GDP growth (percent), 2006 .....	9.4

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

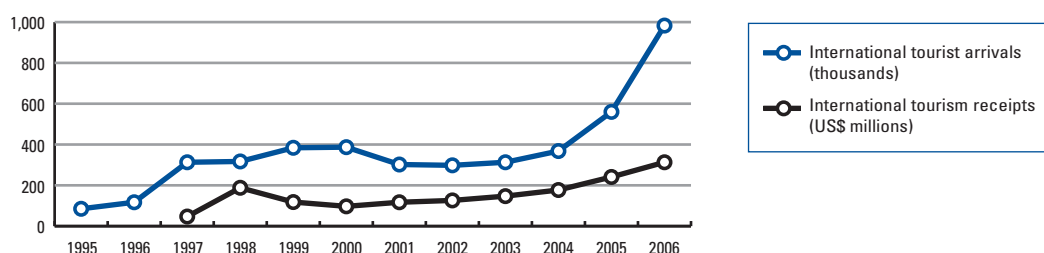
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	n/a	n/a
Employment (1,000 jobs) .....	n/a	n/a

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	n/a	n/a
Employment (1,000 jobs) .....	n/a	n/a

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	983
International tourism receipts (US\$ millions), 2006 .....	313



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>72</b>	<b>3.8</b>
<b>T&amp;T regulatory framework</b> .....	<b>46</b>	<b>4.8</b>
Policy rules and regulations .....	68	4.2
Environmental sustainability .....	54	4.6
Safety and security .....	37	5.6
Health and hygiene .....	42	5.6
Prioritization of Travel & Tourism .....	72	4.2
<b>T&amp;T business environment and infrastructure</b> .....	<b>94</b>	<b>3.0</b>
Air transport infrastructure .....	105	2.3
Ground transport infrastructure .....	76	3.4
Tourism infrastructure .....	90	2.4
ICT infrastructure .....	90	2.1
Price competitiveness in the T&T industry .....	78	4.5
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>85</b>	<b>3.7</b>
Human resources .....	47	5.1
Education and training .....	84	4.3
Availability of qualified labor .....	10	5.9
Affinity for Travel & Tourism .....	37	5.1
Natural resources .....	116	2.2
Cultural resources .....	71	2.4

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....79...■	8.01	Hotel rooms* .....72...■
1.02	Property rights .....117...■	8.02	Presence of major car rental companies* .....89...■
1.03	Business impact of rules on FDI .....89...■	8.03	ATMs accepting Visa cards* .....76...■
1.04	Visa requirements* .....70...■	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....114...■	9.01	Extent of business Internet use .....97...■
1.06	Transparency of government policymaking .....96...■	9.02	Internet users* .....93...■
1.07	Time required to start a business* .....19...■	9.03	Telephone lines* .....79...■
1.08	Cost to start a business* .....54...■	9.04	Broadband Internet subscribers* .....73...■
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....87...■
2.01	Stringency of environmental regulation .....59...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....56...■	10.01	Ticket taxes and airport charges* .....97...■
2.03	Sustainability of T&T industry development .....86...■	10.02	Purchasing power parity* .....60...■
2.04	Carbon dioxide emissions* .....24...■	10.03	Extent and effect of taxation .....31...■
2.05	Particulate matter concentration* .....69...■	10.04	Fuel price levels* .....73...■
2.06	Threatened species* .....79...■	10.05	Hotel price index* .....104...■
2.07	Environmental treaty ratification* .....72...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....59...■
3.01	Business costs of terrorism .....41...■	11.02	2ndary education enrollment* .....76...■
3.02	Reliability of police services .....45...■	11.03	Quality of the educational system .....93...■
3.03	Business costs of crime and violence .....51...■	11.04	Local availability of research and training services .....116...■
3.04	Road traffic accidents* .....22...■	11.05	Extent of staff training .....88...■
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....14...■
4.01	Physician density* .....4...■	11.07	Ease of hiring foreign labor .....5...■
4.02	Access to improved sanitation* .....47...■	11.08	HIV prevalence* .....49...■
4.03	Access to improved drinking water* .....89...■	11.09	Business impact of HIV/AIDS .....40...■
4.04	Hospital beds* .....48...■	11.10	Life expectancy* .....73...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....60...■	12.01	Tourism openness* .....42...■
5.02	T&T government expenditure* .....n/a.....	12.02	Attitude of population toward foreign visitors .....62...■
5.03	Effectiveness of marketing and branding .....99...■	12.03	Extension of business trips recommended .....28...■
5.04	T&T fair attendance* .....76...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....70...■
6.01	Quality of air transport infrastructure .....99...■	13.02	Nationally protected areas* .....93...■
6.02	Available seat kilometers* .....113...■	13.03	Quality of the natural environment .....97...■
6.03	Departures per 1,000 population* .....88...■	13.04	Total known species* .....98...■
6.04	Airport density* .....64...■	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....85...■	14.01	Number of World Heritage cultural sites* .....54...■
6.06	International air transport network .....94...■	14.02	Sports stadiums* .....44...■
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....119...■
7.01	Quality of roads .....76...■		
7.02	Quality of railroad infrastructure .....47...■		
7.03	Quality of port infrastructure .....77...■		
7.04	Quality of domestic transport network .....86...■		
7.05	Road density* .....59...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# Germany

## Key indicators

Population (millions), 2006 .....	82.7
Surface area (1,000 square kilometers) .....	357.0
Gross domestic product (US\$ billions), 2006 .....	2,915.9
Gross domestic product (PPP, US\$) per capita, 2006 .....	31,390
Real GDP growth (percent), 2006 .....	2.9

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

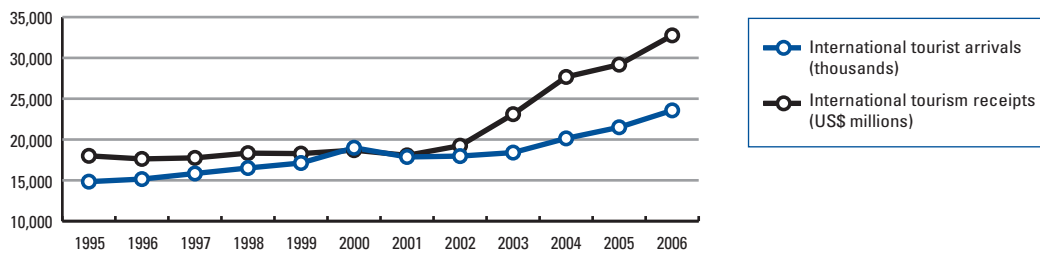
	Percent of total	2008-2017 annual growth (% forecast)
GDP (US\$ millions) .....	92,061	2.9
Employment (1,000 jobs) .....	1,254	3.2

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	319,807	10.0	2.9
Employment (1,000 jobs) .....	4,261	10.8	1.5

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	23,569
International tourism receipts (US\$ millions), 2006 .....	32,760



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1-7 scale)
<b>2008 Index</b> .....	<b>3</b>	<b>5.4</b>
<b>T&amp;T regulatory framework</b> .....	<b>6</b>	<b>5.7</b>
Policy rules and regulations .....	6	5.5
Environmental sustainability .....	4	5.8
Safety and security .....	17	5.9
Health and hygiene .....	4	6.8
Prioritization of Travel & Tourism .....	57	4.4
<b>T&amp;T business environment and infrastructure</b> .....	<b>3</b>	<b>5.4</b>
Air transport infrastructure .....	7	5.5
Ground transport infrastructure .....	3	6.6
Tourism infrastructure .....	18	6.0
ICT infrastructure .....	15	5.2
Price competitiveness in the T&T industry .....	113	3.9
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>9</b>	<b>5.1</b>
Human resources .....	24	5.5
Education and training .....	20	5.8
Availability of qualified labor .....	78	5.2
Affinity for Travel & Tourism .....	72	4.7
Natural resources .....	30	4.3
Cultural resources .....	6	6.0

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	7 ■	8.01 Hotel rooms* .....	23 ■
1.02 Property rights .....	1 ■	8.02 Presence of major car rental companies* .....	1 ■
1.03 Business impact of rules on FDI .....	20 ■	8.03 ATMs accepting Visa cards* .....	18 ■
1.04 Visa requirements* .....	28 ■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	15 ■	9.01 Extent of business Internet use .....	5 ■
1.06 Transparency of government policymaking .....	9 ■	9.02 Internet users* .....	24 ■
1.07 Time required to start a business* .....	39 ■	9.03 Telephone lines* .....	2 ■
1.08 Cost to start a business* .....	36 ■	9.04 Broadband Internet subscribers* .....	23 ■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	28 ■
2.01 Stringency of environmental regulation .....	1 ■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	2 ■	10.01 Ticket taxes and airport charges* .....	47 ■
2.03 Sustainability of T&T industry development .....	29 ■	10.02 Purchasing power parity* .....	116 ■
2.04 Carbon dioxide emissions* .....	103 ■	10.03 Extent and effect of taxation .....	85 ■
2.05 Particulate matter concentration* .....	16 ■	10.04 Fuel price levels* .....	120 ■
2.06 Threatened species* .....	30 ■	10.05 Hotel price index* .....	56 ■
2.07 Environmental treaty ratification* .....	5 ■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	99 ■
3.01 Business costs of terrorism .....	47 ■	11.02 2ndary education enrollment* .....	24 ■
3.02 Reliability of police services .....	3 ■	11.03 Quality of the educational system .....	22 ■
3.03 Business costs of crime and violence .....	7 ■	11.04 Local availability of research and training services .....	3 ■
3.04 Road traffic accidents* .....	103 ■	11.05 Extent of staff training .....	9 ■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	125 ■
4.01 Physician density* .....	16 ■	11.07 Ease of hiring foreign labor .....	57 ■
4.02 Access to improved sanitation* .....	1 ■	11.08 HIV prevalence* .....	24 ■
4.03 Access to improved drinking water* .....	1 ■	11.09 Business impact of HIV/AIDS .....	11 ■
4.04 Hospital beds* .....	4 ■	11.10 Life expectancy* .....	16 ■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	104 ■	12.01 Tourism openness* .....	80 ■
5.02 T&T government expenditure* .....	97 ■	12.02 Attitude of population toward foreign visitors .....	41 ■
5.03 Effectiveness of marketing and branding .....	60 ■	12.03 Extension of business trips recommended .....	62 ■
5.04 T&T fair attendance* .....	13 ■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	39 ■
6.01 Quality of air transport infrastructure .....	3 ■	13.02 Nationally protected areas* .....	11 ■
6.02 Available seat kilometers* .....	5 ■	13.03 Quality of the natural environment .....	16 ■
6.03 Departures per 1,000 population* .....	27 ■	13.04 Total known species* .....	76 ■
6.04 Airport density* .....	86 ■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	4 ■	14.01 Number of World Heritage cultural sites* .....	3 ■
6.06 International air transport network .....	1 ■	14.02 Sports stadiums* .....	28 ■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	2 ■
7.01 Quality of roads .....	4 ■		
7.02 Quality of railroad infrastructure .....	4 ■		
7.03 Quality of port infrastructure .....	4 ■		
7.04 Quality of domestic transport network .....	3 ■		
7.05 Road density* .....	n/a .....		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Greece

## Key indicators

Population (millions), 2006 .....	11.1
Surface area (1,000 square kilometers) .....	132.0
Gross domestic product (US\$ billions), 2006 .....	308.7
Gross domestic product (PPP, US\$) per capita, 2006 .....	33,004
Real GDP growth (percent), 2006 .....	4.3

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

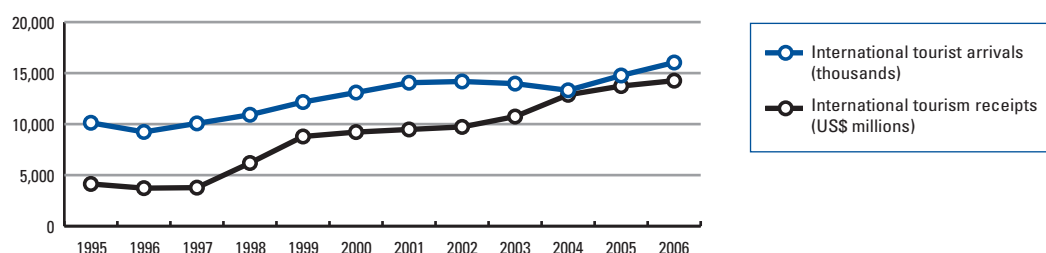
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	7.4	3.9
Employment (1,000 jobs) .....	10.3	3.0

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	16.5	4.0
Employment (1,000 jobs) .....	20.0	3.4

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	16,039
International tourism receipts (US\$ millions), 2006 .....	14,259



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>22</b>	<b>4.9</b>
<b>T&amp;T regulatory framework</b> .....	<b>17</b>	<b>5.5</b>
Policy rules and regulations .....	61	4.4
Environmental sustainability .....	40	4.9
Safety and security .....	31	5.7
Health and hygiene .....	16	6.4
Prioritization of Travel & Tourism .....	1	6.0
<b>T&amp;T business environment and infrastructure</b> .....	<b>30</b>	<b>4.6</b>
Air transport infrastructure .....	20	4.6
Ground transport infrastructure .....	46	4.4
Tourism infrastructure .....	9	6.7
ICT infrastructure .....	39	3.6
Price competitiveness in the T&T industry .....	120	3.8
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>18</b>	<b>4.7</b>
Human resources .....	43	5.1
Education and training .....	45	4.9
Availability of qualified labor .....	62	5.3
Affinity for Travel & Tourism .....	39	5.1
Natural resources .....	75	3.0
Cultural resources .....	16	5.4

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....51... <span style="color: #808080;">■</span>	8.01	Hotel rooms* .....4... <span style="color: #0056b3;">■</span>
1.02	Property rights .....46... <span style="color: #808080;">■</span>	8.02	Presence of major car rental companies* .....1... <span style="color: #0056b3;">■</span>
1.03	Business impact of rules on FDI .....94... <span style="color: #808080;">■</span>	8.03	ATMs accepting Visa cards* .....20... <span style="color: #0056b3;">■</span>
1.04	Visa requirements* .....30... <span style="color: #808080;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....50... <span style="color: #808080;">■</span>	9.01	Extent of business Internet use .....99... <span style="color: #808080;">■</span>
1.06	Transparency of government policymaking .....74... <span style="color: #808080;">■</span>	9.02	Internet users* .....60... <span style="color: #808080;">■</span>
1.07	Time required to start a business* .....89... <span style="color: #808080;">■</span>	9.03	Telephone lines* .....12... <span style="color: #0056b3;">■</span>
1.08	Cost to start a business* .....82... <span style="color: #808080;">■</span>	9.04	Broadband Internet subscribers* .....47... <span style="color: #808080;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....29... <span style="color: #808080;">■</span>
2.01	Stringency of environmental regulation .....51... <span style="color: #808080;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....62... <span style="color: #808080;">■</span>	10.01	Ticket taxes and airport charges* .....98... <span style="color: #808080;">■</span>
2.03	Sustainability of T&T industry development .....35... <span style="color: #808080;">■</span>	10.02	Purchasing power parity* .....109... <span style="color: #808080;">■</span>
2.04	Carbon dioxide emissions* .....95... <span style="color: #808080;">■</span>	10.03	Extent and effect of taxation .....74... <span style="color: #808080;">■</span>
2.05	Particulate matter concentration* .....64... <span style="color: #808080;">■</span>	10.04	Fuel price levels* .....94... <span style="color: #808080;">■</span>
2.06	Threatened species* .....72... <span style="color: #808080;">■</span>	10.05	Hotel price index* .....90... <span style="color: #808080;">■</span>
2.07	Environmental treaty ratification* .....1... <span style="color: #0056b3;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....8... <span style="color: #0056b3;">■</span>
3.01	Business costs of terrorism .....36... <span style="color: #808080;">■</span>	11.02	2ndary education enrollment* .....38... <span style="color: #808080;">■</span>
3.02	Reliability of police services .....43... <span style="color: #808080;">■</span>	11.03	Quality of the educational system .....83... <span style="color: #808080;">■</span>
3.03	Business costs of crime and violence .....20... <span style="color: #0056b3;">■</span>	11.04	Local availability of research and training services .....75... <span style="color: #808080;">■</span>
3.04	Road traffic accidents* .....72... <span style="color: #808080;">■</span>	11.05	Extent of staff training .....55... <span style="color: #808080;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....116... <span style="color: #808080;">■</span>
4.01	Physician density* .....1... <span style="color: #0056b3;">■</span>	11.07	Ease of hiring foreign labor .....64... <span style="color: #808080;">■</span>
4.02	Access to improved sanitation* .....1... <span style="color: #0056b3;">■</span>	11.08	HIV prevalence* .....49... <span style="color: #808080;">■</span>
4.03	Access to improved drinking water* .....1... <span style="color: #0056b3;">■</span>	11.09	Business impact of HIV/AIDS .....14... <span style="color: #0056b3;">■</span>
4.04	Hospital beds* .....39... <span style="color: #808080;">■</span>	11.10	Life expectancy* .....16... <span style="color: #0056b3;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....19... <span style="color: #0056b3;">■</span>	12.01	Tourism openness* .....53... <span style="color: #808080;">■</span>
5.02	T&T government expenditure* .....13... <span style="color: #0056b3;">■</span>	12.02	Attitude of population toward foreign visitors .....17... <span style="color: #0056b3;">■</span>
5.03	Effectiveness of marketing and branding .....35... <span style="color: #808080;">■</span>	12.03	Extension of business trips recommended .....25... <span style="color: #808080;">■</span>
5.04	T&T fair attendance* .....5... <span style="color: #0056b3;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....21... <span style="color: #0056b3;">■</span>
6.01	Quality of air transport infrastructure .....35... <span style="color: #808080;">■</span>	13.02	Nationally protected areas* .....104... <span style="color: #808080;">■</span>
6.02	Available seat kilometers* .....32... <span style="color: #808080;">■</span>	13.03	Quality of the natural environment .....55... <span style="color: #808080;">■</span>
6.03	Departures per 1,000 population* .....31... <span style="color: #808080;">■</span>	13.04	Total known species* .....71... <span style="color: #808080;">■</span>
6.04	Airport density* .....16... <span style="color: #0056b3;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....16... <span style="color: #0056b3;">■</span>	14.01	Number of World Heritage cultural sites* .....9... <span style="color: #0056b3;">■</span>
6.06	International air transport network .....45... <span style="color: #808080;">■</span>	14.02	Sports stadiums* .....33... <span style="color: #808080;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....20... <span style="color: #0056b3;">■</span>
7.01	Quality of roads .....46... <span style="color: #808080;">■</span>		
7.02	Quality of railroad infrastructure .....48... <span style="color: #808080;">■</span>		
7.03	Quality of port infrastructure .....49... <span style="color: #808080;">■</span>		
7.04	Quality of domestic transport network .....56... <span style="color: #808080;">■</span>		
7.05	Road density* .....30... <span style="color: #808080;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Guatemala

## Key indicators

Population (millions), 2006 .....	12.9
Surface area (1,000 square kilometers) .....	108.9
Gross domestic product (US\$ billions), 2006 .....	30.3
Gross domestic product (PPP, US\$) per capita, 2006 .....	4,335
Real GDP growth (percent), 2006 .....	4.9

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

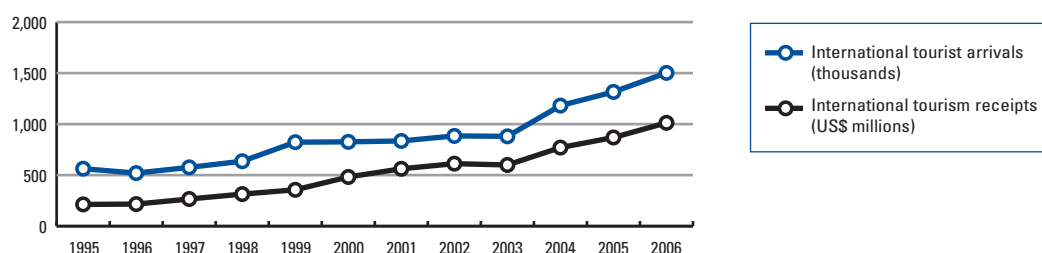
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	1,220	3.2	3.0
Employment (1,000 jobs) .....	116	2.8	2.5

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	2,732	7.2	3.3
Employment (1,000 jobs) .....	257	6.3	2.7

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	1,502
International tourism receipts (US\$ millions), 2006 .....	1,013



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>68</b>	<b>3.9</b>
<b>T&amp;T regulatory framework</b> .....	<b>76</b>	<b>4.3</b>
Policy rules and regulations .....	41	4.7
Environmental sustainability .....	95	4.1
Safety and security .....	110	4.0
Health and hygiene .....	83	4.0
Prioritization of Travel & Tourism .....	53	4.4
<b>T&amp;T business environment and infrastructure</b> .....	<b>77</b>	<b>3.3</b>
Air transport infrastructure .....	76	2.8
Ground transport infrastructure .....	81	3.3
Tourism infrastructure .....	82	2.8
ICT infrastructure .....	74	2.5
Price competitiveness in the T&T industry .....	23	5.2
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>55</b>	<b>4.1</b>
Human resources .....	91	4.8
Education and training .....	94	4.2
Availability of qualified labor .....	48	5.4
Affinity for Travel & Tourism .....	48	5.0
Natural resources .....	19	4.7
Cultural resources .....	81	2.1

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....41...■	8.01	Hotel rooms* .....81...■
1.02	Property rights .....85...■	8.02	Presence of major car rental companies* .....56...■
1.03	Business impact of rules on FDI .....65...■	8.03	ATMs accepting Visa cards* .....86...■
1.04	Visa requirements* .....16...■	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....3...■	9.01	Extent of business Internet use .....38...■
1.06	Transparency of government policymaking .....71...■	9.02	Internet users* .....82...■
1.07	Time required to start a business* .....57...■	9.03	Telephone lines* .....86...■
1.08	Cost to start a business* .....100...■	9.04	Broadband Internet subscribers* .....86...■
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....72...■
2.01	Stringency of environmental regulation .....90...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....101...■	10.01	Ticket taxes and airport charges* .....45...■
2.03	Sustainability of T&T industry development .....76...■	10.02	Purchasing power parity* .....73...■
2.04	Carbon dioxide emissions* .....27...■	10.03	Extent and effect of taxation .....44...■
2.05	Particulate matter concentration* .....85...■	10.04	Fuel price levels* .....36...■
2.06	Threatened species* .....111...■	10.05	Hotel price index* .....11...■
2.07	Environmental treaty ratification* .....72...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....53...■
3.01	Business costs of terrorism .....98...■	11.02	2ndary education enrollment* .....104...■
3.02	Reliability of police services .....126...■	11.03	Quality of the educational system .....114...■
3.03	Business costs of crime and violence .....127...■	11.04	Local availability of research and training services .....53...■
3.04	Road traffic accidents* .....47...■	11.05	Extent of staff training .....62...■
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....42...■
4.01	Physician density* .....88...■	11.07	Ease of hiring foreign labor .....48...■
4.02	Access to improved sanitation* .....64...■	11.08	HIV prevalence* .....93...■
4.03	Access to improved drinking water* .....55...■	11.09	Business impact of HIV/AIDS .....82...■
4.04	Hospital beds* .....105...■	11.10	Life expectancy* .....91...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....54...■	12.01	Tourism openness* .....48...■
5.02	T&T government expenditure* .....38...■	12.02	Attitude of population toward foreign visitors .....90...■
5.03	Effectiveness of marketing and branding .....65...■	12.03	Extension of business trips recommended .....34...■
5.04	T&T fair attendance* .....56...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....39...■
6.01	Quality of air transport infrastructure .....67...■	13.02	Nationally protected areas* .....9...■
6.02	Available seat kilometers* .....86...■	13.03	Quality of the natural environment .....65...■
6.03	Departures per 1,000 population* .....n/a.....	13.04	Total known species* .....28...■
6.04	Airport density* .....118...■	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....88...■	14.01	Number of World Heritage cultural sites* .....54...■
6.06	International air transport network .....55...■	14.02	Sports stadiums* .....76...■
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....68...■
7.01	Quality of roads .....56...■		
7.02	Quality of railroad infrastructure .....110...■		
7.03	Quality of port infrastructure .....73...■		
7.04	Quality of domestic transport network .....28...■		
7.05	Road density* .....80...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Guyana

## Key indicators

Population (millions), 2006 .....	0.7
Surface area (1,000 square kilometers) .....	215.0
Gross domestic product (US\$ billions), 2006 .....	0.9
Gross domestic product (PPP, US\$) per capita, 2006 .....	5,004
Real GDP growth (percent), 2006 .....	5.1

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

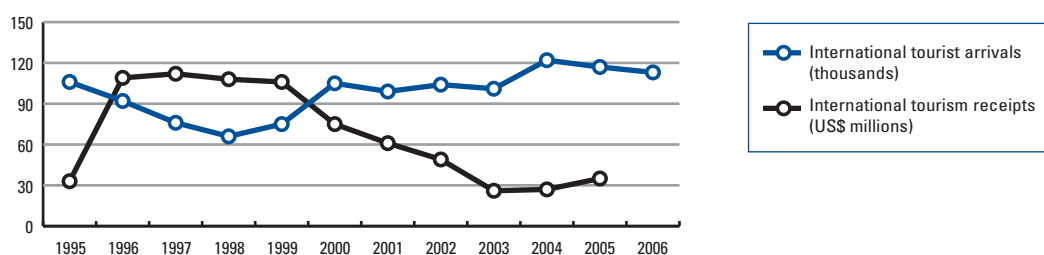
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	25	2.6	4.3
Employment (1,000 jobs) .....	7	2.1	3.3

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	92	9.5	3.6
Employment (1,000 jobs) .....	24	7.8	2.6

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	113
International tourism receipts (US\$ millions), 2005 .....	35



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>109</b>	<b>3.4</b>
<b>T&amp;T regulatory framework</b> .....	<b>104</b>	<b>3.9</b>
Policy rules and regulations .....	120	3.2
Environmental sustainability .....	76	4.3
Safety and security .....	112	4.0
Health and hygiene .....	92	3.6
Prioritization of Travel & Tourism .....	66	4.3
<b>T&amp;T business environment and infrastructure</b> .....	<b>114</b>	<b>2.7</b>
Air transport infrastructure .....	110	2.2
Ground transport infrastructure .....	108	2.7
Tourism infrastructure .....	127	1.1
ICT infrastructure .....	80	2.3
Price competitiveness in the T&T industry .....	36	5.0
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>93</b>	<b>3.6</b>
Human resources .....	77	4.9
Education and training .....	76	4.5
Availability of qualified labor .....	69	5.3
Affinity for Travel & Tourism .....	47	5.0
Natural resources .....	65	3.1
Cultural resources .....	110	1.4

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	92 ...■	8.01 Hotel rooms* .....	n/a .....
1.02 Property rights .....	113 ...■	8.02 Presence of major car rental companies* .....	123 ...■
1.03 Business impact of rules on FDI .....	95 ...■	8.03 ATMs accepting Visa cards* .....	101 ...■
1.04 Visa requirements* .....	81 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	105 ...■	9.01 Extent of business Internet use .....	96 ...■
1.06 Transparency of government policymaking .....	103 ...■	9.02 Internet users* .....	53 ...■
1.07 Time required to start a business* .....	97 ...■	9.03 Telephone lines* .....	74 ...■
1.08 Cost to start a business* .....	112 ...■	9.04 Broadband Internet subscribers* .....	83 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	88 ...■
2.01 Stringency of environmental regulation .....	101 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	100 ...■	10.01 Ticket taxes and airport charges* .....	23 ...■
2.03 Sustainability of T&T industry development .....	88 ...■	10.02 Purchasing power parity* .....	13 ...■
2.04 Carbon dioxide emissions* .....	52 ...■	10.03 Extent and effect of taxation .....	121 ...■
2.05 Particulate matter concentration* .....	n/a .....	10.04 Fuel price levels* .....	32 ...■
2.06 Threatened species* .....	7 ...■	10.05 Hotel price index* .....	61 ...■
2.07 Environmental treaty ratification* .....	115 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	18 ...■
3.01 Business costs of terrorism .....	114 ...■	11.02 2ndary education enrollment* .....	52 ...■
3.02 Reliability of police services .....	121 ...■	11.03 Quality of the educational system .....	82 ...■
3.03 Business costs of crime and violence .....	128 ...■	11.04 Local availability of research and training services .....	124 ...■
3.04 Road traffic accidents* .....	8 ...■	11.05 Extent of staff training .....	95 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	36 ...■
4.01 Physician density* .....	100 ...■	11.07 Ease of hiring foreign labor .....	19 ...■
4.02 Access to improved sanitation* .....	78 ...■	11.08 HIV prevalence* .....	113 ...■
4.03 Access to improved drinking water* .....	86 ...■	11.09 Business impact of HIV/AIDS .....	120 ...■
4.04 Hospital beds* .....	63 ...■	11.10 Life expectancy* .....	103 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	74 ...■	12.01 Tourism openness* .....	32 ...■
5.02 T&T government expenditure* .....	24 ...■	12.02 Attitude of population toward foreign visitors .....	72 ...■
5.03 Effectiveness of marketing and branding .....	87 ...■	12.03 Extension of business trips recommended .....	100 ...■
5.04 T&T fair attendance* .....	76 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	70 ...■
6.01 Quality of air transport infrastructure .....	115 ...■	13.02 Nationally protected areas* .....	109 ...■
6.02 Available seat kilometers* .....	119 ...■	13.03 Quality of the natural environment .....	58 ...■
6.03 Departures per 1,000 population* .....	106 ...■	13.04 Total known species* .....	26 ...■
6.04 Airport density* .....	34 ...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	124 ...■	14.01 Number of World Heritage cultural sites* .....	108 ...■
6.06 International air transport network .....	112 ...■	14.02 Sports stadiums* .....	64 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	119 ...■
7.01 Quality of roads .....	78 ...■		
7.02 Quality of railroad infrastructure .....	93 ...■		
7.03 Quality of port infrastructure .....	110 ...■		
7.04 Quality of domestic transport network .....	126 ...■		
7.05 Road density* .....	n/a .....		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# Honduras

## Key indicators

Population (millions), 2006 .....	7.4
Surface area (1,000 square kilometers) .....	112.1
Gross domestic product (US\$ billions), 2006 .....	9.1
Gross domestic product (PPP, US\$) per capita, 2006 .....	3,199
Real GDP growth (percent), 2006 .....	6.0

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

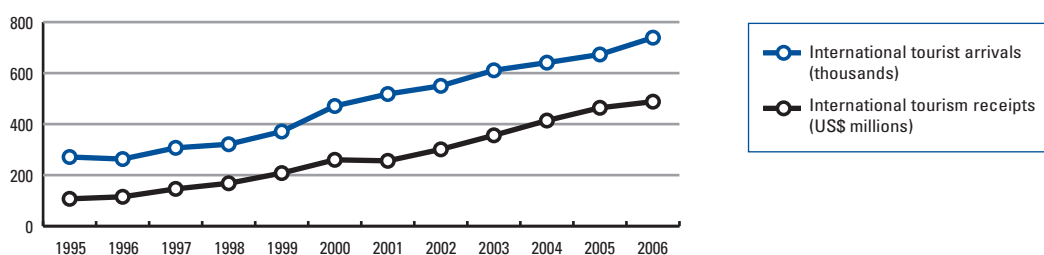
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	4.0	3.7
Employment (1,000 jobs) .....	3.3	2.9

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	1,031	10.0	3.5
Employment (1,000 jobs) .....	249	8.2	2.8

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	739
International tourism receipts (US\$ millions), 2006 .....	488



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>75</b>	<b>3.8</b>
<b>T&amp;T regulatory framework</b> .....	<b>77</b>	<b>4.2</b>
Policy rules and regulations .....	44	4.6
Environmental sustainability .....	61	4.6
Safety and security .....	87	4.6
Health and hygiene .....	95	3.4
Prioritization of Travel & Tourism .....	76	4.1
<b>T&amp;T business environment and infrastructure</b> .....	<b>85</b>	<b>3.2</b>
Air transport infrastructure .....	64	3.0
Ground transport infrastructure .....	88	3.1
Tourism infrastructure .....	85	2.6
ICT infrastructure .....	93	2.0
Price competitiveness in the T&T industry .....	33	5.0
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>62</b>	<b>4.0</b>
Human resources .....	90	4.8
Education and training .....	93	4.2
Availability of qualified labor .....	50	5.4
Affinity for Travel & Tourism .....	41	5.1
Natural resources .....	29	4.3
Cultural resources .....	98	1.7

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....66...■	8.01	Hotel rooms* .....65...■
1.02	Property rights .....86...■	8.02	Presence of major car rental companies* .....74...■
1.03	Business impact of rules on FDI .....64...■	8.03	ATMs accepting Visa cards* .....91...■
1.04	Visa requirements* .....16...■	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....2...■	9.01	Extent of business Internet use .....64...■
1.06	Transparency of government policymaking .....65...■	9.02	Internet users* .....105...■
1.07	Time required to start a business* .....45...■	9.03	Telephone lines* .....89...■
1.08	Cost to start a business* .....104...■	9.04	Broadband Internet subscribers* .....120...■
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....94...■
2.01	Stringency of environmental regulation .....70...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....65...■	10.01	Ticket taxes and airport charges* .....68...■
2.03	Sustainability of T&T industry development .....66...■	10.02	Purchasing power parity* .....45...■
2.04	Carbon dioxide emissions* .....27...■	10.03	Extent and effect of taxation .....55...■
2.05	Particulate matter concentration* .....71...■	10.04	Fuel price levels* .....47...■
2.06	Threatened species* .....91...■	10.05	Hotel price index* .....34...■
2.07	Environmental treaty ratification* .....72...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....75...■
3.01	Business costs of terrorism .....67...■	11.02	2ndary education enrollment* .....95...■
3.02	Reliability of police services .....102...■	11.03	Quality of the educational system .....117...■
3.03	Business costs of crime and violence .....118...■	11.04	Local availability of research and training services .....72...■
3.04	Road traffic accidents* .....52...■	11.05	Extent of staff training .....71...■
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....52...■
4.01	Physician density* .....95...■	11.07	Ease of hiring foreign labor .....32...■
4.02	Access to improved sanitation* .....80...■	11.08	HIV prevalence* .....105...■
4.03	Access to improved drinking water* .....76...■	11.09	Business impact of HIV/AIDS .....93...■
4.04	Hospital beds* .....97...■	11.10	Life expectancy* .....90...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....40...■	12.01	Tourism openness* .....31...■
5.02	T&T government expenditure* .....46...■	12.02	Attitude of population toward foreign visitors .....82...■
5.03	Effectiveness of marketing and branding .....64...■	12.03	Extension of business trips recommended .....72...■
5.04	T&T fair attendance* .....93...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....39...■
6.01	Quality of air transport infrastructure .....69...■	13.02	Nationally protected areas* .....23...■
6.02	Available seat kilometers* .....104...■	13.03	Quality of the natural environment .....34...■
6.03	Departures per 1,000 population* .....n/a.....	13.04	Total known species* .....30...■
6.04	Airport density* .....32...■	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....103...■	14.01	Number of World Heritage cultural sites* .....83...■
6.06	International air transport network .....66...■	14.02	Sports stadiums* .....61...■
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....91...■
7.01	Quality of roads .....62...■		
7.02	Quality of railroad infrastructure .....104...■		
7.03	Quality of port infrastructure .....40...■		
7.04	Quality of domestic transport network .....109...■		
7.05	Road density* .....82...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Hong Kong SAR

## Key indicators

Population (millions), 2006 .....	7.1
Surface area (1,000 square kilometers) .....	1.1
Gross domestic product (US\$ billions), 2006 .....	189.8
Gross domestic product (PPP, US\$) per capita, 2006 .....	38,714
Real GDP growth (percent), 2006 .....	6.9

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

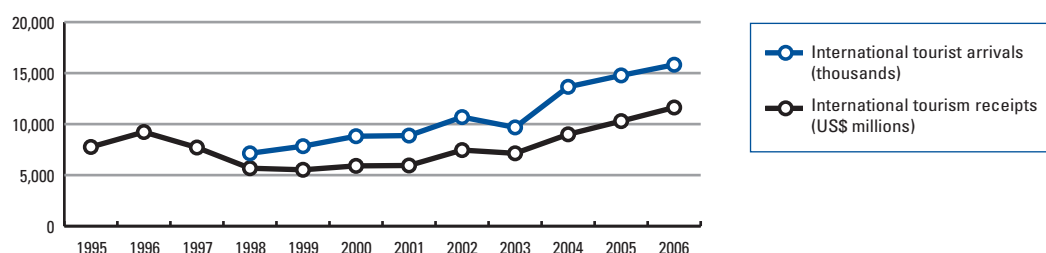
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	3.7	6.5
Employment (1,000 jobs) .....	5.4	2.6

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	37,778	18.5	7.0
Employment (1,000 jobs) .....	625	17.6	3.4

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	15,822
International tourism receipts (US\$ millions), 2006 .....	11,630



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>14</b>	<b>5.1</b>
<b>T&amp;T regulatory framework</b> .....	<b>2</b>	<b>5.9</b>
Policy rules and regulations .....	2	5.9
Environmental sustainability .....	60	4.6
Safety and security .....	7	6.3
Health and hygiene .....	1	7.0
Prioritization of Travel & Tourism .....	9	5.8
<b>T&amp;T business environment and infrastructure</b> .....	<b>16</b>	<b>5.0</b>
Air transport infrastructure .....	13	5.0
Ground transport infrastructure .....	2	6.6
Tourism infrastructure .....	67	3.3
ICT infrastructure .....	8	5.5
Price competitiveness in the T&T industry .....	46	4.9
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>42</b>	<b>4.3</b>
Human resources .....	8	5.8
Education and training .....	23	5.5
Availability of qualified labor .....	4	6.1
Affinity for Travel & Tourism .....	14	5.7
Natural resources .....	55	3.3
Cultural resources .....	67	2.4

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	3 ...■	8.01 Hotel rooms* .....	37 ...■
1.02 Property rights .....	13 ...■	8.02 Presence of major car rental companies* .....	103 ...■
1.03 Business impact of rules on FDI .....	3 ...■	8.03 ATMs accepting Visa cards* .....	41 ...■
1.04 Visa requirements* .....	4 ...■		
1.05 Openness of bilateral Air Service Agreements* .....	24 ...■	<b>9th pillar: ICT infrastructure</b>	
1.06 Transparency of government policymaking .....	5 ...■	9.01 Extent of business Internet use .....	22 ...■
1.07 Time required to start a business* .....	19 ...■	9.02 Internet users* .....	20 ...■
1.08 Cost to start a business* .....	22 ...■	9.03 Telephone lines* .....	13 ...■
		9.04 Broadband Internet subscribers* .....	9 ...■
		9.05 Mobile telephone subscribers* .....	3 ...■
<b>2nd pillar: Environmental sustainability</b>		<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.01 Stringency of environmental regulation .....	39 ...■	10.01 Ticket taxes and airport charges* .....	40 ...■
2.02 Enforcement of environmental regulation .....	28 ...■	10.02 Purchasing power parity* .....	89 ...■
2.03 Sustainability of T&T industry development .....	5 ...■	10.03 Extent and effect of taxation .....	4 ...■
2.04 Carbon dioxide emissions* .....	79 ...■	10.04 Fuel price levels* .....	83 ...■
2.05 Particulate matter concentration* .....	90 ...■	10.05 Hotel price index* .....	86 ...■
2.06 Threatened species* .....	103 ...■		
2.07 Environmental treaty ratification* .....	n/a .....	<b>11th pillar: Human resources</b>	
		11.01 Primary education enrollment* .....	62 ...■
<b>3rd pillar: Safety and security</b>		11.02 2ndary education enrollment* .....	63 ...■
3.01 Business costs of terrorism .....	13 ...■	11.03 Quality of the educational system .....	9 ...■
3.02 Reliability of police services .....	7 ...■	11.04 Local availability of research and training services .....	19 ...■
3.03 Business costs of crime and violence .....	9 ...■	11.05 Extent of staff training .....	28 ...■
3.04 Road traffic accidents* .....	n/a .....	11.06 Hiring and firing practices .....	7 ...■
		11.07 Ease of hiring foreign labor .....	26 ...■
		11.08 HIV prevalence* .....	1 ...■
		11.09 Business impact of HIV/AIDS .....	20 ...■
		11.10 Life expectancy* .....	1 ...■
<b>4th pillar: Health and hygiene</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
4.01 Physician density* .....	n/a .....	12.01 Tourism openness* .....	16 ...■
4.02 Access to improved sanitation* .....	1 ...■	12.02 Attitude of population toward foreign visitors .....	24 ...■
4.03 Access to improved drinking water* .....	1 ...■	12.03 Extension of business trips recommended .....	66 ...■
4.04 Hospital beds* .....	n/a .....		
		<b>13th pillar: Natural resources</b>	
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		13.01 Number of World Heritage natural sites* .....	70 ...■
5.01 Government prioritization of the T&T industry .....	6 ...■	13.02 Nationally protected areas* .....	2 ...■
5.02 T&T government expenditure* .....	16 ...■	13.03 Quality of the natural environment .....	116 ...■
5.03 Effectiveness of marketing and branding .....	2 ...■	13.04 Total known species* .....	121 ...■
5.04 T&T fair attendance* .....	32 ...■		
		<b>14th pillar: Cultural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		14.01 Number of World Heritage cultural sites* .....	108 ...■
6.01 Quality of air transport infrastructure .....	2 ...■	14.02 Sports stadiums* .....	75 ...■
6.02 Available seat kilometers* .....	13 ...■	14.03 Number of international fairs and exhibitions* .....	28 ...■
6.03 Departures per 1,000 population* .....	18 ...■		
6.04 Airport density* .....	110 ...■		
6.05 Number of operating airlines* .....	19 ...■		
6.06 International air transport network .....	3 ...■		
<b>7th pillar: Ground transport infrastructure</b>			
7.01 Quality of roads .....	6 ...■		
7.02 Quality of railroad infrastructure .....	5 ...■		
7.03 Quality of port infrastructure .....	3 ...■		
7.04 Quality of domestic transport network .....	9 ...■		
7.05 Road density* .....	8 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Hungary

## Key indicators

Population (millions), 2006 .....	10.1
Surface area (1,000 square kilometers) .....	93.0
Gross domestic product (US\$ billions), 2006 .....	112.9
Gross domestic product (PPP, US\$) per capita, 2006 .....	20,047
Real GDP growth (percent), 2006 .....	3.9

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

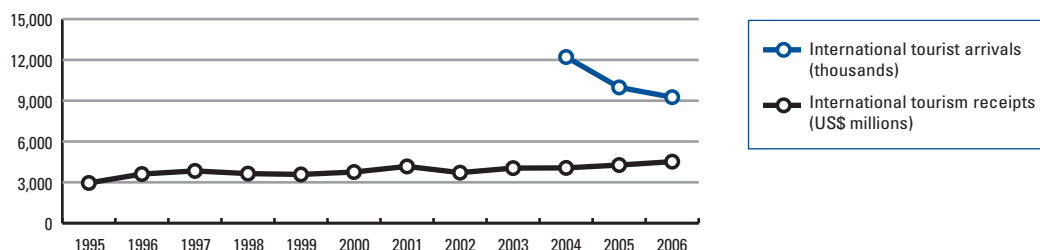
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	4,410	3.3
Employment (1,000 jobs) .....	199	5.0

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	11,132	8.3
Employment (1,000 jobs) .....	310	7.8

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	9,259
International tourism receipts (US\$ millions), 2006 .....	4,519



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>33</b>	<b>4.6</b>
<b>T&amp;T regulatory framework</b> .....	<b>19</b>	<b>5.4</b>
Policy rules and regulations .....	35	4.8
Environmental sustainability .....	25	5.1
Safety and security .....	28	5.7
Health and hygiene .....	11	6.6
Prioritization of Travel & Tourism .....	37	4.8
<b>T&amp;T business environment and infrastructure</b> .....	<b>41</b>	<b>4.2</b>
Air transport infrastructure .....	65	3.0
Ground transport infrastructure .....	32	4.8
Tourism infrastructure .....	27	4.9
ICT infrastructure .....	35	3.8
Price competitiveness in the T&T industry .....	79	4.4
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>50</b>	<b>4.2</b>
Human resources .....	57	5.0
Education and training .....	54	4.8
Availability of qualified labor .....	61	5.3
Affinity for Travel & Tourism .....	108	4.3
Natural resources .....	90	2.7
Cultural resources .....	23	4.7

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	13 ...■	8.01 Hotel rooms* .....	41 ...■
1.02 Property rights .....	37 ...■	8.02 Presence of major car rental companies* .....	1 ...■
1.03 Business impact of rules on FDI .....	31 ...■	8.03 ATMs accepting Visa cards* .....	31 ...■
1.04 Visa requirements* .....	46 ...■		
1.05 Openness of bilateral Air Service Agreements* .....	45 ...■	<b>9th pillar: ICT infrastructure</b>	
1.06 Transparency of government policymaking .....	94 ...■	9.01 Extent of business Internet use .....	51 ...■
1.07 Time required to start a business* .....	34 ...■	9.02 Internet users* .....	34 ...■
1.08 Cost to start a business* .....	68 ...■	9.03 Telephone lines* .....	35 ...■
		9.04 Broadband Internet subscribers* .....	34 ...■
		9.05 Mobile telephone subscribers* .....	30 ...■
<b>2nd pillar: Environmental sustainability</b>		<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.01 Stringency of environmental regulation .....	31 ...■	10.01 Ticket taxes and airport charges* .....	44 ...■
2.02 Enforcement of environmental regulation .....	48 ...■	10.02 Purchasing power parity* .....	72 ...■
2.03 Sustainability of T&T industry development .....	84 ...■	10.03 Extent and effect of taxation .....	117 ...■
2.04 Carbon dioxide emissions* .....	82 ...■	10.04 Fuel price levels* .....	112 ...■
2.05 Particulate matter concentration* .....	15 ...■	10.05 Hotel price index* .....	20 ...■
2.06 Threatened species* .....	58 ...■		
2.07 Environmental treaty ratification* .....	45 ...■	<b>11th pillar: Human resources</b>	
		11.01 Primary education enrollment* .....	83 ...■
<b>3rd pillar: Safety and security</b>		11.02 2ndary education enrollment* .....	37 ...■
3.01 Business costs of terrorism .....	11 ...■	11.03 Quality of the educational system .....	65 ...■
3.02 Reliability of police services .....	41 ...■	11.04 Local availability of research and training services .....	61 ...■
3.03 Business costs of crime and violence .....	31 ...■	11.05 Extent of staff training .....	74 ...■
3.04 Road traffic accidents* .....	62 ...■	11.06 Hiring and firing practices .....	71 ...■
		11.07 Ease of hiring foreign labor .....	76 ...■
		11.08 HIV prevalence* .....	24 ...■
		11.09 Business impact of HIV/AIDS .....	15 ...■
		11.10 Life expectancy* .....	58 ...■
<b>4th pillar: Health and hygiene</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
4.01 Physician density* .....	21 ...■	12.01 Tourism openness* .....	50 ...■
4.02 Access to improved sanitation* .....	45 ...■	12.02 Attitude of population toward foreign visitors .....	109 ...■
4.03 Access to improved drinking water* .....	39 ...■	12.03 Extension of business trips recommended .....	128 ...■
4.04 Hospital beds* .....	8 ...■		
		<b>13th pillar: Natural resources</b>	
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		13.01 Number of World Heritage natural sites* .....	39 ...■
5.01 Government prioritization of the T&T industry .....	57 ...■	13.02 Nationally protected areas* .....	65 ...■
5.02 T&T government expenditure* .....	30 ...■	13.03 Quality of the natural environment .....	107 ...■
5.03 Effectiveness of marketing and branding .....	90 ...■	13.04 Total known species* .....	87 ...■
5.04 T&T fair attendance* .....	22 ...■		
		<b>14th pillar: Cultural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		14.01 Number of World Heritage cultural sites* .....	23 ...■
6.01 Quality of air transport infrastructure .....	72 ...■	14.02 Sports stadiums* .....	32 ...■
6.02 Available seat kilometers* .....	62 ...■	14.03 Number of international fairs and exhibitions* .....	22 ...■
6.03 Departures per 1,000 population* .....	50 ...■		
6.04 Airport density* .....	93 ...■		
6.05 Number of operating airlines* .....	36 ...■		
6.06 International air transport network .....	51 ...■		
<b>7th pillar: Ground transport infrastructure</b>			
7.01 Quality of roads .....	64 ...■		
7.02 Quality of railroad infrastructure .....	42 ...■		
7.03 Quality of port infrastructure .....	71 ...■		
7.04 Quality of domestic transport network .....	23 ...■		
7.05 Road density* .....	10 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Iceland

## Key indicators

Population (millions), 2006 .....	0.3
Surface area (1,000 square kilometers) .....	103.0
Gross domestic product (US\$ billions), 2006 .....	16.3
Gross domestic product (PPP, US\$) per capita, 2006 .....	40,112
Real GDP growth (percent), 2006 .....	2.6

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

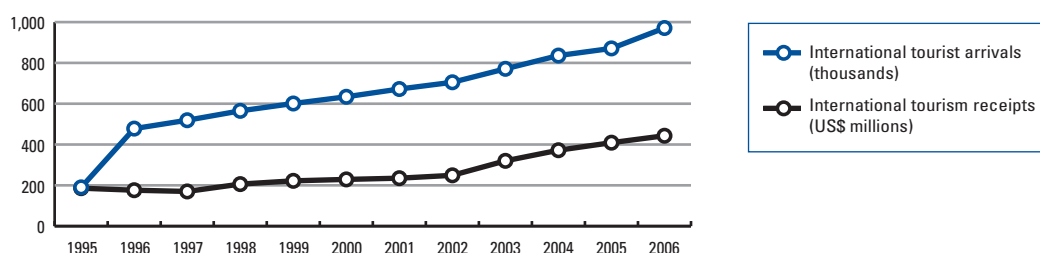
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	5.3	3.1
Employment (1,000 jobs) .....	5.0	0.5

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	2,435	14.7	2.9
Employment (1,000 jobs) .....	27	15.6	0.5

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	971
International tourism receipts (US\$ millions), 2006 .....	443



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>11</b>	<b>5.2</b>
<b>T&amp;T regulatory framework</b> .....	<b>3</b>	<b>5.9</b>
Policy rules and regulations .....	17	5.3
Environmental sustainability .....	20	5.1
Safety and security .....	2	6.5
Health and hygiene .....	3	6.9
Prioritization of Travel & Tourism .....	15	5.5
<b>T&amp;T business environment and infrastructure</b> .....	<b>9</b>	<b>5.2</b>
Air transport infrastructure .....	16	4.9
Ground transport infrastructure .....	35	4.7
Tourism infrastructure .....	7	6.7
ICT infrastructure .....	1	5.9
Price competitiveness in the T&T industry .....	119	3.9
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>36</b>	<b>4.4</b>
Human resources .....	4	6.1
Education and training .....	10	6.0
Availability of qualified labor .....	2	6.2
Affinity for Travel & Tourism .....	24	5.4
Natural resources .....	101	2.6
Cultural resources .....	36	3.5

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	101 <span style="color: #808080;">■</span>	8.01 Hotel rooms* .....	6 <span style="color: #0056b3;">■</span>
1.02 Property rights .....	10 <span style="color: #0056b3;">■</span>	8.02 Presence of major car rental companies* .....	33 <span style="color: #808080;">■</span>
1.03 Business impact of rules on FDI .....	76 <span style="color: #808080;">■</span>	8.03 ATMs accepting Visa cards* .....	8 <span style="color: #0056b3;">■</span>
1.04 Visa requirements* .....	30 <span style="color: #808080;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	16 <span style="color: #808080;">■</span>	9.01 Extent of business Internet use .....	10 <span style="color: #0056b3;">■</span>
1.06 Transparency of government policymaking .....	6 <span style="color: #0056b3;">■</span>	9.02 Internet users* .....	10 <span style="color: #0056b3;">■</span>
1.07 Time required to start a business* .....	4 <span style="color: #0056b3;">■</span>	9.03 Telephone lines* .....	3 <span style="color: #0056b3;">■</span>
1.08 Cost to start a business* .....	19 <span style="color: #808080;">■</span>	9.04 Broadband Internet subscribers* .....	3 <span style="color: #0056b3;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	15 <span style="color: #808080;">■</span>
2.01 Stringency of environmental regulation .....	21 <span style="color: #808080;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	17 <span style="color: #808080;">■</span>	10.01 Ticket taxes and airport charges* .....	67 <span style="color: #808080;">■</span>
2.03 Sustainability of T&T industry development .....	27 <span style="color: #808080;">■</span>	10.02 Purchasing power parity* .....	123 <span style="color: #808080;">■</span>
2.04 Carbon dioxide emissions* .....	90 <span style="color: #808080;">■</span>	10.03 Extent and effect of taxation .....	9 <span style="color: #0056b3;">■</span>
2.05 Particulate matter concentration* .....	n/a	10.04 Fuel price levels* .....	128 <span style="color: #808080;">■</span>
2.06 Threatened species* .....	53 <span style="color: #808080;">■</span>	10.05 Hotel price index* .....	70 <span style="color: #808080;">■</span>
2.07 Environmental treaty ratification* .....	45 <span style="color: #808080;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	15 <span style="color: #808080;">■</span>
3.01 Business costs of terrorism .....	14 <span style="color: #808080;">■</span>	11.02 2ndary education enrollment* .....	14 <span style="color: #808080;">■</span>
3.02 Reliability of police services .....	6 <span style="color: #0056b3;">■</span>	11.03 Quality of the educational system .....	6 <span style="color: #0056b3;">■</span>
3.03 Business costs of crime and violence .....	3 <span style="color: #0056b3;">■</span>	11.04 Local availability of research and training services .....	22 <span style="color: #808080;">■</span>
3.04 Road traffic accidents* .....	3 <span style="color: #0056b3;">■</span>	11.05 Extent of staff training .....	14 <span style="color: #808080;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	5 <span style="color: #0056b3;">■</span>
4.01 Physician density* .....	9 <span style="color: #0056b3;">■</span>	11.07 Ease of hiring foreign labor .....	10 <span style="color: #0056b3;">■</span>
4.02 Access to improved sanitation* .....	1 <span style="color: #0056b3;">■</span>	11.08 HIV prevalence* .....	49 <span style="color: #808080;">■</span>
4.03 Access to improved drinking water* .....	1 <span style="color: #0056b3;">■</span>	11.09 Business impact of HIV/AIDS .....	1 <span style="color: #0056b3;">■</span>
4.04 Hospital beds* .....	12 <span style="color: #808080;">■</span>	11.10 Life expectancy* .....	3 <span style="color: #0056b3;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	49 <span style="color: #808080;">■</span>	12.01 Tourism openness* .....	29 <span style="color: #808080;">■</span>
5.02 T&T government expenditure* .....	5 <span style="color: #0056b3;">■</span>	12.02 Attitude of population toward foreign visitors .....	8 <span style="color: #0056b3;">■</span>
5.03 Effectiveness of marketing and branding .....	15 <span style="color: #808080;">■</span>	12.03 Extension of business trips recommended .....	26 <span style="color: #808080;">■</span>
5.04 T&T fair attendance* .....	56 <span style="color: #808080;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	70 <span style="color: #808080;">■</span>
6.01 Quality of air transport infrastructure .....	11 <span style="color: #808080;">■</span>	13.02 Nationally protected areas* .....	84 <span style="color: #808080;">■</span>
6.02 Available seat kilometers* .....	77 <span style="color: #808080;">■</span>	13.03 Quality of the natural environment .....	7 <span style="color: #0056b3;">■</span>
6.03 Departures per 1,000 population* .....	6 <span style="color: #0056b3;">■</span>	13.04 Total known species* .....	128 <span style="color: #808080;">■</span>
6.04 Airport density* .....	1 <span style="color: #0056b3;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	114 <span style="color: #808080;">■</span>	14.01 Number of World Heritage cultural sites* .....	83 <span style="color: #808080;">■</span>
6.06 International air transport network .....	10 <span style="color: #0056b3;">■</span>	14.02 Sports stadiums* .....	4 <span style="color: #0056b3;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	45 <span style="color: #808080;">■</span>
7.01 Quality of roads .....	40 <span style="color: #808080;">■</span>		
7.02 Quality of railroad infrastructure .....	101 <span style="color: #808080;">■</span>		
7.03 Quality of port infrastructure .....	12 <span style="color: #808080;">■</span>		
7.04 Quality of domestic transport network .....	5 <span style="color: #0056b3;">■</span>		
7.05 Road density* .....	n/a		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# India

## Key indicators

Population (millions), 2006 .....	1,119.5
Surface area (1,000 square kilometers) .....	3,287.3
Gross domestic product (US\$ billions), 2006 .....	873.7
Gross domestic product (PPP, US\$) per capita, 2006 .....	3,802
Real GDP growth (percent), 2006 .....	9.7

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

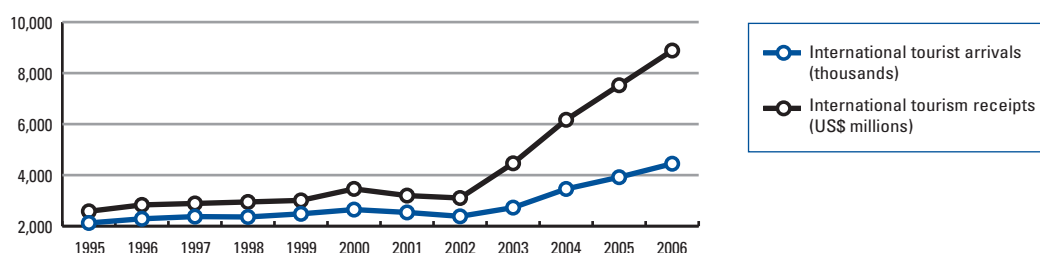
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	18,088	2.0
Employment (1,000 jobs) .....	11,003	2.3

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	47,239	5.4
Employment (1,000 jobs) .....	25,607	5.5

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	4,447
International tourism receipts (US\$ millions), 2006 .....	8,885



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>65</b>	<b>4.0</b>
<b>T&amp;T regulatory framework</b> .....	<b>107</b>	<b>3.8</b>
Policy rules and regulations .....	102	3.7
Environmental sustainability .....	71	4.4
Safety and security .....	117	3.9
Health and hygiene .....	110	2.6
Prioritization of Travel & Tourism .....	59	4.4
<b>T&amp;T business environment and infrastructure</b> .....	<b>59</b>	<b>3.7</b>
Air transport infrastructure .....	35	4.0
Ground transport infrastructure .....	39	4.5
Tourism infrastructure .....	80	2.8
ICT infrastructure .....	97	2.0
Price competitiveness in the T&T industry .....	20	5.2
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>26</b>	<b>4.5</b>
Human resources .....	93	4.8
Education and training .....	60	4.7
Availability of qualified labor .....	109	4.8
Affinity for Travel & Tourism .....	88	4.6
Natural resources .....	13	4.9
Cultural resources .....	31	3.7

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....63... <span style="color: #808080;">■</span>	8.01	Hotel rooms* .....117... <span style="color: #808080;">■</span>
1.02	Property rights .....44... <span style="color: #0056b3;">■</span>	8.02	Presence of major car rental companies* .....33... <span style="color: #0056b3;">■</span>
1.03	Business impact of rules on FDI .....49... <span style="color: #0056b3;">■</span>	8.03	ATMs accepting Visa cards* .....99... <span style="color: #808080;">■</span>
1.04	Visa requirements* .....124... <span style="color: #808080;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....92... <span style="color: #808080;">■</span>	9.01	Extent of business Internet use .....36... <span style="color: #0056b3;">■</span>
1.06	Transparency of government policymaking .....45... <span style="color: #0056b3;">■</span>	9.02	Internet users* .....104... <span style="color: #808080;">■</span>
1.07	Time required to start a business* .....78... <span style="color: #808080;">■</span>	9.03	Telephone lines* .....102... <span style="color: #808080;">■</span>
1.08	Cost to start a business* .....108... <span style="color: #808080;">■</span>	9.04	Broadband Internet subscribers* .....88... <span style="color: #808080;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....109... <span style="color: #808080;">■</span>
2.01	Stringency of environmental regulation .....43... <span style="color: #0056b3;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....50... <span style="color: #0056b3;">■</span>	10.01	Ticket taxes and airport charges* .....8... <span style="color: #0056b3;">■</span>
2.03	Sustainability of T&T industry development .....63... <span style="color: #808080;">■</span>	10.02	Purchasing power parity* .....9... <span style="color: #0056b3;">■</span>
2.04	Carbon dioxide emissions* .....39... <span style="color: #0056b3;">■</span>	10.03	Extent and effect of taxation .....29... <span style="color: #0056b3;">■</span>
2.05	Particulate matter concentration* .....90... <span style="color: #808080;">■</span>	10.04	Fuel price levels* .....51... <span style="color: #808080;">■</span>
2.06	Threatened species* .....120... <span style="color: #808080;">■</span>	10.05	Hotel price index* .....88... <span style="color: #808080;">■</span>
2.07	Environmental treaty ratification* .....18... <span style="color: #0056b3;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....84... <span style="color: #808080;">■</span>
3.01	Business costs of terrorism .....93... <span style="color: #808080;">■</span>	11.02	2ndary education enrollment* .....103... <span style="color: #808080;">■</span>
3.02	Reliability of police services .....60... <span style="color: #808080;">■</span>	11.03	Quality of the educational system .....31... <span style="color: #0056b3;">■</span>
3.03	Business costs of crime and violence .....45... <span style="color: #0056b3;">■</span>	11.04	Local availability of research and training services .....31... <span style="color: #0056b3;">■</span>
3.04	Road traffic accidents* .....124... <span style="color: #808080;">■</span>	11.05	Extent of staff training .....33... <span style="color: #0056b3;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....101... <span style="color: #808080;">■</span>
4.01	Physician density* .....94... <span style="color: #808080;">■</span>	11.07	Ease of hiring foreign labor .....86... <span style="color: #808080;">■</span>
4.02	Access to improved sanitation* .....114... <span style="color: #808080;">■</span>	11.08	HIV prevalence* .....93... <span style="color: #808080;">■</span>
4.03	Access to improved drinking water* .....78... <span style="color: #808080;">■</span>	11.09	Business impact of HIV/AIDS .....100... <span style="color: #808080;">■</span>
4.04	Hospital beds* .....105... <span style="color: #808080;">■</span>	11.10	Life expectancy* .....103... <span style="color: #808080;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....51... <span style="color: #808080;">■</span>	12.01	Tourism openness* .....110... <span style="color: #808080;">■</span>
5.02	T&T government expenditure* .....115... <span style="color: #808080;">■</span>	12.02	Attitude of population toward foreign visitors .....52... <span style="color: #808080;">■</span>
5.03	Effectiveness of marketing and branding .....51... <span style="color: #808080;">■</span>	12.03	Extension of business trips recommended .....55... <span style="color: #808080;">■</span>
5.04	T&T fair attendance* .....22... <span style="color: #0056b3;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....7... <span style="color: #0056b3;">■</span>
6.01	Quality of air transport infrastructure .....61... <span style="color: #808080;">■</span>	13.02	Nationally protected areas* .....86... <span style="color: #808080;">■</span>
6.02	Available seat kilometers* .....10... <span style="color: #0056b3;">■</span>	13.03	Quality of the natural environment .....115... <span style="color: #808080;">■</span>
6.03	Departures per 1,000 population* .....109... <span style="color: #808080;">■</span>	13.04	Total known species* .....10... <span style="color: #0056b3;">■</span>
6.04	Airport density* .....129... <span style="color: #808080;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....15... <span style="color: #0056b3;">■</span>	14.01	Number of World Heritage cultural sites* .....8... <span style="color: #0056b3;">■</span>
6.06	International air transport network .....42... <span style="color: #0056b3;">■</span>	14.02	Sports stadiums* .....128... <span style="color: #808080;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....35... <span style="color: #0056b3;">■</span>
7.01	Quality of roads .....82... <span style="color: #808080;">■</span>		
7.02	Quality of railroad infrastructure .....23... <span style="color: #0056b3;">■</span>		
7.03	Quality of port infrastructure .....80... <span style="color: #808080;">■</span>		
7.04	Quality of domestic transport network .....33... <span style="color: #0056b3;">■</span>		
7.05	Road density* .....25... <span style="color: #0056b3;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Indonesia

## Key indicators

Population (millions), 2006 .....	225.5
Surface area (1,000 square kilometers) .....	1,904.6
Gross domestic product (US\$ billions), 2006 .....	364.2
Gross domestic product (PPP, US\$) per capita, 2006 .....	4,356
Real GDP growth (percent), 2006 .....	5.5

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

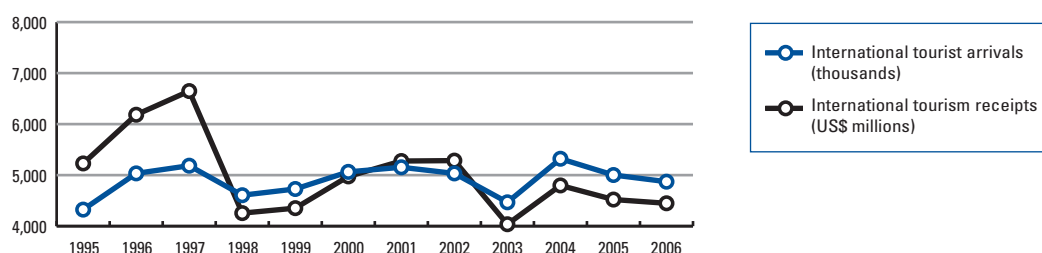
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	10,167	2.4
Employment (1,000 jobs) .....	1,981	2.0

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	31,014	7.5
Employment (1,000 jobs) .....	6,056	6.2

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	4,871
International tourism receipts (US\$ millions), 2006 .....	4,448



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>80</b>	<b>3.7</b>
<b>T&amp;T regulatory framework</b> .....	<b>108</b>	<b>3.8</b>
Policy rules and regulations .....	121	3.1
Environmental sustainability .....	126	3.5
Safety and security .....	108	4.1
Health and hygiene .....	111	2.5
Prioritization of Travel & Tourism .....	11	5.7
<b>T&amp;T business environment and infrastructure</b> .....	<b>86</b>	<b>3.2</b>
Air transport infrastructure .....	61	3.1
Ground transport infrastructure .....	98	2.9
Tourism infrastructure .....	109	1.9
ICT infrastructure .....	94	2.0
Price competitiveness in the T&T industry .....	1	6.0
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>53</b>	<b>4.2</b>
Human resources .....	34	5.3
Education and training .....	39	5.0
Availability of qualified labor .....	28	5.6
Affinity for Travel & Tourism .....	56	4.9
Natural resources .....	26	4.4
Cultural resources .....	80	2.1

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	10...■	8.01 Hotel rooms* .....	88...■
1.02 Property rights .....	115...■	8.02 Presence of major car rental companies* .....	103...■
1.03 Business impact of rules on FDI .....	11...■	8.03 ATMs accepting Visa cards* .....	88...■
1.04 Visa requirements* .....	104...■		
1.05 Openness of bilateral Air Service Agreements* .....	30...■	<b>9th pillar: ICT infrastructure</b>	
1.06 Transparency of government policymaking .....	130...■	9.01 Extent of business Internet use .....	57...■
1.07 Time required to start a business* .....	120...■	9.02 Internet users* .....	95...■
1.08 Cost to start a business* .....	110...■	9.03 Telephone lines* .....	99...■
		9.04 Broadband Internet subscribers* .....	100...■
		9.05 Mobile telephone subscribers* .....	97...■
<b>2nd pillar: Environmental sustainability</b>		<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.01 Stringency of environmental regulation .....	117...■	10.01 Ticket taxes and airport charges* .....	12...■
2.02 Enforcement of environmental regulation .....	95...■	10.02 Purchasing power parity* .....	38...■
2.03 Sustainability of T&T industry development .....	32...■	10.03 Extent and effect of taxation .....	8...■
2.04 Carbon dioxide emissions* .....	44...■	10.04 Fuel price levels* .....	15...■
2.05 Particulate matter concentration* .....	106...■	10.05 Hotel price index* .....	8...■
2.06 Threatened species* .....	118...■		
2.07 Environmental treaty ratification* .....	97...■	<b>11th pillar: Human resources</b>	
		11.01 Primary education enrollment* .....	41...■
<b>3rd pillar: Safety and security</b>		11.02 2ndary education enrollment* .....	96...■
3.01 Business costs of terrorism .....	30...■	11.03 Quality of the educational system .....	29...■
3.02 Reliability of police services .....	93...■	11.04 Local availability of research and training services .....	29...■
3.03 Business costs of crime and violence .....	24...■	11.05 Extent of staff training .....	34...■
3.04 Road traffic accidents* .....	123...■	11.06 Hiring and firing practices .....	34...■
		11.07 Ease of hiring foreign labor .....	13...■
		11.08 HIV prevalence* .....	24...■
		11.09 Business impact of HIV/AIDS .....	28...■
		11.10 Life expectancy* .....	91...■
<b>4th pillar: Health and hygiene</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
4.01 Physician density* .....	114...■	12.01 Tourism openness* .....	98...■
4.02 Access to improved sanitation* .....	92...■	12.02 Attitude of population toward foreign visitors .....	42...■
4.03 Access to improved drinking water* .....	98...■	12.03 Extension of business trips recommended .....	4...■
4.04 Hospital beds* .....	110...■		
		<b>13th pillar: Natural resources</b>	
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		13.01 Number of World Heritage natural sites* .....	10...■
5.01 Government prioritization of the T&T industry .....	32...■	13.02 Nationally protected areas* .....	62...■
5.02 T&T government expenditure* .....	12...■	13.03 Quality of the natural environment .....	130...■
5.03 Effectiveness of marketing and branding .....	13...■	13.04 Total known species* .....	4...■
5.04 T&T fair attendance* .....	32...■		
		<b>14th pillar: Cultural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		14.01 Number of World Heritage cultural sites* .....	54...■
6.01 Quality of air transport infrastructure .....	85...■	14.02 Sports stadiums* .....	114...■
6.02 Available seat kilometers* .....	24...■	14.03 Number of international fairs and exhibitions* .....	40...■
6.03 Departures per 1,000 population* .....	79...■		
6.04 Airport density* .....	112...■		
6.05 Number of operating airlines* .....	35...■		
6.06 International air transport network .....	52...■		
<b>7th pillar: Ground transport infrastructure</b>			
7.01 Quality of roads .....	113...■		
7.02 Quality of railroad infrastructure .....	61...■		
7.03 Quality of port infrastructure .....	113...■		
7.04 Quality of domestic transport network .....	92...■		
7.05 Road density* .....	68...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Ireland

## Key indicators

Population (millions), 2006 .....	4.2
Surface area (1,000 square kilometers) .....	70.3
Gross domestic product (US\$ billions), 2006 .....	219.4
Gross domestic product (PPP, US\$) per capita, 2006 .....	44,676
Real GDP growth (percent), 2006 .....	5.7

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

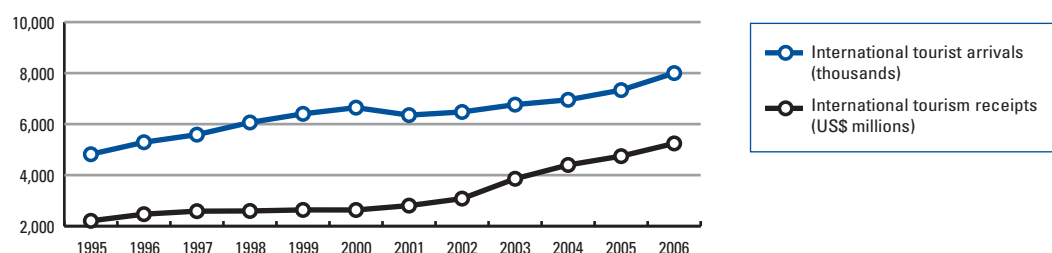
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	2.6	3.7
Employment (1,000 jobs) .....	2.7	1.9

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	8.4	3.7
Employment (1,000 jobs) .....	7.8	2.2

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	8,001
International tourism receipts (US\$ millions), 2006 .....	5,242



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>21</b>	<b>4.9</b>
<b>T&amp;T regulatory framework</b> .....	<b>11</b>	<b>5.6</b>
Policy rules and regulations .....	3	5.6
Environmental sustainability .....	12	5.5
Safety and security .....	19	5.9
Health and hygiene .....	24	6.2
Prioritization of Travel & Tourism .....	40	4.7
<b>T&amp;T business environment and infrastructure</b> .....	<b>20</b>	<b>4.9</b>
Air transport infrastructure .....	24	4.5
Ground transport infrastructure .....	45	4.5
Tourism infrastructure .....	5	6.8
ICT infrastructure .....	27	4.5
Price competitiveness in the T&T industry .....	99	4.2
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>41</b>	<b>4.3</b>
Human resources .....	11	5.8
Education and training .....	15	5.9
Availability of qualified labor .....	21	5.7
Affinity for Travel & Tourism .....	51	4.9
Natural resources .....	113	2.3
Cultural resources .....	26	4.3

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	1...■	8.01 Hotel rooms* .....	13...■
1.02 Property rights .....	11...■	8.02 Presence of major car rental companies* .....	1...■
1.03 Business impact of rules on FDI .....	1...■	8.03 ATMs accepting Visa cards* .....	11...■
1.04 Visa requirements* .....	10...■		
1.05 Openness of bilateral Air Service Agreements* .....	26...■	<b>9th pillar: ICT infrastructure</b>	
1.06 Transparency of government policymaking .....	21...■	9.01 Extent of business Internet use .....	24...■
1.07 Time required to start a business* .....	24...■	9.02 Internet users* .....	38...■
1.08 Cost to start a business* .....	3...■	9.03 Telephone lines* .....	17...■
		9.04 Broadband Internet subscribers* .....	29...■
		9.05 Mobile telephone subscribers* .....	14...■
<b>2nd pillar: Environmental sustainability</b>		<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.01 Stringency of environmental regulation .....	23...■	10.01 Ticket taxes and airport charges* .....	38...■
2.02 Enforcement of environmental regulation .....	31...■	10.02 Purchasing power parity* .....	121...■
2.03 Sustainability of T&T industry development .....	21...■	10.03 Extent and effect of taxation .....	11...■
2.04 Carbon dioxide emissions* .....	110...■	10.04 Fuel price levels* .....	117...■
2.05 Particulate matter concentration* .....	16...■	10.05 Hotel price index* .....	78...■
2.06 Threatened species* .....	4...■		
2.07 Environmental treaty ratification* .....	5...■	<b>11th pillar: Human resources</b>	
		11.01 Primary education enrollment* .....	37...■
<b>3rd pillar: Safety and security</b>		11.02 2ndary education enrollment* .....	8...■
3.01 Business costs of terrorism .....	35...■	11.03 Quality of the educational system .....	7...■
3.02 Reliability of police services .....	25...■	11.04 Local availability of research and training services .....	23...■
3.03 Business costs of crime and violence .....	43...■	11.05 Extent of staff training .....	15...■
3.04 Road traffic accidents* .....	28...■	11.06 Hiring and firing practices .....	100...■
		11.07 Ease of hiring foreign labor .....	3...■
		11.08 HIV prevalence* .....	49...■
<b>4th pillar: Health and hygiene</b>		11.09 Business impact of HIV/AIDS .....	33...■
4.01 Physician density* .....	32...■	11.10 Life expectancy* .....	16...■
4.02 Access to improved sanitation* .....	1...■		
4.03 Access to improved drinking water* .....	1...■	<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
4.04 Hospital beds* .....	29...■	12.01 Tourism openness* .....	55...■
		12.02 Attitude of population toward foreign visitors .....	9...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		12.03 Extension of business trips recommended .....	75...■
5.01 Government prioritization of the T&T industry .....	15...■		
5.02 T&T government expenditure* .....	61...■	<b>13th pillar: Natural resources</b>	
5.03 Effectiveness of marketing and branding .....	9...■	13.01 Number of World Heritage natural sites* .....	70...■
5.04 T&T fair attendance* .....	56...■	13.02 Nationally protected areas* .....	122...■
		13.03 Quality of the natural environment .....	19...■
<b>6th pillar: Air transport infrastructure</b>		13.04 Total known species* .....	119...■
6.01 Quality of air transport infrastructure .....	45...■		
6.02 Available seat kilometers* .....	34...■	<b>14th pillar: Cultural resources</b>	
6.03 Departures per 1,000 population* .....	2...■	14.01 Number of World Heritage cultural sites* .....	69...■
6.04 Airport density* .....	23...■	14.02 Sports stadiums* .....	1...■
6.05 Number of operating airlines* .....	36...■	14.03 Number of international fairs and exhibitions* .....	33...■
6.06 International air transport network .....	47...■		
<b>7th pillar: Ground transport infrastructure</b>			
7.01 Quality of roads .....	60...■		
7.02 Quality of railroad infrastructure .....	54...■		
7.03 Quality of port infrastructure .....	64...■		
7.04 Quality of domestic transport network .....	73...■		
7.05 Road density* .....	20...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Israel

## Key indicators

Population (millions), 2006 .....	6.8
Surface area (1,000 square kilometers) .....	22.1
Gross domestic product (US\$ billions), 2006 .....	142.3
Gross domestic product (PPP, US\$) per capita, 2006 .....	31,561
Real GDP growth (percent), 2006 .....	5.2

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

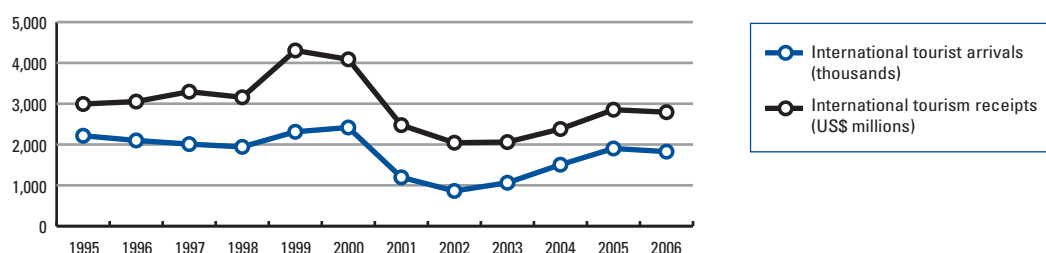
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	3,352	2.3	3.9
Employment (1,000 jobs) .....	83	3.2	2.1

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	9,785	6.7	3.9
Employment (1,000 jobs) .....	202	7.8	2.0

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	1,825
International tourism receipts (US\$ millions), 2006 .....	2,792



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>35</b>	<b>4.5</b>
<b>T&amp;T regulatory framework</b> .....	<b>32</b>	<b>5.1</b>
Policy rules and regulations .....	30	5.0
Environmental sustainability .....	67	4.4
Safety and security .....	60	5.1
Health and hygiene .....	8	6.7
Prioritization of Travel & Tourism .....	61	4.4
<b>T&amp;T business environment and infrastructure</b> .....	<b>36</b>	<b>4.4</b>
Air transport infrastructure .....	47	3.5
Ground transport infrastructure .....	31	4.9
Tourism infrastructure .....	36	4.5
ICT infrastructure .....	22	4.7
Price competitiveness in the T&T industry .....	91	4.3
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>59</b>	<b>4.0</b>
Human resources .....	20	5.6
Education and training .....	22	5.7
Availability of qualified labor .....	31	5.5
Affinity for Travel & Tourism .....	59	4.8
Natural resources .....	64	3.1
Cultural resources .....	60	2.5

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	19... <span style="color: #0056b3;">■</span>	8.01 Hotel rooms* .....	39... <span style="color: #808080;">■</span>
1.02 Property rights .....	25... <span style="color: #0056b3;">■</span>	8.02 Presence of major car rental companies* .....	1... <span style="color: #0056b3;">■</span>
1.03 Business impact of rules on FDI .....	25... <span style="color: #0056b3;">■</span>	8.03 ATMs accepting Visa cards* .....	49... <span style="color: #808080;">■</span>
1.04 Visa requirements* .....	21... <span style="color: #0056b3;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	39... <span style="color: #808080;">■</span>	9.01 Extent of business Internet use .....	14... <span style="color: #0056b3;">■</span>
1.06 Transparency of government policymaking .....	22... <span style="color: #0056b3;">■</span>	9.02 Internet users* .....	47... <span style="color: #808080;">■</span>
1.07 Time required to start a business* .....	81... <span style="color: #808080;">■</span>	9.03 Telephone lines* .....	23... <span style="color: #0056b3;">■</span>
1.08 Cost to start a business* .....	29... <span style="color: #0056b3;">■</span>	9.04 Broadband Internet subscribers* .....	13... <span style="color: #0056b3;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	7... <span style="color: #0056b3;">■</span>
2.01 Stringency of environmental regulation .....	36... <span style="color: #808080;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	32... <span style="color: #0056b3;">■</span>	10.01 Ticket taxes and airport charges* .....	58... <span style="color: #808080;">■</span>
2.03 Sustainability of T&T industry development .....	46... <span style="color: #808080;">■</span>	10.02 Purchasing power parity* .....	84... <span style="color: #808080;">■</span>
2.04 Carbon dioxide emissions* .....	108... <span style="color: #808080;">■</span>	10.03 Extent and effect of taxation .....	68... <span style="color: #808080;">■</span>
2.05 Particulate matter concentration* .....	54... <span style="color: #808080;">■</span>	10.04 Fuel price levels* .....	107... <span style="color: #808080;">■</span>
2.06 Threatened species* .....	68... <span style="color: #808080;">■</span>	10.05 Hotel price index* .....	62... <span style="color: #808080;">■</span>
2.07 Environmental treaty ratification* .....	109... <span style="color: #808080;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	27... <span style="color: #0056b3;">■</span>
3.01 Business costs of terrorism .....	127... <span style="color: #808080;">■</span>	11.02 2ndary education enrollment* .....	49... <span style="color: #808080;">■</span>
3.02 Reliability of police services .....	53... <span style="color: #808080;">■</span>	11.03 Quality of the educational system .....	25... <span style="color: #0056b3;">■</span>
3.03 Business costs of crime and violence .....	29... <span style="color: #0056b3;">■</span>	11.04 Local availability of research and training services .....	13... <span style="color: #0056b3;">■</span>
3.04 Road traffic accidents* .....	38... <span style="color: #808080;">■</span>	11.05 Extent of staff training .....	23... <span style="color: #0056b3;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	20... <span style="color: #0056b3;">■</span>
4.01 Physician density* .....	7... <span style="color: #0056b3;">■</span>	11.07 Ease of hiring foreign labor .....	126... <span style="color: #808080;">■</span>
4.02 Access to improved sanitation* .....	1... <span style="color: #0056b3;">■</span>	11.08 HIV prevalence* .....	24... <span style="color: #0056b3;">■</span>
4.03 Access to improved drinking water* .....	1... <span style="color: #0056b3;">■</span>	11.09 Business impact of HIV/AIDS .....	8... <span style="color: #0056b3;">■</span>
4.04 Hospital beds* .....	23... <span style="color: #0056b3;">■</span>	11.10 Life expectancy* .....	8... <span style="color: #0056b3;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	64... <span style="color: #808080;">■</span>	12.01 Tourism openness* .....	73... <span style="color: #808080;">■</span>
5.02 T&T government expenditure* .....	96... <span style="color: #808080;">■</span>	12.02 Attitude of population toward foreign visitors .....	67... <span style="color: #808080;">■</span>
5.03 Effectiveness of marketing and branding .....	49... <span style="color: #808080;">■</span>	12.03 Extension of business trips recommended .....	31... <span style="color: #0056b3;">■</span>
5.04 T&T fair attendance* .....	32... <span style="color: #0056b3;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	70... <span style="color: #808080;">■</span>
6.01 Quality of air transport infrastructure .....	23... <span style="color: #0056b3;">■</span>	13.02 Nationally protected areas* .....	37... <span style="color: #808080;">■</span>
6.02 Available seat kilometers* .....	41... <span style="color: #808080;">■</span>	13.03 Quality of the natural environment .....	60... <span style="color: #808080;">■</span>
6.03 Departures per 1,000 population* .....	49... <span style="color: #808080;">■</span>	13.04 Total known species* .....	66... <span style="color: #808080;">■</span>
6.04 Airport density* .....	61... <span style="color: #808080;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	42... <span style="color: #808080;">■</span>	14.01 Number of World Heritage cultural sites* .....	38... <span style="color: #808080;">■</span>
6.06 International air transport network .....	15... <span style="color: #0056b3;">■</span>	14.02 Sports stadiums* .....	65... <span style="color: #808080;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	73... <span style="color: #808080;">■</span>
7.01 Quality of roads .....	30... <span style="color: #0056b3;">■</span>		
7.02 Quality of railroad infrastructure .....	36... <span style="color: #808080;">■</span>		
7.03 Quality of port infrastructure .....	37... <span style="color: #808080;">■</span>		
7.04 Quality of domestic transport network .....	14... <span style="color: #0056b3;">■</span>		
7.05 Road density* .....	34... <span style="color: #0056b3;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# Italy

## Key indicators

Population (millions), 2006 .....	58.1
Surface area (1,000 square kilometers) .....	301.3
Gross domestic product (US\$ billions), 2006 .....	1,852.6
Gross domestic product (PPP, US\$) per capita, 2006 .....	31,051
Real GDP growth (percent), 2006 .....	1.9

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

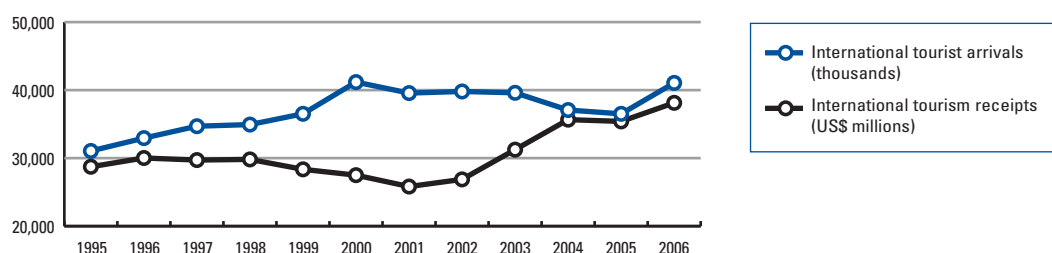
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	4.2	1.1
Employment (1,000 jobs) .....	4.6	0.5

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	10.2	1.3
Employment (1,000 jobs) .....	11.5	0.6

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	41,058
International tourism receipts (US\$ millions), 2006 .....	38,129



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>28</b>	<b>4.8</b>
<b>T&amp;T regulatory framework</b> .....	<b>41</b>	<b>5.0</b>
Policy rules and regulations .....	57	4.4
Environmental sustainability .....	39	4.9
Safety and security .....	81	4.8
Health and hygiene .....	19	6.3
Prioritization of Travel & Tourism .....	46	4.6
<b>T&amp;T business environment and infrastructure</b> .....	<b>24</b>	<b>4.8</b>
Air transport infrastructure .....	26	4.4
Ground transport infrastructure .....	40	4.5
Tourism infrastructure .....	4	6.9
ICT infrastructure .....	25	4.6
Price competitiveness in the T&T industry .....	124	3.5
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>15</b>	<b>4.7</b>
Human resources .....	39	5.2
Education and training .....	35	5.1
Availability of qualified labor .....	55	5.3
Affinity for Travel & Tourism .....	67	4.8
Natural resources .....	60	3.2
Cultural resources .....	8	5.8

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	102 ... <span style="color: #808080;">■</span>	8.01 Hotel rooms* .....	9 ... <span style="color: #0056b3;">■</span>
1.02 Property rights .....	53 ... <span style="color: #808080;">■</span>	8.02 Presence of major car rental companies* .....	1 ... <span style="color: #0056b3;">■</span>
1.03 Business impact of rules on FDI .....	109 ... <span style="color: #808080;">■</span>	8.03 ATMs accepting Visa cards* .....	15 ... <span style="color: #0056b3;">■</span>
1.04 Visa requirements* .....	30 ... <span style="color: #808080;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	28 ... <span style="color: #808080;">■</span>	9.01 Extent of business Internet use .....	55 ... <span style="color: #808080;">■</span>
1.06 Transparency of government policymaking .....	108 ... <span style="color: #808080;">■</span>	9.02 Internet users* .....	22 ... <span style="color: #0056b3;">■</span>
1.07 Time required to start a business* .....	24 ... <span style="color: #0056b3;">■</span>	9.03 Telephone lines* .....	25 ... <span style="color: #0056b3;">■</span>
1.08 Cost to start a business* .....	70 ... <span style="color: #808080;">■</span>	9.04 Broadband Internet subscribers* .....	25 ... <span style="color: #0056b3;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	6 ... <span style="color: #0056b3;">■</span>
2.01 Stringency of environmental regulation .....	33 ... <span style="color: #808080;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	46 ... <span style="color: #808080;">■</span>	10.01 Ticket taxes and airport charges* .....	29 ... <span style="color: #808080;">■</span>
2.03 Sustainability of T&T industry development .....	113 ... <span style="color: #808080;">■</span>	10.02 Purchasing power parity* .....	107 ... <span style="color: #808080;">■</span>
2.04 Carbon dioxide emissions* .....	91 ... <span style="color: #808080;">■</span>	10.03 Extent and effect of taxation .....	126 ... <span style="color: #808080;">■</span>
2.05 Particulate matter concentration* .....	36 ... <span style="color: #808080;">■</span>	10.04 Fuel price levels* .....	124 ... <span style="color: #808080;">■</span>
2.06 Threatened species* .....	62 ... <span style="color: #808080;">■</span>	10.05 Hotel price index* .....	106 ... <span style="color: #808080;">■</span>
2.07 Environmental treaty ratification* .....	18 ... <span style="color: #0056b3;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	13 ... <span style="color: #0056b3;">■</span>
3.01 Business costs of terrorism .....	86 ... <span style="color: #808080;">■</span>	11.02 2ndary education enrollment* .....	28 ... <span style="color: #808080;">■</span>
3.02 Reliability of police services .....	42 ... <span style="color: #808080;">■</span>	11.03 Quality of the educational system .....	77 ... <span style="color: #808080;">■</span>
3.03 Business costs of crime and violence .....	66 ... <span style="color: #808080;">■</span>	11.04 Local availability of research and training services .....	28 ... <span style="color: #808080;">■</span>
3.04 Road traffic accidents* .....	104 ... <span style="color: #808080;">■</span>	11.05 Extent of staff training .....	80 ... <span style="color: #808080;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	127 ... <span style="color: #808080;">■</span>
4.01 Physician density* .....	3 ... <span style="color: #0056b3;">■</span>	11.07 Ease of hiring foreign labor .....	29 ... <span style="color: #808080;">■</span>
4.02 Access to improved sanitation* .....	1 ... <span style="color: #0056b3;">■</span>	11.08 HIV prevalence* .....	76 ... <span style="color: #808080;">■</span>
4.03 Access to improved drinking water* .....	1 ... <span style="color: #0056b3;">■</span>	11.09 Business impact of HIV/AIDS .....	21 ... <span style="color: #0056b3;">■</span>
4.04 Hospital beds* .....	45 ... <span style="color: #808080;">■</span>	11.10 Life expectancy* .....	8 ... <span style="color: #0056b3;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	97 ... <span style="color: #808080;">■</span>	12.01 Tourism openness* .....	89 ... <span style="color: #808080;">■</span>
5.02 T&T government expenditure* .....	57 ... <span style="color: #808080;">■</span>	12.02 Attitude of population toward foreign visitors .....	76 ... <span style="color: #808080;">■</span>
5.03 Effectiveness of marketing and branding .....	103 ... <span style="color: #808080;">■</span>	12.03 Extension of business trips recommended .....	20 ... <span style="color: #0056b3;">■</span>
5.04 T&T fair attendance* .....	3 ... <span style="color: #0056b3;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	39 ... <span style="color: #808080;">■</span>
6.01 Quality of air transport infrastructure .....	71 ... <span style="color: #808080;">■</span>	13.02 Nationally protected areas* .....	50 ... <span style="color: #808080;">■</span>
6.02 Available seat kilometers* .....	11 ... <span style="color: #0056b3;">■</span>	13.03 Quality of the natural environment .....	76 ... <span style="color: #808080;">■</span>
6.03 Departures per 1,000 population* .....	39 ... <span style="color: #808080;">■</span>	13.04 Total known species* .....	64 ... <span style="color: #808080;">■</span>
6.04 Airport density* .....	65 ... <span style="color: #808080;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	5 ... <span style="color: #0056b3;">■</span>	14.01 Number of World Heritage cultural sites* .....	1 ... <span style="color: #0056b3;">■</span>
6.06 International air transport network .....	73 ... <span style="color: #808080;">■</span>	14.02 Sports stadiums* .....	37 ... <span style="color: #808080;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	6 ... <span style="color: #0056b3;">■</span>
7.01 Quality of roads .....	51 ... <span style="color: #808080;">■</span>		
7.02 Quality of railroad infrastructure .....	52 ... <span style="color: #808080;">■</span>		
7.03 Quality of port infrastructure .....	97 ... <span style="color: #808080;">■</span>		
7.04 Quality of domestic transport network .....	70 ... <span style="color: #808080;">■</span>		
7.05 Road density* .....	14 ... <span style="color: #0056b3;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Jamaica

## Key indicators

Population (millions), 2006	2.7
Surface area (1,000 square kilometers)	11.0
Gross domestic product (US\$ billions), 2006	10.4
Gross domestic product (PPP, US\$) per capita, 2006	4,494
Real GDP growth (percent), 2006	2.5

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

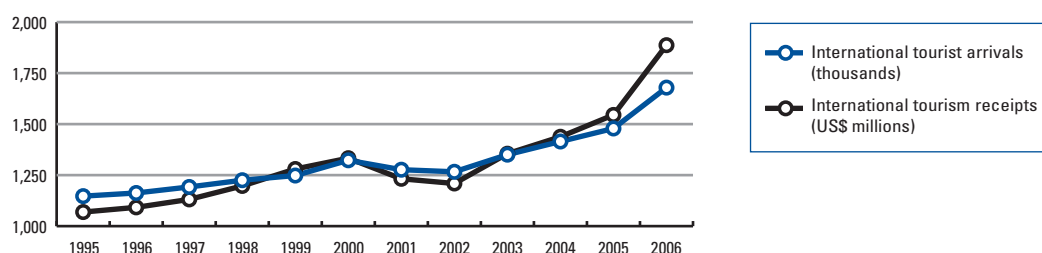
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions)	1,167	9.6	3.5
Employment (1,000 jobs)	92	8.7	2.8

### T&T economy, 2007 estimates

GDP (US\$ millions)	3,769	31.1	3.0
Employment (1,000 jobs)	289	27.4	2.2

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006	1,679
International tourism receipts (US\$ millions), 2006	1,887



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b>	<b>57</b>	<b>4.2</b>
<b>T&amp;T regulatory framework</b>	<b>51</b>	<b>4.7</b>
Policy rules and regulations	13	5.3
Environmental sustainability	99	4.0
Safety and security	102	4.4
Health and hygiene	82	4.0
Prioritization of Travel & Tourism	2	6.0
<b>T&amp;T business environment and infrastructure</b>	<b>48</b>	<b>3.9</b>
Air transport infrastructure	53	3.3
Ground transport infrastructure	38	4.5
Tourism infrastructure	55	3.8
ICT infrastructure	45	3.4
Price competitiveness in the T&T industry	85	4.4
<b>T&amp;T human, cultural, and natural resources</b>	<b>66</b>	<b>3.9</b>
Human resources	69	4.9
Education and training	69	4.6
Availability of qualified labor	59	5.3
Affinity for Travel & Tourism	4	6.4
Natural resources	99	2.6
Cultural resources	100	1.7

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	21 ...■	8.01 Hotel rooms* .....	33 ...■
1.02 Property rights .....	55 ...■	8.02 Presence of major car rental companies* .....	56 ...■
1.03 Business impact of rules on FDI .....	43 ...■	8.03 ATMs accepting Visa cards* .....	69 ...■
1.04 Visa requirements* .....	11 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	6 ...■	9.01 Extent of business Internet use .....	44 ...■
1.06 Transparency of government policymaking .....	53 ...■	9.02 Internet users* .....	26 ...■
1.07 Time required to start a business* .....	15 ...■	9.03 Telephone lines* .....	81 ...■
1.08 Cost to start a business* .....	51 ...■	9.04 Broadband Internet subscribers* .....	61 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	25 ...■
2.01 Stringency of environmental regulation .....	83 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	97 ...■	10.01 Ticket taxes and airport charges* .....	86 ...■
2.03 Sustainability of T&T industry development .....	60 ...■	10.02 Purchasing power parity* .....	99 ...■
2.04 Carbon dioxide emissions* .....	67 ...■	10.03 Extent and effect of taxation .....	102 ...■
2.05 Particulate matter concentration* .....	65 ...■	10.04 Fuel price levels* .....	51 ...■
2.06 Threatened species* .....	122 ...■	10.05 Hotel price index* .....	59 ...■
2.07 Environmental treaty ratification* .....	63 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	76 ...■
3.01 Business costs of terrorism .....	57 ...■	11.02 2ndary education enrollment* .....	58 ...■
3.02 Reliability of police services .....	112 ...■	11.03 Quality of the educational system .....	91 ...■
3.03 Business costs of crime and violence .....	129 ...■	11.04 Local availability of research and training services .....	60 ...■
3.04 Road traffic accidents* .....	4 ...■	11.05 Extent of staff training .....	67 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	59 ...■
4.01 Physician density* .....	89 ...■	11.07 Ease of hiring foreign labor .....	53 ...■
4.02 Access to improved sanitation* .....	68 ...■	11.08 HIV prevalence* .....	105 ...■
4.03 Access to improved drinking water* .....	60 ...■	11.09 Business impact of HIV/AIDS .....	115 ...■
4.04 Hospital beds* .....	85 ...■	11.10 Life expectancy* .....	73 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	20 ...■	12.01 Tourism openness* .....	3 ...■
5.02 T&T government expenditure* .....	2 ...■	12.02 Attitude of population toward foreign visitors .....	21 ...■
5.03 Effectiveness of marketing and branding .....	19 ...■	12.03 Extension of business trips recommended .....	59 ...■
5.04 T&T fair attendance* .....	32 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	70 ...■
6.01 Quality of air transport infrastructure .....	40 ...■	13.02 Nationally protected areas* .....	46 ...■
6.02 Available seat kilometers* .....	68 ...■	13.03 Quality of the natural environment .....	79 ...■
6.03 Departures per 1,000 population* .....	38 ...■	13.04 Total known species* .....	124 ...■
6.04 Airport density* .....	59 ...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	68 ...■	14.01 Number of World Heritage cultural sites* .....	108 ...■
6.06 International air transport network .....	28 ...■	14.02 Sports stadiums* .....	53 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	76 ...■
7.01 Quality of roads .....	58 ...■		
7.02 Quality of railroad infrastructure .....	113 ...■		
7.03 Quality of port infrastructure .....	28 ...■		
7.04 Quality of domestic transport network .....	67 ...■		
7.05 Road density* .....	6 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Japan

## Key indicators

Population (millions), 2006 .....	128.2
Surface area (1,000 square kilometers) .....	377.9
Gross domestic product (US\$ billions), 2006 .....	4,366.5
Gross domestic product (PPP, US\$) per capita, 2006 .....	32,530
Real GDP growth (percent), 2006 .....	2.2

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

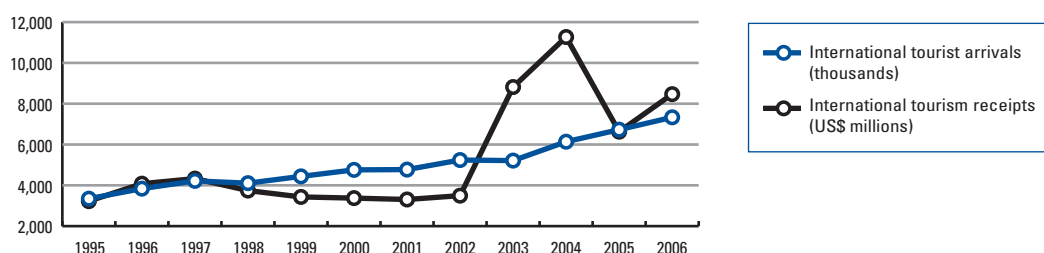
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	170,703	3.8	2.4
Employment (1,000 jobs) .....	2,920	4.6	1.8

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	457,566	10.1	2.8
Employment (1,000 jobs) .....	7,554	11.8	2.2

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	7,334
International tourism receipts (US\$ millions), 2006 .....	8,469



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>23</b>	<b>4.9</b>
<b>T&amp;T regulatory framework</b> .....	<b>34</b>	<b>5.1</b>
Policy rules and regulations .....	32	5.0
Environmental sustainability .....	48	4.7
Safety and security .....	74	4.9
Health and hygiene .....	23	6.2
Prioritization of Travel & Tourism .....	41	4.7
<b>T&amp;T business environment and infrastructure</b> .....	<b>21</b>	<b>4.9</b>
Air transport infrastructure .....	21	4.6
Ground transport infrastructure .....	9	6.3
Tourism infrastructure .....	46	4.2
ICT infrastructure .....	18	5.0
Price competitiveness in the T&T industry .....	94	4.3
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>16</b>	<b>4.7</b>
Human resources .....	12	5.7
Education and training .....	8	6.0
Availability of qualified labor .....	38	5.5
Affinity for Travel & Tourism .....	128	3.9
Natural resources .....	40	3.9
Cultural resources .....	14	5.4

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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



INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....90...	8.01	Hotel rooms* .....17...
1.02	Property rights .....14...	8.02	Presence of major car rental companies* .....74...
1.03	Business impact of rules on FDI .....80...	8.03	ATMs accepting Visa cards* .....57...
1.04	Visa requirements* .....55...	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....19...	9.01	Extent of business Internet use .....9...
1.06	Transparency of government policymaking .....14...	9.02	Internet users* .....8...
1.07	Time required to start a business* .....49...	9.03	Telephone lines* .....26...
1.08	Cost to start a business* .....42...	9.04	Broadband Internet subscribers* .....14...
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....48...
2.01	Stringency of environmental regulation .....12...	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....11...	10.01	Ticket taxes and airport charges* .....57...
2.03	Sustainability of T&T industry development .....79...	10.02	Purchasing power parity* .....108...
2.04	Carbon dioxide emissions* .....102...	10.03	Extent and effect of taxation .....66...
2.05	Particulate matter concentration* .....44...	10.04	Fuel price levels* .....74...
2.06	Threatened species* .....123...	10.05	Hotel price index* .....75...
2.07	Environmental treaty ratification* .....5...	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....1...
3.01	Business costs of terrorism .....104...	11.02	2ndary education enrollment* .....22...
3.02	Reliability of police services .....19...	11.03	Quality of the educational system .....28...
3.03	Business costs of crime and violence .....32...	11.04	Local availability of research and training services .....6...
3.04	Road traffic accidents* .....111...	11.05	Extent of staff training .....4...
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....84...
4.01	Physician density* .....57...	11.07	Ease of hiring foreign labor .....103...
4.02	Access to improved sanitation* .....1...	11.08	HIV prevalence* .....1...
4.03	Access to improved drinking water* .....1...	11.09	Business impact of HIV/AIDS .....50...
4.04	Hospital beds* .....1...	11.10	Life expectancy* .....1...
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....87...	12.01	Tourism openness* .....118...
5.02	T&T government expenditure* .....44...	12.02	Attitude of population toward foreign visitors .....98...
5.03	Effectiveness of marketing and branding .....86...	12.03	Extension of business trips recommended .....125...
5.04	T&T fair attendance* .....13...	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....15...
6.01	Quality of air transport infrastructure .....32...	13.02	Nationally protected areas* .....69...
6.02	Available seat kilometers* .....4...	13.03	Quality of the natural environment .....42...
6.03	Departures per 1,000 population* .....45...	13.04	Total known species* .....48...
6.04	Airport density* .....77...	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....16...	14.01	Number of World Heritage cultural sites* .....15...
6.06	International air transport network .....18...	14.02	Sports stadiums* .....71...
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....11...
7.01	Quality of roads .....13...		
7.02	Quality of railroad infrastructure .....2...		
7.03	Quality of port infrastructure .....17...		
7.04	Quality of domestic transport network .....8...		
7.05	Road density* .....4...		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Jordan

## Key indicators

Population (millions), 2006 .....	5.8
Surface area (1,000 square kilometers) .....	88.8
Gross domestic product (US\$ billions), 2006 .....	14.1
Gross domestic product (PPP, US\$) per capita, 2006 .....	5,611
Real GDP growth (percent), 2006 .....	6.3

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

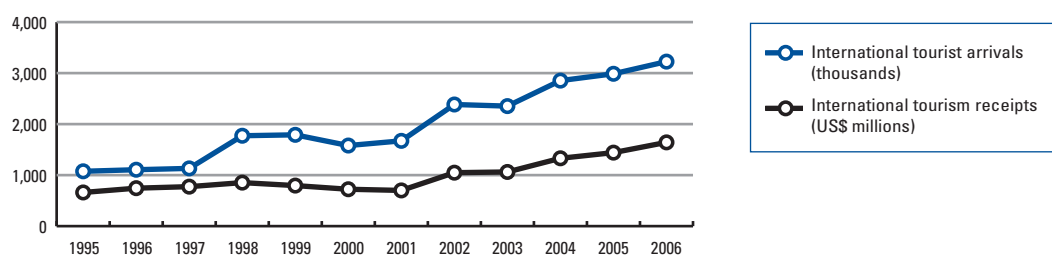
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	1,360	8.6	4.6
Employment (1,000 jobs) .....	142	8.2	3.1

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	3,279	20.8	4.5
Employment (1,000 jobs) .....	329	19.1	2.9

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	3,225
International tourism receipts (US\$ millions), 2006 .....	1,642



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>53</b>	<b>4.2</b>
<b>T&amp;T regulatory framework</b> .....	<b>36</b>	<b>5.1</b>
Policy rules and regulations .....	78	4.1
Environmental sustainability .....	38	4.9
Safety and security .....	15	6.0
Health and hygiene .....	58	4.8
Prioritization of Travel & Tourism .....	16	5.5
<b>T&amp;T business environment and infrastructure</b> .....	<b>60</b>	<b>3.6</b>
Air transport infrastructure .....	60	3.1
Ground transport infrastructure .....	65	3.7
Tourism infrastructure .....	56	3.8
ICT infrastructure .....	65	2.6
Price competitiveness in the T&T industry .....	37	5.0
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>64</b>	<b>3.9</b>
Human resources .....	70	4.9
Education and training .....	51	4.8
Availability of qualified labor .....	94	5.1
Affinity for Travel & Tourism .....	9	6.1
Natural resources .....	87	2.8
Cultural resources .....	91	1.8

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	38...■	8.01 Hotel rooms* .....	58...■
1.02 Property rights .....	29...■	8.02 Presence of major car rental companies* .....	1...■
1.03 Business impact of rules on FDI .....	41...■	8.03 ATMs accepting Visa cards* .....	75...■
1.04 Visa requirements* .....	124...■		
1.05 Openness of bilateral Air Service Agreements* .....	36...■	<b>9th pillar: ICT infrastructure</b>	
1.06 Transparency of government policymaking .....	57...■	9.01 Extent of business Internet use .....	42...■
1.07 Time required to start a business* .....	28...■	9.02 Internet users* .....	71...■
1.08 Cost to start a business* .....	105...■	9.03 Telephone lines* .....	85...■
		9.04 Broadband Internet subscribers* .....	69...■
		9.05 Mobile telephone subscribers* .....	54...■
<b>2nd pillar: Environmental sustainability</b>		<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.01 Stringency of environmental regulation .....	58...■	10.01 Ticket taxes and airport charges* .....	109...■
2.02 Enforcement of environmental regulation .....	51...■	10.02 Purchasing power parity* .....	57...■
2.03 Sustainability of T&T industry development .....	40...■	10.03 Extent and effect of taxation .....	73...■
2.04 Carbon dioxide emissions* .....	61...■	10.04 Fuel price levels* .....	16...■
2.05 Particulate matter concentration* .....	73...■	10.05 Hotel price index* .....	30...■
2.06 Threatened species* .....	73...■		
2.07 Environmental treaty ratification* .....	18...■	<b>11th pillar: Human resources</b>	
		11.01 Primary education enrollment* .....	81...■
<b>3rd pillar: Safety and security</b>		11.02 2ndary education enrollment* .....	62...■
3.01 Business costs of terrorism .....	75...■	11.03 Quality of the educational system .....	37...■
3.02 Reliability of police services .....	14...■	11.04 Local availability of research and training services .....	59...■
3.03 Business costs of crime and violence .....	13...■	11.05 Extent of staff training .....	57...■
3.04 Road traffic accidents* .....	60...■	11.06 Hiring and firing practices .....	102...■
		11.07 Ease of hiring foreign labor .....	94...■
		11.08 HIV prevalence* .....	1...■
		11.09 Business impact of HIV/AIDS .....	13...■
		11.10 Life expectancy* .....	68...■
<b>4th pillar: Health and hygiene</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
4.01 Physician density* .....	55...■	12.01 Tourism openness* .....	9...■
4.02 Access to improved sanitation* .....	51...■	12.02 Attitude of population toward foreign visitors .....	65...■
4.03 Access to improved drinking water* .....	45...■	12.03 Extension of business trips recommended .....	24...■
4.04 Hospital beds* .....	85...■		
		<b>13th pillar: Natural resources</b>	
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		13.01 Number of World Heritage natural sites* .....	70...■
5.01 Government prioritization of the T&T industry .....	45...■	13.02 Nationally protected areas* .....	55...■
5.02 T&T government expenditure* .....	7...■	13.03 Quality of the natural environment .....	35...■
5.03 Effectiveness of marketing and branding .....	48...■	13.04 Total known species* .....	103...■
5.04 T&T fair attendance* .....	45...■		
		<b>14th pillar: Cultural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		14.01 Number of World Heritage cultural sites* .....	54...■
6.01 Quality of air transport infrastructure .....	36...■	14.02 Sports stadiums* .....	95...■
6.02 Available seat kilometers* .....	65...■	14.03 Number of international fairs and exhibitions* .....	80...■
6.03 Departures per 1,000 population* .....	53...■		
6.04 Airport density* .....	80...■		
6.05 Number of operating airlines* .....	59...■		
6.06 International air transport network .....	35...■		
<b>7th pillar: Ground transport infrastructure</b>			
7.01 Quality of roads .....	37...■		
7.02 Quality of railroad infrastructure .....	85...■		
7.03 Quality of port infrastructure .....	54...■		
7.04 Quality of domestic transport network .....	18...■		
7.05 Road density* .....	98...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# Kazakhstan

## Key indicators

Population (millions), 2006 .....	14.8
Surface area (1,000 square kilometers) .....	2,724.9
Gross domestic product (US\$ billions), 2006 .....	81.0
Gross domestic product (PPP, US\$) per capita, 2006 .....	9,568
Real GDP growth (percent), 2006 .....	10.7

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

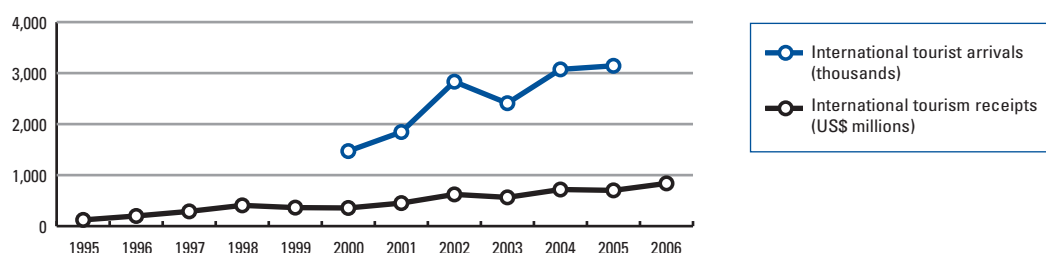
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	n/a	n/a
Employment (1,000 jobs) .....	n/a	n/a

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	n/a	n/a
Employment (1,000 jobs) .....	n/a	n/a

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2005 .....	3,143
International tourism receipts (US\$ millions), 2006 .....	838



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>91</b>	<b>3.6</b>
<b>T&amp;T regulatory framework</b> .....	<b>61</b>	<b>4.5</b>
Policy rules and regulations .....	77	4.1
Environmental sustainability .....	120	3.7
Safety and security .....	73	4.9
Health and hygiene .....	33	5.8
Prioritization of Travel & Tourism .....	83	3.9
<b>T&amp;T business environment and infrastructure</b> .....	<b>96</b>	<b>2.9</b>
Air transport infrastructure .....	85	2.6
Ground transport infrastructure .....	91	3.0
Tourism infrastructure .....	100	2.2
ICT infrastructure .....	77	2.4
Price competitiveness in the T&T industry .....	80	4.4
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>112</b>	<b>3.4</b>
Human resources .....	55	5.0
Education and training .....	59	4.7
Availability of qualified labor .....	51	5.4
Affinity for Travel & Tourism .....	79	4.6
Natural resources .....	115	2.2
Cultural resources .....	101	1.6

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....97...■	8.01	Hotel rooms* .....92...■
1.02	Property rights .....91...■	8.02	Presence of major car rental companies* .....103...■
1.03	Business impact of rules on FDI .....91...■	8.03	ATMs accepting Visa cards* .....63...■
1.04	Visa requirements* .....97...■	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....98...■	9.01	Extent of business Internet use .....78...■
1.06	Transparency of government policymaking .....75...■	9.02	Internet users* .....87...■
1.07	Time required to start a business* .....45...■	9.03	Telephone lines* .....61...■
1.08	Cost to start a business* .....43...■	9.04	Broadband Internet subscribers* .....87...■
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....75...■
2.01	Stringency of environmental regulation .....95...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....77...■	10.01	Ticket taxes and airport charges* .....n/a.....
2.03	Sustainability of T&T industry development .....96...■	10.02	Purchasing power parity* .....67...■
2.04	Carbon dioxide emissions* .....111...■	10.03	Extent and effect of taxation .....81...■
2.05	Particulate matter concentration* .....16...■	10.04	Fuel price levels* .....16...■
2.06	Threatened species* .....93...■	10.05	Hotel price index* .....100...■
2.07	Environmental treaty ratification* .....125...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....73...■
3.01	Business costs of terrorism .....82...■	11.02	2ndary education enrollment* .....30...■
3.02	Reliability of police services .....91...■	11.03	Quality of the educational system .....64...■
3.03	Business costs of crime and violence .....68...■	11.04	Local availability of research and training services .....82...■
3.04	Road traffic accidents* .....76...■	11.05	Extent of staff training .....93...■
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....4...■
4.01	Physician density* .....14...■	11.07	Ease of hiring foreign labor .....116...■
4.02	Access to improved sanitation* .....76...■	11.08	HIV prevalence* .....24...■
4.03	Access to improved drinking water* .....78...■	11.09	Business impact of HIV/AIDS .....87...■
4.04	Hospital beds* .....9...■	11.10	Life expectancy* .....99...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....100...■	12.01	Tourism openness* .....97...■
5.02	T&T government expenditure* .....n/a.....	12.02	Attitude of population toward foreign visitors .....92...■
5.03	Effectiveness of marketing and branding .....98...■	12.03	Extension of business trips recommended .....29...■
5.04	T&T fair attendance* .....76...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....70...■
6.01	Quality of air transport infrastructure .....92...■	13.02	Nationally protected areas* .....103...■
6.02	Available seat kilometers* .....64...■	13.03	Quality of the natural environment .....118...■
6.03	Departures per 1,000 population* .....85...■	13.04	Total known species* .....56...■
6.04	Airport density* .....43...■	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....65...■	14.01	Number of World Heritage cultural sites* .....69...■
6.06	International air transport network .....85...■	14.02	Sports stadiums* .....92...■
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....99...■
7.01	Quality of roads .....109...■		
7.02	Quality of railroad infrastructure .....39...■		
7.03	Quality of port infrastructure .....88...■		
7.04	Quality of domestic transport network .....93...■		
7.05	Road density* .....111...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Kenya

## Key indicators

Population (millions), 2006 .....	35.1
Surface area (1,000 square kilometers) .....	580.4
Gross domestic product (US\$ billions), 2006 .....	22.8
Gross domestic product (PPP, US\$) per capita, 2006 .....	1,357
Real GDP growth (percent), 2006 .....	6.1

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

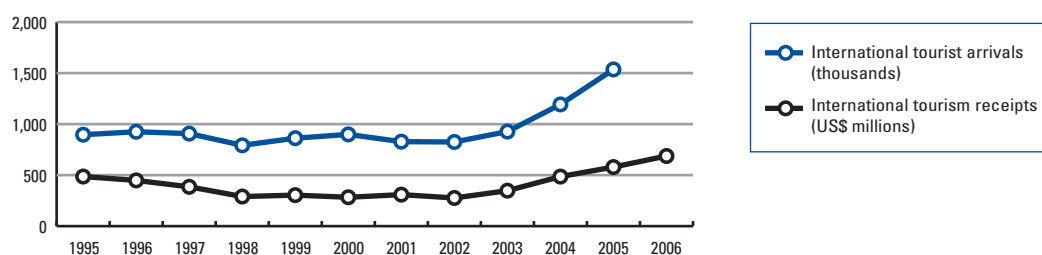
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	1,306	5.0	3.0
Employment (1,000 jobs) .....	219	4.0	2.0

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	3,002	11.6	3.1
Employment (1,000 jobs) .....	509	9.4	2.1

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2005 .....	1,536
International tourism receipts (US\$ millions), 2006 .....	688



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>101</b>	<b>3.5</b>
<b>T&amp;T regulatory framework</b> .....	<b>100</b>	<b>4.0</b>
Policy rules and regulations .....	101	3.7
Environmental sustainability .....	19	5.2
Safety and security .....	120	3.7
Health and hygiene .....	118	2.1
Prioritization of Travel & Tourism .....	20	5.3
<b>T&amp;T business environment and infrastructure</b> .....	<b>102</b>	<b>2.8</b>
Air transport infrastructure .....	73	2.8
Ground transport infrastructure .....	107	2.7
Tourism infrastructure .....	98	2.3
ICT infrastructure .....	108	1.8
Price competitiveness in the T&T industry .....	75	4.5
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>77</b>	<b>3.8</b>
Human resources .....	105	4.3
Education and training .....	89	4.2
Availability of qualified labor .....	118	4.5
Affinity for Travel & Tourism .....	60	4.8
Natural resources .....	24	4.5
Cultural resources .....	116	1.4

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....60... <span style="color: #808080;">■</span>	8.01	Hotel rooms* .....106... <span style="color: #808080;">■</span>
1.02	Property rights .....87... <span style="color: #808080;">■</span>	8.02	Presence of major car rental companies* .....74... <span style="color: #808080;">■</span>
1.03	Business impact of rules on FDI .....83... <span style="color: #808080;">■</span>	8.03	ATMs accepting Visa cards* .....98... <span style="color: #808080;">■</span>
1.04	Visa requirements* .....80... <span style="color: #808080;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....112... <span style="color: #808080;">■</span>	9.01	Extent of business Internet use .....76... <span style="color: #808080;">■</span>
1.06	Transparency of government policymaking .....77... <span style="color: #808080;">■</span>	9.02	Internet users* .....90... <span style="color: #808080;">■</span>
1.07	Time required to start a business* .....97... <span style="color: #808080;">■</span>	9.03	Telephone lines* .....117... <span style="color: #808080;">■</span>
1.08	Cost to start a business* .....97... <span style="color: #808080;">■</span>	9.04	Broadband Internet subscribers* .....120... <span style="color: #808080;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....107... <span style="color: #808080;">■</span>
2.01	Stringency of environmental regulation .....65... <span style="color: #808080;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....60... <span style="color: #808080;">■</span>	10.01	Ticket taxes and airport charges* .....114... <span style="color: #808080;">■</span>
2.03	Sustainability of T&T industry development .....19... <span style="color: #0056b3;">■</span>	10.02	Purchasing power parity* .....62... <span style="color: #808080;">■</span>
2.04	Carbon dioxide emissions* .....15... <span style="color: #0056b3;">■</span>	10.03	Extent and effect of taxation .....113... <span style="color: #808080;">■</span>
2.05	Particulate matter concentration* .....57... <span style="color: #808080;">■</span>	10.04	Fuel price levels* .....77... <span style="color: #808080;">■</span>
2.06	Threatened species* .....50... <span style="color: #0056b3;">■</span>	10.05	Hotel price index* .....15... <span style="color: #0056b3;">■</span>
2.07	Environmental treaty ratification* .....5... <span style="color: #0056b3;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....109... <span style="color: #808080;">■</span>
3.01	Business costs of terrorism .....124... <span style="color: #808080;">■</span>	11.02	2ndary education enrollment* .....106... <span style="color: #808080;">■</span>
3.02	Reliability of police services .....96... <span style="color: #808080;">■</span>	11.03	Quality of the educational system .....34... <span style="color: #0056b3;">■</span>
3.03	Business costs of crime and violence .....123... <span style="color: #808080;">■</span>	11.04	Local availability of research and training services .....42... <span style="color: #0056b3;">■</span>
3.04	Road traffic accidents* .....102... <span style="color: #808080;">■</span>	11.05	Extent of staff training .....54... <span style="color: #808080;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....22... <span style="color: #0056b3;">■</span>
4.01	Physician density* .....113... <span style="color: #808080;">■</span>	11.07	Ease of hiring foreign labor .....87... <span style="color: #808080;">■</span>
4.02	Access to improved sanitation* .....106... <span style="color: #808080;">■</span>	11.08	HIV prevalence* .....120... <span style="color: #808080;">■</span>
4.03	Access to improved drinking water* .....108... <span style="color: #808080;">■</span>	11.09	Business impact of HIV/AIDS .....114... <span style="color: #808080;">■</span>
4.04	Hospital beds* .....81... <span style="color: #808080;">■</span>	11.10	Life expectancy* .....115... <span style="color: #808080;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....27... <span style="color: #0056b3;">■</span>	12.01	Tourism openness* .....70... <span style="color: #808080;">■</span>
5.02	T&T government expenditure* .....19... <span style="color: #0056b3;">■</span>	12.02	Attitude of population toward foreign visitors .....26... <span style="color: #0056b3;">■</span>
5.03	Effectiveness of marketing and branding .....16... <span style="color: #0056b3;">■</span>	12.03	Extension of business trips recommended .....53... <span style="color: #808080;">■</span>
5.04	T&T fair attendance* .....45... <span style="color: #0056b3;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....21... <span style="color: #0056b3;">■</span>
6.01	Quality of air transport infrastructure .....51... <span style="color: #808080;">■</span>	13.02	Nationally protected areas* .....49... <span style="color: #0056b3;">■</span>
6.02	Available seat kilometers* .....52... <span style="color: #808080;">■</span>	13.03	Quality of the natural environment .....92... <span style="color: #808080;">■</span>
6.03	Departures per 1,000 population* .....96... <span style="color: #808080;">■</span>	13.04	Total known species* .....13... <span style="color: #0056b3;">■</span>
6.04	Airport density* .....102... <span style="color: #808080;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....52... <span style="color: #808080;">■</span>	14.01	Number of World Heritage cultural sites* .....83... <span style="color: #808080;">■</span>
6.06	International air transport network .....58... <span style="color: #808080;">■</span>	14.02	Sports stadiums* .....111... <span style="color: #808080;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....72... <span style="color: #808080;">■</span>
7.01	Quality of roads .....100... <span style="color: #808080;">■</span>		
7.02	Quality of railroad infrastructure .....74... <span style="color: #808080;">■</span>		
7.03	Quality of port infrastructure .....85... <span style="color: #808080;">■</span>		
7.04	Quality of domestic transport network .....116... <span style="color: #808080;">■</span>		
7.05	Road density* .....86... <span style="color: #808080;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Korea, Rep.

## Key indicators

Population (millions), 2006	48.0
Surface area (1,000 square kilometers)	99.3
Gross domestic product (US\$ billions), 2006	888.3
Gross domestic product (PPP, US\$) per capita, 2006	24,084
Real GDP growth (percent), 2006	5.0

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

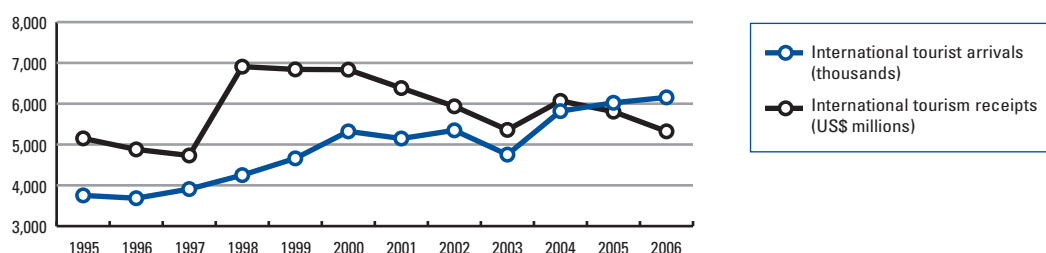
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions)	14,995	1.5
Employment (1,000 jobs)	500	2.1

### T&T economy, 2007 estimates

GDP (US\$ millions)	66,196	6.7
Employment (1,000 jobs)	1,739	7.4

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006	6,155
International tourism receipts (US\$ millions), 2006	5,323



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b>	<b>31</b>	<b>4.7</b>
<b>T&amp;T regulatory framework</b>	<b>38</b>	<b>5.0</b>
Policy rules and regulations	33	4.9
Environmental sustainability	50	4.7
Safety and security	67	5.0
Health and hygiene	38	5.7
Prioritization of Travel & Tourism	34	4.9
<b>T&amp;T business environment and infrastructure</b>	<b>34</b>	<b>4.5</b>
Air transport infrastructure	39	3.9
Ground transport infrastructure	15	5.6
Tourism infrastructure	70	3.2
ICT infrastructure	6	5.7
Price competitiveness in the T&T industry	106	4.1
<b>T&amp;T human, cultural, and natural resources</b>	<b>29</b>	<b>4.5</b>
Human resources	9	5.8
Education and training	14	5.9
Availability of qualified labor	16	5.8
Affinity for Travel & Tourism	112	4.3
Natural resources	80	2.9
Cultural resources	22	4.9

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....61...■	8.01	Hotel rooms* .....89...■
1.02	Property rights .....24...■	8.02	Presence of major car rental companies* .....89...■
1.03	Business impact of rules on FDI .....53...■	8.03	ATMs accepting Visa cards* .....29...■
1.04	Visa requirements* .....30...■	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....41...■	9.01	Extent of business Internet use .....1...■
1.06	Transparency of government policymaking .....34...■	9.02	Internet users* .....6...■
1.07	Time required to start a business* .....37...■	9.03	Telephone lines* .....10...■
1.08	Cost to start a business* .....67...■	9.04	Broadband Internet subscribers* .....5...■
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....44...■
2.01	Stringency of environmental regulation .....25...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....21...■	10.01	Ticket taxes and airport charges* .....31...■
2.03	Sustainability of T&T industry development .....41...■	10.02	Purchasing power parity* .....92...■
2.04	Carbon dioxide emissions* .....101...■	10.03	Extent and effect of taxation .....30...■
2.05	Particulate matter concentration* .....54...■	10.04	Fuel price levels* .....114...■
2.06	Threatened species* .....108...■	10.05	Hotel price index* .....107...■
2.07	Environmental treaty ratification* .....63...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....4...■
3.01	Business costs of terrorism .....78...■	11.02	2ndary education enrollment* .....48...■
3.02	Reliability of police services .....27...■	11.03	Quality of the educational system .....19...■
3.03	Business costs of crime and violence .....40...■	11.04	Local availability of research and training services .....14...■
3.04	Road traffic accidents* .....110...■	11.05	Extent of staff training .....5...■
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....23...■
4.01	Physician density* .....62...■	11.07	Ease of hiring foreign labor .....61...■
4.02	Access to improved sanitation* .....1...■	11.08	HIV prevalence* .....1...■
4.03	Access to improved drinking water* .....66...■	11.09	Business impact of HIV/AIDS .....70...■
4.04	Hospital beds* .....19...■	11.10	Life expectancy* .....28...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....70...■	12.01	Tourism openness* .....94...■
5.02	T&T government expenditure* .....82...■	12.02	Attitude of population toward foreign visitors .....111...■
5.03	Effectiveness of marketing and branding .....40...■	12.03	Extension of business trips recommended .....98...■
5.04	T&T fair attendance* .....5...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....39...■
6.01	Quality of air transport infrastructure .....26...■	13.02	Nationally protected areas* .....97...■
6.02	Available seat kilometers* .....19...■	13.03	Quality of the natural environment .....32...■
6.03	Departures per 1,000 population* .....52...■	13.04	Total known species* .....67...■
6.04	Airport density* .....105...■	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....32...■	14.01	Number of World Heritage cultural sites* .....23...■
6.06	International air transport network .....27...■	14.02	Sports stadiums* .....34...■
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....16...■
7.01	Quality of roads .....20...■		
7.02	Quality of railroad infrastructure .....12...■		
7.03	Quality of port infrastructure .....20...■		
7.04	Quality of domestic transport network .....26...■		
7.05	Road density* .....28...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Kuwait

## Key indicators

Population (millions), 2006 .....	2.8
Surface area (1,000 square kilometers) .....	17.8
Gross domestic product (US\$ billions), 2006 .....	95.9
Gross domestic product (PPP, US\$) per capita, 2006 .....	20,886
Real GDP growth (percent), 2006 .....	5.0

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

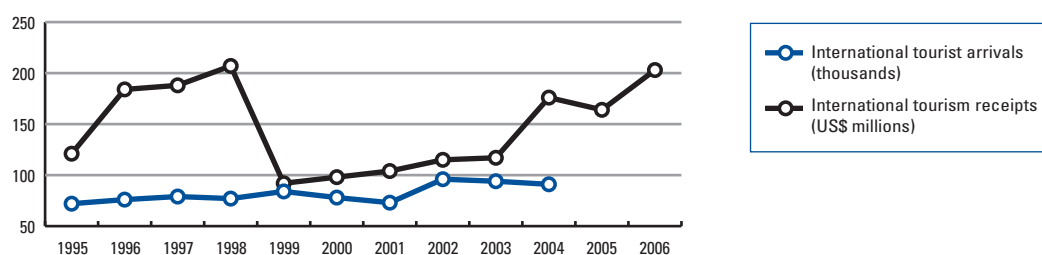
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	1,106	1.1	12.4
Employment (1,000 jobs) .....	29	1.6	10.1

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	7,230	7.3	5.9
Employment (1,000 jobs) .....	132	7.1	4.9

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2004 .....	91
International tourism receipts (US\$ millions), 2006 .....	203



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>85</b>	<b>3.7</b>
<b>T&amp;T regulatory framework</b> .....	<b>105</b>	<b>3.9</b>
Policy rules and regulations .....	97	3.8
Environmental sustainability .....	130	3.0
Safety and security .....	18	5.9
Health and hygiene .....	77	4.2
Prioritization of Travel & Tourism .....	129	2.6
<b>T&amp;T business environment and infrastructure</b> .....	<b>53</b>	<b>3.8</b>
Air transport infrastructure .....	59	3.1
Ground transport infrastructure .....	48	4.4
Tourism infrastructure .....	57	3.8
ICT infrastructure .....	53	3.0
Price competitiveness in the T&T industry .....	51	4.8
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>119</b>	<b>3.3</b>
Human resources .....	32	5.3
Education and training .....	57	4.7
Availability of qualified labor .....	8	5.9
Affinity for Travel & Tourism .....	119	4.1
Natural resources .....	125	2.1
Cultural resources .....	94	1.8

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....129... <span style="color: #808080;">■</span>	8.01	Hotel rooms* .....79... <span style="color: #808080;">■</span>
1.02	Property rights .....42... <span style="color: #0056b3;">■</span>	8.02	Presence of major car rental companies* .....1... <span style="color: #0056b3;">■</span>
1.03	Business impact of rules on FDI .....128... <span style="color: #808080;">■</span>	8.03	ATMs accepting Visa cards* .....60... <span style="color: #808080;">■</span>
1.04	Visa requirements* .....113... <span style="color: #808080;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....123... <span style="color: #808080;">■</span>	9.01	Extent of business Internet use .....62... <span style="color: #808080;">■</span>
1.06	Transparency of government policymaking .....52... <span style="color: #808080;">■</span>	9.02	Internet users* .....43... <span style="color: #0056b3;">■</span>
1.07	Time required to start a business* .....84... <span style="color: #808080;">■</span>	9.03	Telephone lines* .....64... <span style="color: #808080;">■</span>
1.08	Cost to start a business* .....14... <span style="color: #0056b3;">■</span>	9.04	Broadband Internet subscribers* .....67... <span style="color: #808080;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....40... <span style="color: #0056b3;">■</span>
2.01	Stringency of environmental regulation .....89... <span style="color: #808080;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....85... <span style="color: #808080;">■</span>	10.01	Ticket taxes and airport charges* .....4... <span style="color: #0056b3;">■</span>
2.03	Sustainability of T&T industry development .....126... <span style="color: #808080;">■</span>	10.02	Purchasing power parity* .....126... <span style="color: #808080;">■</span>
2.04	Carbon dioxide emissions* .....124... <span style="color: #808080;">■</span>	10.03	Extent and effect of taxation .....5... <span style="color: #0056b3;">■</span>
2.05	Particulate matter concentration* .....109... <span style="color: #808080;">■</span>	10.04	Fuel price levels* .....9... <span style="color: #0056b3;">■</span>
2.06	Threatened species* .....55... <span style="color: #808080;">■</span>	10.05	Hotel price index* .....108... <span style="color: #808080;">■</span>
2.07	Environmental treaty ratification* .....88... <span style="color: #808080;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....97... <span style="color: #808080;">■</span>
3.01	Business costs of terrorism .....69... <span style="color: #808080;">■</span>	11.02	2ndary education enrollment* .....40... <span style="color: #0056b3;">■</span>
3.02	Reliability of police services .....33... <span style="color: #0056b3;">■</span>	11.03	Quality of the educational system .....80... <span style="color: #808080;">■</span>
3.03	Business costs of crime and violence .....18... <span style="color: #0056b3;">■</span>	11.04	Local availability of research and training services .....51... <span style="color: #808080;">■</span>
3.04	Road traffic accidents* .....27... <span style="color: #0056b3;">■</span>	11.05	Extent of staff training .....48... <span style="color: #0056b3;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....53... <span style="color: #808080;">■</span>
4.01	Physician density* .....63... <span style="color: #808080;">■</span>	11.07	Ease of hiring foreign labor .....1... <span style="color: #0056b3;">■</span>
4.02	Access to improved sanitation* .....1... <span style="color: #0056b3;">■</span>	11.08	HIV prevalence* .....1... <span style="color: #0056b3;">■</span>
4.03	Access to improved drinking water* .....n/a.....	11.09	Business impact of HIV/AIDS .....22... <span style="color: #0056b3;">■</span>
4.04	Hospital beds* .....81... <span style="color: #808080;">■</span>	11.10	Life expectancy* .....28... <span style="color: #0056b3;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....129... <span style="color: #808080;">■</span>	12.01	Tourism openness* .....46... <span style="color: #0056b3;">■</span>
5.02	T&T government expenditure* .....112... <span style="color: #808080;">■</span>	12.02	Attitude of population toward foreign visitors .....126... <span style="color: #808080;">■</span>
5.03	Effectiveness of marketing and branding .....126... <span style="color: #808080;">■</span>	12.03	Extension of business trips recommended .....130... <span style="color: #808080;">■</span>
5.04	T&T fair attendance* .....93... <span style="color: #808080;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....70... <span style="color: #808080;">■</span>
6.01	Quality of air transport infrastructure .....52... <span style="color: #808080;">■</span>	13.02	Nationally protected areas* .....106... <span style="color: #808080;">■</span>
6.02	Available seat kilometers* .....54... <span style="color: #808080;">■</span>	13.03	Quality of the natural environment .....93... <span style="color: #808080;">■</span>
6.03	Departures per 1,000 population* .....40... <span style="color: #0056b3;">■</span>	13.04	Total known species* .....116... <span style="color: #808080;">■</span>
6.04	Airport density* .....99... <span style="color: #808080;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....45... <span style="color: #0056b3;">■</span>	14.01	Number of World Heritage cultural sites* .....108... <span style="color: #808080;">■</span>
6.06	International air transport network .....49... <span style="color: #0056b3;">■</span>	14.02	Sports stadiums* .....43... <span style="color: #0056b3;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....105... <span style="color: #808080;">■</span>
7.01	Quality of roads .....27... <span style="color: #0056b3;">■</span>		
7.02	Quality of railroad infrastructure .....n/a.....		
7.03	Quality of port infrastructure .....55... <span style="color: #808080;">■</span>		
7.04	Quality of domestic transport network .....51... <span style="color: #808080;">■</span>		
7.05	Road density* .....55... <span style="color: #808080;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# Kyrgyz Republic

## Key indicators

Population (millions), 2006 .....	5.3
Surface area (1,000 square kilometers) .....	199.9
Gross domestic product (US\$ billions), 2006 .....	2.8
Gross domestic product (PPP, US\$) per capita, 2006 .....	2,121
Real GDP growth (percent), 2006 .....	2.7

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

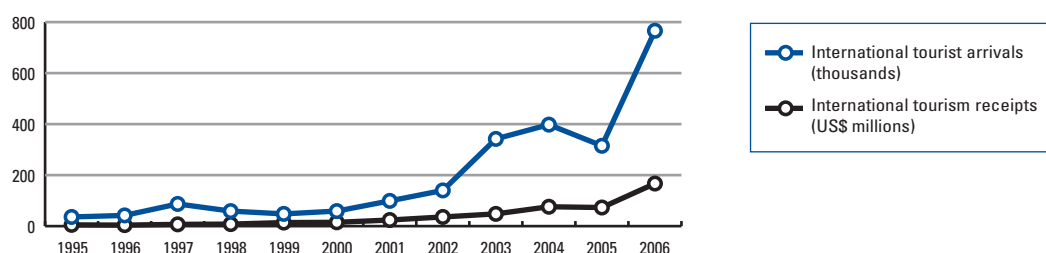
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	n/a	n/a
Employment (1,000 jobs) .....	n/a	n/a

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	n/a	n/a
Employment (1,000 jobs) .....	n/a	n/a

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	766
International tourism receipts (US\$ millions), 2006 .....	167



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>113</b>	<b>3.3</b>
<b>T&amp;T regulatory framework</b> .....	<b>90</b>	<b>4.1</b>
Policy rules and regulations .....	105	3.6
Environmental sustainability .....	91	4.1
Safety and security .....	100	4.4
Health and hygiene .....	71	4.4
Prioritization of Travel & Tourism .....	97	3.7
<b>T&amp;T business environment and infrastructure</b> .....	<b>128</b>	<b>2.4</b>
Air transport infrastructure .....	119	2.1
Ground transport infrastructure .....	121	2.4
Tourism infrastructure .....	129	1.1
ICT infrastructure .....	112	1.7
Price competitiveness in the T&T industry .....	70	4.6
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>102</b>	<b>3.5</b>
Human resources .....	92	4.8
Education and training .....	99	4.1
Availability of qualified labor .....	43	5.4
Affinity for Travel & Tourism .....	26	5.4
Natural resources .....	102	2.5
Cultural resources .....	125	1.2

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	113 ...■	8.01 Hotel rooms* .....	110 ...■
1.02 Property rights .....	121 ...■	8.02 Presence of major car rental companies* .....	123 ...■
1.03 Business impact of rules on FDI .....	121 ...■	8.03 ATMs accepting Visa cards* .....	112 ...■
1.04 Visa requirements* .....	99 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	116 ...■	9.01 Extent of business Internet use .....	118 ...■
1.06 Transparency of government policymaking .....	125 ...■	9.02 Internet users* .....	101 ...■
1.07 Time required to start a business* .....	45 ...■	9.03 Telephone lines* .....	92 ...■
1.08 Cost to start a business* .....	52 ...■	9.04 Broadband Internet subscribers* .....	101 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	119 ...■
2.01 Stringency of environmental regulation .....	124 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	115 ...■	10.01 Ticket taxes and airport charges* .....	81 ...■
2.03 Sustainability of T&T industry development .....	106 ...■	10.02 Purchasing power parity* .....	14 ...■
2.04 Carbon dioxide emissions* .....	37 ...■	10.03 Extent and effect of taxation .....	116 ...■
2.05 Particulate matter concentration* .....	30 ...■	10.04 Fuel price levels* .....	24 ...■
2.06 Threatened species* .....	90 ...■	10.05 Hotel price index* .....	103 ...■
2.07 Environmental treaty ratification* .....	115 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	95 ...■
3.01 Business costs of terrorism .....	110 ...■	11.02 2ndary education enrollment* .....	68 ...■
3.02 Reliability of police services .....	116 ...■	11.03 Quality of the educational system .....	72 ...■
3.03 Business costs of crime and violence .....	101 ...■	11.04 Local availability of research and training services .....	118 ...■
3.04 Road traffic accidents* .....	43 ...■	11.05 Extent of staff training .....	124 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	10 ...■
4.01 Physician density* .....	38 ...■	11.07 Ease of hiring foreign labor .....	109 ...■
4.02 Access to improved sanitation* .....	88 ...■	11.08 HIV prevalence* .....	24 ...■
4.03 Access to improved drinking water* .....	98 ...■	11.09 Business impact of HIV/AIDS .....	96 ...■
4.04 Hospital beds* .....	36 ...■	11.10 Life expectancy* .....	91 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	69 ...■	12.01 Tourism openness* .....	23 ...■
5.02 T&T government expenditure* .....	n/a .....	12.02 Attitude of population toward foreign visitors .....	95 ...■
5.03 Effectiveness of marketing and branding .....	97 ...■	12.03 Extension of business trips recommended .....	15 ...■
5.04 T&T fair attendance* .....	111 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	70 ...■
6.01 Quality of air transport infrastructure .....	111 ...■	13.02 Nationally protected areas* .....	99 ...■
6.02 Available seat kilometers* .....	109 ...■	13.03 Quality of the natural environment .....	11 ...■
6.03 Departures per 1,000 population* .....	91 ...■	13.04 Total known species* .....	122 ...■
6.04 Airport density* .....	97 ...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	88 ...■	14.01 Number of World Heritage cultural sites* .....	108 ...■
6.06 International air transport network .....	119 ...■	14.02 Sports stadiums* .....	103 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	n/a .....
7.01 Quality of roads .....	104 ...■		
7.02 Quality of railroad infrastructure .....	64 ...■		
7.03 Quality of port infrastructure .....	129 ...■		
7.04 Quality of domestic transport network .....	110 ...■		
7.05 Road density* .....	93 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Latvia

## Key indicators

Population (millions), 2006 .....	2.3
Surface area (1,000 square kilometers) .....	64.6
Gross domestic product (US\$ billions), 2006 .....	20.1
Gross domestic product (PPP, US\$) per capita, 2006 .....	15,806
Real GDP growth (percent), 2006 .....	11.9

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

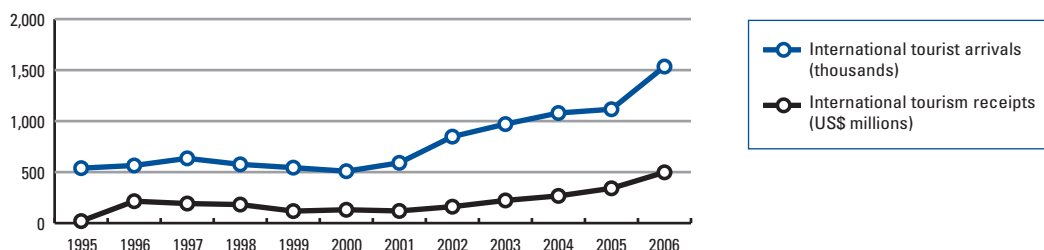
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	1.3	6.0
Employment (1,000 jobs) .....	1.2	-0.7

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	1,373	6.1	6.5
Employment (1,000 jobs) .....	55	5.2	-0.2

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	1,535
International tourism receipts (US\$ millions), 2006 .....	498



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>45</b>	<b>4.3</b>
<b>T&amp;T regulatory framework</b> .....	<b>35</b>	<b>5.1</b>
Policy rules and regulations .....	42	4.7
Environmental sustainability .....	16	5.3
Safety and security .....	40	5.6
Health and hygiene .....	25	6.2
Prioritization of Travel & Tourism .....	95	3.8
<b>T&amp;T business environment and infrastructure</b> .....	<b>43</b>	<b>4.2</b>
Air transport infrastructure .....	56	3.2
Ground transport infrastructure .....	41	4.5
Tourism infrastructure .....	33	4.8
ICT infrastructure .....	38	3.7
Price competitiveness in the T&T industry .....	67	4.6
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>82</b>	<b>3.7</b>
Human resources .....	51	5.0
Education and training .....	46	4.9
Availability of qualified labor .....	83	5.2
Affinity for Travel & Tourism .....	66	4.8
Natural resources .....	78	3.0
Cultural resources .....	76	2.2

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	37 ... <span style="color: #0056b3;">■</span>	8.01 Hotel rooms* .....	55 ... <span style="color: #808080;">■</span>
1.02 Property rights .....	54 ... <span style="color: #808080;">■</span>	8.02 Presence of major car rental companies* .....	1 ... <span style="color: #0056b3;">■</span>
1.03 Business impact of rules on FDI .....	71 ... <span style="color: #808080;">■</span>	8.03 ATMs accepting Visa cards* .....	27 ... <span style="color: #0056b3;">■</span>
1.04 Visa requirements* .....	46 ... <span style="color: #808080;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	110 ... <span style="color: #808080;">■</span>	9.01 Extent of business Internet use .....	40 ... <span style="color: #0056b3;">■</span>
1.06 Transparency of government policymaking .....	78 ... <span style="color: #808080;">■</span>	9.02 Internet users* .....	25 ... <span style="color: #0056b3;">■</span>
1.07 Time required to start a business* .....	34 ... <span style="color: #0056b3;">■</span>	9.03 Telephone lines* .....	40 ... <span style="color: #0056b3;">■</span>
1.08 Cost to start a business* .....	20 ... <span style="color: #0056b3;">■</span>	9.04 Broadband Internet subscribers* .....	45 ... <span style="color: #808080;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	35 ... <span style="color: #0056b3;">■</span>
2.01 Stringency of environmental regulation .....	45 ... <span style="color: #808080;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	37 ... <span style="color: #0056b3;">■</span>	10.01 Ticket taxes and airport charges* .....	41 ... <span style="color: #0056b3;">■</span>
2.03 Sustainability of T&T industry development .....	92 ... <span style="color: #808080;">■</span>	10.02 Purchasing power parity* .....	68 ... <span style="color: #808080;">■</span>
2.04 Carbon dioxide emissions* .....	57 ... <span style="color: #808080;">■</span>	10.03 Extent and effect of taxation .....	53 ... <span style="color: #808080;">■</span>
2.05 Particulate matter concentration* .....	8 ... <span style="color: #0056b3;">■</span>	10.04 Fuel price levels* .....	93 ... <span style="color: #808080;">■</span>
2.06 Threatened species* .....	23 ... <span style="color: #0056b3;">■</span>	10.05 Hotel price index* .....	51 ... <span style="color: #808080;">■</span>
2.07 Environmental treaty ratification* .....	28 ... <span style="color: #0056b3;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	85 ... <span style="color: #808080;">■</span>
3.01 Business costs of terrorism .....	44 ... <span style="color: #0056b3;">■</span>	11.02 2ndary education enrollment* .....	36 ... <span style="color: #0056b3;">■</span>
3.02 Reliability of police services .....	61 ... <span style="color: #808080;">■</span>	11.03 Quality of the educational system .....	42 ... <span style="color: #0056b3;">■</span>
3.03 Business costs of crime and violence .....	37 ... <span style="color: #0056b3;">■</span>	11.04 Local availability of research and training services .....	66 ... <span style="color: #808080;">■</span>
3.04 Road traffic accidents* .....	42 ... <span style="color: #0056b3;">■</span>	11.05 Extent of staff training .....	49 ... <span style="color: #808080;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	76 ... <span style="color: #808080;">■</span>
4.01 Physician density* .....	28 ... <span style="color: #0056b3;">■</span>	11.07 Ease of hiring foreign labor .....	81 ... <span style="color: #808080;">■</span>
4.02 Access to improved sanitation* .....	71 ... <span style="color: #808080;">■</span>	11.08 HIV prevalence* .....	92 ... <span style="color: #808080;">■</span>
4.03 Access to improved drinking water* .....	39 ... <span style="color: #0056b3;">■</span>	11.09 Business impact of HIV/AIDS .....	52 ... <span style="color: #808080;">■</span>
4.04 Hospital beds* .....	10 ... <span style="color: #0056b3;">■</span>	11.10 Life expectancy* .....	73 ... <span style="color: #808080;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	107 ... <span style="color: #808080;">■</span>	12.01 Tourism openness* .....	41 ... <span style="color: #0056b3;">■</span>
5.02 T&T government expenditure* .....	69 ... <span style="color: #808080;">■</span>	12.02 Attitude of population toward foreign visitors .....	115 ... <span style="color: #808080;">■</span>
5.03 Effectiveness of marketing and branding .....	88 ... <span style="color: #808080;">■</span>	12.03 Extension of business trips recommended .....	82 ... <span style="color: #808080;">■</span>
5.04 T&T fair attendance* .....	56 ... <span style="color: #808080;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	70 ... <span style="color: #808080;">■</span>
6.01 Quality of air transport infrastructure .....	42 ... <span style="color: #0056b3;">■</span>	13.02 Nationally protected areas* .....	45 ... <span style="color: #808080;">■</span>
6.02 Available seat kilometers* .....	84 ... <span style="color: #808080;">■</span>	13.03 Quality of the natural environment .....	24 ... <span style="color: #0056b3;">■</span>
6.03 Departures per 1,000 population* .....	34 ... <span style="color: #0056b3;">■</span>	13.04 Total known species* .....	108 ... <span style="color: #808080;">■</span>
6.04 Airport density* .....	52 ... <span style="color: #808080;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	83 ... <span style="color: #808080;">■</span>	14.01 Number of World Heritage cultural sites* .....	69 ... <span style="color: #808080;">■</span>
6.06 International air transport network .....	41 ... <span style="color: #0056b3;">■</span>	14.02 Sports stadiums* .....	58 ... <span style="color: #808080;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	48 ... <span style="color: #808080;">■</span>
7.01 Quality of roads .....	79 ... <span style="color: #808080;">■</span>		
7.02 Quality of railroad infrastructure .....	35 ... <span style="color: #0056b3;">■</span>		
7.03 Quality of port infrastructure .....	45 ... <span style="color: #808080;">■</span>		
7.04 Quality of domestic transport network .....	53 ... <span style="color: #808080;">■</span>		
7.05 Road density* .....	26 ... <span style="color: #0056b3;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Lesotho

## Key indicators

Population (millions), 2006 .....	1.8
Surface area (1,000 square kilometers) .....	30.4
Gross domestic product (US\$ billions), 2006 .....	1.5
Gross domestic product (PPP, US\$) per capita, 2006 .....	2,251
Real GDP growth (percent), 2006 .....	7.2

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

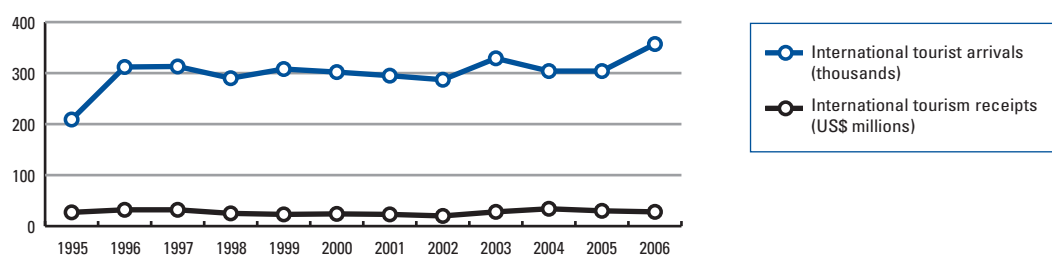
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	2.0	1.3
Employment (1,000 jobs) .....	1.6	-2.2

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	6.6	2.7
Employment (1,000 jobs) .....	5.5	-0.8

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	357
International tourism receipts (US\$ millions), 2006 .....	28



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>129</b>	<b>2.8</b>
<b>T&amp;T regulatory framework</b> .....	<b>124</b>	<b>3.4</b>
Policy rules and regulations .....	116	3.3
Environmental sustainability .....	116	3.8
Safety and security .....	91	4.5
Health and hygiene .....	112	2.5
Prioritization of Travel & Tourism .....	120	2.8
<b>T&amp;T business environment and infrastructure</b> .....	<b>125</b>	<b>2.5</b>
Air transport infrastructure .....	129	1.7
Ground transport infrastructure .....	127	2.3
Tourism infrastructure .....	113	1.7
ICT infrastructure .....	120	1.5
Price competitiveness in the T&T industry .....	34	5.0
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>130</b>	<b>2.6</b>
Human resources .....	129	2.9
Education and training .....	114	3.4
Availability of qualified labor .....	129	2.4
Affinity for Travel & Tourism .....	109	4.3
Natural resources .....	128	2.0
Cultural resources .....	122	1.2

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	70 ...■	8.01 Hotel rooms* .....	96 ...■
1.02 Property rights .....	126 ...■	8.02 Presence of major car rental companies* .....	103 ...■
1.03 Business impact of rules on FDI .....	86 ...■	8.03 ATMs accepting Visa cards* .....	100 ...■
1.04 Visa requirements* .....	25 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	125 ...■	9.01 Extent of business Internet use .....	124 ...■
1.06 Transparency of government policymaking .....	111 ...■	9.02 Internet users* .....	114 ...■
1.07 Time required to start a business* .....	113 ...■	9.03 Telephone lines* .....	109 ...■
1.08 Cost to start a business* .....	93 ...■	9.04 Broadband Internet subscribers* .....	114 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	112 ...■
2.01 Stringency of environmental regulation .....	126 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	119 ...■	10.01 Ticket taxes and airport charges* .....	3 ...■
2.03 Sustainability of T&T industry development .....	95 ...■	10.02 Purchasing power parity* .....	21 ...■
2.04 Carbon dioxide emissions* .....	n/a .....	10.03 Extent and effect of taxation .....	98 ...■
2.05 Particulate matter concentration* .....	74 ...■	10.04 Fuel price levels* .....	72 ...■
2.06 Threatened species* .....	18 ...■	10.05 Hotel price index* .....	n/a .....
2.07 Environmental treaty ratification* .....	97 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	96 ...■
3.01 Business costs of terrorism .....	95 ...■	11.02 2ndary education enrollment* .....	112 ...■
3.02 Reliability of police services .....	100 ...■	11.03 Quality of the educational system .....	100 ...■
3.03 Business costs of crime and violence .....	117 ...■	11.04 Local availability of research and training services .....	125 ...■
3.04 Road traffic accidents* .....	30 ...■	11.05 Extent of staff training .....	105 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	81 ...■
4.01 Physician density* .....	122 ...■	11.07 Ease of hiring foreign labor .....	115 ...■
4.02 Access to improved sanitation* .....	110 ...■	11.08 HIV prevalence* .....	128 ...■
4.03 Access to improved drinking water* .....	94 ...■	11.09 Business impact of HIV/AIDS .....	130 ...■
4.04 Hospital beds* .....	n/a .....	11.10 Life expectancy* .....	129 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	105 ...■	12.01 Tourism openness* .....	92 ...■
5.02 T&T government expenditure* .....	111 ...■	12.02 Attitude of population toward foreign visitors .....	113 ...■
5.03 Effectiveness of marketing and branding .....	102 ...■	12.03 Extension of business trips recommended .....	97 ...■
5.04 T&T fair attendance* .....	122 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	70 ...■
6.01 Quality of air transport infrastructure .....	130 ...■	13.02 Nationally protected areas* .....	126 ...■
6.02 Available seat kilometers* .....	130 ...■	13.03 Quality of the natural environment .....	100 ...■
6.03 Departures per 1,000 population* .....	n/a .....	13.04 Total known species* .....	111 ...■
6.04 Airport density* .....	78 ...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	130 ...■	14.01 Number of World Heritage cultural sites* .....	108 ...■
6.06 International air transport network .....	130 ...■	14.02 Sports stadiums* .....	102 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	n/a .....
7.01 Quality of roads .....	119 ...■		
7.02 Quality of railroad infrastructure .....	100 ...■		
7.03 Quality of port infrastructure .....	107 ...■		
7.04 Quality of domestic transport network .....	124 ...■		
7.05 Road density* .....	68 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Libya

## Key indicators

Population (millions), 2006 .....	6.0
Surface area (1,000 square kilometers) .....	1,759.5
Gross domestic product (US\$ billions), 2006 .....	50.4
Gross domestic product (PPP, US\$) per capita, 2006 .....	12,848
Real GDP growth (percent), 2006 .....	5.6

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

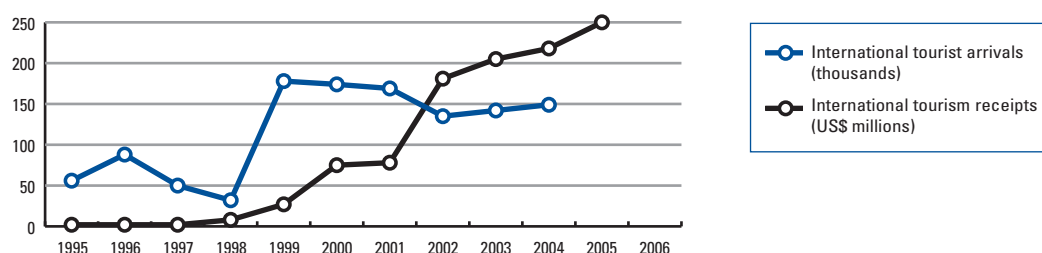
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	2.2	8.9
Employment (1,000 jobs) .....	3.1	5.4

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	7,586	16.9	4.0
Employment (1,000 jobs) .....	267	15.8	1.3

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2004 .....	149
International tourism receipts (US\$ millions), 2005 .....	250



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>104</b>	<b>3.5</b>
<b>T&amp;T regulatory framework</b> .....	<b>75</b>	<b>4.3</b>
Policy rules and regulations .....	122	3.1
Environmental sustainability .....	118	3.8
Safety and security .....	24	5.8
Health and hygiene .....	50	5.2
Prioritization of Travel & Tourism .....	109	3.4
<b>T&amp;T business environment and infrastructure</b> .....	<b>115</b>	<b>2.7</b>
Air transport infrastructure .....	103	2.4
Ground transport infrastructure .....	130	2.3
Tourism infrastructure .....	110	1.8
ICT infrastructure .....	91	2.1
Price competitiveness in the T&T industry .....	57	4.8
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>106</b>	<b>3.4</b>
Human resources .....	99	4.5
Education and training .....	92	4.2
Availability of qualified labor .....	106	4.9
Affinity for Travel & Tourism .....	105	4.4
Natural resources .....	114	2.2
Cultural resources .....	56	2.6

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....130... <span style="color: #808080;">■</span>	8.01	Hotel rooms* .....74... <span style="color: #808080;">■</span>
1.02	Property rights .....99... <span style="color: #808080;">■</span>	8.02	Presence of major car rental companies* .....103... <span style="color: #808080;">■</span>
1.03	Business impact of rules on FDI .....113... <span style="color: #808080;">■</span>	8.03	ATMs accepting Visa cards* .....114... <span style="color: #808080;">■</span>
1.04	Visa requirements* .....95... <span style="color: #808080;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....56... <span style="color: #808080;">■</span>	9.01	Extent of business Internet use .....119... <span style="color: #808080;">■</span>
1.06	Transparency of government policymaking .....115... <span style="color: #808080;">■</span>	9.02	Internet users* .....109... <span style="color: #808080;">■</span>
1.07	Time required to start a business* .....n/a.....	9.03	Telephone lines* .....94... <span style="color: #808080;">■</span>
1.08	Cost to start a business* .....n/a.....	9.04	Broadband Internet subscribers* .....95... <span style="color: #808080;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....65... <span style="color: #808080;">■</span>
2.01	Stringency of environmental regulation .....103... <span style="color: #808080;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....104... <span style="color: #808080;">■</span>	10.01	Ticket taxes and airport charges* .....1... <span style="color: #0056b3;">■</span>
2.03	Sustainability of T&T industry development .....115... <span style="color: #808080;">■</span>	10.02	Purchasing power parity* .....87... <span style="color: #808080;">■</span>
2.04	Carbon dioxide emissions* .....99... <span style="color: #808080;">■</span>	10.03	Extent and effect of taxation .....46... <span style="color: #0056b3;">■</span>
2.05	Particulate matter concentration* .....104... <span style="color: #808080;">■</span>	10.04	Fuel price levels* .....4... <span style="color: #0056b3;">■</span>
2.06	Threatened species* .....39... <span style="color: #0056b3;">■</span>	10.05	Hotel price index* .....113... <span style="color: #808080;">■</span>
2.07	Environmental treaty ratification* .....28... <span style="color: #0056b3;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....93... <span style="color: #808080;">■</span>
3.01	Business costs of terrorism .....2... <span style="color: #0056b3;">■</span>	11.02	2ndary education enrollment* .....17... <span style="color: #0056b3;">■</span>
3.02	Reliability of police services .....99... <span style="color: #808080;">■</span>	11.03	Quality of the educational system .....124... <span style="color: #808080;">■</span>
3.03	Business costs of crime and violence .....4... <span style="color: #0056b3;">■</span>	11.04	Local availability of research and training services .....114... <span style="color: #808080;">■</span>
3.04	Road traffic accidents* .....50... <span style="color: #0056b3;">■</span>	11.05	Extent of staff training .....106... <span style="color: #808080;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....115... <span style="color: #808080;">■</span>
4.01	Physician density* .....n/a.....	11.07	Ease of hiring foreign labor .....123... <span style="color: #808080;">■</span>
4.02	Access to improved sanitation* .....42... <span style="color: #0056b3;">■</span>	11.08	HIV prevalence* .....63... <span style="color: #808080;">■</span>
4.03	Access to improved drinking water* .....n/a.....	11.09	Business impact of HIV/AIDS .....78... <span style="color: #808080;">■</span>
4.04	Hospital beds* .....53... <span style="color: #808080;">■</span>	11.10	Life expectancy* .....50... <span style="color: #0056b3;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....102... <span style="color: #808080;">■</span>	12.01	Tourism openness* .....108... <span style="color: #808080;">■</span>
5.02	T&T government expenditure* .....79... <span style="color: #808080;">■</span>	12.02	Attitude of population toward foreign visitors .....73... <span style="color: #808080;">■</span>
5.03	Effectiveness of marketing and branding .....114... <span style="color: #808080;">■</span>	12.03	Extension of business trips recommended .....95... <span style="color: #808080;">■</span>
5.04	T&T fair attendance* .....76... <span style="color: #808080;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....70... <span style="color: #808080;">■</span>
6.01	Quality of air transport infrastructure .....122... <span style="color: #808080;">■</span>	13.02	Nationally protected areas* .....127... <span style="color: #808080;">■</span>
6.02	Available seat kilometers* .....79... <span style="color: #808080;">■</span>	13.03	Quality of the natural environment .....46... <span style="color: #0056b3;">■</span>
6.03	Departures per 1,000 population* .....80... <span style="color: #808080;">■</span>	13.04	Total known species* .....94... <span style="color: #808080;">■</span>
6.04	Airport density* .....38... <span style="color: #0056b3;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....68... <span style="color: #808080;">■</span>	14.01	Number of World Heritage cultural sites* .....38... <span style="color: #0056b3;">■</span>
6.06	International air transport network .....111... <span style="color: #808080;">■</span>	14.02	Sports stadiums* .....52... <span style="color: #808080;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....113... <span style="color: #808080;">■</span>
7.01	Quality of roads .....88... <span style="color: #808080;">■</span>		
7.02	Quality of railroad infrastructure .....116... <span style="color: #808080;">■</span>		
7.03	Quality of port infrastructure .....114... <span style="color: #808080;">■</span>		
7.04	Quality of domestic transport network .....125... <span style="color: #808080;">■</span>		
7.05	Road density* .....105... <span style="color: #808080;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# Lithuania

## Key indicators

Population (millions), 2006 .....	3.4
Surface area (1,000 square kilometers) .....	65.3
Gross domestic product (US\$ billions), 2006 .....	29.8
Gross domestic product (PPP, US\$) per capita, 2006 .....	16,373
Real GDP growth (percent), 2006 .....	7.5

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

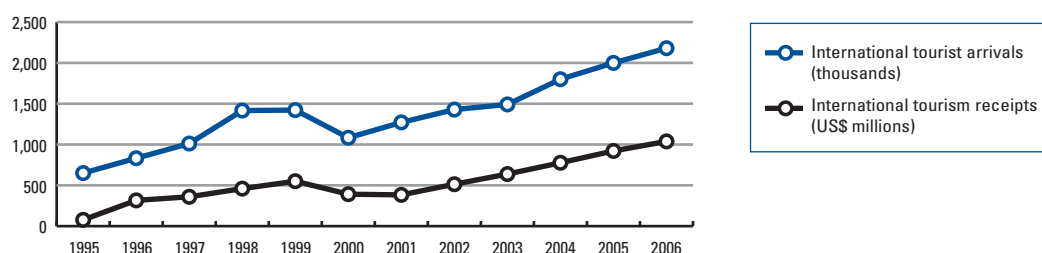
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	1.3	5.1
Employment (1,000 jobs) .....	1.1	-0.7

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	2,790	7.9	6.0
Employment (1,000 jobs) .....	103	6.7	0.2

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	2,180
International tourism receipts (US\$ millions), 2006 .....	1,038



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>47</b>	<b>4.3</b>
<b>T&amp;T regulatory framework</b> .....	<b>31</b>	<b>5.2</b>
Policy rules and regulations .....	50	4.5
Environmental sustainability .....	18	5.3
Safety and security .....	46	5.4
Health and hygiene .....	2	7.0
Prioritization of Travel & Tourism .....	94	3.8
<b>T&amp;T business environment and infrastructure</b> .....	<b>45</b>	<b>4.0</b>
Air transport infrastructure .....	82	2.7
Ground transport infrastructure .....	27	5.0
Tourism infrastructure .....	58	3.7
ICT infrastructure .....	33	4.1
Price competitiveness in the T&T industry .....	73	4.6
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>74</b>	<b>3.8</b>
Human resources .....	53	5.0
Education and training .....	37	5.1
Availability of qualified labor .....	99	5.0
Affinity for Travel & Tourism .....	52	4.9
Natural resources .....	92	2.7
Cultural resources .....	63	2.4

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	81 ... <span style="color: #808080;">■</span>	8.01 Hotel rooms* .....	62 ... <span style="color: #808080;">■</span>
1.02 Property rights .....	48 ... <span style="color: #808080;">■</span>	8.02 Presence of major car rental companies* .....	56 ... <span style="color: #808080;">■</span>
1.03 Business impact of rules on FDI .....	97 ... <span style="color: #808080;">■</span>	8.03 ATMs accepting Visa cards* .....	39 ... <span style="color: #0056b3;">■</span>
1.04 Visa requirements* .....	46 ... <span style="color: #0056b3;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	88 ... <span style="color: #808080;">■</span>	9.01 Extent of business Internet use .....	34 ... <span style="color: #0056b3;">■</span>
1.06 Transparency of government policymaking .....	56 ... <span style="color: #808080;">■</span>	9.02 Internet users* .....	41 ... <span style="color: #0056b3;">■</span>
1.07 Time required to start a business* .....	57 ... <span style="color: #808080;">■</span>	9.03 Telephone lines* .....	57 ... <span style="color: #808080;">■</span>
1.08 Cost to start a business* .....	20 ... <span style="color: #0056b3;">■</span>	9.04 Broadband Internet subscribers* .....	31 ... <span style="color: #0056b3;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	2 ... <span style="color: #0056b3;">■</span>
2.01 Stringency of environmental regulation .....	38 ... <span style="color: #0056b3;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	38 ... <span style="color: #0056b3;">■</span>	10.01 Ticket taxes and airport charges* .....	69 ... <span style="color: #808080;">■</span>
2.03 Sustainability of T&T industry development .....	98 ... <span style="color: #808080;">■</span>	10.02 Purchasing power parity* .....	66 ... <span style="color: #808080;">■</span>
2.04 Carbon dioxide emissions* .....	64 ... <span style="color: #808080;">■</span>	10.03 Extent and effect of taxation .....	70 ... <span style="color: #808080;">■</span>
2.05 Particulate matter concentration* .....	2 ... <span style="color: #0056b3;">■</span>	10.04 Fuel price levels* .....	87 ... <span style="color: #808080;">■</span>
2.06 Threatened species* .....	37 ... <span style="color: #0056b3;">■</span>	10.05 Hotel price index* .....	49 ... <span style="color: #808080;">■</span>
2.07 Environmental treaty ratification* .....	28 ... <span style="color: #0056b3;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	82 ... <span style="color: #808080;">■</span>
3.01 Business costs of terrorism .....	26 ... <span style="color: #0056b3;">■</span>	11.02 2ndary education enrollment* .....	20 ... <span style="color: #0056b3;">■</span>
3.02 Reliability of police services .....	80 ... <span style="color: #808080;">■</span>	11.03 Quality of the educational system .....	44 ... <span style="color: #0056b3;">■</span>
3.03 Business costs of crime and violence .....	56 ... <span style="color: #808080;">■</span>	11.04 Local availability of research and training services .....	48 ... <span style="color: #808080;">■</span>
3.04 Road traffic accidents* .....	45 ... <span style="color: #0056b3;">■</span>	11.05 Extent of staff training .....	41 ... <span style="color: #0056b3;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	106 ... <span style="color: #808080;">■</span>
4.01 Physician density* .....	5 ... <span style="color: #0056b3;">■</span>	11.07 Ease of hiring foreign labor .....	93 ... <span style="color: #808080;">■</span>
4.02 Access to improved sanitation* .....	n/a .....	11.08 HIV prevalence* .....	49 ... <span style="color: #808080;">■</span>
4.03 Access to improved drinking water* .....	n/a .....	11.09 Business impact of HIV/AIDS .....	34 ... <span style="color: #0056b3;">■</span>
4.04 Hospital beds* .....	7 ... <span style="color: #0056b3;">■</span>	11.10 Life expectancy* .....	73 ... <span style="color: #808080;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	111 ... <span style="color: #808080;">■</span>	12.01 Tourism openness* .....	40 ... <span style="color: #0056b3;">■</span>
5.02 T&T government expenditure* .....	70 ... <span style="color: #808080;">■</span>	12.02 Attitude of population toward foreign visitors .....	112 ... <span style="color: #808080;">■</span>
5.03 Effectiveness of marketing and branding .....	101 ... <span style="color: #808080;">■</span>	12.03 Extension of business trips recommended .....	45 ... <span style="color: #0056b3;">■</span>
5.04 T&T fair attendance* .....	45 ... <span style="color: #0056b3;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	70 ... <span style="color: #808080;">■</span>
6.01 Quality of air transport infrastructure .....	73 ... <span style="color: #808080;">■</span>	13.02 Nationally protected areas* .....	57 ... <span style="color: #808080;">■</span>
6.02 Available seat kilometers* .....	100 ... <span style="color: #808080;">■</span>	13.03 Quality of the natural environment .....	40 ... <span style="color: #0056b3;">■</span>
6.03 Departures per 1,000 population* .....	55 ... <span style="color: #808080;">■</span>	13.04 Total known species* .....	114 ... <span style="color: #808080;">■</span>
6.04 Airport density* .....	51 ... <span style="color: #808080;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	100 ... <span style="color: #808080;">■</span>	14.01 Number of World Heritage cultural sites* .....	46 ... <span style="color: #0056b3;">■</span>
6.06 International air transport network .....	69 ... <span style="color: #808080;">■</span>	14.02 Sports stadiums* .....	63 ... <span style="color: #808080;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	56 ... <span style="color: #808080;">■</span>
7.01 Quality of roads .....	32 ... <span style="color: #0056b3;">■</span>		
7.02 Quality of railroad infrastructure .....	30 ... <span style="color: #0056b3;">■</span>		
7.03 Quality of port infrastructure .....	61 ... <span style="color: #808080;">■</span>		
7.04 Quality of domestic transport network .....	48 ... <span style="color: #808080;">■</span>		
7.05 Road density* .....	24 ... <span style="color: #0056b3;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Luxembourg

## Key indicators

Population (millions), 2006 .....	0.5
Surface area (1,000 square kilometers) .....	2.6
Gross domestic product (US\$ billions), 2006 .....	41.5
Gross domestic product (PPP, US\$) per capita, 2006 .....	81,511
Real GDP growth (percent), 2006 .....	6.2

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

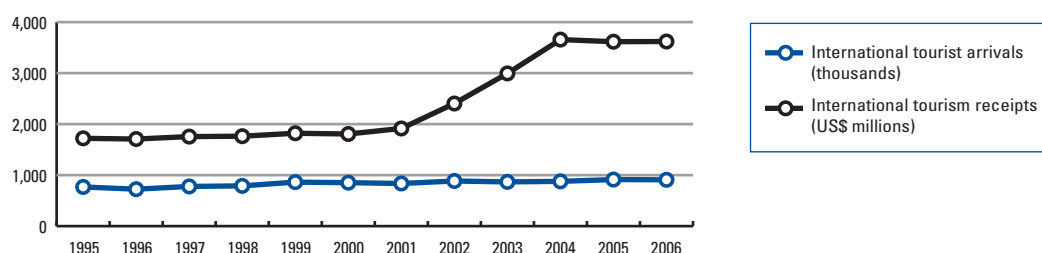
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	1,492	3.3	4.1
Employment (1,000 jobs) .....	8	4.1	2.2

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	4,413	9.7	4.1
Employment (1,000 jobs) .....	25	12.4	2.4

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	908
International tourism receipts (US\$ millions), 2006 .....	3,620



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>20</b>	<b>5.0</b>
<b>T&amp;T regulatory framework</b> .....	<b>24</b>	<b>5.3</b>
Policy rules and regulations .....	14	5.3
Environmental sustainability .....	22	5.1
Safety and security .....	9	6.2
Health and hygiene .....	22	6.3
Prioritization of Travel & Tourism .....	103	3.6
<b>T&amp;T business environment and infrastructure</b> .....	<b>12</b>	<b>5.2</b>
Air transport infrastructure .....	37	4.0
Ground transport infrastructure .....	14	5.6
Tourism infrastructure .....	14	6.2
ICT infrastructure .....	7	5.6
Price competitiveness in the T&T industry .....	77	4.5
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>35</b>	<b>4.4</b>
Human resources .....	26	5.5
Education and training .....	28	5.4
Availability of qualified labor .....	27	5.6
Affinity for Travel & Tourism .....	12	5.8
Natural resources .....	71	3.0
Cultural resources .....	38	3.3

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....14...■	8.01	Hotel rooms* .....14...■
1.02	Property rights .....20...■	8.02	Presence of major car rental companies* .....56...■
1.03	Business impact of rules on FDI .....5...■	8.03	ATMs accepting Visa cards* .....6...■
1.04	Visa requirements* .....30...■	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....14...■	9.01	Extent of business Internet use .....30...■
1.06	Transparency of government policymaking .....17...■	9.02	Internet users* .....5...■
1.07	Time required to start a business* .....57...■	9.03	Telephone lines* .....14...■
1.08	Cost to start a business* .....17...■	9.04	Broadband Internet subscribers* .....15...■
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....1...■
2.01	Stringency of environmental regulation .....6...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....9...■	10.01	Ticket taxes and airport charges* .....2...■
2.03	Sustainability of T&T industry development .....37...■	10.02	Purchasing power parity* .....112...■
2.04	Carbon dioxide emissions* .....121...■	10.03	Extent and effect of taxation .....13...■
2.05	Particulate matter concentration* .....n/a.....	10.04	Fuel price levels* .....118...■
2.06	Threatened species* .....2...■	10.05	Hotel price index* .....73...■
2.07	Environmental treaty ratification* .....18...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....47...■
3.01	Business costs of terrorism .....21...■	11.02	2ndary education enrollment* .....41...■
3.02	Reliability of police services .....15...■	11.03	Quality of the educational system .....38...■
3.03	Business costs of crime and violence .....19...■	11.04	Local availability of research and training services .....44...■
3.04	Road traffic accidents* .....6...■	11.05	Extent of staff training .....18...■
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....91...■
4.01	Physician density* .....34...■	11.07	Ease of hiring foreign labor .....20...■
4.02	Access to improved sanitation* .....1...■	11.08	HIV prevalence* .....49...■
4.03	Access to improved drinking water* .....1...■	11.09	Business impact of HIV/AIDS .....31...■
4.04	Hospital beds* .....23...■	11.10	Life expectancy* .....16...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....98...■	12.01	Tourism openness* .....7...■
5.02	T&T government expenditure* .....83...■	12.02	Attitude of population toward foreign visitors .....107...■
5.03	Effectiveness of marketing and branding .....73...■	12.03	Extension of business trips recommended .....88...■
5.04	T&T fair attendance* .....93...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....70...■
6.01	Quality of air transport infrastructure .....47...■	13.02	Nationally protected areas* .....33...■
6.02	Available seat kilometers* .....112...■	13.03	Quality of the natural environment .....20...■
6.03	Departures per 1,000 population* .....1...■	13.04	Total known species* .....123...■
6.04	Airport density* .....24...■	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....108...■	14.01	Number of World Heritage cultural sites* .....83...■
6.06	International air transport network .....56...■	14.02	Sports stadiums* .....11...■
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....62...■
7.01	Quality of roads .....12...■		
7.02	Quality of railroad infrastructure .....18...■		
7.03	Quality of port infrastructure .....24...■		
7.04	Quality of domestic transport network .....38...■		
7.05	Road density* .....n/a.....		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Macedonia, FYR

## Key indicators

Population (millions), 2006.....	2.0
Surface area (1,000 square kilometers) .....	25.7
Gross domestic product (US\$ billions), 2006 .....	6.3
Gross domestic product (PPP, US\$) per capita, 2006 .....	7,680
Real GDP growth (percent), 2006.....	3.0

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

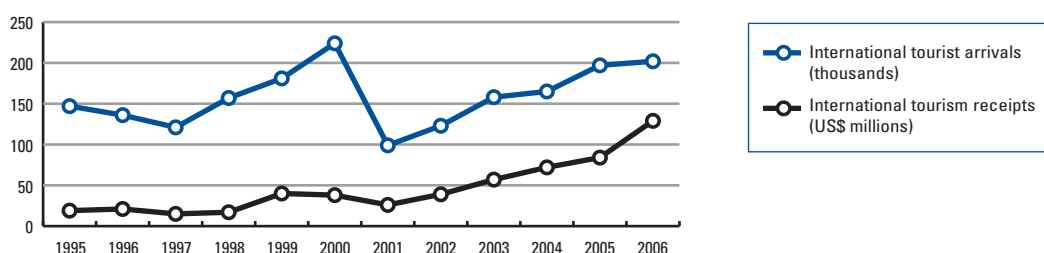
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	1.4	4.5
Employment (1,000 jobs).....	1.4	1.5

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	442	6.4	5.1
Employment (1,000 jobs).....	33	5.9	2.0

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006.....	202
International tourism receipts (US\$ millions), 2006 .....	129



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>83</b>	<b>3.7</b>
<b>T&amp;T regulatory framework</b> .....	<b>93</b>	<b>4.1</b>
Policy rules and regulations .....	75	4.1
Environmental sustainability .....	84	4.2
Safety and security .....	80	4.8
Health and hygiene .....	68	4.5
Prioritization of Travel & Tourism .....	128	2.6
<b>T&amp;T business environment and infrastructure</b> .....	<b>80</b>	<b>3.2</b>
Air transport infrastructure .....	113	2.1
Ground transport infrastructure .....	79	3.4
Tourism infrastructure .....	61	3.6
ICT infrastructure .....	72	2.5
Price competitiveness in the T&T industry.....	72	4.6
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>81</b>	<b>3.7</b>
Human resources .....	71	4.9
Education and training.....	71	4.5
Availability of qualified labor .....	53	5.3
Affinity for Travel & Tourism .....	75	4.7
Natural resources .....	85	2.8
Cultural resources.....	57	2.5

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	110 ...■	8.01 Hotel rooms* .....	59 ...■
1.02 Property rights .....	105 ...■	8.02 Presence of major car rental companies* .....	33 ...■
1.03 Business impact of rules on FDI .....	117 ...■	8.03 ATMs accepting Visa cards* .....	66 ...■
1.04 Visa requirements* .....	68 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	113 ...■	9.01 Extent of business Internet use .....	125 ...■
1.06 Transparency of government policymaking .....	85 ...■	9.02 Internet users* .....	72 ...■
1.07 Time required to start a business* .....	31 ...■	9.03 Telephone lines* .....	56 ...■
1.08 Cost to start a business* .....	39 ...■	9.04 Broadband Internet subscribers* .....	58 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	61 ...■
2.01 Stringency of environmental regulation .....	112 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	112 ...■	10.01 Ticket taxes and airport charges* .....	73 ...■
2.03 Sustainability of T&T industry development .....	119 ...■	10.02 Purchasing power parity* .....	44 ...■
2.04 Carbon dioxide emissions* .....	75 ...■	10.03 Extent and effect of taxation .....	69 ...■
2.05 Particulate matter concentration* .....	22 ...■	10.04 Fuel price levels* .....	87 ...■
2.06 Threatened species* .....	59 ...■	10.05 Hotel price index* .....	n/a .....
2.07 Environmental treaty ratification* .....	97 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	69 ...■
3.01 Business costs of terrorism .....	111 ...■	11.02 2ndary education enrollment* .....	71 ...■
3.02 Reliability of police services .....	78 ...■	11.03 Quality of the educational system .....	57 ...■
3.03 Business costs of crime and violence .....	92 ...■	11.04 Local availability of research and training services .....	96 ...■
3.04 Road traffic accidents* .....	11 ...■	11.05 Extent of staff training .....	79 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	73 ...■
4.01 Physician density* .....	48 ...■	11.07 Ease of hiring foreign labor .....	72 ...■
4.02 Access to improved sanitation* .....	n/a .....	11.08 HIV prevalence* .....	1 ...■
4.03 Access to improved drinking water* .....	n/a .....	11.09 Business impact of HIV/AIDS .....	91 ...■
4.04 Hospital beds* .....	39 ...■	11.10 Life expectancy* .....	50 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	114 ...■	12.01 Tourism openness* .....	88 ...■
5.02 T&T government expenditure* .....	109 ...■	12.02 Attitude of population toward foreign visitors .....	27 ...■
5.03 Effectiveness of marketing and branding .....	115 ...■	12.03 Extension of business trips recommended .....	69 ...■
5.04 T&T fair attendance* .....	122 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	39 ...■
6.01 Quality of air transport infrastructure .....	120 ...■	13.02 Nationally protected areas* .....	74 ...■
6.02 Available seat kilometers* .....	123 ...■	13.03 Quality of the natural environment .....	66 ...■
6.03 Departures per 1,000 population* .....	86 ...■	13.04 Total known species* .....	81 ...■
6.04 Airport density* .....	47 ...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	106 ...■	14.01 Number of World Heritage cultural sites* .....	83 ...■
6.06 International air transport network .....	121 ...■	14.02 Sports stadiums* .....	19 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	85 ...■
7.01 Quality of roads .....	72 ...■		
7.02 Quality of railroad infrastructure .....	73 ...■		
7.03 Quality of port infrastructure .....	82 ...■		
7.04 Quality of domestic transport network .....	63 ...■		
7.05 Road density* .....	52 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Madagascar

## Key indicators

Population (millions), 2006.....	19.1
Surface area (1,000 square kilometers).....	587.0
Gross domestic product (US\$ billions), 2006.....	5.5
Gross domestic product (PPP, US\$) per capita, 2006.....	.954
Real GDP growth (percent), 2006.....	4.9

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

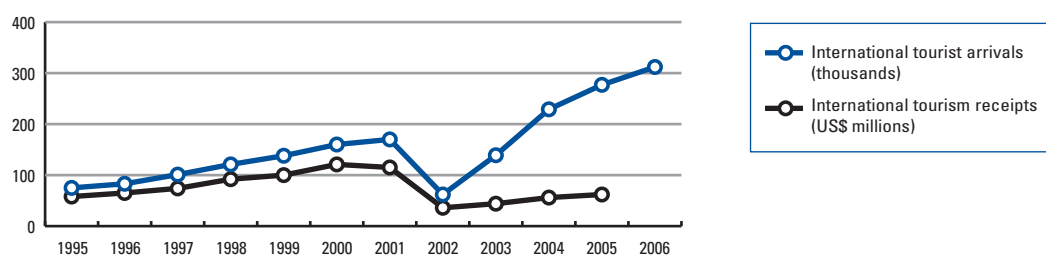
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions).....	125.....2.2	2.8
Employment (1,000 jobs).....	70.....1.7	1.5

### T&T economy, 2007 estimates

GDP (US\$ millions).....	359.....6.3	2.4
Employment (1,000 jobs).....	206.....5.1	1.1

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006.....	312
International tourism receipts (US\$ millions), 2005.....	62



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index.....</b>	<b>118</b>	<b>3.2</b>
<b>T&amp;T regulatory framework.....</b>	<b>111</b>	<b>3.7</b>
Policy rules and regulations.....	84	4.0
Environmental sustainability.....	74	4.4
Safety and security.....	99	4.4
Health and hygiene.....	126	1.3
Prioritization of Travel & Tourism.....	48	4.6
<b>T&amp;T business environment and infrastructure.....</b>	<b>107</b>	<b>2.7</b>
Air transport infrastructure.....	91	2.5
Ground transport infrastructure.....	120	2.4
Tourism infrastructure.....	88	2.5
ICT infrastructure.....	128	1.4
Price competitiveness in the T&T industry.....	52	4.8
<b>T&amp;T human, cultural, and natural resources.....</b>	<b>124</b>	<b>3.2</b>
Human resources.....	113	4.1
Education and training.....	116	3.4
Availability of qualified labor.....	108	4.8
Affinity for Travel & Tourism.....	110	4.3
Natural resources.....	74	3.0
Cultural resources.....	124	1.2

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....87...■	8.01	Hotel rooms* .....107...■
1.02	Property rights .....110...■	8.02	Presence of major car rental companies* .....56...■
1.03	Business impact of rules on FDI .....101...■	8.03	ATMs accepting Visa cards* .....117...■
1.04	Visa requirements* .....124...■	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....93...■	9.01	Extent of business Internet use .....120...■
1.06	Transparency of government policymaking .....79...■	9.02	Internet users* .....125...■
1.07	Time required to start a business* .....9...■	9.03	Telephone lines* .....121...■
1.08	Cost to start a business* .....81...■	9.04	Broadband Internet subscribers* .....120...■
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....124...■
2.01	Stringency of environmental regulation .....66...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....61...■	10.01	Ticket taxes and airport charges* .....88...■
2.03	Sustainability of T&T industry development .....54...■	10.02	Purchasing power parity* .....23...■
2.04	Carbon dioxide emissions* .....5...■	10.03	Extent and effect of taxation .....77...■
2.05	Particulate matter concentration* .....69...■	10.04	Fuel price levels* .....79...■
2.06	Threatened species* .....128...■	10.05	Hotel price index* .....27...■
2.07	Environmental treaty ratification* .....28...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....64...■
3.01	Business costs of terrorism .....90...■	11.02	2ndary education enrollment* .....125...■
3.02	Reliability of police services .....85...■	11.03	Quality of the educational system .....101...■
3.03	Business costs of crime and violence .....111...■	11.04	Local availability of research and training services .....108...■
3.04	Road traffic accidents* .....91...■	11.05	Extent of staff training .....107...■
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....56...■
4.01	Physician density* .....106...■	11.07	Ease of hiring foreign labor .....75...■
4.02	Access to improved sanitation* .....116...■	11.08	HIV prevalence* .....76...■
4.03	Access to improved drinking water* .....117...■	11.09	Business impact of HIV/AIDS .....106...■
4.04	Hospital beds* .....n/a.....	11.10	Life expectancy* .....110...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....39...■	12.01	Tourism openness* .....112...■
5.02	T&T government expenditure* .....27...■	12.02	Attitude of population toward foreign visitors .....93...■
5.03	Effectiveness of marketing and branding .....43...■	12.03	Extension of business trips recommended .....84...■
5.04	T&T fair attendance* .....76...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....21...■
6.01	Quality of air transport infrastructure .....91...■	13.02	Nationally protected areas* .....105...■
6.02	Available seat kilometers* .....93...■	13.03	Quality of the natural environment .....95...■
6.03	Departures per 1,000 population* .....92...■	13.04	Total known species* .....52...■
6.04	Airport density* .....27...■	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....114...■	14.01	Number of World Heritage cultural sites* .....83...■
6.06	International air transport network .....101...■	14.02	Sports stadiums* .....130...■
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....113...■
7.01	Quality of roads .....89...■		
7.02	Quality of railroad infrastructure .....94...■		
7.03	Quality of port infrastructure .....120...■		
7.04	Quality of domestic transport network .....115...■		
7.05	Road density* .....95...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# Malaysia

## Key indicators

Population (millions), 2006 .....	25.8
Surface area (1,000 square kilometers) .....	329.7
Gross domestic product (US\$ billions), 2006 .....	148.9
Gross domestic product (PPP, US\$) per capita, 2006 .....	11,957
Real GDP growth (percent), 2006 .....	5.9

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

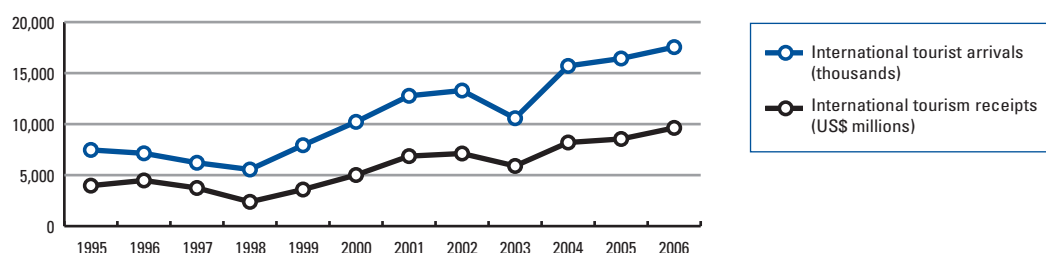
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	7,562	4.4
Employment (1,000 jobs) .....	476	4.5

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	22,782	13.3	6.5
Employment (1,000 jobs) .....	1,217	11.4	4.0

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	17,547
International tourism receipts (US\$ millions), 2006 .....	9,630



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>32</b>	<b>4.6</b>
<b>T&amp;T regulatory framework</b> .....	<b>37</b>	<b>5.0</b>
Policy rules and regulations .....	12	5.3
Environmental sustainability .....	44	4.8
Safety and security .....	42	5.5
Health and hygiene .....	70	4.4
Prioritization of Travel & Tourism .....	24	5.1
<b>T&amp;T business environment and infrastructure</b> .....	<b>39</b>	<b>4.3</b>
Air transport infrastructure .....	32	4.2
Ground transport infrastructure .....	28	4.9
Tourism infrastructure .....	71	3.2
ICT infrastructure .....	46	3.4
Price competitiveness in the T&T industry .....	3	5.9
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>23</b>	<b>4.6</b>
Human resources .....	22	5.5
Education and training .....	24	5.5
Availability of qualified labor .....	29	5.6
Affinity for Travel & Tourism .....	22	5.5
Natural resources .....	18	4.7
Cultural resources .....	59	2.5

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	55...■	8.01 Hotel rooms* .....	43...■
1.02 Property rights .....	23...■	8.02 Presence of major car rental companies* .....	89...■
1.03 Business impact of rules on FDI .....	22...■	8.03 ATMs accepting Visa cards* .....	55...■
1.04 Visa requirements* .....	2...■		
1.05 Openness of bilateral Air Service Agreements* .....	51...■	<b>9th pillar: ICT infrastructure</b>	
1.06 Transparency of government policymaking .....	16...■	9.01 Extent of business Internet use .....	29...■
1.07 Time required to start a business* .....	52...■	9.02 Internet users* .....	28...■
1.08 Cost to start a business* .....	69...■	9.03 Telephone lines* .....	69...■
		9.04 Broadband Internet subscribers* .....	51...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	53...■
2.01 Stringency of environmental regulation .....	19...■		
2.02 Enforcement of environmental regulation .....	22...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.03 Sustainability of T&T industry development .....	6...■	10.01 Ticket taxes and airport charges* .....	11...■
2.04 Carbon dioxide emissions* .....	86...■	10.02 Purchasing power parity* .....	59...■
2.05 Particulate matter concentration* .....	41...■	10.03 Extent and effect of taxation .....	15...■
2.06 Threatened species* .....	114...■	10.04 Fuel price levels* .....	13...■
2.07 Environmental treaty ratification* .....	72...■	10.05 Hotel price index* .....	3...■
<b>3rd pillar: Safety and security</b>		<b>11th pillar: Human resources</b>	
3.01 Business costs of terrorism .....	59...■	11.01 Primary education enrollment* .....	42...■
3.02 Reliability of police services .....	31...■	11.02 2ndary education enrollment* .....	86...■
3.03 Business costs of crime and violence .....	46...■	11.03 Quality of the educational system .....	15...■
3.04 Road traffic accidents* .....	84...■	11.04 Local availability of research and training services .....	21...■
		11.05 Extent of staff training .....	16...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	44...■
4.01 Physician density* .....	93...■	11.07 Ease of hiring foreign labor .....	40...■
4.02 Access to improved sanitation* .....	47...■	11.08 HIV prevalence* .....	76...■
4.03 Access to improved drinking water* .....	39...■	11.09 Business impact of HIV/AIDS .....	60...■
4.04 Hospital beds* .....	83...■	11.10 Life expectancy* .....	50...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	9...■	12.01 Tourism openness* .....	27...■
5.02 T&T government expenditure* .....	103...■	12.02 Attitude of population toward foreign visitors .....	36...■
5.03 Effectiveness of marketing and branding .....	7...■	12.03 Extension of business trips recommended .....	17...■
5.04 T&T fair attendance* .....	13...■		
		<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	21...■
6.01 Quality of air transport infrastructure .....	15...■	13.02 Nationally protected areas* .....	31...■
6.02 Available seat kilometers* .....	22...■	13.03 Quality of the natural environment .....	27...■
6.03 Departures per 1,000 population* .....	42...■	13.04 Total known species* .....	22...■
6.04 Airport density* .....	33...■		
6.05 Number of operating airlines* .....	27...■	<b>14th pillar: Cultural resources</b>	
6.06 International air transport network .....	25...■	14.01 Number of World Heritage cultural sites* .....	108...■
		14.02 Sports stadiums* .....	62...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	30...■
7.01 Quality of roads .....	14...■		
7.02 Quality of railroad infrastructure .....	17...■		
7.03 Quality of port infrastructure .....	13...■		
7.04 Quality of domestic transport network .....	43...■		
7.05 Road density* .....	56...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Mali

## Key indicators

Population (millions), 2006 .....	13.9
Surface area (1,000 square kilometers) .....	1,240.2
Gross domestic product (US\$ billions), 2006 .....	6.2
Gross domestic product (PPP, US\$) per capita, 2006 .....	1,308
Real GDP growth (percent), 2006 .....	5.3

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

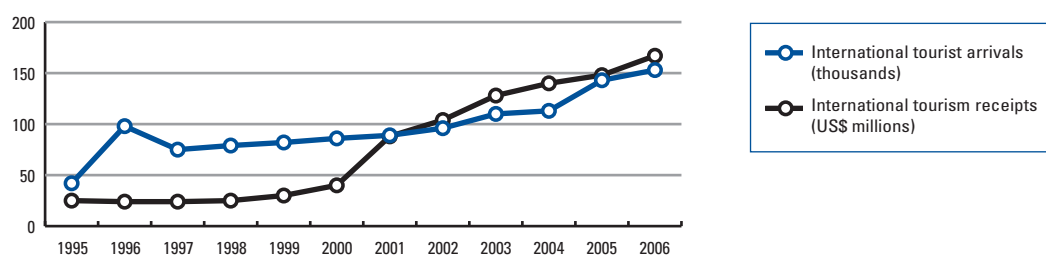
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	198	2.9
Employment (1,000 jobs) .....	72	2.3

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	431	6.4	3.5
Employment (1,000 jobs) .....	160	5.1	2.2

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	153
International tourism receipts (US\$ millions), 2006 .....	167



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>119</b>	<b>3.2</b>
<b>T&amp;T regulatory framework</b> .....	<b>109</b>	<b>3.8</b>
Policy rules and regulations .....	106	3.6
Environmental sustainability .....	65	4.5
Safety and security .....	64	5.0
Health and hygiene .....	123	1.6
Prioritization of Travel & Tourism .....	74	4.2
<b>T&amp;T business environment and infrastructure</b> .....	<b>124</b>	<b>2.5</b>
Air transport infrastructure .....	117	2.1
Ground transport infrastructure .....	96	2.9
Tourism infrastructure .....	116	1.6
ICT infrastructure .....	117	1.6
Price competitiveness in the T&T industry .....	97	4.3
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>116</b>	<b>3.4</b>
Human resources .....	120	3.6
Education and training .....	127	2.5
Availability of qualified labor .....	115	4.7
Affinity for Travel & Tourism .....	55	4.9
Natural resources .....	77	3.0
Cultural resources .....	83	2.0

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	84 ...■	8.01 Hotel rooms* .....	111 ...■
1.02 Property rights .....	82 ...■	8.02 Presence of major car rental companies* .....	103 ...■
1.03 Business impact of rules on FDI .....	61 ...■	8.03 ATMs accepting Visa cards* .....	118 ...■
1.04 Visa requirements* .....	93 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	102 ...■	9.01 Extent of business Internet use .....	90 ...■
1.06 Transparency of government policymaking .....	32 ...■	9.02 Internet users* .....	126 ...■
1.07 Time required to start a business* .....	57 ...■	9.03 Telephone lines* .....	123 ...■
1.08 Cost to start a business* .....	117 ...■	9.04 Broadband Internet subscribers* .....	107 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	117 ...■
2.01 Stringency of environmental regulation .....	73 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	63 ...■	10.01 Ticket taxes and airport charges* .....	126 ...■
2.03 Sustainability of T&T industry development .....	13 ...■	10.02 Purchasing power parity* .....	33 ...■
2.04 Carbon dioxide emissions* .....	1 ...■	10.03 Extent and effect of taxation .....	58 ...■
2.05 Particulate matter concentration* .....	119 ...■	10.04 Fuel price levels* .....	82 ...■
2.06 Threatened species* .....	19 ...■	10.05 Hotel price index* .....	n/a .....
2.07 Environmental treaty ratification* .....	72 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	124 ...■
3.01 Business costs of terrorism .....	60 ...■	11.02 2ndary education enrollment* .....	121 ...■
3.02 Reliability of police services .....	49 ...■	11.03 Quality of the educational system .....	108 ...■
3.03 Business costs of crime and violence .....	75 ...■	11.04 Local availability of research and training services .....	87 ...■
3.04 Road traffic accidents* .....	89 ...■	11.05 Extent of staff training .....	125 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	46 ...■
4.01 Physician density* .....	119 ...■	11.07 Ease of hiring foreign labor .....	49 ...■
4.02 Access to improved sanitation* .....	102 ...■	11.08 HIV prevalence* .....	109 ...■
4.03 Access to improved drinking water* .....	115 ...■	11.09 Business impact of HIV/AIDS .....	112 ...■
4.04 Hospital beds* .....	n/a .....	11.10 Life expectancy* .....	115 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	34 ...■	12.01 Tourism openness* .....	77 ...■
5.02 T&T government expenditure* .....	106 ...■	12.02 Attitude of population toward foreign visitors .....	11 ...■
5.03 Effectiveness of marketing and branding .....	12 ...■	12.03 Extension of business trips recommended .....	46 ...■
5.04 T&T fair attendance* .....	76 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	39 ...■
6.01 Quality of air transport infrastructure .....	100 ...■	13.02 Nationally protected areas* .....	110 ...■
6.02 Available seat kilometers* .....	106 ...■	13.03 Quality of the natural environment .....	56 ...■
6.03 Departures per 1,000 population* .....	118 ...■	13.04 Total known species* .....	44 ...■
6.04 Airport density* .....	128 ...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	93 ...■	14.01 Number of World Heritage cultural sites* .....	46 ...■
6.06 International air transport network .....	100 ...■	14.02 Sports stadiums* .....	99 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	99 ...■
7.01 Quality of roads .....	90 ...■		
7.02 Quality of railroad infrastructure .....	91 ...■		
7.03 Quality of port infrastructure .....	69 ...■		
7.04 Quality of domestic transport network .....	80 ...■		
7.05 Road density* .....	115 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Malta

## Key indicators

Population (millions), 2006 .....	0.4
Surface area (1,000 square kilometers) .....	0.3
Gross domestic product (US\$ billions), 2006 .....	6.4
Gross domestic product (PPP, US\$) per capita, 2006 .....	22,239
Real GDP growth (percent), 2006 .....	3.3

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

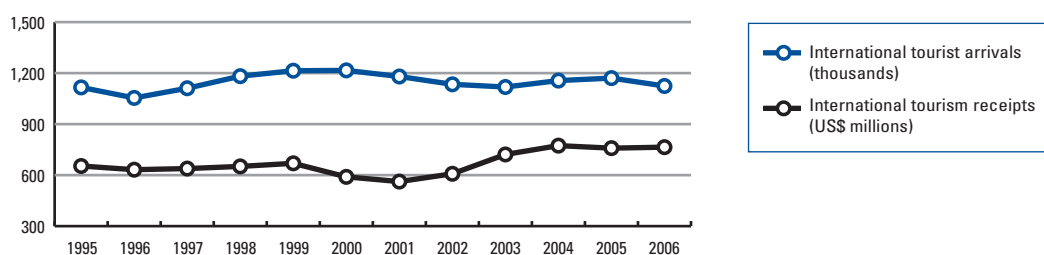
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	11.8	3.6
Employment (1,000 jobs) .....	16.5	1.0

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	23.7	3.7
Employment (1,000 jobs) .....	28.8	1.1

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	1,124
International tourism receipts (US\$ millions), 2006 .....	764



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>25</b>	<b>4.9</b>
<b>T&amp;T regulatory framework</b> .....	<b>13</b>	<b>5.6</b>
Policy rules and regulations .....	51	4.5
Environmental sustainability .....	42	4.8
Safety and security .....	12	6.1
Health and hygiene .....	10	6.6
Prioritization of Travel & Tourism .....	10	5.8
<b>T&amp;T business environment and infrastructure</b> .....	<b>25</b>	<b>4.7</b>
Air transport infrastructure .....	22	4.6
Ground transport infrastructure .....	34	4.8
Tourism infrastructure .....	19	6.0
ICT infrastructure .....	32	4.1
Price competitiveness in the T&T industry .....	100	4.2
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>43</b>	<b>4.3</b>
Human resources .....	40	5.2
Education and training .....	40	5.0
Availability of qualified labor .....	45	5.4
Affinity for Travel & Tourism .....	8	6.2
Natural resources .....	129	1.9
Cultural resources .....	30	3.9

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	29 ...■	8.01 Hotel rooms* .....	2 ...■
1.02 Property rights .....	43 ...■	8.02 Presence of major car rental companies* .....	1 ...■
1.03 Business impact of rules on FDI .....	13 ...■	8.03 ATMs accepting Visa cards* .....	35 ...■
1.04 Visa requirements* .....	46 ...■		
1.05 Openness of bilateral Air Service Agreements* .....	72 ...■	<b>9th pillar: ICT infrastructure</b>	
1.06 Transparency of government policymaking .....	46 ...■	9.01 Extent of business Internet use .....	32 ...■
1.07 Time required to start a business* .....	n/a .....	9.02 Internet users* .....	40 ...■
1.08 Cost to start a business* .....	n/a .....	9.03 Telephone lines* .....	15 ...■
		9.04 Broadband Internet subscribers* .....	33 ...■
		9.05 Mobile telephone subscribers* .....	42 ...■
<b>2nd pillar: Environmental sustainability</b>		<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.01 Stringency of environmental regulation .....	62 ...■	10.01 Ticket taxes and airport charges* .....	106 ...■
2.02 Enforcement of environmental regulation .....	72 ...■	10.02 Purchasing power parity* .....	91 ...■
2.03 Sustainability of T&T industry development .....	69 ...■	10.03 Extent and effect of taxation .....	65 ...■
2.04 Carbon dioxide emissions* .....	84 ...■	10.04 Fuel price levels* .....	104 ...■
2.05 Particulate matter concentration* .....	n/a .....	10.05 Hotel price index* .....	39 ...■
2.06 Threatened species* .....	6 ...■		
2.07 Environmental treaty ratification* .....	45 ...■	<b>11th pillar: Human resources</b>	
		11.01 Primary education enrollment* .....	98 ...■
<b>3rd pillar: Safety and security</b>		11.02 2ndary education enrollment* .....	15 ...■
3.01 Business costs of terrorism .....	25 ...■	11.03 Quality of the educational system .....	26 ...■
3.02 Reliability of police services .....	28 ...■	11.04 Local availability of research and training services .....	94 ...■
3.03 Business costs of crime and violence .....	15 ...■	11.05 Extent of staff training .....	43 ...■
3.04 Road traffic accidents* .....	1 ...■	11.06 Hiring and firing practices .....	98 ...■
		11.07 Ease of hiring foreign labor .....	78 ...■
		11.08 HIV prevalence* .....	24 ...■
		11.09 Business impact of HIV/AIDS .....	36 ...■
		11.10 Life expectancy* .....	8 ...■
<b>4th pillar: Health and hygiene</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
4.01 Physician density* .....	23 ...■	12.01 Tourism openness* .....	8 ...■
4.02 Access to improved sanitation* .....	n/a .....	12.02 Attitude of population toward foreign visitors .....	5 ...■
4.03 Access to improved drinking water* .....	1 ...■	12.03 Extension of business trips recommended .....	33 ...■
4.04 Hospital beds* .....	12 ...■		
		<b>13th pillar: Natural resources</b>	
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		13.01 Number of World Heritage natural sites* .....	70 ...■
5.01 Government prioritization of the T&T industry .....	17 ...■	13.02 Nationally protected areas* .....	115 ...■
5.02 T&T government expenditure* .....	6 ...■	13.03 Quality of the natural environment .....	110 ...■
5.03 Effectiveness of marketing and branding .....	61 ...■	13.04 Total known species* .....	125 ...■
5.04 T&T fair attendance* .....	32 ...■		
		<b>14th pillar: Cultural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		14.01 Number of World Heritage cultural sites* .....	54 ...■
6.01 Quality of air transport infrastructure .....	41 ...■	14.02 Sports stadiums* .....	5 ...■
6.02 Available seat kilometers* .....	87 ...■	14.03 Number of international fairs and exhibitions* .....	47 ...■
6.03 Departures per 1,000 population* .....	8 ...■		
6.04 Airport density* .....	8 ...■		
6.05 Number of operating airlines* .....	100 ...■		
6.06 International air transport network .....	53 ...■		
<b>7th pillar: Ground transport infrastructure</b>			
7.01 Quality of roads .....	73 ...■		
7.02 Quality of railroad infrastructure .....	n/a .....		
7.03 Quality of port infrastructure .....	33 ...■		
7.04 Quality of domestic transport network .....	29 ...■		
7.05 Road density* .....	n/a .....		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Mauritania

## Key indicators

Population (millions), 2006 .....	3.2
Surface area (1,000 square kilometers) .....	1,025.5
Gross domestic product (US\$ billions), 2006 .....	2.7
Gross domestic product (PPP, US\$) per capita, 2006 .....	2,504
Real GDP growth (percent), 2006 .....	11.4

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

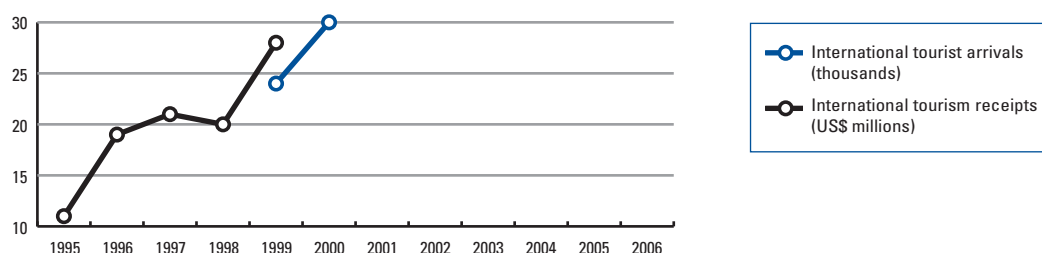
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	n/a	n/a
Employment (1,000 jobs) .....	n/a	n/a

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	n/a	n/a
Employment (1,000 jobs) .....	n/a	n/a

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2000 .....	30
International tourism receipts (US\$ millions), 1999 .....	28



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>122</b>	<b>3.1</b>
<b>T&amp;T regulatory framework</b> .....	<b>117</b>	<b>3.6</b>
Policy rules and regulations .....	113	3.3
Environmental sustainability .....	86	4.2
Safety and security .....	47	5.3
Health and hygiene .....	125	1.4
Prioritization of Travel & Tourism .....	93	3.8
<b>T&amp;T business environment and infrastructure</b> .....	<b>120</b>	<b>2.6</b>
Air transport infrastructure .....	115	2.1
Ground transport infrastructure .....	111	2.7
Tourism infrastructure .....	120	1.4
ICT infrastructure .....	109	1.8
Price competitiveness in the T&T industry .....	40	4.9
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>125</b>	<b>3.1</b>
Human resources .....	115	3.9
Education and training .....	126	2.8
Availability of qualified labor .....	89	5.1
Affinity for Travel & Tourism .....	99	4.4
Natural resources .....	93	2.7
Cultural resources .....	115	1.4

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....116...■	8.01	Hotel rooms* .....n/a.....
1.02	Property rights .....88...■	8.02	Presence of major car rental companies* .....117...■
1.03	Business impact of rules on FDI .....84...■	8.03	ATMs accepting Visa cards* .....124...■
1.04	Visa requirements* .....90...■		
1.05	Openness of bilateral Air Service Agreements* .....84...■	<b>9th pillar: ICT infrastructure</b>	
1.06	Transparency of government policymaking .....55...■	9.01	Extent of business Internet use .....95...■
1.07	Time required to start a business* .....110...■	9.02	Internet users* .....113...■
1.08	Cost to start a business* .....102...■	9.03	Telephone lines* .....114...■
		9.04	Broadband Internet subscribers* .....106...■
		9.05	Mobile telephone subscribers* .....90...■
<b>2nd pillar: Environmental sustainability</b>		<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.01	Stringency of environmental regulation .....113...■	10.01	Ticket taxes and airport charges* .....110...■
2.02	Enforcement of environmental regulation .....90...■	10.02	Purchasing power parity* .....34...■
2.03	Sustainability of T&T industry development .....101...■	10.03	Extent and effect of taxation .....22...■
2.04	Carbon dioxide emissions* .....27...■	10.04	Fuel price levels* .....62...■
2.05	Particulate matter concentration* .....107...■	10.05	Hotel price index* .....n/a.....
2.06	Threatened species* .....36...■		
2.07	Environmental treaty ratification* .....28...■	<b>11th pillar: Human resources</b>	
		11.01	Primary education enrollment* .....115...■
<b>3rd pillar: Safety and security</b>		11.02	2ndary education enrollment* .....122...■
3.01	Business costs of terrorism .....49...■	11.03	Quality of the educational system .....126...■
3.02	Reliability of police services .....76...■	11.04	Local availability of research and training services .....127...■
3.03	Business costs of crime and violence .....55...■	11.05	Extent of staff training .....104...■
3.04	Road traffic accidents* .....55...■	11.06	Hiring and firing practices .....17...■
		11.07	Ease of hiring foreign labor .....30...■
<b>4th pillar: Health and hygiene</b>		11.08	HIV prevalence* .....89...■
4.01	Physician density* .....117...■	11.09	Business impact of HIV/AIDS .....110...■
4.02	Access to improved sanitation* .....113...■	11.10	Life expectancy* .....113...■
4.03	Access to improved drinking water* .....114...■		
4.04	Hospital beds* .....110...■	<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
		12.01	Tourism openness* .....122...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		12.02	Attitude of population toward foreign visitors .....60...■
5.01	Government prioritization of the T&T industry .....72...■	12.03	Extension of business trips recommended .....38...■
5.02	T&T government expenditure* .....n/a.....		
5.03	Effectiveness of marketing and branding .....68...■	<b>13th pillar: Natural resources</b>	
5.04	T&T fair attendance* .....122...■	13.01	Number of World Heritage natural sites* .....39...■
		13.02	Nationally protected areas* .....113...■
<b>6th pillar: Air transport infrastructure</b>		13.03	Quality of the natural environment .....77...■
6.01	Quality of air transport infrastructure .....117...■	13.04	Total known species* .....57...■
6.02	Available seat kilometers* .....120...■		
6.03	Departures per 1,000 population* .....101...■	<b>14th pillar: Cultural resources</b>	
6.04	Airport density* .....72...■	14.01	Number of World Heritage cultural sites* .....83...■
6.05	Number of operating airlines* .....119...■	14.02	Sports stadiums* .....96...■
6.06	International air transport network .....96...■	14.03	Number of international fairs and exhibitions* .....119...■
<b>7th pillar: Ground transport infrastructure</b>			
7.01	Quality of roads .....118...■		
7.02	Quality of railroad infrastructure .....83...■		
7.03	Quality of port infrastructure .....115...■		
7.04	Quality of domestic transport network .....60...■		
7.05	Road density* .....116...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# Mauritius

## Key indicators

Population (millions), 2006 .....	1.3
Surface area (1,000 square kilometers) .....	2.0
Gross domestic product (US\$ billions), 2006 .....	6.3
Gross domestic product (PPP, US\$) per capita, 2006 .....	13,281
Real GDP growth (percent), 2006 .....	3.5

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

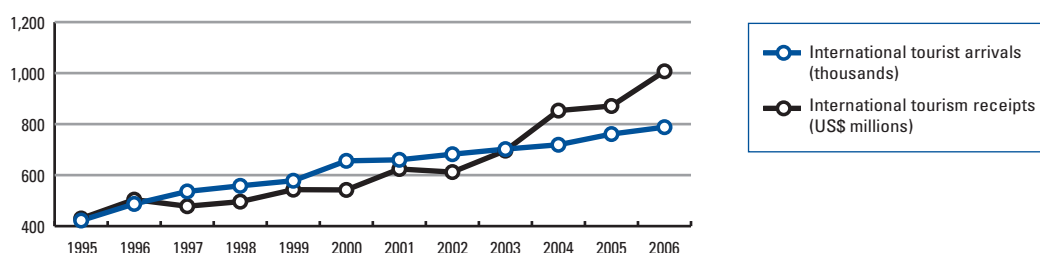
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	11.6	3.4
Employment (1,000 jobs) .....	13.5	0.3

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	26.0	3.3
Employment (1,000 jobs) .....	27.7	0.3

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	788
International tourism receipts (US\$ millions), 2006 .....	1,007



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>41</b>	<b>4.4</b>
<b>T&amp;T regulatory framework</b> .....	<b>29</b>	<b>5.2</b>
Policy rules and regulations .....	28	5.0
Environmental sustainability .....	46	4.7
Safety and security .....	33	5.7
Health and hygiene .....	57	4.8
Prioritization of Travel & Tourism .....	4	5.9
<b>T&amp;T business environment and infrastructure</b> .....	<b>44</b>	<b>4.1</b>
Air transport infrastructure .....	48	3.5
Ground transport infrastructure .....	30	4.9
Tourism infrastructure .....	42	4.3
ICT infrastructure .....	61	2.7
Price competitiveness in the T&T industry .....	19	5.3
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>76</b>	<b>3.8</b>
Human resources .....	56	5.0
Education and training .....	44	4.9
Availability of qualified labor .....	90	5.1
Affinity for Travel & Tourism .....	3	6.5
Natural resources .....	126	2.0
Cultural resources .....	103	1.6

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	73 ...■	8.01 Hotel rooms* .....	34 ...■
1.02 Property rights .....	27 ...■	8.02 Presence of major car rental companies* .....	33 ...■
1.03 Business impact of rules on FDI .....	38 ...■	8.03 ATMs accepting Visa cards* .....	56 ...■
1.04 Visa requirements* .....	13 ...■		
1.05 Openness of bilateral Air Service Agreements* .....	101 ...■	<b>9th pillar: ICT infrastructure</b>	
1.06 Transparency of government policymaking .....	27 ...■	9.01 Extent of business Internet use .....	89 ...■
1.07 Time required to start a business* .....	9 ...■	9.02 Internet users* .....	69 ...■
1.08 Cost to start a business* .....	32 ...■	9.03 Telephone lines* .....	41 ...■
		9.04 Broadband Internet subscribers* .....	59 ...■
		9.05 Mobile telephone subscribers* .....	70 ...■
<b>2nd pillar: Environmental sustainability</b>		<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.01 Stringency of environmental regulation .....	50 ...■	10.01 Ticket taxes and airport charges* .....	61 ...■
2.02 Enforcement of environmental regulation .....	45 ...■	10.02 Purchasing power parity* .....	36 ...■
2.03 Sustainability of T&T industry development .....	9 ...■	10.03 Extent and effect of taxation .....	18 ...■
2.04 Carbon dioxide emissions* .....	55 ...■	10.04 Fuel price levels* .....	27 ...■
2.05 Particulate matter concentration* .....	8 ...■	10.05 Hotel price index* .....	65 ...■
2.06 Threatened species* .....	129 ...■		
2.07 Environmental treaty ratification* .....	28 ...■	<b>11th pillar: Human resources</b>	
		11.01 Primary education enrollment* .....	46 ...■
<b>3rd pillar: Safety and security</b>		11.02 2ndary education enrollment* .....	56 ...■
3.01 Business costs of terrorism .....	6 ...■	11.03 Quality of the educational system .....	53 ...■
3.02 Reliability of police services .....	64 ...■	11.04 Local availability of research and training services .....	89 ...■
3.03 Business costs of crime and violence .....	48 ...■	11.05 Extent of staff training .....	29 ...■
3.04 Road traffic accidents* .....	15 ...■	11.06 Hiring and firing practices .....	111 ...■
		11.07 Ease of hiring foreign labor .....	62 ...■
		11.08 HIV prevalence* .....	83 ...■
		11.09 Business impact of HIV/AIDS .....	63 ...■
		11.10 Life expectancy* .....	58 ...■
<b>4th pillar: Health and hygiene</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
4.01 Physician density* .....	87 ...■	12.01 Tourism openness* .....	5 ...■
4.02 Access to improved sanitation* .....	47 ...■	12.02 Attitude of population toward foreign visitors .....	13 ...■
4.03 Access to improved drinking water* .....	1 ...■	12.03 Extension of business trips recommended .....	48 ...■
4.04 Hospital beds* .....	58 ...■		
		<b>13th pillar: Natural resources</b>	
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		13.01 Number of World Heritage natural sites* .....	70 ...■
5.01 Government prioritization of the T&T industry .....	1 ...■	13.02 Nationally protected areas* .....	121 ...■
5.02 T&T government expenditure* .....	3 ...■	13.03 Quality of the natural environment .....	50 ...■
5.03 Effectiveness of marketing and branding .....	8 ...■	13.04 Total known species* .....	130 ...■
5.04 T&T fair attendance* .....	56 ...■		
		<b>14th pillar: Cultural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		14.01 Number of World Heritage cultural sites* .....	83 ...■
6.01 Quality of air transport infrastructure .....	39 ...■	14.02 Sports stadiums* .....	74 ...■
6.02 Available seat kilometers* .....	59 ...■	14.03 Number of international fairs and exhibitions* .....	85 ...■
6.03 Departures per 1,000 population* .....	30 ...■		
6.04 Airport density* .....	28 ...■		
6.05 Number of operating airlines* .....	95 ...■		
6.06 International air transport network .....	39 ...■		
<b>7th pillar: Ground transport infrastructure</b>			
7.01 Quality of roads .....	43 ...■		
7.02 Quality of railroad infrastructure .....	n/a .....		
7.03 Quality of port infrastructure .....	41 ...■		
7.04 Quality of domestic transport network .....	57 ...■		
7.05 Road density* .....	29 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Mexico

## Key indicators

Population (millions), 2006 .....	108.3
Surface area (1,000 square kilometers) .....	1,958.2
Gross domestic product (US\$ billions), 2006 .....	840.0
Gross domestic product (PPP, US\$) per capita, 2006 .....	11,369
Real GDP growth (percent), 2006 .....	4.8

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

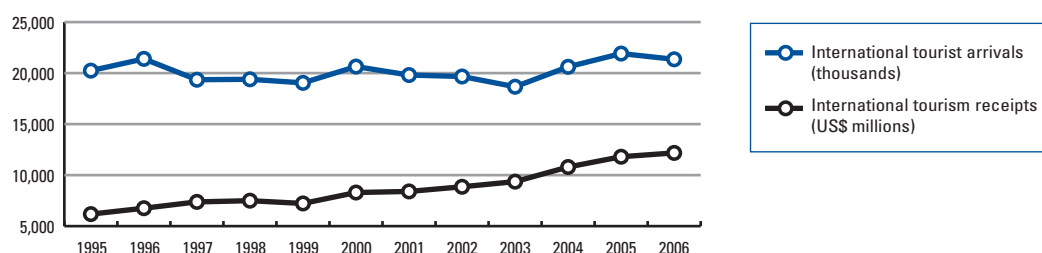
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	4.9	3.8
Employment (1,000 jobs) .....	4.7	1.9

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	14.3	4.8
Employment (1,000 jobs) .....	15.1	2.8

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	21,353
International tourism receipts (US\$ millions), 2006 .....	12,177



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>55</b>	<b>4.2</b>
<b>T&amp;T regulatory framework</b> .....	<b>71</b>	<b>4.3</b>
Policy rules and regulations .....	49	4.6
Environmental sustainability .....	85	4.2
Safety and security .....	122	3.6
Health and hygiene .....	79	4.2
Prioritization of Travel & Tourism .....	31	4.9
<b>T&amp;T business environment and infrastructure</b> .....	<b>61</b>	<b>3.6</b>
Air transport infrastructure .....	42	3.8
Ground transport infrastructure .....	82	3.3
Tourism infrastructure .....	49	4.0
ICT infrastructure .....	64	2.7
Price competitiveness in the T&T industry .....	83	4.4
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>19</b>	<b>4.6</b>
Human resources .....	52	5.0
Education and training .....	64	4.7
Availability of qualified labor .....	42	5.4
Affinity for Travel & Tourism .....	86	4.6
Natural resources .....	25	4.4
Cultural resources .....	25	4.4

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	32...■	8.01 Hotel rooms* .....	48...■
1.02 Property rights .....	77...■	8.02 Presence of major car rental companies* .....	33...■
1.03 Business impact of rules on FDI .....	46...■	8.03 ATMs accepting Visa cards* .....	50...■
1.04 Visa requirements* .....	76...■		
1.05 Openness of bilateral Air Service Agreements* .....	21...■	<b>9th pillar: ICT infrastructure</b>	
1.06 Transparency of government policymaking .....	76...■	9.01 Extent of business Internet use .....	65...■
1.07 Time required to start a business* .....	62...■	9.02 Internet users* .....	65...■
1.08 Cost to start a business* .....	63...■	9.03 Telephone lines* .....	66...■
		9.04 Broadband Internet subscribers* .....	52...■
		9.05 Mobile telephone subscribers* .....	76...■
<b>2nd pillar: Environmental sustainability</b>		<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.01 Stringency of environmental regulation .....	54...■	10.01 Ticket taxes and airport charges* .....	124...■
2.02 Enforcement of environmental regulation .....	64...■	10.02 Purchasing power parity* .....	88...■
2.03 Sustainability of T&T industry development .....	48...■	10.03 Extent and effect of taxation .....	80...■
2.04 Carbon dioxide emissions* .....	67...■	10.04 Fuel price levels* .....	21...■
2.05 Particulate matter concentration* .....	57...■	10.05 Hotel price index* .....	67...■
2.06 Threatened species* .....	126...■		
2.07 Environmental treaty ratification* .....	45...■	<b>11th pillar: Human resources</b>	
		11.01 Primary education enrollment* .....	23...■
<b>3rd pillar: Safety and security</b>		11.02 2ndary education enrollment* .....	80...■
3.01 Business costs of terrorism .....	53...■	11.03 Quality of the educational system .....	92...■
3.02 Reliability of police services .....	118...■	11.04 Local availability of research and training services .....	52...■
3.03 Business costs of crime and violence .....	119...■	11.05 Extent of staff training .....	65...■
3.04 Road traffic accidents* .....	112...■	11.06 Hiring and firing practices .....	75...■
		11.07 Ease of hiring foreign labor .....	66...■
		11.08 HIV prevalence* .....	63...■
		11.09 Business impact of HIV/AIDS .....	57...■
		11.10 Life expectancy* .....	40...■
<b>4th pillar: Health and hygiene</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
4.01 Physician density* .....	65...■	12.01 Tourism openness* .....	100...■
4.02 Access to improved sanitation* .....	70...■	12.02 Attitude of population toward foreign visitors .....	40...■
4.03 Access to improved drinking water* .....	45...■	12.03 Extension of business trips recommended .....	71...■
4.04 Hospital beds* .....	97...■		
		<b>13th pillar: Natural resources</b>	
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		13.01 Number of World Heritage natural sites* .....	15...■
5.01 Government prioritization of the T&T industry .....	38...■	13.02 Nationally protected areas* .....	67...■
5.02 T&T government expenditure* .....	37...■	13.03 Quality of the natural environment .....	122...■
5.03 Effectiveness of marketing and branding .....	30...■	13.04 Total known species* .....	8...■
5.04 T&T fair attendance* .....	32...■		
		<b>14th pillar: Cultural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		14.01 Number of World Heritage cultural sites* .....	6...■
6.01 Quality of air transport infrastructure .....	60...■	14.02 Sports stadiums* .....	78...■
6.02 Available seat kilometers* .....	18...■	14.03 Number of international fairs and exhibitions* .....	26...■
6.03 Departures per 1,000 population* .....	57...■		
6.04 Airport density* .....	75...■		
6.05 Number of operating airlines* .....	29...■		
6.06 International air transport network .....	40...■		
<b>7th pillar: Ground transport infrastructure</b>			
7.01 Quality of roads .....	59...■		
7.02 Quality of railroad infrastructure .....	72...■		
7.03 Quality of port infrastructure .....	91...■		
7.04 Quality of domestic transport network .....	61...■		
7.05 Road density* .....	73...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Moldova

## Key indicators

Population (millions), 2006 .....	4.2
Surface area (1,000 square kilometers) .....	33.8
Gross domestic product (US\$ billions), 2006 .....	3.4
Gross domestic product (PPP, US\$) per capita, 2006 .....	2,869
Real GDP growth (percent), 2006 .....	4.0

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

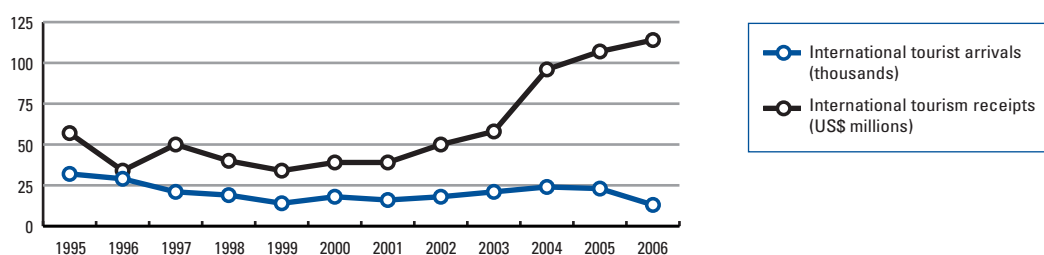
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	n/a	n/a
Employment (1,000 jobs) .....	n/a	n/a

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	n/a	n/a
Employment (1,000 jobs) .....	n/a	n/a

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	13
International tourism receipts (US\$ millions), 2006 .....	114



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>98</b>	<b>3.6</b>
<b>T&amp;T regulatory framework</b> .....	<b>66</b>	<b>4.4</b>
Policy rules and regulations .....	94	3.9
Environmental sustainability .....	70	4.4
Safety and security .....	70	4.9
Health and hygiene .....	47	5.4
Prioritization of Travel & Tourism .....	113	3.4
<b>T&amp;T business environment and infrastructure</b> .....	<b>100</b>	<b>2.9</b>
Air transport infrastructure .....	118	2.1
Ground transport infrastructure .....	104	2.8
Tourism infrastructure .....	91	2.4
ICT infrastructure .....	82	2.3
Price competitiveness in the T&T industry .....	49	4.8
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>110</b>	<b>3.4</b>
Human resources .....	88	4.8
Education and training .....	91	4.2
Availability of qualified labor .....	54	5.3
Affinity for Travel & Tourism .....	29	5.3
Natural resources .....	124	2.1
Cultural resources .....	111	1.4

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....119... <span style="color: #808080;">■</span>	8.01	Hotel rooms* .....105... <span style="color: #808080;">■</span>
1.02	Property rights .....107... <span style="color: #808080;">■</span>	8.02	Presence of major car rental companies* .....74... <span style="color: #808080;">■</span>
1.03	Business impact of rules on FDI .....114... <span style="color: #808080;">■</span>	8.03	ATMs accepting Visa cards* .....81... <span style="color: #808080;">■</span>
1.04	Visa requirements* .....76... <span style="color: #808080;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....117... <span style="color: #808080;">■</span>	9.01	Extent of business Internet use .....121... <span style="color: #808080;">■</span>
1.06	Transparency of government policymaking .....100... <span style="color: #808080;">■</span>	9.02	Internet users* .....62... <span style="color: #808080;">■</span>
1.07	Time required to start a business* .....49... <span style="color: #0056b3;">■</span>	9.03	Telephone lines* .....54... <span style="color: #808080;">■</span>
1.08	Cost to start a business* .....59... <span style="color: #808080;">■</span>	9.04	Broadband Internet subscribers* .....79... <span style="color: #808080;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....93... <span style="color: #808080;">■</span>
2.01	Stringency of environmental regulation .....109... <span style="color: #808080;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....82... <span style="color: #808080;">■</span>	10.01	Ticket taxes and airport charges* .....101... <span style="color: #808080;">■</span>
2.03	Sustainability of T&T industry development .....109... <span style="color: #808080;">■</span>	10.02	Purchasing power parity* .....29... <span style="color: #0056b3;">■</span>
2.04	Carbon dioxide emissions* .....47... <span style="color: #0056b3;">■</span>	10.03	Extent and effect of taxation .....106... <span style="color: #808080;">■</span>
2.05	Particulate matter concentration* .....57... <span style="color: #808080;">■</span>	10.04	Fuel price levels* .....65... <span style="color: #808080;">■</span>
2.06	Threatened species* .....64... <span style="color: #808080;">■</span>	10.05	Hotel price index* .....12... <span style="color: #0056b3;">■</span>
2.07	Environmental treaty ratification* .....72... <span style="color: #808080;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....101... <span style="color: #808080;">■</span>
3.01	Business costs of terrorism .....58... <span style="color: #808080;">■</span>	11.02	2ndary education enrollment* .....78... <span style="color: #808080;">■</span>
3.02	Reliability of police services .....109... <span style="color: #808080;">■</span>	11.03	Quality of the educational system .....75... <span style="color: #808080;">■</span>
3.03	Business costs of crime and violence .....69... <span style="color: #808080;">■</span>	11.04	Local availability of research and training services .....104... <span style="color: #808080;">■</span>
3.04	Road traffic accidents* .....44... <span style="color: #0056b3;">■</span>	11.05	Extent of staff training .....103... <span style="color: #808080;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....35... <span style="color: #0056b3;">■</span>
4.01	Physician density* .....35... <span style="color: #0056b3;">■</span>	11.07	Ease of hiring foreign labor .....65... <span style="color: #808080;">■</span>
4.02	Access to improved sanitation* .....81... <span style="color: #808080;">■</span>	11.08	HIV prevalence* .....99... <span style="color: #808080;">■</span>
4.03	Access to improved drinking water* .....66... <span style="color: #808080;">■</span>	11.09	Business impact of HIV/AIDS .....75... <span style="color: #808080;">■</span>
4.04	Hospital beds* .....21... <span style="color: #0056b3;">■</span>	11.10	Life expectancy* .....91... <span style="color: #808080;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....112... <span style="color: #808080;">■</span>	12.01	Tourism openness* .....25... <span style="color: #0056b3;">■</span>
5.02	T&T government expenditure* .....n/a.....	12.02	Attitude of population toward foreign visitors .....80... <span style="color: #808080;">■</span>
5.03	Effectiveness of marketing and branding .....117... <span style="color: #808080;">■</span>	12.03	Extension of business trips recommended .....43... <span style="color: #0056b3;">■</span>
5.04	T&T fair attendance* .....93... <span style="color: #808080;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....70... <span style="color: #808080;">■</span>
6.01	Quality of air transport infrastructure .....89... <span style="color: #808080;">■</span>	13.02	Nationally protected areas* .....114... <span style="color: #808080;">■</span>
6.02	Available seat kilometers* .....122... <span style="color: #808080;">■</span>	13.03	Quality of the natural environment .....74... <span style="color: #808080;">■</span>
6.03	Departures per 1,000 population* .....89... <span style="color: #808080;">■</span>	13.04	Total known species* .....117... <span style="color: #808080;">■</span>
6.04	Airport density* .....114... <span style="color: #808080;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....120... <span style="color: #808080;">■</span>	14.01	Number of World Heritage cultural sites* .....83... <span style="color: #808080;">■</span>
6.06	International air transport network .....115... <span style="color: #808080;">■</span>	14.02	Sports stadiums* .....88... <span style="color: #808080;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....119... <span style="color: #808080;">■</span>
7.01	Quality of roads .....128... <span style="color: #808080;">■</span>		
7.02	Quality of railroad infrastructure .....63... <span style="color: #808080;">■</span>		
7.03	Quality of port infrastructure .....127... <span style="color: #808080;">■</span>		
7.04	Quality of domestic transport network .....82... <span style="color: #808080;">■</span>		
7.05	Road density* .....48... <span style="color: #0056b3;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Mongolia

## Key indicators

Population (millions), 2006 .....	2.7
Surface area (1,000 square kilometers) .....	1,566.5
Gross domestic product (US\$ billions), 2006 .....	3.2
Gross domestic product (PPP, US\$) per capita, 2006 .....	2,891
Real GDP growth (percent), 2006 .....	8.6

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

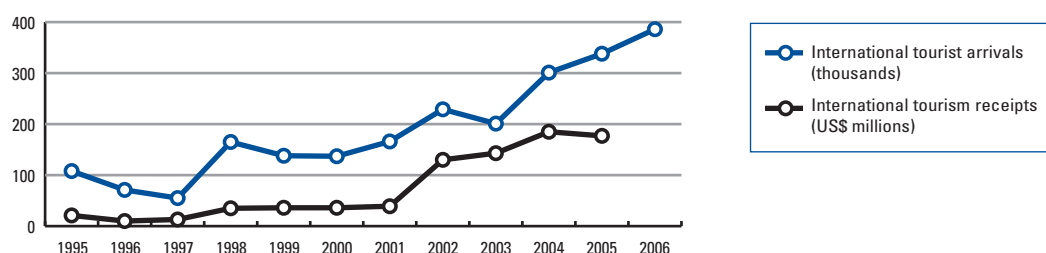
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	n/a	n/a
Employment (1,000 jobs) .....	n/a	n/a

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	n/a	n/a
Employment (1,000 jobs) .....	n/a	n/a

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	386
International tourism receipts (US\$ millions), 2005 .....	177



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>100</b>	<b>3.5</b>
<b>T&amp;T regulatory framework</b> .....	<b>78</b>	<b>4.2</b>
Policy rules and regulations .....	80	4.1
Environmental sustainability .....	119	3.8
Safety and security .....	78	4.9
Health and hygiene .....	64	4.5
Prioritization of Travel & Tourism .....	78	4.1
<b>T&amp;T business environment and infrastructure</b> .....	<b>106</b>	<b>2.7</b>
Air transport infrastructure .....	74	2.8
Ground transport infrastructure .....	125	2.4
Tourism infrastructure .....	107	1.9
ICT infrastructure .....	103	1.8
Price competitiveness in the T&T industry .....	61	4.7
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>91</b>	<b>3.6</b>
Human resources .....	85	4.8
Education and training .....	86	4.3
Availability of qualified labor .....	58	5.3
Affinity for Travel & Tourism .....	35	5.2
Natural resources .....	66	3.1
Cultural resources .....	117	1.3

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....59...■	8.01	Hotel rooms* .....n/a.....
1.02	Property rights .....89...■	8.02	Presence of major car rental companies* .....103...■
1.03	Business impact of rules on FDI .....93...■	8.03	ATMs accepting Visa cards* .....107...■
1.04	Visa requirements* .....107...■	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....108...■	9.01	Extent of business Internet use .....102...■
1.06	Transparency of government policymaking .....123...■	9.02	Internet users* .....83...■
1.07	Time required to start a business* .....43...■	9.03	Telephone lines* .....100...■
1.08	Cost to start a business* .....27...■	9.04	Broadband Internet subscribers* .....98...■
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....106...■
2.01	Stringency of environmental regulation .....130...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....130...■	10.01	Ticket taxes and airport charges* .....30...■
2.03	Sustainability of T&T industry development .....111...■	10.02	Purchasing power parity* .....55...■
2.04	Carbon dioxide emissions* .....59...■	10.03	Extent and effect of taxation .....99...■
2.05	Particulate matter concentration* .....87...■	10.04	Fuel price levels* .....68...■
2.06	Threatened species* .....96...■	10.05	Hotel price index* .....n/a.....
2.07	Environmental treaty ratification* .....63...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....104...■
3.01	Business costs of terrorism .....42...■	11.02	2ndary education enrollment* .....45...■
3.02	Reliability of police services .....113...■	11.03	Quality of the educational system .....111...■
3.03	Business costs of crime and violence .....82...■	11.04	Local availability of research and training services .....90...■
3.04	Road traffic accidents* .....56...■	11.05	Extent of staff training .....94...■
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....18...■
4.01	Physician density* .....36...■	11.07	Ease of hiring foreign labor .....100...■
4.02	Access to improved sanitation* .....88...■	11.08	HIV prevalence* .....1...■
4.03	Access to improved drinking water* .....106...■	11.09	Business impact of HIV/AIDS .....104...■
4.04	Hospital beds* .....12...■	11.10	Life expectancy* .....97...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....86...■	12.01	Tourism openness* .....15...■
5.02	T&T government expenditure* .....n/a.....	12.02	Attitude of population toward foreign visitors .....124...■
5.03	Effectiveness of marketing and branding .....116...■	12.03	Extension of business trips recommended .....90...■
5.04	T&T fair attendance* .....56...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....39...■
6.01	Quality of air transport infrastructure .....124...■	13.02	Nationally protected areas* .....44...■
6.02	Available seat kilometers* .....116...■	13.03	Quality of the natural environment .....108...■
6.03	Departures per 1,000 population* .....69...■	13.04	Total known species* .....68...■
6.04	Airport density* .....7...■	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....120...■	14.01	Number of World Heritage cultural sites* .....83...■
6.06	International air transport network .....123...■	14.02	Sports stadiums* .....112...■
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....99...■
7.01	Quality of roads .....129...■		
7.02	Quality of railroad infrastructure .....67...■		
7.03	Quality of port infrastructure .....119...■		
7.04	Quality of domestic transport network .....108...■		
7.05	Road density* .....111...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# Montenegro

## Key indicators

Population (millions), 2006.....	0.6
Surface area (1,000 square kilometers).....	13.8
Gross domestic product (US\$ billions), 2006.....	n/a
Gross domestic product (PPP, US\$) per capita, 2006.....	n/a
Real GDP growth (percent), 2006.....	n/a

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

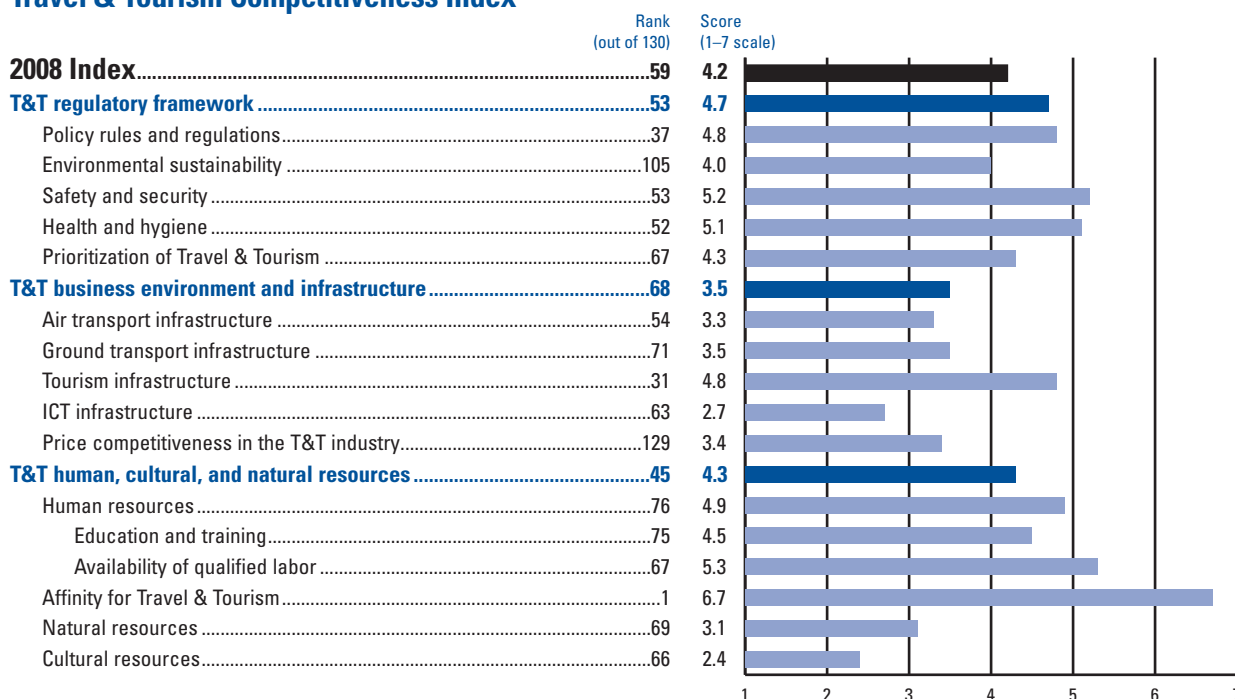
		Percent of total	2008–2017 annual growth (% forecast)
<b>T&amp;T Industry, 2007 estimates</b>			
GDP (US\$ millions).....	252	10.2	9.1
Employment (1,000 jobs).....	16	11.0	5.8
<b>T&amp;T economy, 2007 estimates</b>			
GDP (US\$ millions).....	408	16.6	8.2
Employment (1,000 jobs).....	27	17.7	5.0

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006.....	378
International tourism receipts (US\$ millions), 2006.....	362

Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....67...■	8.01	Hotel rooms* .....5...■
1.02	Property rights .....62...■	8.02	Presence of major car rental companies* .....56...■
1.03	Business impact of rules on FDI .....57...■	8.03	ATMs accepting Visa cards* .....71...■
1.04	Visa requirements* .....63...■		
1.05	Openness of bilateral Air Service Agreements* .....n/a.....	<b>9th pillar: ICT infrastructure</b>	
1.06	Transparency of government policymaking .....98...■	9.01	Extent of business Internet use .....127...■
1.07	Time required to start a business* .....52...■	9.02	Internet users* .....76...■
1.08	Cost to start a business* .....38...■	9.03	Telephone lines* .....46...■
		9.04	Broadband Internet subscribers* .....n/a.....
		9.05	Mobile telephone subscribers* .....74...■
<b>2nd pillar: Environmental sustainability</b>		<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.01	Stringency of environmental regulation .....81...■	10.01	Ticket taxes and airport charges* .....n/a.....
2.02	Enforcement of environmental regulation .....117...■	10.02	Purchasing power parity* .....n/a.....
2.03	Sustainability of T&T industry development .....64...■	10.03	Extent and effect of taxation .....35...■
2.04	Carbon dioxide emissions* .....n/a.....	10.04	Fuel price levels* .....107...■
2.05	Particulate matter concentration* .....n/a.....	10.05	Hotel price index* .....n/a.....
2.06	Threatened species* .....56...■		
2.07	Environmental treaty ratification* .....97...■	<b>11th pillar: Human resources</b>	
		11.01	Primary education enrollment* .....65...■
<b>3rd pillar: Safety and security</b>		11.02	2ndary education enrollment* .....73...■
3.01	Business costs of terrorism .....7...■	11.03	Quality of the educational system .....66...■
3.02	Reliability of police services .....81...■	11.04	Local availability of research and training services .....93...■
3.03	Business costs of crime and violence .....38...■	11.05	Extent of staff training .....97...■
3.04	Road traffic accidents* .....n/a.....	11.06	Hiring and firing practices .....92...■
		11.07	Ease of hiring foreign labor .....54...■
		11.08	HIV prevalence* .....1...■
<b>4th pillar: Health and hygiene</b>		11.09	Business impact of HIV/AIDS .....9...■
4.01	Physician density* .....51...■	11.10	Life expectancy* .....58...■
4.02	Access to improved sanitation* .....61...■		
4.03	Access to improved drinking water* .....60...■	<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
4.04	Hospital beds* .....42...■	12.01	Tourism openness* .....n/a.....
		12.02	Attitude of population toward foreign visitors .....1...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		12.03	Extension of business trips recommended .....1...■
5.01	Government prioritization of the T&T industry .....3...■		
5.02	T&T government expenditure* .....60...■	<b>13th pillar: Natural resources</b>	
5.03	Effectiveness of marketing and branding .....25...■	13.01	Number of World Heritage natural sites* .....39...■
5.04	T&T fair attendance* .....111...■	13.02	Nationally protected areas* .....n/a.....
		13.03	Quality of the natural environment .....36...■
<b>6th pillar: Air transport infrastructure</b>		13.04	Total known species* .....100...■
6.01	Quality of air transport infrastructure .....68...■		
6.02	Available seat kilometers* .....125...■	<b>14th pillar: Cultural resources</b>	
6.03	Departures per 1,000 population* .....n/a.....	14.01	Number of World Heritage cultural sites* .....83...■
6.04	Airport density* .....17...■	14.02	Sports stadiums* .....24...■
6.05	Number of operating airlines* .....117...■	14.03	Number of international fairs and exhibitions* .....105...■
6.06	International air transport network .....117...■		
<b>7th pillar: Ground transport infrastructure</b>			
7.01	Quality of roads .....107...■		
7.02	Quality of railroad infrastructure .....78...■		
7.03	Quality of port infrastructure .....52...■		
7.04	Quality of domestic transport network .....76...■		
7.05	Road density* .....n/a.....		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Morocco

## Key indicators

Population (millions), 2006 .....	31.9
Surface area (1,000 square kilometers) .....	446.6
Gross domestic product (US\$ billions), 2006 .....	65.4
Gross domestic product (PPP, US\$) per capita, 2006 .....	5,765
Real GDP growth (percent), 2006 .....	8.0

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

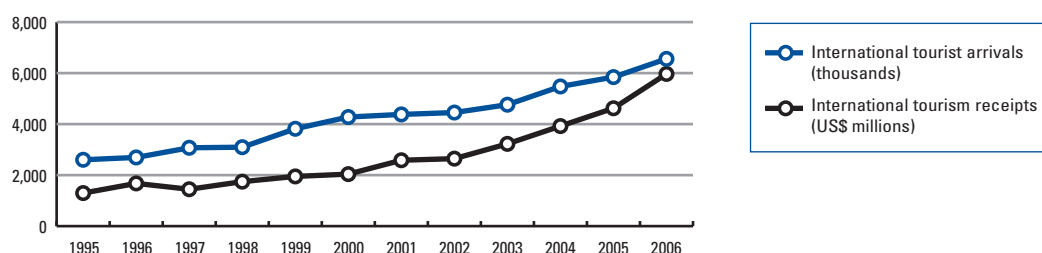
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	10.0	3.7
Employment (1,000 jobs) .....	8.8	2.6

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	17.9	3.9
Employment (1,000 jobs) .....	15.5	2.8

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	6,558
International tourism receipts (US\$ millions), 2006 .....	5,967



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>67</b>	<b>3.9</b>
<b>T&amp;T regulatory framework</b> .....	<b>55</b>	<b>4.6</b>
Policy rules and regulations .....	40	4.7
Environmental sustainability .....	31	5.0
Safety and security .....	61	5.1
Health and hygiene .....	98	3.2
Prioritization of Travel & Tourism .....	30	4.9
<b>T&amp;T business environment and infrastructure</b> .....	<b>75</b>	<b>3.3</b>
Air transport infrastructure .....	69	2.9
Ground transport infrastructure .....	67	3.6
Tourism infrastructure .....	72	3.2
ICT infrastructure .....	85	2.2
Price competitiveness in the T&T industry .....	64	4.7
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>72</b>	<b>3.8</b>
Human resources .....	95	4.7
Education and training .....	101	4.0
Availability of qualified labor .....	56	5.3
Affinity for Travel & Tourism .....	25	5.4
Natural resources .....	118	2.2
Cultural resources .....	48	3.0

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	69... <span style="color: #808080;">■</span>	8.01 Hotel rooms* .....	76... <span style="color: #808080;">■</span>
1.02 Property rights .....	63... <span style="color: #808080;">■</span>	8.02 Presence of major car rental companies* .....	33... <span style="color: #0056b3;">■</span>
1.03 Business impact of rules on FDI .....	75... <span style="color: #808080;">■</span>	8.03 ATMs accepting Visa cards* .....	80... <span style="color: #808080;">■</span>
1.04 Visa requirements* .....	27... <span style="color: #0056b3;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	54... <span style="color: #808080;">■</span>	9.01 Extent of business Internet use .....	107... <span style="color: #808080;">■</span>
1.06 Transparency of government policymaking .....	49... <span style="color: #0056b3;">■</span>	9.02 Internet users* .....	56... <span style="color: #808080;">■</span>
1.07 Time required to start a business* .....	22... <span style="color: #0056b3;">■</span>	9.03 Telephone lines* .....	106... <span style="color: #808080;">■</span>
1.08 Cost to start a business* .....	59... <span style="color: #808080;">■</span>	9.04 Broadband Internet subscribers* .....	70... <span style="color: #808080;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	79... <span style="color: #808080;">■</span>
2.01 Stringency of environmental regulation .....	80... <span style="color: #808080;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	78... <span style="color: #808080;">■</span>	10.01 Ticket taxes and airport charges* .....	76... <span style="color: #808080;">■</span>
2.03 Sustainability of T&T industry development .....	10... <span style="color: #0056b3;">■</span>	10.02 Purchasing power parity* .....	39... <span style="color: #0056b3;">■</span>
2.04 Carbon dioxide emissions* .....	41... <span style="color: #0056b3;">■</span>	10.03 Extent and effect of taxation .....	61... <span style="color: #808080;">■</span>
2.05 Particulate matter concentration* .....	22... <span style="color: #0056b3;">■</span>	10.04 Fuel price levels* .....	68... <span style="color: #808080;">■</span>
2.06 Threatened species* .....	80... <span style="color: #808080;">■</span>	10.05 Hotel price index* .....	81... <span style="color: #808080;">■</span>
2.07 Environmental treaty ratification* .....	63... <span style="color: #808080;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	100... <span style="color: #808080;">■</span>
3.01 Business costs of terrorism .....	92... <span style="color: #808080;">■</span>	11.02 2ndary education enrollment* .....	105... <span style="color: #808080;">■</span>
3.02 Reliability of police services .....	36... <span style="color: #0056b3;">■</span>	11.03 Quality of the educational system .....	90... <span style="color: #808080;">■</span>
3.03 Business costs of crime and violence .....	53... <span style="color: #808080;">■</span>	11.04 Local availability of research and training services .....	57... <span style="color: #808080;">■</span>
3.04 Road traffic accidents* .....	95... <span style="color: #808080;">■</span>	11.05 Extent of staff training .....	73... <span style="color: #808080;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	58... <span style="color: #808080;">■</span>
4.01 Physician density* .....	99... <span style="color: #808080;">■</span>	11.07 Ease of hiring foreign labor .....	56... <span style="color: #808080;">■</span>
4.02 Access to improved sanitation* .....	74... <span style="color: #808080;">■</span>	11.08 HIV prevalence* .....	24... <span style="color: #0056b3;">■</span>
4.03 Access to improved drinking water* .....	92... <span style="color: #808080;">■</span>	11.09 Business impact of HIV/AIDS .....	72... <span style="color: #808080;">■</span>
4.04 Hospital beds* .....	100... <span style="color: #808080;">■</span>	11.10 Life expectancy* .....	86... <span style="color: #808080;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	23... <span style="color: #0056b3;">■</span>	12.01 Tourism openness* .....	20... <span style="color: #0056b3;">■</span>
5.02 T&T government expenditure* .....	55... <span style="color: #808080;">■</span>	12.02 Attitude of population toward foreign visitors .....	71... <span style="color: #808080;">■</span>
5.03 Effectiveness of marketing and branding .....	18... <span style="color: #0056b3;">■</span>	12.03 Extension of business trips recommended .....	37... <span style="color: #0056b3;">■</span>
5.04 T&T fair attendance* .....	32... <span style="color: #0056b3;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	70... <span style="color: #808080;">■</span>
6.01 Quality of air transport infrastructure .....	65... <span style="color: #808080;">■</span>	13.02 Nationally protected areas* .....	119... <span style="color: #808080;">■</span>
6.02 Available seat kilometers* .....	49... <span style="color: #0056b3;">■</span>	13.03 Quality of the natural environment .....	96... <span style="color: #808080;">■</span>
6.03 Departures per 1,000 population* .....	76... <span style="color: #808080;">■</span>	13.04 Total known species* .....	69... <span style="color: #808080;">■</span>
6.04 Airport density* .....	82... <span style="color: #808080;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	36... <span style="color: #0056b3;">■</span>	14.01 Number of World Heritage cultural sites* .....	19... <span style="color: #0056b3;">■</span>
6.06 International air transport network .....	70... <span style="color: #808080;">■</span>	14.02 Sports stadiums* .....	90... <span style="color: #808080;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	64... <span style="color: #808080;">■</span>
7.01 Quality of roads .....	67... <span style="color: #808080;">■</span>		
7.02 Quality of railroad infrastructure .....	51... <span style="color: #808080;">■</span>		
7.03 Quality of port infrastructure .....	63... <span style="color: #808080;">■</span>		
7.04 Quality of domestic transport network .....	42... <span style="color: #0056b3;">■</span>		
7.05 Road density* .....	80... <span style="color: #808080;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Mozambique

## Key indicators

Population (millions), 2006 .....	20.2
Surface area (1,000 square kilometers) .....	801.6
Gross domestic product (US\$ billions), 2006 .....	7.7
Gross domestic product (PPP, US\$) per capita, 2006 .....	1,494
Real GDP growth (percent), 2006 .....	8.5

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

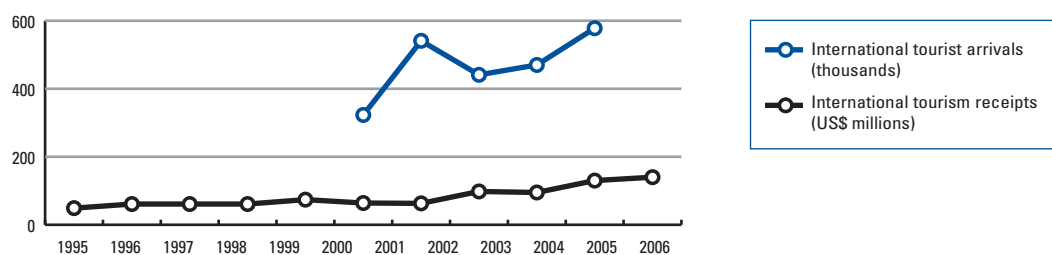
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	n/a	n/a
Employment (1,000 jobs) .....	n/a	n/a

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	n/a	n/a
Employment (1,000 jobs) .....	n/a	n/a

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2005 .....	578
International tourism receipts (US\$ millions), 2006 .....	140



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>123</b>	<b>3.1</b>
<b>T&amp;T regulatory framework</b> .....	<b>119</b>	<b>3.6</b>
Policy rules and regulations .....	90	4.0
Environmental sustainability .....	57	4.6
Safety and security .....	103	4.4
Health and hygiene .....	127	1.2
Prioritization of Travel & Tourism .....	85	3.9
<b>T&amp;T business environment and infrastructure</b> .....	<b>119</b>	<b>2.6</b>
Air transport infrastructure .....	114	2.1
Ground transport infrastructure .....	118	2.5
Tourism infrastructure .....	106	2.0
ICT infrastructure .....	125	1.5
Price competitiveness in the T&T industry .....	44	4.9
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>128</b>	<b>3.0</b>
Human resources .....	130	2.9
Education and training .....	124	3.0
Availability of qualified labor .....	125	2.9
Affinity for Travel & Tourism .....	92	4.5
Natural resources .....	61	3.2
Cultural resources .....	118	1.3

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....72...■	8.01	Hotel rooms* .....112...■
1.02	Property rights .....97...■	8.02	Presence of major car rental companies* .....89...■
1.03	Business impact of rules on FDI .....87...■	8.03	ATMs accepting Visa cards* .....102...■
1.04	Visa requirements* .....117...■	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....78...■	9.01	Extent of business Internet use .....115...■
1.06	Transparency of government policymaking .....72...■	9.02	Internet users* .....121...■
1.07	Time required to start a business* .....67...■	9.03	Telephone lines* .....127...■
1.08	Cost to start a business* .....78...■	9.04	Broadband Internet subscribers* .....120...■
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....116...■
2.01	Stringency of environmental regulation .....92...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....99...■	10.01	Ticket taxes and airport charges* .....22...■
2.03	Sustainability of T&T industry development .....83...■	10.02	Purchasing power parity* .....12...■
2.04	Carbon dioxide emissions* .....5...■	10.03	Extent and effect of taxation .....91...■
2.05	Particulate matter concentration* .....57...■	10.04	Fuel price levels* .....83...■
2.06	Threatened species* .....45...■	10.05	Hotel price index* .....40...■
2.07	Environmental treaty ratification* .....88...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....112...■
3.01	Business costs of terrorism .....81...■	11.02	2ndary education enrollment* .....127...■
3.02	Reliability of police services .....111...■	11.03	Quality of the educational system .....115...■
3.03	Business costs of crime and violence .....115...■	11.04	Local availability of research and training services .....115...■
3.04	Road traffic accidents* .....77...■	11.05	Extent of staff training .....90...■
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....109...■
4.01	Physician density* .....127...■	11.07	Ease of hiring foreign labor .....125...■
4.02	Access to improved sanitation* .....116...■	11.08	HIV prevalence* .....123...■
4.03	Access to improved drinking water* .....118...■	11.09	Business impact of HIV/AIDS .....127...■
4.04	Hospital beds* .....n/a.....	11.10	Life expectancy* .....126...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....59...■	12.01	Tourism openness* .....68...■
5.02	T&T government expenditure* .....n/a.....	12.02	Attitude of population toward foreign visitors .....89...■
5.03	Effectiveness of marketing and branding .....91...■	12.03	Extension of business trips recommended .....105...■
5.04	T&T fair attendance* .....111...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....70...■
6.01	Quality of air transport infrastructure .....107...■	13.02	Nationally protected areas* .....68...■
6.02	Available seat kilometers* .....101...■	13.03	Quality of the natural environment .....83...■
6.03	Departures per 1,000 population* .....104...■	13.04	Total known species* .....32...■
6.04	Airport density* .....70...■	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....117...■	14.01	Number of World Heritage cultural sites* .....83...■
6.06	International air transport network .....107...■	14.02	Sports stadiums* .....115...■
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....105...■
7.01	Quality of roads .....124...■		
7.02	Quality of railroad infrastructure .....84...■		
7.03	Quality of port infrastructure .....109...■		
7.04	Quality of domestic transport network .....90...■		
7.05	Road density* .....108...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Namibia

## Key indicators

Population (millions), 2006 .....	2.1
Surface area (1,000 square kilometers) .....	824.3
Gross domestic product (US\$ billions), 2006 .....	6.3
Gross domestic product (PPP, US\$) per capita, 2006 .....	8,577
Real GDP growth (percent), 2006 .....	4.6

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

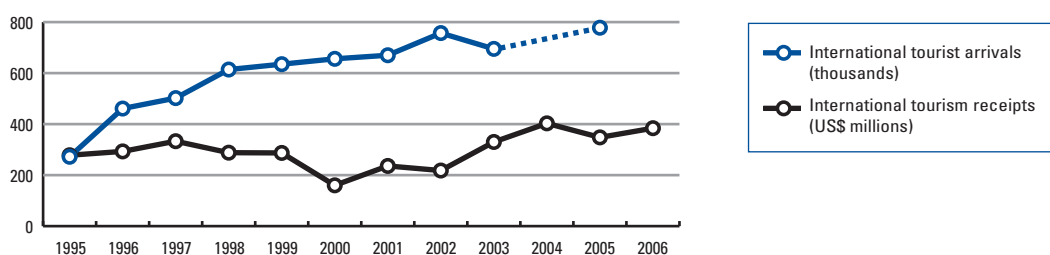
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	3.8	8.8
Employment (1,000 jobs) .....	4.6	4.7

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	1,163	16.3	8.1
Employment (1,000 jobs) .....	73	17.7	4.5

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2005 .....	778
International tourism receipts (US\$ millions), 2006 .....	384



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>93</b>	<b>3.6</b>
<b>T&amp;T regulatory framework</b> .....	<b>92</b>	<b>4.1</b>
Policy rules and regulations .....	88	4.0
Environmental sustainability .....	34	4.9
Safety and security .....	72	4.9
Health and hygiene .....	108	2.6
Prioritization of Travel & Tourism .....	86	3.9
<b>T&amp;T business environment and infrastructure</b> .....	<b>74</b>	<b>3.3</b>
Air transport infrastructure .....	51	3.4
Ground transport infrastructure .....	55	4.0
Tourism infrastructure .....	84	2.7
ICT infrastructure .....	105	1.8
Price competitiveness in the T&T industry .....	54	4.8
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>113</b>	<b>3.4</b>
Human resources .....	127	3.0
Education and training .....	115	3.4
Availability of qualified labor .....	127	2.5
Affinity for Travel & Tourism .....	33	5.3
Natural resources .....	42	3.8
Cultural resources .....	108	1.5

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	62 ...■	8.01 Hotel rooms* .....	83 ...■
1.02 Property rights .....	41 ...■	8.02 Presence of major car rental companies* .....	74 ...■
1.03 Business impact of rules on FDI .....	88 ...■	8.03 ATMs accepting Visa cards* .....	72 ...■
1.04 Visa requirements* .....	63 ...■		
1.05 Openness of bilateral Air Service Agreements* .....	49 ...■	<b>9th pillar: ICT infrastructure</b>	
1.06 Transparency of government policymaking .....	61 ...■	9.01 Extent of business Internet use .....	94 ...■
1.07 Time required to start a business* .....	119 ...■	9.02 Internet users* .....	108 ...■
1.08 Cost to start a business* .....	80 ...■	9.03 Telephone lines* .....	97 ...■
		9.04 Broadband Internet subscribers* .....	120 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	101 ...■
2.01 Stringency of environmental regulation .....	71 ...■		
2.02 Enforcement of environmental regulation .....	58 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.03 Sustainability of T&T industry development .....	57 ...■	10.01 Ticket taxes and airport charges* .....	91 ...■
2.04 Carbon dioxide emissions* .....	39 ...■	10.02 Purchasing power parity* .....	35 ...■
2.05 Particulate matter concentration* .....	66 ...■	10.03 Extent and effect of taxation .....	59 ...■
2.06 Threatened species* .....	43 ...■	10.04 Fuel price levels* .....	68 ...■
2.07 Environmental treaty ratification* .....	45 ...■	10.05 Hotel price index* .....	n/a .....
<b>3rd pillar: Safety and security</b>		<b>11th pillar: Human resources</b>	
3.01 Business costs of terrorism .....	32 ...■	11.01 Primary education enrollment* .....	116 ...■
3.02 Reliability of police services .....	101 ...■	11.02 2ndary education enrollment* .....	102 ...■
3.03 Business costs of crime and violence .....	102 ...■	11.03 Quality of the educational system .....	118 ...■
3.04 Road traffic accidents* .....	35 ...■	11.04 Local availability of research and training services .....	129 ...■
		11.05 Extent of staff training .....	58 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	117 ...■
4.01 Physician density* .....	105 ...■	11.07 Ease of hiring foreign labor .....	130 ...■
4.02 Access to improved sanitation* .....	118 ...■	11.08 HIV prevalence* .....	126 ...■
4.03 Access to improved drinking water* .....	76 ...■	11.09 Business impact of HIV/AIDS .....	126 ...■
4.04 Hospital beds* .....	n/a .....	11.10 Life expectancy* .....	119 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	53 ...■	12.01 Tourism openness* .....	36 ...■
5.02 T&T government expenditure* .....	73 ...■	12.02 Attitude of population toward foreign visitors .....	78 ...■
5.03 Effectiveness of marketing and branding .....	31 ...■	12.03 Extension of business trips recommended .....	7 ...■
5.04 T&T fair attendance* .....	111 ...■		
		<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	70 ...■
6.01 Quality of air transport infrastructure .....	58 ...■	13.02 Nationally protected areas* .....	42 ...■
6.02 Available seat kilometers* .....	103 ...■	13.03 Quality of the natural environment .....	3 ...■
6.03 Departures per 1,000 population* .....	59 ...■	13.04 Total known species* .....	39 ...■
6.04 Airport density* .....	12 ...■		
6.05 Number of operating airlines* .....	123 ...■	<b>14th pillar: Cultural resources</b>	
6.06 International air transport network .....	68 ...■	14.01 Number of World Heritage cultural sites* .....	83 ...■
		14.02 Sports stadiums* .....	81 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	119 ...■
7.01 Quality of roads .....	35 ...■		
7.02 Quality of railroad infrastructure .....	34 ...■		
7.03 Quality of port infrastructure .....	30 ...■		
7.04 Quality of domestic transport network .....	78 ...■		
7.05 Road density* .....	105 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# Nepal

## Key indicators

Population (millions), 2006 .....	27.7
Surface area (1,000 square kilometers) .....	147.2
Gross domestic product (US\$ billions), 2006 .....	8.9
Gross domestic product (PPP, US\$) per capita, 2006 .....	1,947
Real GDP growth (percent), 2006 .....	2.8

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

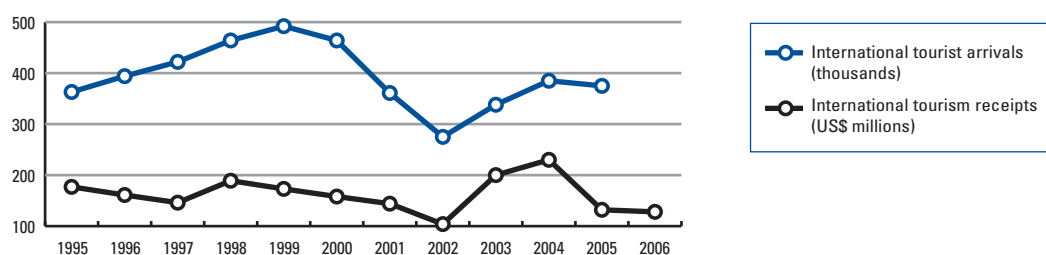
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	2.7	6.4
Employment (1,000 jobs) .....	2.1	4.6

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	6.4	5.9
Employment (1,000 jobs) .....	5.0	4.1

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2005 .....	375
International tourism receipts (US\$ millions), 2006 .....	128



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>116</b>	<b>3.2</b>
<b>T&amp;T regulatory framework</b> .....	<b>120</b>	<b>3.6</b>
Policy rules and regulations .....	123	3.0
Environmental sustainability .....	79	4.3
Safety and security .....	124	3.5
Health and hygiene .....	113	2.5
Prioritization of Travel & Tourism .....	44	4.6
<b>T&amp;T business environment and infrastructure</b> .....	<b>122</b>	<b>2.6</b>
Air transport infrastructure .....	109	2.2
Ground transport infrastructure .....	122	2.4
Tourism infrastructure .....	126	1.1
ICT infrastructure .....	124	1.5
Price competitiveness in the T&T industry .....	5	5.5
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>99</b>	<b>3.5</b>
Human resources .....	116	3.8
Education and training .....	119	3.3
Availability of qualified labor .....	119	4.4
Affinity for Travel & Tourism .....	78	4.7
Natural resources .....	35	4.1
Cultural resources .....	112	1.4

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....126... <span style="color: #808080;">■</span>	8.01	Hotel rooms* .....103... <span style="color: #808080;">■</span>
1.02	Property rights .....93... <span style="color: #808080;">■</span>	8.02	Presence of major car rental companies* .....123... <span style="color: #808080;">■</span>
1.03	Business impact of rules on FDI .....107... <span style="color: #808080;">■</span>	8.03	ATMs accepting Visa cards* .....115... <span style="color: #808080;">■</span>
1.04	Visa requirements* .....120... <span style="color: #808080;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....121... <span style="color: #808080;">■</span>	9.01	Extent of business Internet use .....105... <span style="color: #808080;">■</span>
1.06	Transparency of government policymaking .....116... <span style="color: #808080;">■</span>	9.02	Internet users* .....120... <span style="color: #808080;">■</span>
1.07	Time required to start a business* .....71... <span style="color: #808080;">■</span>	9.03	Telephone lines* .....112... <span style="color: #808080;">■</span>
1.08	Cost to start a business* .....107... <span style="color: #808080;">■</span>	9.04	Broadband Internet subscribers* .....120... <span style="color: #808080;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....127... <span style="color: #808080;">■</span>
2.01	Stringency of environmental regulation .....122... <span style="color: #808080;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....111... <span style="color: #808080;">■</span>	10.01	Ticket taxes and airport charges* .....37... <span style="color: #0056b3;">■</span>
2.03	Sustainability of T&T industry development .....87... <span style="color: #808080;">■</span>	10.02	Purchasing power parity* .....6... <span style="color: #0056b3;">■</span>
2.04	Carbon dioxide emissions* .....5... <span style="color: #0056b3;">■</span>	10.03	Extent and effect of taxation .....52... <span style="color: #808080;">■</span>
2.05	Particulate matter concentration* .....57... <span style="color: #808080;">■</span>	10.04	Fuel price levels* .....47... <span style="color: #0056b3;">■</span>
2.06	Threatened species* .....83... <span style="color: #808080;">■</span>	10.05	Hotel price index* .....2... <span style="color: #0056b3;">■</span>
2.07	Environmental treaty ratification* .....97... <span style="color: #808080;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....107... <span style="color: #808080;">■</span>
3.01	Business costs of terrorism .....130... <span style="color: #808080;">■</span>	11.02	2ndary education enrollment* .....108... <span style="color: #808080;">■</span>
3.02	Reliability of police services .....107... <span style="color: #808080;">■</span>	11.03	Quality of the educational system .....99... <span style="color: #808080;">■</span>
3.03	Business costs of crime and violence .....113... <span style="color: #808080;">■</span>	11.04	Local availability of research and training services .....123... <span style="color: #808080;">■</span>
3.04	Road traffic accidents* .....85... <span style="color: #808080;">■</span>	11.05	Extent of staff training .....127... <span style="color: #808080;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....104... <span style="color: #808080;">■</span>
4.01	Physician density* .....109... <span style="color: #808080;">■</span>	11.07	Ease of hiring foreign labor .....128... <span style="color: #808080;">■</span>
4.02	Access to improved sanitation* .....112... <span style="color: #808080;">■</span>	11.08	HIV prevalence* .....76... <span style="color: #808080;">■</span>
4.03	Access to improved drinking water* .....72... <span style="color: #808080;">■</span>	11.09	Business impact of HIV/AIDS .....102... <span style="color: #808080;">■</span>
4.04	Hospital beds* .....116... <span style="color: #808080;">■</span>	11.10	Life expectancy* .....107... <span style="color: #808080;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....44... <span style="color: #0056b3;">■</span>	12.01	Tourism openness* .....82... <span style="color: #808080;">■</span>
5.02	T&T government expenditure* .....33... <span style="color: #0056b3;">■</span>	12.02	Attitude of population toward foreign visitors .....44... <span style="color: #0056b3;">■</span>
5.03	Effectiveness of marketing and branding .....79... <span style="color: #808080;">■</span>	12.03	Extension of business trips recommended .....73... <span style="color: #808080;">■</span>
5.04	T&T fair attendance* .....45... <span style="color: #0056b3;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....21... <span style="color: #0056b3;">■</span>
6.01	Quality of air transport infrastructure .....108... <span style="color: #808080;">■</span>	13.02	Nationally protected areas* .....36... <span style="color: #0056b3;">■</span>
6.02	Available seat kilometers* .....92... <span style="color: #808080;">■</span>	13.03	Quality of the natural environment .....111... <span style="color: #808080;">■</span>
6.03	Departures per 1,000 population* .....110... <span style="color: #808080;">■</span>	13.04	Total known species* .....29... <span style="color: #0056b3;">■</span>
6.04	Airport density* .....55... <span style="color: #808080;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....85... <span style="color: #808080;">■</span>	14.01	Number of World Heritage cultural sites* .....69... <span style="color: #808080;">■</span>
6.06	International air transport network .....106... <span style="color: #808080;">■</span>	14.02	Sports stadiums* .....122... <span style="color: #808080;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....91... <span style="color: #808080;">■</span>
7.01	Quality of roads .....117... <span style="color: #808080;">■</span>		
7.02	Quality of railroad infrastructure .....112... <span style="color: #808080;">■</span>		
7.03	Quality of port infrastructure .....100... <span style="color: #808080;">■</span>		
7.04	Quality of domestic transport network .....111... <span style="color: #808080;">■</span>		
7.05	Road density* .....82... <span style="color: #808080;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Netherlands

## Key indicators

Population (millions), 2006.....	16.4
Surface area (1,000 square kilometers).....	41.5
Gross domestic product (US\$ billions), 2006.....	670.9
Gross domestic product (PPP, US\$) per capita, 2006.....	36,937
Real GDP growth (percent), 2006.....	3.0

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

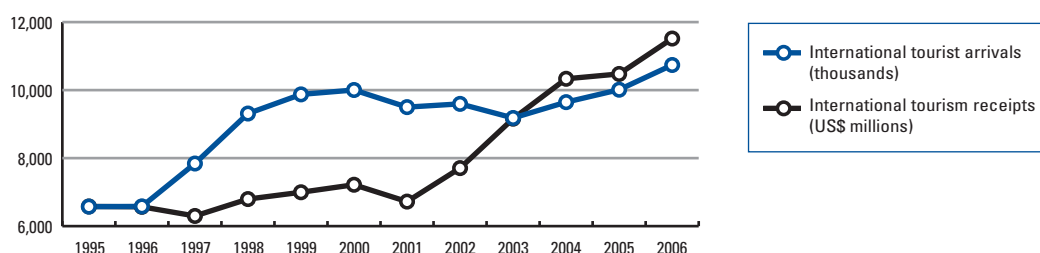
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions).....	24,169.....3.3	1.3
Employment (1,000 jobs).....	234.....3.3	-0.4

### T&T economy, 2007 estimates

GDP (US\$ millions).....	66,361.....8.9	1.8
Employment (1,000 jobs).....	621.....8.7	-0.1

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006.....	10,739
International tourism receipts (US\$ millions), 2006.....	11,516



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>18</b>	<b>5.0</b>
<b>T&amp;T regulatory framework</b> .....	<b>22</b>	<b>5.3</b>
Policy rules and regulations.....	9	5.4
Environmental sustainability.....	9	5.6
Safety and security.....	34	5.7
Health and hygiene.....	26	6.1
Prioritization of Travel & Tourism.....	81	4.0
<b>T&amp;T business environment and infrastructure</b> .....	<b>14</b>	<b>5.1</b>
Air transport infrastructure.....	17	4.8
Ground transport infrastructure.....	8	6.4
Tourism infrastructure.....	35	4.7
ICT infrastructure.....	2	5.9
Price competitiveness in the T&T industry.....	121	3.8
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>21</b>	<b>4.6</b>
Human resources.....	16	5.7
Education and training.....	6	6.1
Availability of qualified labor.....	66	5.3
Affinity for Travel & Tourism.....	76	4.7
Natural resources.....	88	2.8
Cultural resources.....	18	5.2

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	22 ...■	8.01 Hotel rooms* .....	44 ...■
1.02 Property rights .....	6 ...■	8.02 Presence of major car rental companies* .....	33 ...■
1.03 Business impact of rules on FDI .....	12 ...■	8.03 ATMs accepting Visa cards* .....	25 ...■
1.04 Visa requirements* .....	30 ...■		
1.05 Openness of bilateral Air Service Agreements* .....	19 ...■	<b>9th pillar: ICT infrastructure</b>	
1.06 Transparency of government policymaking .....	10 ...■	9.01 Extent of business Internet use .....	12 ...■
1.07 Time required to start a business* .....	17 ...■	9.02 Internet users* .....	1 ...■
1.08 Cost to start a business* .....	37 ...■	9.03 Telephone lines* .....	20 ...■
		9.04 Broadband Internet subscribers* .....	2 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	32 ...■
2.01 Stringency of environmental regulation .....	5 ...■		
2.02 Enforcement of environmental regulation .....	10 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.03 Sustainability of T&T industry development .....	33 ...■	10.01 Ticket taxes and airport charges* .....	96 ...■
2.04 Carbon dioxide emissions* .....	95 ...■	10.02 Purchasing power parity* .....	120 ...■
2.05 Particulate matter concentration* .....	50 ...■	10.03 Extent and effect of taxation .....	51 ...■
2.06 Threatened species* .....	31 ...■	10.04 Fuel price levels* .....	113 ...■
2.07 Environmental treaty ratification* .....	5 ...■	10.05 Hotel price index* .....	92 ...■
<b>3rd pillar: Safety and security</b>		<b>11th pillar: Human resources</b>	
3.01 Business costs of terrorism .....	91 ...■	11.01 Primary education enrollment* .....	16 ...■
3.02 Reliability of police services .....	13 ...■	11.02 2ndary education enrollment* .....	4 ...■
3.03 Business costs of crime and violence .....	57 ...■	11.03 Quality of the educational system .....	13 ...■
3.04 Road traffic accidents* .....	54 ...■	11.04 Local availability of research and training services .....	7 ...■
		11.05 Extent of staff training .....	8 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	112 ...■
4.01 Physician density* .....	25 ...■	11.07 Ease of hiring foreign labor .....	70 ...■
4.02 Access to improved sanitation* .....	1 ...■	11.08 HIV prevalence* .....	49 ...■
4.03 Access to improved drinking water* .....	1 ...■	11.09 Business impact of HIV/AIDS .....	29 ...■
4.04 Hospital beds* .....	37 ...■	11.10 Life expectancy* .....	16 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	89 ...■	12.01 Tourism openness* .....	72 ...■
5.02 T&T government expenditure* .....	91 ...■	12.02 Attitude of population toward foreign visitors .....	32 ...■
5.03 Effectiveness of marketing and branding .....	50 ...■	12.03 Extension of business trips recommended .....	91 ...■
5.04 T&T fair attendance* .....	56 ...■		
		<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	70 ...■
6.01 Quality of air transport infrastructure .....	7 ...■	13.02 Nationally protected areas* .....	43 ...■
6.02 Available seat kilometers* .....	20 ...■	13.03 Quality of the natural environment .....	81 ...■
6.03 Departures per 1,000 population* .....	23 ...■	13.04 Total known species* .....	98 ...■
6.04 Airport density* .....	106 ...■		
6.05 Number of operating airlines* .....	11 ...■	<b>14th pillar: Cultural resources</b>	
6.06 International air transport network .....	4 ...■	14.01 Number of World Heritage cultural sites* .....	23 ...■
		14.02 Sports stadiums* .....	40 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	7 ...■
7.01 Quality of roads .....	16 ...■		
7.02 Quality of railroad infrastructure .....	11 ...■		
7.03 Quality of port infrastructure .....	2 ...■		
7.04 Quality of domestic transport network .....	13 ...■		
7.05 Road density* .....	3 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# New Zealand

## Key indicators

Population (millions), 2006 .....	4.1
Surface area (1,000 square kilometers) .....	270.5
Gross domestic product (US\$ billions), 2006 .....	104.6
Gross domestic product (PPP, US\$) per capita, 2006 .....	25,874
Real GDP growth (percent), 2006 .....	1.6

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

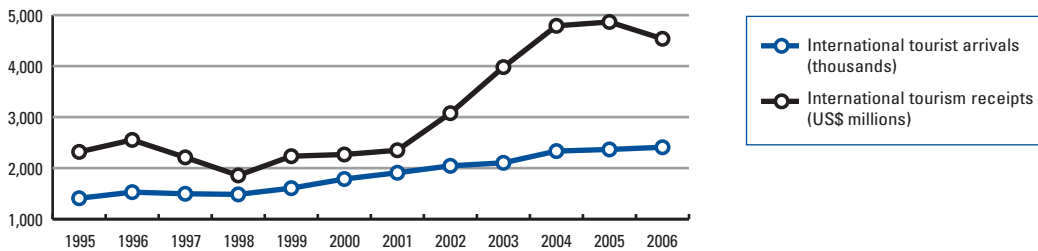
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	7,348	6.9
Employment (1,000 jobs) .....	157	7.4

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	15,282	14.4	3.2
Employment (1,000 jobs) .....	326	15.3	0.3

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006.....2,409  
 International tourism receipts (US\$ millions), 2006 .....4,536



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>19</b>	<b>5.0</b>
<b>T&amp;T regulatory framework</b> .....	<b>15</b>	<b>5.5</b>
Policy rules and regulations .....	11	5.4
Environmental sustainability .....	24	5.1
Safety and security .....	11	6.1
Health and hygiene .....	27	6.0
Prioritization of Travel & Tourism .....	38	4.8
<b>T&amp;T business environment and infrastructure</b> .....	<b>26</b>	<b>4.7</b>
Air transport infrastructure .....	10	5.1
Ground transport infrastructure .....	50	4.3
Tourism infrastructure .....	34	4.8
ICT infrastructure .....	21	4.8
Price competitiveness in the T&T industry .....	68	4.6
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>17</b>	<b>4.7</b>
Human resources .....	21	5.6
Education and training .....	21	5.7
Availability of qualified labor .....	33	5.5
Affinity for Travel & Tourism .....	34	5.3
Natural resources .....	28	4.3
Cultural resources .....	33	3.6

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	11 ...■	8.01 Hotel rooms* .....	47 ...■
1.02 Property rights .....	16 ...■	8.02 Presence of major car rental companies* .....	33 ...■
1.03 Business impact of rules on FDI .....	33 ...■	8.03 ATMs accepting Visa cards* .....	23 ...■
1.04 Visa requirements* .....	60 ...■		
1.05 Openness of bilateral Air Service Agreements* .....	25 ...■	<b>9th pillar: ICT infrastructure</b>	
1.06 Transparency of government policymaking .....	8 ...■	9.01 Extent of business Internet use .....	25 ...■
1.07 Time required to start a business* .....	22 ...■	9.02 Internet users* .....	2 ...■
1.08 Cost to start a business* .....	2 ...■	9.03 Telephone lines* .....	27 ...■
		9.04 Broadband Internet subscribers* .....	26 ...■
		9.05 Mobile telephone subscribers* .....	41 ...■
<b>2nd pillar: Environmental sustainability</b>		<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.01 Stringency of environmental regulation .....	11 ...■	10.01 Ticket taxes and airport charges* .....	77 ...■
2.02 Enforcement of environmental regulation .....	12 ...■	10.02 Purchasing power parity* .....	103 ...■
2.03 Sustainability of T&T industry development .....	7 ...■	10.03 Extent and effect of taxation .....	67 ...■
2.04 Carbon dioxide emissions* .....	95 ...■	10.04 Fuel price levels* .....	45 ...■
2.05 Particulate matter concentration* .....	6 ...■	10.05 Hotel price index* .....	26 ...■
2.06 Threatened species* .....	130 ...■		
2.07 Environmental treaty ratification* .....	5 ...■	<b>11th pillar: Human resources</b>	
		11.01 Primary education enrollment* .....	7 ...■
<b>3rd pillar: Safety and security</b>		11.02 2ndary education enrollment* .....	5 ...■
3.01 Business costs of terrorism .....	17 ...■	11.03 Quality of the educational system .....	21 ...■
3.02 Reliability of police services .....	18 ...■	11.04 Local availability of research and training services .....	24 ...■
3.03 Business costs of crime and violence .....	17 ...■	11.05 Extent of staff training .....	22 ...■
3.04 Road traffic accidents* .....	37 ...■	11.06 Hiring and firing practices .....	89 ...■
		11.07 Ease of hiring foreign labor .....	63 ...■
		11.08 HIV prevalence* .....	24 ...■
		11.09 Business impact of HIV/AIDS .....	18 ...■
		11.10 Life expectancy* .....	8 ...■
<b>4th pillar: Health and hygiene</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
4.01 Physician density* .....	46 ...■	12.01 Tourism openness* .....	49 ...■
4.02 Access to improved sanitation* .....	1 ...■	12.02 Attitude of population toward foreign visitors .....	2 ...■
4.03 Access to improved drinking water* .....	1 ...■	12.03 Extension of business trips recommended .....	10 ...■
4.04 Hospital beds* .....	26 ...■		
		<b>13th pillar: Natural resources</b>	
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		13.01 Number of World Heritage natural sites* .....	15 ...■
5.01 Government prioritization of the T&T industry .....	8 ...■	13.02 Nationally protected areas* .....	25 ...■
5.02 T&T government expenditure* .....	62 ...■	13.03 Quality of the natural environment .....	2 ...■
5.03 Effectiveness of marketing and branding .....	5 ...■	13.04 Total known species* .....	120 ...■
5.04 T&T fair attendance* .....	56 ...■		
		<b>14th pillar: Cultural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		14.01 Number of World Heritage cultural sites* .....	83 ...■
6.01 Quality of air transport infrastructure .....	24 ...■	14.02 Sports stadiums* .....	10 ...■
6.02 Available seat kilometers* .....	28 ...■	14.03 Number of international fairs and exhibitions* .....	42 ...■
6.03 Departures per 1,000 population* .....	4 ...■		
6.04 Airport density* .....	6 ...■		
6.05 Number of operating airlines* .....	72 ...■		
6.06 International air transport network .....	24 ...■		
<b>7th pillar: Ground transport infrastructure</b>			
7.01 Quality of roads .....	48 ...■		
7.02 Quality of railroad infrastructure .....	44 ...■		
7.03 Quality of port infrastructure .....	22 ...■		
7.04 Quality of domestic transport network .....	47 ...■		
7.05 Road density* .....	51 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Nicaragua

## Key indicators

Population (millions), 2006 .....	5.6
Surface area (1,000 square kilometers) .....	130.0
Gross domestic product (US\$ billions), 2006 .....	5.3
Gross domestic product (PPP, US\$) per capita, 2006 .....	3,886
Real GDP growth (percent), 2006 .....	3.7

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

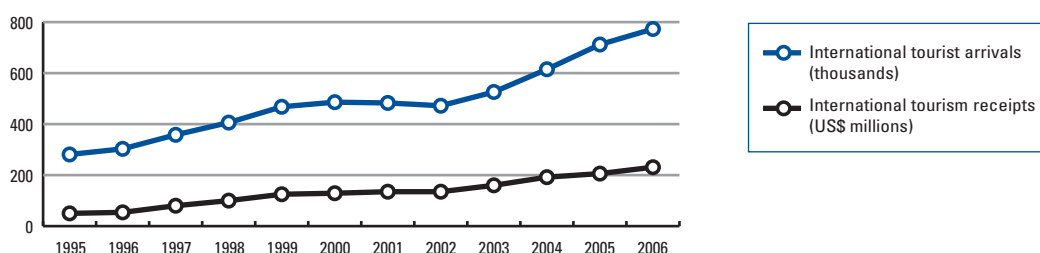
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	2.7	2.7
Employment (1,000 jobs) .....	2.1	2.9

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	7.2	3.5
Employment (1,000 jobs) .....	5.8	3.7

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	773
International tourism receipts (US\$ millions), 2006 .....	231



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>99</b>	<b>3.5</b>
<b>T&amp;T regulatory framework</b> .....	<b>96</b>	<b>4.0</b>
Policy rules and regulations .....	92	3.9
Environmental sustainability .....	49	4.7
Safety and security .....	51	5.2
Health and hygiene .....	109	2.6
Prioritization of Travel & Tourism .....	100	3.7
<b>T&amp;T business environment and infrastructure</b> .....	<b>99</b>	<b>2.9</b>
Air transport infrastructure .....	102	2.4
Ground transport infrastructure .....	126	2.3
Tourism infrastructure .....	77	2.9
ICT infrastructure .....	110	1.8
Price competitiveness in the T&T industry .....	31	5.1
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>87</b>	<b>3.7</b>
Human resources .....	94	4.7
Education and training .....	105	3.8
Availability of qualified labor .....	17	5.7
Affinity for Travel & Tourism .....	71	4.7
Natural resources .....	45	3.7
Cultural resources .....	107	1.5

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....78...■	8.01	Hotel rooms* .....91...■
1.02	Property rights .....108...■	8.02	Presence of major car rental companies* .....33...■
1.03	Business impact of rules on FDI .....72...■	8.03	ATMs accepting Visa cards* .....94...■
1.04	Visa requirements* .....16...■	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....5...■	9.01	Extent of business Internet use .....110...■
1.06	Transparency of government policymaking .....109...■	9.02	Internet users* .....115...■
1.07	Time required to start a business* .....90...■	9.03	Telephone lines* .....103...■
1.08	Cost to start a business* .....115...■	9.04	Broadband Internet subscribers* .....81...■
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....92...■
2.01	Stringency of environmental regulation .....97...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....107...■	10.01	Ticket taxes and airport charges* .....63...■
2.03	Sustainability of T&T industry development .....93...■	10.02	Purchasing power parity* .....11...■
2.04	Carbon dioxide emissions* .....24...■	10.03	Extent and effect of taxation .....100...■
2.05	Particulate matter concentration* .....44...■	10.04	Fuel price levels* .....30...■
2.06	Threatened species* .....21...■	10.05	Hotel price index* .....41...■
2.07	Environmental treaty ratification* .....72...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....91...■
3.01	Business costs of terrorism .....65...■	11.02	2ndary education enrollment* .....98...■
3.02	Reliability of police services .....56...■	11.03	Quality of the educational system .....123...■
3.03	Business costs of crime and violence .....79...■	11.04	Local availability of research and training services .....100...■
3.04	Road traffic accidents* .....49...■	11.05	Extent of staff training .....109...■
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....32...■
4.01	Physician density* .....103...■	11.07	Ease of hiring foreign labor .....6...■
4.02	Access to improved sanitation* .....100...■	11.08	HIV prevalence* .....49...■
4.03	Access to improved drinking water* .....94...■	11.09	Business impact of HIV/AIDS .....89...■
4.04	Hospital beds* .....100...■	11.10	Life expectancy* .....86...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....71...■	12.01	Tourism openness* .....47...■
5.02	T&T government expenditure* .....94...■	12.02	Attitude of population toward foreign visitors .....58...■
5.03	Effectiveness of marketing and branding .....72...■	12.03	Extension of business trips recommended .....110...■
5.04	T&T fair attendance* .....93...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....70...■
6.01	Quality of air transport infrastructure .....80...■	13.02	Nationally protected areas* .....29...■
6.02	Available seat kilometers* .....107...■	13.03	Quality of the natural environment .....51...■
6.03	Departures per 1,000 population* .....114...■	13.04	Total known species* .....35...■
6.04	Airport density* .....63...■	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....111...■	14.01	Number of World Heritage cultural sites* .....83...■
6.06	International air transport network .....80...■	14.02	Sports stadiums* .....82...■
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....99...■
7.01	Quality of roads .....102...■		
7.02	Quality of railroad infrastructure .....117...■		
7.03	Quality of port infrastructure .....124...■		
7.04	Quality of domestic transport network .....112...■		
7.05	Road density* .....77...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# Nigeria

## Key indicators

Population (millions), 2006 .....	134.4
Surface area (1,000 square kilometers) .....	923.8
Gross domestic product (US\$ billions), 2006 .....	116.5
Gross domestic product (PPP, US\$) per capita, 2006 .....	1,227
Real GDP growth (percent), 2006 .....	5.6

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

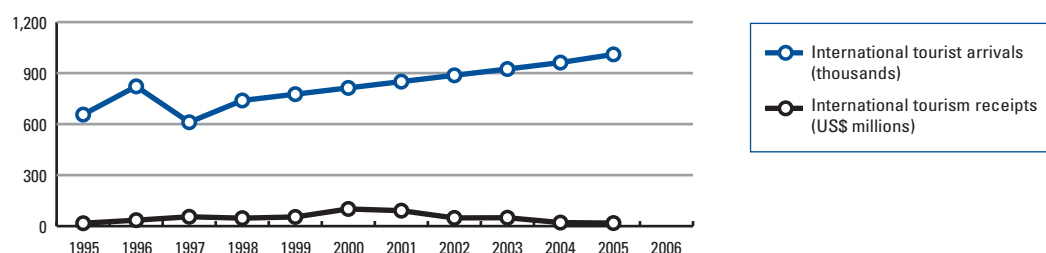
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	1,047	0.9
Employment (1,000 jobs) .....	382	0.7

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	7,312	6.1
Employment (1,000 jobs) .....	2,599	5.1

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2005 .....	1,010
International tourism receipts (US\$ millions), 2005 .....	18



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>125</b>	<b>3.0</b>
<b>T&amp;T regulatory framework</b> .....	<b>127</b>	<b>3.2</b>
Policy rules and regulations .....	99	3.7
Environmental sustainability .....	56	4.6
Safety and security .....	130	2.7
Health and hygiene .....	122	1.7
Prioritization of Travel & Tourism .....	119	3.1
<b>T&amp;T business environment and infrastructure</b> .....	<b>109</b>	<b>2.7</b>
Air transport infrastructure .....	106	2.3
Ground transport infrastructure .....	109	2.7
Tourism infrastructure .....	95	2.3
ICT infrastructure .....	111	1.8
Price competitiveness in the T&T industry .....	71	4.6
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>123</b>	<b>3.2</b>
Human resources .....	112	4.1
Education and training .....	111	3.5
Availability of qualified labor .....	114	4.7
Affinity for Travel & Tourism .....	118	4.1
Natural resources .....	70	3.1
Cultural resources .....	105	1.5

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	48...■	8.01 Hotel rooms* .....	n/a...■
1.02 Property rights .....	100...■	8.02 Presence of major car rental companies* .....	89...■
1.03 Business impact of rules on FDI .....	40...■	8.03 ATMs accepting Visa cards* .....	122...■
1.04 Visa requirements* .....	99...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	94...■	9.01 Extent of business Internet use .....	82...■
1.06 Transparency of government policymaking .....	62...■	9.02 Internet users* .....	111...■
1.07 Time required to start a business* .....	81...■	9.03 Telephone lines* .....	113...■
1.08 Cost to start a business* .....	103...■	9.04 Broadband Internet subscribers* .....	118...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	102...■
2.01 Stringency of environmental regulation .....	107...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	86...■	10.01 Ticket taxes and airport charges* .....	78...■
2.03 Sustainability of T&T industry development .....	62...■	10.02 Purchasing power parity* .....	81...■
2.04 Carbon dioxide emissions* .....	18...■	10.03 Extent and effect of taxation .....	27...■
2.05 Particulate matter concentration* .....	85...■	10.04 Fuel price levels* .....	40...■
2.06 Threatened species* .....	54...■	10.05 Hotel price index* .....	105...■
2.07 Environmental treaty ratification* .....	28...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	120...■
3.01 Business costs of terrorism .....	121...■	11.02 2ndary education enrollment* .....	114...■
3.02 Reliability of police services .....	114...■	11.03 Quality of the educational system .....	71...■
3.03 Business costs of crime and violence .....	120...■	11.04 Local availability of research and training services .....	56...■
3.04 Road traffic accidents* .....	119...■	11.05 Extent of staff training .....	76...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	13...■
4.01 Physician density* .....	107...■	11.07 Ease of hiring foreign labor .....	25...■
4.02 Access to improved sanitation* .....	104...■	11.08 HIV prevalence* .....	118...■
4.03 Access to improved drinking water* .....	116...■	11.09 Business impact of HIV/AIDS .....	108...■
4.04 Hospital beds* .....	92...■	11.10 Life expectancy* .....	123...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	94...■	12.01 Tourism openness* .....	116...■
5.02 T&T government expenditure* .....	121...■	12.02 Attitude of population toward foreign visitors .....	94...■
5.03 Effectiveness of marketing and branding .....	77...■	12.03 Extension of business trips recommended .....	115...■
5.04 T&T fair attendance* .....	111...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	70...■
6.01 Quality of air transport infrastructure .....	105...■	13.02 Nationally protected areas* .....	81...■
6.02 Available seat kilometers* .....	55...■	13.03 Quality of the natural environment .....	124...■
6.03 Departures per 1,000 population* .....	117...■	13.04 Total known species* .....	20...■
6.04 Airport density* .....	127...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	57...■	14.01 Number of World Heritage cultural sites* .....	69...■
6.06 International air transport network .....	90...■	14.02 Sports stadiums* .....	116...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	80...■
7.01 Quality of roads .....	115...■		
7.02 Quality of railroad infrastructure .....	90...■		
7.03 Quality of port infrastructure .....	111...■		
7.04 Quality of domestic transport network .....	89...■		
7.05 Road density* .....	66...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Norway

## Key indicators

Population (millions), 2006.....	4.6
Surface area (1,000 square kilometers).....	323.8
Gross domestic product (US\$ billions), 2006.....	335.9
Gross domestic product (PPP, US\$) per capita, 2006.....	44,648
Real GDP growth (percent), 2006.....	2.8

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

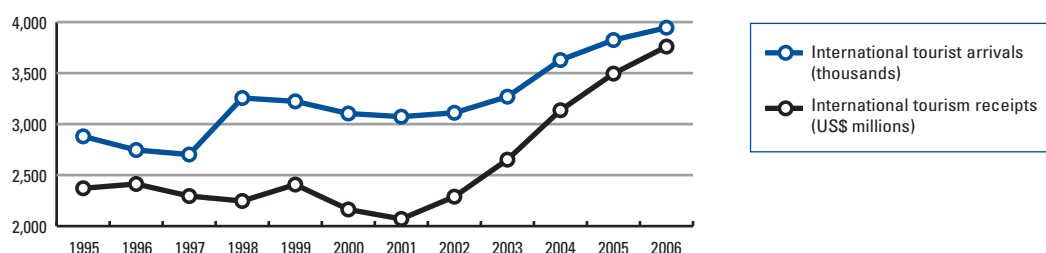
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions).....	2.5	2.6
Employment (1,000 jobs).....	3.1	-1.1

### T&T economy, 2007 estimates

GDP (US\$ millions).....	8.3	2.8
Employment (1,000 jobs).....	10.9	-0.9

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006.....	3,945
International tourism receipts (US\$ millions), 2006.....	3,760



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index.....</b>	<b>17</b>	<b>5.1</b>
<b>T&amp;T regulatory framework.....</b>	<b>8</b>	<b>5.7</b>
Policy rules and regulations.....	20	5.2
Environmental sustainability.....	6	5.7
Safety and security.....	5	6.4
Health and hygiene.....	29	6.0
Prioritization of Travel & Tourism.....	28	5.0
<b>T&amp;T business environment and infrastructure.....</b>	<b>19</b>	<b>4.9</b>
Air transport infrastructure.....	9	5.2
Ground transport infrastructure.....	36	4.6
Tourism infrastructure.....	21	5.9
ICT infrastructure.....	11	5.4
Price competitiveness in the T&T industry.....	125	3.5
<b>T&amp;T human, cultural, and natural resources.....</b>	<b>20</b>	<b>4.6</b>
Human resources.....	17	5.7
Education and training.....	12	5.9
Availability of qualified labor.....	40	5.4
Affinity for Travel & Tourism.....	95	4.5
Natural resources.....	73	3.0
Cultural resources.....	17	5.2

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	36 ...■	8.01 Hotel rooms* .....	12 ...■
1.02 Property rights .....	12 ...■	8.02 Presence of major car rental companies* .....	33 ...■
1.03 Business impact of rules on FDI .....	62 ...■	8.03 ATMs accepting Visa cards* .....	24 ...■
1.04 Visa requirements* .....	30 ...■		
1.05 Openness of bilateral Air Service Agreements* .....	70 ...■	<b>9th pillar: ICT infrastructure</b>	
1.06 Transparency of government policymaking .....	11 ...■	9.01 Extent of business Internet use .....	15 ...■
1.07 Time required to start a business* .....	17 ...■	9.02 Internet users* .....	15 ...■
1.08 Cost to start a business* .....	17 ...■	9.03 Telephone lines* .....	22 ...■
		9.04 Broadband Internet subscribers* .....	6 ...■
		9.05 Mobile telephone subscribers* .....	18 ...■
<b>2nd pillar: Environmental sustainability</b>		<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.01 Stringency of environmental regulation .....	8 ...■	10.01 Ticket taxes and airport charges* .....	25 ...■
2.02 Enforcement of environmental regulation .....	7 ...■	10.02 Purchasing power parity* .....	127 ...■
2.03 Sustainability of T&T industry development .....	45 ...■	10.03 Extent and effect of taxation .....	64 ...■
2.04 Carbon dioxide emissions* .....	104 ...■	10.04 Fuel price levels* .....	126 ...■
2.05 Particulate matter concentration* .....	3 ...■	10.05 Hotel price index* .....	69 ...■
2.06 Threatened species* .....	38 ...■		
2.07 Environmental treaty ratification* .....	5 ...■	<b>11th pillar: Human resources</b>	
		11.01 Primary education enrollment* .....	22 ...■
<b>3rd pillar: Safety and security</b>		11.02 2ndary education enrollment* .....	6 ...■
3.01 Business costs of terrorism .....	29 ...■	11.03 Quality of the educational system .....	10 ...■
3.02 Reliability of police services .....	8 ...■	11.04 Local availability of research and training services .....	18 ...■
3.03 Business costs of crime and violence .....	6 ...■	11.05 Extent of staff training .....	10 ...■
3.04 Road traffic accidents* .....	24 ...■	11.06 Hiring and firing practices .....	121 ...■
		11.07 Ease of hiring foreign labor .....	31 ...■
		11.08 HIV prevalence* .....	24 ...■
		11.09 Business impact of HIV/AIDS .....	2 ...■
		11.10 Life expectancy* .....	8 ...■
<b>4th pillar: Health and hygiene</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
4.01 Physician density* .....	25 ...■	12.01 Tourism openness* .....	62 ...■
4.02 Access to improved sanitation* .....	1 ...■	12.02 Attitude of population toward foreign visitors .....	35 ...■
4.03 Access to improved drinking water* .....	1 ...■	12.03 Extension of business trips recommended .....	124 ...■
4.04 Hospital beds* .....	42 ...■		
		<b>13th pillar: Natural resources</b>	
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		13.01 Number of World Heritage natural sites* .....	39 ...■
5.01 Government prioritization of the T&T industry .....	77 ...■	13.02 Nationally protected areas* .....	90 ...■
5.02 T&T government expenditure* .....	25 ...■	13.03 Quality of the natural environment .....	8 ...■
5.03 Effectiveness of marketing and branding .....	47 ...■	13.04 Total known species* .....	107 ...■
5.04 T&T fair attendance* .....	22 ...■		
		<b>14th pillar: Cultural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		14.01 Number of World Heritage cultural sites* .....	30 ...■
6.01 Quality of air transport infrastructure .....	13 ...■	14.02 Sports stadiums* .....	9 ...■
6.02 Available seat kilometers* .....	44 ...■	14.03 Number of international fairs and exhibitions* .....	29 ...■
6.03 Departures per 1,000 population* .....	5 ...■		
6.04 Airport density* .....	2 ...■		
6.05 Number of operating airlines* .....	34 ...■		
6.06 International air transport network .....	22 ...■		
<b>7th pillar: Ground transport infrastructure</b>			
7.01 Quality of roads .....	44 ...■		
7.02 Quality of railroad infrastructure .....	26 ...■		
7.03 Quality of port infrastructure .....	16 ...■		
7.04 Quality of domestic transport network .....	12 ...■		
7.05 Road density* .....	56 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Oman

## Key indicators

Population (millions), 2006 .....	2.6
Surface area (1,000 square kilometers) .....	309.5
Gross domestic product (US\$ billions), 2006 .....	36.0
Gross domestic product (PPP, US\$) per capita, 2006 .....	18,498
Real GDP growth (percent), 2006 .....	5.9

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

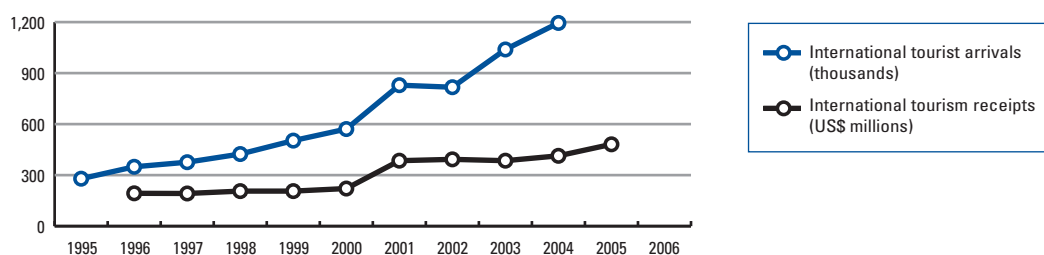
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	2.2	7.4
Employment (1,000 jobs) .....	3.1	5.0

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	3,625	9.5	5.3
Employment (1,000 jobs) .....	107	10.1	3.4

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2004 .....	1,195
International tourism receipts (US\$ millions), 2005 .....	481



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>76</b>	<b>3.8</b>
<b>T&amp;T regulatory framework</b> .....	<b>88</b>	<b>4.1</b>
Policy rules and regulations .....	76	4.1
Environmental sustainability .....	103	4.0
Safety and security .....	35	5.6
Health and hygiene .....	106	2.8
Prioritization of Travel & Tourism .....	90	3.8
<b>T&amp;T business environment and infrastructure</b> .....	<b>58</b>	<b>3.7</b>
Air transport infrastructure .....	57	3.2
Ground transport infrastructure .....	56	4.0
Tourism infrastructure .....	63	3.5
ICT infrastructure .....	71	2.6
Price competitiveness in the T&T industry .....	22	5.2
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>96</b>	<b>3.5</b>
Human resources .....	74	4.9
Education and training .....	68	4.6
Availability of qualified labor .....	75	5.2
Affinity for Travel & Tourism .....	127	3.9
Natural resources .....	84	2.9
Cultural resources .....	61	2.5

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....98... <span style="color: #808080;">■</span>	8.01	Hotel rooms* .....66... <span style="color: #808080;">■</span>
1.02	Property rights .....59... <span style="color: #808080;">■</span>	8.02	Presence of major car rental companies* .....33... <span style="color: #0056b3;">■</span>
1.03	Business impact of rules on FDI .....103... <span style="color: #808080;">■</span>	8.03	ATMs accepting Visa cards* .....64... <span style="color: #808080;">■</span>
1.04	Visa requirements* .....124... <span style="color: #808080;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....96... <span style="color: #808080;">■</span>	9.01	Extent of business Internet use .....45... <span style="color: #0056b3;">■</span>
1.06	Transparency of government policymaking .....35... <span style="color: #0056b3;">■</span>	9.02	Internet users* .....77... <span style="color: #808080;">■</span>
1.07	Time required to start a business* .....81... <span style="color: #808080;">■</span>	9.03	Telephone lines* .....84... <span style="color: #808080;">■</span>
1.08	Cost to start a business* .....27... <span style="color: #0056b3;">■</span>	9.04	Broadband Internet subscribers* .....77... <span style="color: #808080;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....60... <span style="color: #808080;">■</span>
2.01	Stringency of environmental regulation .....30... <span style="color: #0056b3;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....27... <span style="color: #0056b3;">■</span>	10.01	Ticket taxes and airport charges* .....10... <span style="color: #0056b3;">■</span>
2.03	Sustainability of T&T industry development .....58... <span style="color: #808080;">■</span>	10.02	Purchasing power parity* .....90... <span style="color: #808080;">■</span>
2.04	Carbon dioxide emissions* .....114... <span style="color: #808080;">■</span>	10.03	Extent and effect of taxation .....16... <span style="color: #0056b3;">■</span>
2.05	Particulate matter concentration* .....111... <span style="color: #808080;">■</span>	10.04	Fuel price levels* .....11... <span style="color: #0056b3;">■</span>
2.06	Threatened species* .....66... <span style="color: #808080;">■</span>	10.05	Hotel price index* .....93... <span style="color: #808080;">■</span>
2.07	Environmental treaty ratification* .....72... <span style="color: #808080;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....114... <span style="color: #808080;">■</span>
3.01	Business costs of terrorism .....76... <span style="color: #808080;">■</span>	11.02	2ndary education enrollment* .....66... <span style="color: #808080;">■</span>
3.02	Reliability of police services .....34... <span style="color: #0056b3;">■</span>	11.03	Quality of the educational system .....50... <span style="color: #0056b3;">■</span>
3.03	Business costs of crime and violence .....41... <span style="color: #0056b3;">■</span>	11.04	Local availability of research and training services .....54... <span style="color: #808080;">■</span>
3.04	Road traffic accidents* .....25... <span style="color: #0056b3;">■</span>	11.05	Extent of staff training .....38... <span style="color: #0056b3;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....68... <span style="color: #808080;">■</span>
4.01	Physician density* .....75... <span style="color: #808080;">■</span>	11.07	Ease of hiring foreign labor .....114... <span style="color: #808080;">■</span>
4.02	Access to improved sanitation* .....n/a.....	11.08	HIV prevalence* .....24... <span style="color: #0056b3;">■</span>
4.03	Access to improved drinking water* .....n/a.....	11.09	Business impact of HIV/AIDS .....81... <span style="color: #808080;">■</span>
4.04	Hospital beds* .....79... <span style="color: #808080;">■</span>	11.10	Life expectancy* .....40... <span style="color: #0056b3;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....81... <span style="color: #808080;">■</span>	12.01	Tourism openness* .....83... <span style="color: #808080;">■</span>
5.02	T&T government expenditure* .....110... <span style="color: #808080;">■</span>	12.02	Attitude of population toward foreign visitors .....130... <span style="color: #808080;">■</span>
5.03	Effectiveness of marketing and branding .....70... <span style="color: #808080;">■</span>	12.03	Extension of business trips recommended .....112... <span style="color: #808080;">■</span>
5.04	T&T fair attendance* .....56... <span style="color: #808080;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....70... <span style="color: #808080;">■</span>
6.01	Quality of air transport infrastructure .....54... <span style="color: #808080;">■</span>	13.02	Nationally protected areas* .....54... <span style="color: #808080;">■</span>
6.02	Available seat kilometers* .....73... <span style="color: #808080;">■</span>	13.03	Quality of the natural environment .....38... <span style="color: #0056b3;">■</span>
6.03	Departures per 1,000 population* .....28... <span style="color: #0056b3;">■</span>	13.04	Total known species* .....82... <span style="color: #808080;">■</span>
6.04	Airport density* .....39... <span style="color: #0056b3;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....65... <span style="color: #808080;">■</span>	14.01	Number of World Heritage cultural sites* .....46... <span style="color: #0056b3;">■</span>
6.06	International air transport network .....81... <span style="color: #808080;">■</span>	14.02	Sports stadiums* .....48... <span style="color: #0056b3;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....91... <span style="color: #808080;">■</span>
7.01	Quality of roads .....28... <span style="color: #0056b3;">■</span>		
7.02	Quality of railroad infrastructure .....n/a.....		
7.03	Quality of port infrastructure .....35... <span style="color: #0056b3;">■</span>		
7.04	Quality of domestic transport network .....100... <span style="color: #808080;">■</span>		
7.05	Road density* .....86... <span style="color: #808080;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Pakistan

## Key indicators

Population (millions), 2006 .....	161.2
Surface area (1,000 square kilometers) .....	796.1
Gross domestic product (US\$ billions), 2006 .....	127.0
Gross domestic product (PPP, US\$) per capita, 2006 .....	2,744
Real GDP growth (percent), 2006 .....	6.9

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

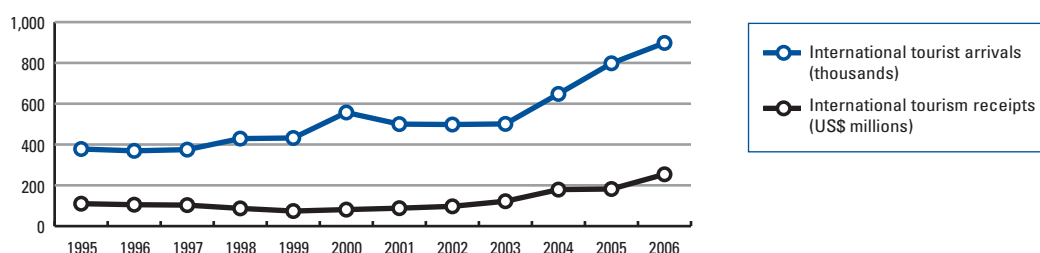
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	3,356	2.4	5.2
Employment (1,000 jobs) .....	1,056	1.9	3.1

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	8,332	6.0	4.8
Employment (1,000 jobs) .....	2,669	4.8	2.7

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	898
International tourism receipts (US\$ millions), 2006 .....	254



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>111</b>	<b>3.4</b>
<b>T&amp;T regulatory framework</b> .....	<b>114</b>	<b>3.7</b>
Policy rules and regulations .....	71	4.2
Environmental sustainability .....	96	4.0
Safety and security .....	126	3.3
Health and hygiene .....	96	3.3
Prioritization of Travel & Tourism .....	107	3.5
<b>T&amp;T business environment and infrastructure</b> .....	<b>90</b>	<b>3.0</b>
Air transport infrastructure .....	94	2.5
Ground transport infrastructure .....	68	3.6
Tourism infrastructure .....	101	2.2
ICT infrastructure .....	104	1.8
Price competitiveness in the T&T industry .....	38	5.0
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>109</b>	<b>3.4</b>
Human resources .....	109	4.2
Education and training .....	123	3.0
Availability of qualified labor .....	44	5.4
Affinity for Travel & Tourism .....	122	4.0
Natural resources .....	72	3.0
Cultural resources .....	72	2.3

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....64... <span style="color: #808080;">■</span>	8.01	Hotel rooms* .....115... <span style="color: #808080;">■</span>
1.02	Property rights .....92... <span style="color: #808080;">■</span>	8.02	Presence of major car rental companies* .....74... <span style="color: #808080;">■</span>
1.03	Business impact of rules on FDI .....24... <span style="color: #0056b3;">■</span>	8.03	ATMs accepting Visa cards* .....110... <span style="color: #808080;">■</span>
1.04	Visa requirements* .....124... <span style="color: #808080;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....64... <span style="color: #808080;">■</span>	9.01	Extent of business Internet use .....86... <span style="color: #808080;">■</span>
1.06	Transparency of government policymaking .....101... <span style="color: #808080;">■</span>	9.02	Internet users* .....92... <span style="color: #808080;">■</span>
1.07	Time required to start a business* .....52... <span style="color: #808080;">■</span>	9.03	Telephone lines* .....108... <span style="color: #808080;">■</span>
1.08	Cost to start a business* .....64... <span style="color: #808080;">■</span>	9.04	Broadband Internet subscribers* .....103... <span style="color: #808080;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....105... <span style="color: #808080;">■</span>
2.01	Stringency of environmental regulation .....68... <span style="color: #808080;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....83... <span style="color: #808080;">■</span>	10.01	Ticket taxes and airport charges* .....84... <span style="color: #808080;">■</span>
2.03	Sustainability of T&T industry development .....103... <span style="color: #808080;">■</span>	10.02	Purchasing power parity* .....24... <span style="color: #0056b3;">■</span>
2.04	Carbon dioxide emissions* .....24... <span style="color: #0056b3;">■</span>	10.03	Extent and effect of taxation .....32... <span style="color: #0056b3;">■</span>
2.05	Particulate matter concentration* .....114... <span style="color: #808080;">■</span>	10.04	Fuel price levels* .....36... <span style="color: #0056b3;">■</span>
2.06	Threatened species* .....77... <span style="color: #808080;">■</span>	10.05	Hotel price index* .....85... <span style="color: #808080;">■</span>
2.07	Environmental treaty ratification* .....63... <span style="color: #808080;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....119... <span style="color: #808080;">■</span>
3.01	Business costs of terrorism .....122... <span style="color: #808080;">■</span>	11.02	2ndary education enrollment* .....119... <span style="color: #808080;">■</span>
3.02	Reliability of police services .....95... <span style="color: #808080;">■</span>	11.03	Quality of the educational system .....88... <span style="color: #808080;">■</span>
3.03	Business costs of crime and violence .....91... <span style="color: #808080;">■</span>	11.04	Local availability of research and training services .....95... <span style="color: #808080;">■</span>
3.04	Road traffic accidents* .....115... <span style="color: #808080;">■</span>	11.05	Extent of staff training .....117... <span style="color: #808080;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....26... <span style="color: #0056b3;">■</span>
4.01	Physician density* .....92... <span style="color: #808080;">■</span>	11.07	Ease of hiring foreign labor .....47... <span style="color: #0056b3;">■</span>
4.02	Access to improved sanitation* .....88... <span style="color: #808080;">■</span>	11.08	HIV prevalence* .....24... <span style="color: #0056b3;">■</span>
4.03	Access to improved drinking water* .....70... <span style="color: #808080;">■</span>	11.09	Business impact of HIV/AIDS .....92... <span style="color: #808080;">■</span>
4.04	Hospital beds* .....105... <span style="color: #808080;">■</span>	11.10	Life expectancy* .....100... <span style="color: #808080;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....103... <span style="color: #808080;">■</span>	12.01	Tourism openness* .....113... <span style="color: #808080;">■</span>
5.02	T&T government expenditure* .....100... <span style="color: #808080;">■</span>	12.02	Attitude of population toward foreign visitors .....120... <span style="color: #808080;">■</span>
5.03	Effectiveness of marketing and branding .....106... <span style="color: #808080;">■</span>	12.03	Extension of business trips recommended .....107... <span style="color: #808080;">■</span>
5.04	T&T fair attendance* .....56... <span style="color: #808080;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....70... <span style="color: #808080;">■</span>
6.01	Quality of air transport infrastructure .....78... <span style="color: #808080;">■</span>	13.02	Nationally protected areas* .....63... <span style="color: #808080;">■</span>
6.02	Available seat kilometers* .....43... <span style="color: #0056b3;">■</span>	13.03	Quality of the natural environment .....78... <span style="color: #808080;">■</span>
6.03	Departures per 1,000 population* .....108... <span style="color: #808080;">■</span>	13.04	Total known species* .....40... <span style="color: #0056b3;">■</span>
6.04	Airport density* .....119... <span style="color: #808080;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....55... <span style="color: #808080;">■</span>	14.01	Number of World Heritage cultural sites* .....30... <span style="color: #0056b3;">■</span>
6.06	International air transport network .....98... <span style="color: #808080;">■</span>	14.02	Sports stadiums* .....117... <span style="color: #808080;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....83... <span style="color: #808080;">■</span>
7.01	Quality of roads .....61... <span style="color: #808080;">■</span>		
7.02	Quality of railroad infrastructure .....45... <span style="color: #0056b3;">■</span>		
7.03	Quality of port infrastructure .....68... <span style="color: #808080;">■</span>		
7.04	Quality of domestic transport network .....79... <span style="color: #808080;">■</span>		
7.05	Road density* .....52... <span style="color: #808080;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# Panama

## Key indicators

Population (millions), 2006 .....	3.3
Surface area (1,000 square kilometers) .....	75.5
Gross domestic product (US\$ billions), 2006 .....	17.1
Gross domestic product (PPP, US\$) per capita, 2006 .....	8,593
Real GDP growth (percent), 2006 .....	8.1

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

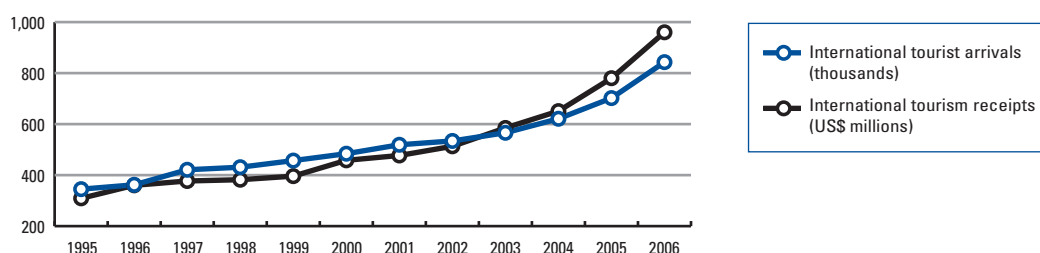
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	4.6	4.6
Employment (1,000 jobs) .....	4.6	2.9

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	2,289	12.3	3.5
Employment (1,000 jobs) .....	158	11.7	1.9

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	843
International tourism receipts (US\$ millions), 2006 .....	960



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>50</b>	<b>4.3</b>
<b>T&amp;T regulatory framework</b> .....	<b>52</b>	<b>4.7</b>
Policy rules and regulations .....	34	4.8
Environmental sustainability .....	45	4.8
Safety and security .....	56	5.1
Health and hygiene .....	80	4.2
Prioritization of Travel & Tourism .....	55	4.4
<b>T&amp;T business environment and infrastructure</b> .....	<b>47</b>	<b>3.9</b>
Air transport infrastructure .....	34	4.1
Ground transport infrastructure .....	58	3.9
Tourism infrastructure .....	44	4.3
ICT infrastructure .....	76	2.4
Price competitiveness in the T&T industry .....	35	5.0
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>47</b>	<b>4.3</b>
Human resources .....	89	4.8
Education and training .....	72	4.5
Availability of qualified labor .....	98	5.0
Affinity for Travel & Tourism .....	50	5.0
Natural resources .....	6	5.4
Cultural resources .....	89	1.8

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	31 ... <span style="color: #0056b3;">■</span>	8.01 Hotel rooms* .....	52 ... <span style="color: #808080;">■</span>
1.02 Property rights .....	49 ... <span style="color: #0056b3;">■</span>	8.02 Presence of major car rental companies* .....	56 ... <span style="color: #808080;">■</span>
1.03 Business impact of rules on FDI .....	35 ... <span style="color: #0056b3;">■</span>	8.03 ATMs accepting Visa cards* .....	26 ... <span style="color: #0056b3;">■</span>
1.04 Visa requirements* .....	68 ... <span style="color: #808080;">■</span>		
1.05 Openness of bilateral Air Service Agreements* .....	11 ... <span style="color: #0056b3;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.06 Transparency of government policymaking .....	60 ... <span style="color: #808080;">■</span>	9.01 Extent of business Internet use .....	41 ... <span style="color: #0056b3;">■</span>
1.07 Time required to start a business* .....	42 ... <span style="color: #0056b3;">■</span>	9.02 Internet users* .....	97 ... <span style="color: #808080;">■</span>
1.08 Cost to start a business* .....	79 ... <span style="color: #808080;">■</span>	9.03 Telephone lines* .....	77 ... <span style="color: #808080;">■</span>
		9.04 Broadband Internet subscribers* .....	78 ... <span style="color: #808080;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	78 ... <span style="color: #808080;">■</span>
2.01 Stringency of environmental regulation .....	78 ... <span style="color: #808080;">■</span>		
2.02 Enforcement of environmental regulation .....	79 ... <span style="color: #808080;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.03 Sustainability of T&T industry development .....	59 ... <span style="color: #808080;">■</span>	10.01 Ticket taxes and airport charges* .....	16 ... <span style="color: #0056b3;">■</span>
2.04 Carbon dioxide emissions* .....	49 ... <span style="color: #0056b3;">■</span>	10.02 Purchasing power parity* .....	78 ... <span style="color: #808080;">■</span>
2.05 Particulate matter concentration* .....	53 ... <span style="color: #808080;">■</span>	10.03 Extent and effect of taxation .....	87 ... <span style="color: #808080;">■</span>
2.06 Threatened species* .....	88 ... <span style="color: #808080;">■</span>	10.04 Fuel price levels* .....	31 ... <span style="color: #0056b3;">■</span>
2.07 Environmental treaty ratification* .....	28 ... <span style="color: #0056b3;">■</span>	10.05 Hotel price index* .....	25 ... <span style="color: #0056b3;">■</span>
<b>3rd pillar: Safety and security</b>		<b>11th pillar: Human resources</b>	
3.01 Business costs of terrorism .....	70 ... <span style="color: #808080;">■</span>	11.01 Primary education enrollment* .....	17 ... <span style="color: #0056b3;">■</span>
3.02 Reliability of police services .....	74 ... <span style="color: #808080;">■</span>	11.02 2ndary education enrollment* .....	93 ... <span style="color: #808080;">■</span>
3.03 Business costs of crime and violence .....	80 ... <span style="color: #808080;">■</span>	11.03 Quality of the educational system .....	106 ... <span style="color: #808080;">■</span>
3.04 Road traffic accidents* .....	32 ... <span style="color: #0056b3;">■</span>	11.04 Local availability of research and training services .....	69 ... <span style="color: #808080;">■</span>
		11.05 Extent of staff training .....	56 ... <span style="color: #808080;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	99 ... <span style="color: #808080;">■</span>
4.01 Physician density* .....	64 ... <span style="color: #808080;">■</span>	11.07 Ease of hiring foreign labor .....	118 ... <span style="color: #808080;">■</span>
4.02 Access to improved sanitation* .....	74 ... <span style="color: #808080;">■</span>	11.08 HIV prevalence* .....	93 ... <span style="color: #808080;">■</span>
4.03 Access to improved drinking water* .....	72 ... <span style="color: #808080;">■</span>	11.09 Business impact of HIV/AIDS .....	84 ... <span style="color: #808080;">■</span>
4.04 Hospital beds* .....	68 ... <span style="color: #808080;">■</span>	11.10 Life expectancy* .....	40 ... <span style="color: #0056b3;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	55 ... <span style="color: #808080;">■</span>	12.01 Tourism openness* .....	37 ... <span style="color: #0056b3;">■</span>
5.02 T&T government expenditure* .....	35 ... <span style="color: #0056b3;">■</span>	12.02 Attitude of population toward foreign visitors .....	103 ... <span style="color: #808080;">■</span>
5.03 Effectiveness of marketing and branding .....	39 ... <span style="color: #0056b3;">■</span>	12.03 Extension of business trips recommended .....	61 ... <span style="color: #808080;">■</span>
5.04 T&T fair attendance* .....	76 ... <span style="color: #808080;">■</span>		
		<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	15 ... <span style="color: #0056b3;">■</span>
6.01 Quality of air transport infrastructure .....	38 ... <span style="color: #0056b3;">■</span>	13.02 Nationally protected areas* .....	17 ... <span style="color: #0056b3;">■</span>
6.02 Available seat kilometers* .....	66 ... <span style="color: #808080;">■</span>	13.03 Quality of the natural environment .....	47 ... <span style="color: #0056b3;">■</span>
6.03 Departures per 1,000 population* .....	35 ... <span style="color: #0056b3;">■</span>	13.04 Total known species* .....	17 ... <span style="color: #0056b3;">■</span>
6.04 Airport density* .....	5 ... <span style="color: #0056b3;">■</span>		
6.05 Number of operating airlines* .....	95 ... <span style="color: #808080;">■</span>	<b>14th pillar: Cultural resources</b>	
6.06 International air transport network .....	26 ... <span style="color: #0056b3;">■</span>	14.01 Number of World Heritage cultural sites* .....	69 ... <span style="color: #808080;">■</span>
		14.02 Sports stadiums* .....	79 ... <span style="color: #808080;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	60 ... <span style="color: #808080;">■</span>
7.01 Quality of roads .....	52 ... <span style="color: #808080;">■</span>		
7.02 Quality of railroad infrastructure .....	62 ... <span style="color: #808080;">■</span>		
7.03 Quality of port infrastructure .....	15 ... <span style="color: #0056b3;">■</span>		
7.04 Quality of domestic transport network .....	54 ... <span style="color: #808080;">■</span>		
7.05 Road density* .....	75 ... <span style="color: #808080;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Paraguay

## Key indicators

Population (millions), 2006.....	6.3
Surface area (1,000 square kilometers).....	406.8
Gross domestic product (US\$ billions), 2006.....	9.5
Gross domestic product (PPP, US\$) per capita, 2006.....	5,339
Real GDP growth (percent), 2006.....	4.3

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

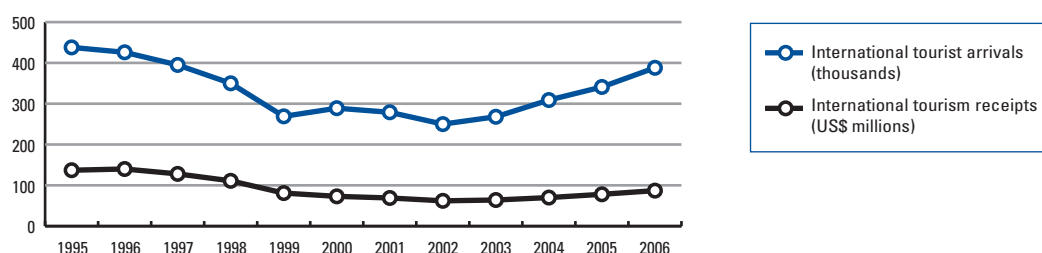
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions).....	1.6	2.6
Employment (1,000 jobs).....	1.5	2.1

### T&T economy, 2007 estimates

GDP (US\$ millions).....	5.4	3.2
Employment (1,000 jobs).....	4.7	2.7

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006.....	388
International tourism receipts (US\$ millions), 2006.....	87



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>115</b>	<b>3.2</b>
<b>T&amp;T regulatory framework</b> .....	<b>112</b>	<b>3.7</b>
Policy rules and regulations.....	119	3.2
Environmental sustainability.....	123	3.7
Safety and security.....	101	4.4
Health and hygiene.....	87	3.8
Prioritization of Travel & Tourism.....	106	3.5
<b>T&amp;T business environment and infrastructure</b> .....	<b>111</b>	<b>2.7</b>
Air transport infrastructure.....	128	1.8
Ground transport infrastructure.....	123	2.4
Tourism infrastructure.....	103	2.0
ICT infrastructure.....	102	1.9
Price competitiveness in the T&T industry.....	21	5.2
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>118</b>	<b>3.3</b>
Human resources.....	103	4.4
Education and training.....	109	3.6
Availability of qualified labor.....	77	5.2
Affinity for Travel & Tourism.....	124	4.0
Natural resources.....	62	3.1
Cultural resources.....	95	1.8

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	115 ...■	8.01 Hotel rooms* .....	100 ...■
1.02 Property rights .....	125 ...■	8.02 Presence of major car rental companies* .....	89 ...■
1.03 Business impact of rules on FDI .....	116 ...■	8.03 ATMs accepting Visa cards* .....	97 ...■
1.04 Visa requirements* .....	74 ...■		
1.05 Openness of bilateral Air Service Agreements* .....	35 ...■	<b>9th pillar: ICT infrastructure</b>	
1.06 Transparency of government policymaking .....	124 ...■	9.01 Extent of business Internet use .....	123 ...■
1.07 Time required to start a business* .....	84 ...■	9.02 Internet users* .....	107 ...■
1.08 Cost to start a business* .....	109 ...■	9.03 Telephone lines* .....	101 ...■
		9.04 Broadband Internet subscribers* .....	84 ...■
		9.05 Mobile telephone subscribers* .....	80 ...■
<b>2nd pillar: Environmental sustainability</b>			
2.01 Stringency of environmental regulation .....	121 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	126 ...■	10.01 Ticket taxes and airport charges* .....	52 ...■
2.03 Sustainability of T&T industry development .....	130 ...■	10.02 Purchasing power parity* .....	20 ...■
2.04 Carbon dioxide emissions* .....	22 ...■	10.03 Extent and effect of taxation .....	28 ...■
2.05 Particulate matter concentration* .....	105 ...■	10.04 Fuel price levels* .....	54 ...■
2.06 Threatened species* .....	48 ...■	10.05 Hotel price index* .....	37 ...■
2.07 Environmental treaty ratification* .....	72 ...■		
<b>3rd pillar: Safety and security</b>			
3.01 Business costs of terrorism .....	56 ...■	<b>11th pillar: Human resources</b>	
3.02 Reliability of police services .....	127 ...■	11.01 Primary education enrollment* .....	89 ...■
3.03 Business costs of crime and violence .....	116 ...■	11.02 2ndary education enrollment* .....	99 ...■
3.04 Road traffic accidents* .....	39 ...■	11.03 Quality of the educational system .....	130 ...■
		11.04 Local availability of research and training services .....	117 ...■
		11.05 Extent of staff training .....	120 ...■
		11.06 Hiring and firing practices .....	108 ...■
		11.07 Ease of hiring foreign labor .....	21 ...■
		11.08 HIV prevalence* .....	72 ...■
		11.09 Business impact of HIV/AIDS .....	94 ...■
		11.10 Life expectancy* .....	73 ...■
<b>4th pillar: Health and hygiene</b>			
4.01 Physician density* .....	84 ...■	<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
4.02 Access to improved sanitation* .....	68 ...■	12.01 Tourism openness* .....	105 ...■
4.03 Access to improved drinking water* .....	78 ...■	12.02 Attitude of population toward foreign visitors .....	110 ...■
4.04 Hospital beds* .....	92 ...■	12.03 Extension of business trips recommended .....	127 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>13th pillar: Natural resources</b>	
5.01 Government prioritization of the T&T industry .....	130 ...■	13.01 Number of World Heritage natural sites* .....	70 ...■
5.02 T&T government expenditure* .....	15 ...■	13.02 Nationally protected areas* .....	83 ...■
5.03 Effectiveness of marketing and branding .....	127 ...■	13.03 Quality of the natural environment .....	44 ...■
5.04 T&T fair attendance* .....	93 ...■	13.04 Total known species* .....	34 ...■
<b>6th pillar: Air transport infrastructure</b>		<b>14th pillar: Cultural resources</b>	
6.01 Quality of air transport infrastructure .....	129 ...■	14.01 Number of World Heritage cultural sites* .....	83 ...■
6.02 Available seat kilometers* .....	118 ...■	14.02 Sports stadiums* .....	60 ...■
6.03 Departures per 1,000 population* .....	75 ...■	14.03 Number of international fairs and exhibitions* .....	75 ...■
6.04 Airport density* .....	84 ...■		
6.05 Number of operating airlines* .....	129 ...■		
6.06 International air transport network .....	124 ...■		
<b>7th pillar: Ground transport infrastructure</b>			
7.01 Quality of roads .....	126 ...■		
7.02 Quality of railroad infrastructure .....	118 ...■		
7.03 Quality of port infrastructure .....	59 ...■		
7.04 Quality of domestic transport network .....	121 ...■		
7.05 Road density* .....	100 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Peru

## Key indicators

Population (millions), 2006 .....	28.4
Surface area (1,000 square kilometers) .....	1,285.2
Gross domestic product (US\$ billions), 2006 .....	93.0
Gross domestic product (PPP, US\$) per capita, 2006 .....	6,856
Real GDP growth (percent), 2006 .....	7.6

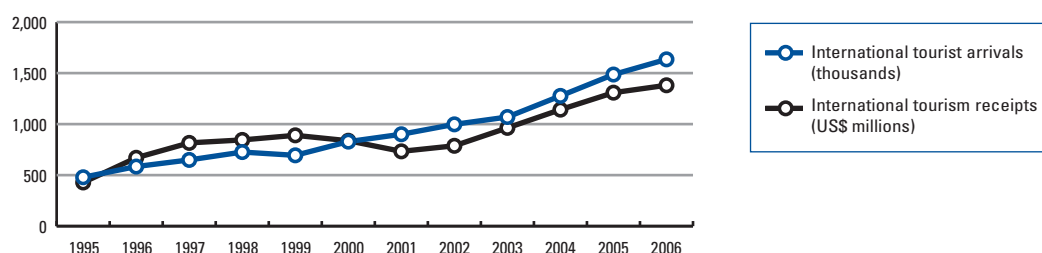
Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

T&T Industry, 2007 estimates	Percent of total	2008–2017 annual growth (% forecast)	
GDP (US\$ millions) .....	2,737	3.0	4.6
Employment (1,000 jobs) .....	361	2.9	3.4
<b>T&amp;T economy, 2007 estimates</b>			
GDP (US\$ millions) .....	7,000	7.7	4.2
Employment (1,000 jobs) .....	886	7.1	3.1

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	1,635
International tourism receipts (US\$ millions), 2006 .....	1,381



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>70</b>	<b>3.9</b>
<b>T&amp;T regulatory framework</b> .....	<b>86</b>	<b>4.1</b>
Policy rules and regulations .....	64	4.3
Environmental sustainability .....	77	4.3
Safety and security .....	106	4.1
Health and hygiene .....	93	3.4
Prioritization of Travel & Tourism .....	60	4.4
<b>T&amp;T business environment and infrastructure</b> .....	<b>88</b>	<b>3.1</b>
Air transport infrastructure .....	86	2.6
Ground transport infrastructure .....	105	2.7
Tourism infrastructure .....	73	3.1
ICT infrastructure .....	83	2.3
Price competitiveness in the T&T industry .....	58	4.8
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>33</b>	<b>4.4</b>
Human resources .....	78	4.9
Education and training .....	74	4.5
Availability of qualified labor .....	72	5.3
Affinity for Travel & Tourism .....	97	4.5
Natural resources .....	10	5.2
Cultural resources .....	42	3.2

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....35... <span style="color: #0056b3;">■</span>	8.01	Hotel rooms* .....50... <span style="color: #0056b3;">■</span>
1.02	Property rights .....109... <span style="color: #808080;">■</span>	8.02	Presence of major car rental companies* .....56... <span style="color: #808080;">■</span>
1.03	Business impact of rules on FDI .....44... <span style="color: #0056b3;">■</span>	8.03	ATMs accepting Visa cards* .....92... <span style="color: #808080;">■</span>
1.04	Visa requirements* .....8... <span style="color: #0056b3;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....7... <span style="color: #0056b3;">■</span>	9.01	Extent of business Internet use .....71... <span style="color: #808080;">■</span>
1.06	Transparency of government policymaking .....86... <span style="color: #808080;">■</span>	9.02	Internet users* .....51... <span style="color: #808080;">■</span>
1.07	Time required to start a business* .....112... <span style="color: #808080;">■</span>	9.03	Telephone lines* .....93... <span style="color: #808080;">■</span>
1.08	Cost to start a business* .....87... <span style="color: #808080;">■</span>	9.04	Broadband Internet subscribers* .....60... <span style="color: #808080;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....95... <span style="color: #808080;">■</span>
2.01	Stringency of environmental regulation .....79... <span style="color: #808080;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....88... <span style="color: #808080;">■</span>	10.01	Ticket taxes and airport charges* .....89... <span style="color: #808080;">■</span>
2.03	Sustainability of T&T industry development .....85... <span style="color: #808080;">■</span>	10.02	Purchasing power parity* .....61... <span style="color: #808080;">■</span>
2.04	Carbon dioxide emissions* .....33... <span style="color: #0056b3;">■</span>	10.03	Extent and effect of taxation .....92... <span style="color: #808080;">■</span>
2.05	Particulate matter concentration* .....83... <span style="color: #808080;">■</span>	10.04	Fuel price levels* .....65... <span style="color: #808080;">■</span>
2.06	Threatened species* .....110... <span style="color: #808080;">■</span>	10.05	Hotel price index* .....19... <span style="color: #0056b3;">■</span>
2.07	Environmental treaty ratification* .....45... <span style="color: #0056b3;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....34... <span style="color: #0056b3;">■</span>
3.01	Business costs of terrorism .....97... <span style="color: #808080;">■</span>	11.02	2ndary education enrollment* .....50... <span style="color: #0056b3;">■</span>
3.02	Reliability of police services .....115... <span style="color: #808080;">■</span>	11.03	Quality of the educational system .....129... <span style="color: #808080;">■</span>
3.03	Business costs of crime and violence .....114... <span style="color: #808080;">■</span>	11.04	Local availability of research and training services .....78... <span style="color: #808080;">■</span>
3.04	Road traffic accidents* .....87... <span style="color: #808080;">■</span>	11.05	Extent of staff training .....86... <span style="color: #808080;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....97... <span style="color: #808080;">■</span>
4.01	Physician density* .....81... <span style="color: #808080;">■</span>	11.07	Ease of hiring foreign labor .....28... <span style="color: #0056b3;">■</span>
4.02	Access to improved sanitation* .....85... <span style="color: #808080;">■</span>	11.08	HIV prevalence* .....83... <span style="color: #808080;">■</span>
4.03	Access to improved drinking water* .....86... <span style="color: #808080;">■</span>	11.09	Business impact of HIV/AIDS .....68... <span style="color: #808080;">■</span>
4.04	Hospital beds* .....96... <span style="color: #808080;">■</span>	11.10	Life expectancy* .....73... <span style="color: #808080;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....82... <span style="color: #808080;">■</span>	12.01	Tourism openness* .....99... <span style="color: #808080;">■</span>
5.02	T&T government expenditure* .....77... <span style="color: #808080;">■</span>	12.02	Attitude of population toward foreign visitors .....88... <span style="color: #808080;">■</span>
5.03	Effectiveness of marketing and branding .....59... <span style="color: #808080;">■</span>	12.03	Extension of business trips recommended .....81... <span style="color: #808080;">■</span>
5.04	T&T fair attendance* .....32... <span style="color: #0056b3;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....10... <span style="color: #0056b3;">■</span>
6.01	Quality of air transport infrastructure .....98... <span style="color: #808080;">■</span>	13.02	Nationally protected areas* .....47... <span style="color: #0056b3;">■</span>
6.02	Available seat kilometers* .....48... <span style="color: #0056b3;">■</span>	13.03	Quality of the natural environment .....85... <span style="color: #808080;">■</span>
6.03	Departures per 1,000 population* .....66... <span style="color: #808080;">■</span>	13.04	Total known species* .....3... <span style="color: #0056b3;">■</span>
6.04	Airport density* .....71... <span style="color: #808080;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....72... <span style="color: #808080;">■</span>	14.01	Number of World Heritage cultural sites* .....19... <span style="color: #0056b3;">■</span>
6.06	International air transport network .....76... <span style="color: #808080;">■</span>	14.02	Sports stadiums* .....73... <span style="color: #808080;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....50... <span style="color: #0056b3;">■</span>
7.01	Quality of roads .....95... <span style="color: #808080;">■</span>		
7.02	Quality of railroad infrastructure .....89... <span style="color: #808080;">■</span>		
7.03	Quality of port infrastructure .....122... <span style="color: #808080;">■</span>		
7.04	Quality of domestic transport network .....55... <span style="color: #808080;">■</span>		
7.05	Road density* .....102... <span style="color: #808080;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Philippines

## Key indicators

Population (millions), 2006 .....	84.5
Surface area (1,000 square kilometers) .....	300.0
Gross domestic product (US\$ billions), 2006 .....	117.6
Gross domestic product (PPP, US\$) per capita, 2006 .....	5,365
Real GDP growth (percent), 2006 .....	5.4

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

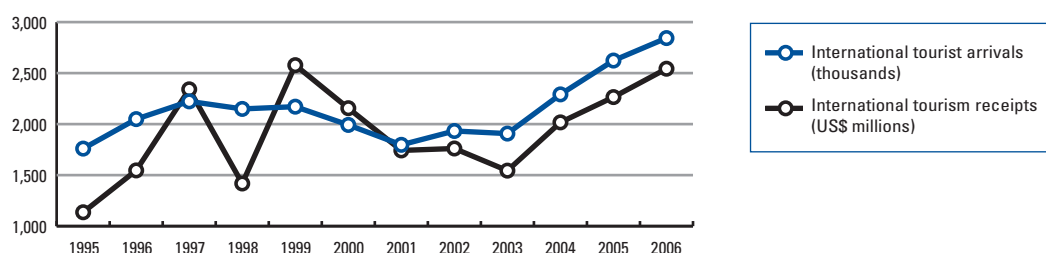
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	4.1	4.4
Employment (1,000 jobs) .....	4.1	1.8

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	9.1	4.7
Employment (1,000 jobs) .....	10.6	1.8

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	2,843
International tourism receipts (US\$ millions), 2006 .....	2,543



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>81</b>	<b>3.7</b>
<b>T&amp;T regulatory framework</b> .....	<b>83</b>	<b>4.1</b>
Policy rules and regulations .....	58	4.4
Environmental sustainability .....	80	4.3
Safety and security .....	113	4.0
Health and hygiene .....	91	3.6
Prioritization of Travel & Tourism .....	54	4.4
<b>T&amp;T business environment and infrastructure</b> .....	<b>84</b>	<b>3.2</b>
Air transport infrastructure .....	72	2.9
Ground transport infrastructure .....	85	3.2
Tourism infrastructure .....	97	2.3
ICT infrastructure .....	89	2.1
Price competitiveness in the T&T industry .....	9	5.5
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>78</b>	<b>3.8</b>
Human resources .....	61	5.0
Education and training .....	43	5.0
Availability of qualified labor .....	97	5.0
Affinity for Travel & Tourism .....	65	4.8
Natural resources .....	58	3.2
Cultural resources .....	82	2.0

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	99 ...■	8.01 Hotel rooms* .....	113 ...■
1.02 Property rights .....	75 ...■	8.02 Presence of major car rental companies* .....	74 ...■
1.03 Business impact of rules on FDI .....	92 ...■	8.03 ATMs accepting Visa cards* .....	93 ...■
1.04 Visa requirements* .....	3 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	27 ...■	9.01 Extent of business Internet use .....	68 ...■
1.06 Transparency of government policymaking .....	69 ...■	9.02 Internet users* .....	102 ...■
1.07 Time required to start a business* .....	106 ...■	9.03 Telephone lines* .....	105 ...■
1.08 Cost to start a business* .....	83 ...■	9.04 Broadband Internet subscribers* .....	92 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	82 ...■
2.01 Stringency of environmental regulation .....	67 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	91 ...■	10.01 Ticket taxes and airport charges* .....	17 ...■
2.03 Sustainability of T&T industry development .....	89 ...■	10.02 Purchasing power parity* .....	15 ...■
2.04 Carbon dioxide emissions* .....	33 ...■	10.03 Extent and effect of taxation .....	57 ...■
2.05 Particulate matter concentration* .....	47 ...■	10.04 Fuel price levels* .....	42 ...■
2.06 Threatened species* .....	127 ...■	10.05 Hotel price index* .....	9 ...■
2.07 Environmental treaty ratification* .....	28 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	55 ...■
3.01 Business costs of terrorism .....	126 ...■	11.02 2ndary education enrollment* .....	69 ...■
3.02 Reliability of police services .....	98 ...■	11.03 Quality of the educational system .....	54 ...■
3.03 Business costs of crime and violence .....	84 ...■	11.04 Local availability of research and training services .....	64 ...■
3.04 Road traffic accidents* .....	105 ...■	11.05 Extent of staff training .....	31 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	83 ...■
4.01 Physician density* .....	82 ...■	11.07 Ease of hiring foreign labor .....	112 ...■
4.02 Access to improved sanitation* .....	76 ...■	11.08 HIV prevalence* .....	1 ...■
4.03 Access to improved drinking water* .....	81 ...■	11.09 Business impact of HIV/AIDS .....	74 ...■
4.04 Hospital beds* .....	92 ...■	11.10 Life expectancy* .....	73 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	75 ...■	12.01 Tourism openness* .....	81 ...■
5.02 T&T government expenditure* .....	56 ...■	12.02 Attitude of population toward foreign visitors .....	29 ...■
5.03 Effectiveness of marketing and branding .....	82 ...■	12.03 Extension of business trips recommended .....	42 ...■
5.04 T&T fair attendance* .....	32 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	21 ...■
6.01 Quality of air transport infrastructure .....	82 ...■	13.02 Nationally protected areas* .....	77 ...■
6.02 Available seat kilometers* .....	30 ...■	13.03 Quality of the natural environment .....	125 ...■
6.03 Departures per 1,000 population* .....	97 ...■	13.04 Total known species* .....	38 ...■
6.04 Airport density* .....	79 ...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	44 ...■	14.01 Number of World Heritage cultural sites* .....	54 ...■
6.06 International air transport network .....	65 ...■	14.02 Sports stadiums* .....	121 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	43 ...■
7.01 Quality of roads .....	91 ...■		
7.02 Quality of railroad infrastructure .....	86 ...■		
7.03 Quality of port infrastructure .....	102 ...■		
7.04 Quality of domestic transport network .....	74 ...■		
7.05 Road density* .....	39 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# Poland

## Key indicators

Population (millions), 2006 .....	38.5
Surface area (1,000 square kilometers) .....	312.7
Gross domestic product (US\$ billions), 2006 .....	341.0
Gross domestic product (PPP, US\$) per capita, 2006 .....	15,149
Real GDP growth (percent), 2006 .....	6.1

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

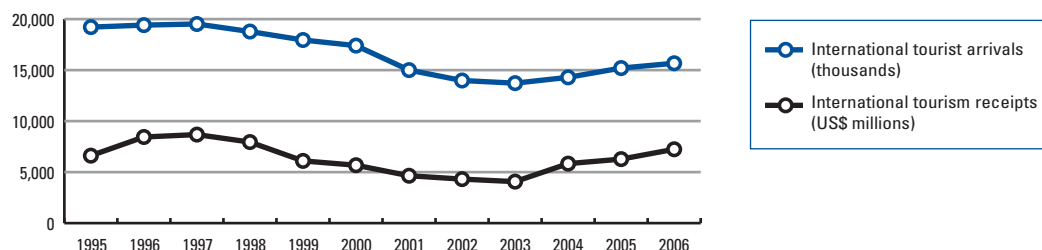
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	1.9	3.3
Employment (1,000 jobs) .....	1.9	-0.6

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	8.3	4.1
Employment (1,000 jobs) .....	7.8	0.0

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006.....15,670  
International tourism receipts (US\$ millions), 2006 .....7,239



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>56</b>	<b>4.2</b>
<b>T&amp;T regulatory framework</b> .....	<b>60</b>	<b>4.5</b>
Policy rules and regulations .....	65	4.3
Environmental sustainability .....	58	4.6
Safety and security .....	88	4.6
Health and hygiene .....	54	5.0
Prioritization of Travel & Tourism .....	73	4.2
<b>T&amp;T business environment and infrastructure</b> .....	<b>62</b>	<b>3.6</b>
Air transport infrastructure .....	87	2.6
Ground transport infrastructure .....	57	4.0
Tourism infrastructure .....	60	3.6
ICT infrastructure .....	41	3.6
Price competitiveness in the T&T industry .....	87	4.4
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>34</b>	<b>4.4</b>
Human resources .....	41	5.2
Education and training .....	36	5.1
Availability of qualified labor .....	73	5.3
Affinity for Travel & Tourism .....	120	4.1
Natural resources .....	46	3.7
Cultural resources .....	24	4.7

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	91 ... <span style="color: #808080;">■</span>	8.01 Hotel rooms* .....	70 ... <span style="color: #808080;">■</span>
1.02 Property rights .....	90 ... <span style="color: #808080;">■</span>	8.02 Presence of major car rental companies* .....	33 ... <span style="color: #0056b3;">■</span>
1.03 Business impact of rules on FDI .....	100 ... <span style="color: #808080;">■</span>	8.03 ATMs accepting Visa cards* .....	53 ... <span style="color: #808080;">■</span>
1.04 Visa requirements* .....	46 ... <span style="color: #0056b3;">■</span>		
1.05 Openness of bilateral Air Service Agreements* .....	12 ... <span style="color: #0056b3;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.06 Transparency of government policymaking .....	113 ... <span style="color: #808080;">■</span>	9.01 Extent of business Internet use .....	39 ... <span style="color: #0056b3;">■</span>
1.07 Time required to start a business* .....	71 ... <span style="color: #808080;">■</span>	9.02 Internet users* .....	44 ... <span style="color: #0056b3;">■</span>
1.08 Cost to start a business* .....	75 ... <span style="color: #808080;">■</span>	9.03 Telephone lines* .....	39 ... <span style="color: #0056b3;">■</span>
		9.04 Broadband Internet subscribers* .....	36 ... <span style="color: #0056b3;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	34 ... <span style="color: #0056b3;">■</span>
2.01 Stringency of environmental regulation .....	48 ... <span style="color: #0056b3;">■</span>		
2.02 Enforcement of environmental regulation .....	59 ... <span style="color: #808080;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.03 Sustainability of T&T industry development .....	114 ... <span style="color: #808080;">■</span>	10.01 Ticket taxes and airport charges* .....	51 ... <span style="color: #808080;">■</span>
2.04 Carbon dioxide emissions* .....	94 ... <span style="color: #808080;">■</span>	10.02 Purchasing power parity* .....	75 ... <span style="color: #808080;">■</span>
2.05 Particulate matter concentration* .....	54 ... <span style="color: #808080;">■</span>	10.03 Extent and effect of taxation .....	101 ... <span style="color: #808080;">■</span>
2.06 Threatened species* .....	57 ... <span style="color: #808080;">■</span>	10.04 Fuel price levels* .....	111 ... <span style="color: #808080;">■</span>
2.07 Environmental treaty ratification* .....	28 ... <span style="color: #0056b3;">■</span>	10.05 Hotel price index* .....	43 ... <span style="color: #0056b3;">■</span>
<b>3rd pillar: Safety and security</b>		<b>11th pillar: Human resources</b>	
3.01 Business costs of terrorism .....	96 ... <span style="color: #808080;">■</span>	11.01 Primary education enrollment* .....	35 ... <span style="color: #0056b3;">■</span>
3.02 Reliability of police services .....	77 ... <span style="color: #808080;">■</span>	11.02 2ndary education enrollment* .....	34 ... <span style="color: #0056b3;">■</span>
3.03 Business costs of crime and violence .....	81 ... <span style="color: #808080;">■</span>	11.03 Quality of the educational system .....	49 ... <span style="color: #0056b3;">■</span>
3.04 Road traffic accidents* .....	96 ... <span style="color: #808080;">■</span>	11.04 Local availability of research and training services .....	41 ... <span style="color: #0056b3;">■</span>
		11.05 Extent of staff training .....	66 ... <span style="color: #808080;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	72 ... <span style="color: #808080;">■</span>
4.01 Physician density* .....	38 ... <span style="color: #0056b3;">■</span>	11.07 Ease of hiring foreign labor .....	108 ... <span style="color: #808080;">■</span>
4.02 Access to improved sanitation* .....	n/a .....	11.08 HIV prevalence* .....	24 ... <span style="color: #0056b3;">■</span>
4.03 Access to improved drinking water* .....	n/a .....	11.09 Business impact of HIV/AIDS .....	67 ... <span style="color: #808080;">■</span>
4.04 Hospital beds* .....	32 ... <span style="color: #0056b3;">■</span>	11.10 Life expectancy* .....	40 ... <span style="color: #0056b3;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	122 ... <span style="color: #808080;">■</span>	12.01 Tourism openness* .....	75 ... <span style="color: #808080;">■</span>
5.02 T&T government expenditure* .....	78 ... <span style="color: #808080;">■</span>	12.02 Attitude of population toward foreign visitors .....	128 ... <span style="color: #808080;">■</span>
5.03 Effectiveness of marketing and branding .....	109 ... <span style="color: #808080;">■</span>	12.03 Extension of business trips recommended .....	116 ... <span style="color: #808080;">■</span>
5.04 T&T fair attendance* .....	5 ... <span style="color: #0056b3;">■</span>		
		<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	39 ... <span style="color: #0056b3;">■</span>
6.01 Quality of air transport infrastructure .....	101 ... <span style="color: #808080;">■</span>	13.02 Nationally protected areas* .....	14 ... <span style="color: #0056b3;">■</span>
6.02 Available seat kilometers* .....	50 ... <span style="color: #0056b3;">■</span>	13.03 Quality of the natural environment .....	94 ... <span style="color: #808080;">■</span>
6.03 Departures per 1,000 population* .....	70 ... <span style="color: #808080;">■</span>	13.04 Total known species* .....	84 ... <span style="color: #808080;">■</span>
6.04 Airport density* .....	109 ... <span style="color: #808080;">■</span>		
6.05 Number of operating airlines* .....	43 ... <span style="color: #0056b3;">■</span>	<b>14th pillar: Cultural resources</b>	
6.06 International air transport network .....	89 ... <span style="color: #808080;">■</span>	14.01 Number of World Heritage cultural sites* .....	12 ... <span style="color: #0056b3;">■</span>
		14.02 Sports stadiums* .....	55 ... <span style="color: #808080;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	27 ... <span style="color: #0056b3;">■</span>
7.01 Quality of roads .....	98 ... <span style="color: #808080;">■</span>		
7.02 Quality of railroad infrastructure .....	49 ... <span style="color: #0056b3;">■</span>		
7.03 Quality of port infrastructure .....	95 ... <span style="color: #808080;">■</span>		
7.04 Quality of domestic transport network .....	101 ... <span style="color: #808080;">■</span>		
7.05 Road density* .....	21 ... <span style="color: #0056b3;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Portugal

## Key indicators

Population (millions), 2006 .....	10.5
Surface area (1,000 square kilometers) .....	92.0
Gross domestic product (US\$ billions), 2006 .....	194.8
Gross domestic product (PPP, US\$) per capita, 2006 .....	22,937
Real GDP growth (percent), 2006 .....	1.3

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

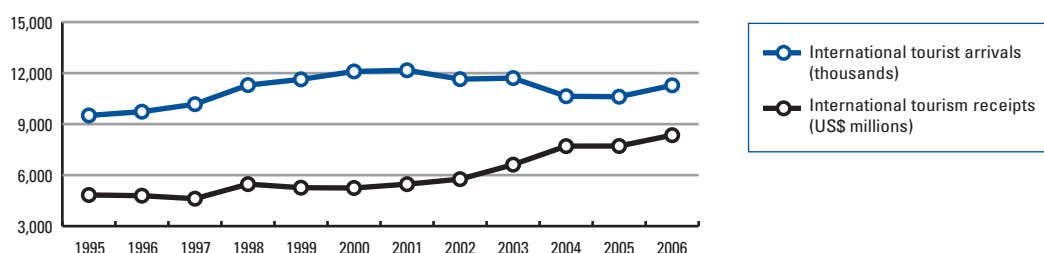
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	13,802	6.5	3.3
Employment (1,000 jobs) .....	403	7.7	1.0

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	32,697	15.4	3.2
Employment (1,000 jobs) .....	959	18.4	1.0

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	11,282
International tourism receipts (US\$ millions), 2006 .....	8,349



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>15</b>	<b>5.1</b>
<b>T&amp;T regulatory framework</b> .....	<b>14</b>	<b>5.5</b>
Policy rules and regulations .....	21	5.2
Environmental sustainability .....	15	5.4
Safety and security .....	16	5.9
Health and hygiene .....	30	6.0
Prioritization of Travel & Tourism .....	27	5.0
<b>T&amp;T business environment and infrastructure</b> .....	<b>22</b>	<b>4.8</b>
Air transport infrastructure .....	31	4.2
Ground transport infrastructure .....	24	5.0
Tourism infrastructure .....	13	6.3
ICT infrastructure .....	30	4.2
Price competitiveness in the T&T industry .....	86	4.4
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>11</b>	<b>4.9</b>
Human resources .....	37	5.3
Education and training .....	34	5.1
Availability of qualified labor .....	39	5.4
Affinity for Travel & Tourism .....	42	5.1
Natural resources .....	81	2.9
Cultural resources .....	2	6.5

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	54 ...■	8.01 Hotel rooms* .....	21 ...■
1.02 Property rights .....	28 ...■	8.02 Presence of major car rental companies* .....	1 ...■
1.03 Business impact of rules on FDI .....	18 ...■	8.03 ATMs accepting Visa cards* .....	3 ...■
1.04 Visa requirements* .....	30 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	18 ...■	9.01 Extent of business Internet use .....	37 ...■
1.06 Transparency of government policymaking .....	43 ...■	9.02 Internet users* .....	42 ...■
1.07 Time required to start a business* .....	9 ...■	9.03 Telephone lines* .....	33 ...■
1.08 Cost to start a business* .....	23 ...■	9.04 Broadband Internet subscribers* .....	27 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	12 ...■
2.01 Stringency of environmental regulation .....	29 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	33 ...■	10.01 Ticket taxes and airport charges* .....	66 ...■
2.03 Sustainability of T&T industry development .....	18 ...■	10.02 Purchasing power parity* .....	95 ...■
2.04 Carbon dioxide emissions* .....	77 ...■	10.03 Extent and effect of taxation .....	83 ...■
2.05 Particulate matter concentration* .....	34 ...■	10.04 Fuel price levels* .....	90 ...■
2.06 Threatened species* .....	69 ...■	10.05 Hotel price index* .....	46 ...■
2.07 Environmental treaty ratification* .....	5 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	19 ...■
3.01 Business costs of terrorism .....	23 ...■	11.02 2ndary education enrollment* .....	35 ...■
3.02 Reliability of police services .....	32 ...■	11.03 Quality of the educational system .....	68 ...■
3.03 Business costs of crime and violence .....	21 ...■	11.04 Local availability of research and training services .....	37 ...■
3.04 Road traffic accidents* .....	65 ...■	11.05 Extent of staff training .....	53 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	122 ...■
4.01 Physician density* .....	19 ...■	11.07 Ease of hiring foreign labor .....	11 ...■
4.02 Access to improved sanitation* .....	1 ...■	11.08 HIV prevalence* .....	72 ...■
4.03 Access to improved drinking water* .....	1 ...■	11.09 Business impact of HIV/AIDS .....	26 ...■
4.04 Hospital beds* .....	50 ...■	11.10 Life expectancy* .....	28 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	13 ...■	12.01 Tourism openness* .....	51 ...■
5.02 T&T government expenditure* .....	23 ...■	12.02 Attitude of population toward foreign visitors .....	25 ...■
5.03 Effectiveness of marketing and branding .....	23 ...■	12.03 Extension of business trips recommended .....	40 ...■
5.04 T&T fair attendance* .....	56 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	39 ...■
6.01 Quality of air transport infrastructure .....	33 ...■	13.02 Nationally protected areas* .....	88 ...■
6.02 Available seat kilometers* .....	31 ...■	13.03 Quality of the natural environment .....	31 ...■
6.03 Departures per 1,000 population* .....	25 ...■	13.04 Total known species* .....	78 ...■
6.04 Airport density* .....	30 ...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	22 ...■	14.01 Number of World Heritage cultural sites* .....	12 ...■
6.06 International air transport network .....	37 ...■	14.02 Sports stadiums* .....	13 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	17 ...■
7.01 Quality of roads .....	19 ...■		
7.02 Quality of railroad infrastructure .....	28 ...■		
7.03 Quality of port infrastructure .....	38 ...■		
7.04 Quality of domestic transport network .....	31 ...■		
7.05 Road density* .....	32 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Puerto Rico

## Key indicators

Population (millions), 2006.....	4.0
Surface area (1,000 square kilometers).....	9.0
Gross domestic product (US\$ billions), 2006.....	86.5
Gross domestic product (PPP, US\$) per capita, 2006.....	n/a
Real GDP growth (percent), 2006.....	n/a

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

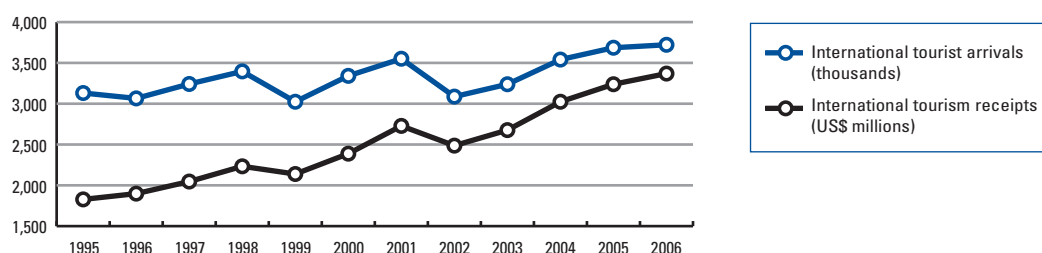
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions).....	1.8	2.2
Employment (1,000 jobs).....	2.0	1.1

### T&T economy, 2007 estimates

GDP (US\$ millions).....	6,144	6.3	2.3
Employment (1,000 jobs).....	87	6.6	1.1

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006.....	3,722
International tourism receipts (US\$ millions), 2006.....	3,369



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>46</b>	<b>4.3</b>
<b>T&amp;T regulatory framework</b> .....	<b>40</b>	<b>5.0</b>
Policy rules and regulations.....	15	5.3
Environmental sustainability.....	14	5.4
Safety and security.....	55	5.2
Health and hygiene.....	60	4.7
Prioritization of Travel & Tourism.....	52	4.5
<b>T&amp;T business environment and infrastructure</b> .....	<b>40</b>	<b>4.3</b>
Air transport infrastructure.....	11	5.1
Ground transport infrastructure.....	29	4.9
Tourism infrastructure.....	54	3.9
ICT infrastructure.....	50	3.2
Price competitiveness in the T&T industry.....	93	4.3
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>80</b>	<b>3.7</b>
Human resources.....	81	4.8
Education and training.....	79	4.4
Availability of qualified labor.....	70	5.3
Affinity for Travel & Tourism.....	10	6.1
Natural resources.....	109	2.3
Cultural resources.....	96	1.7

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	24 ...■	8.01 Hotel rooms* .....	56 ...■
1.02 Property rights .....	21 ...■	8.02 Presence of major car rental companies* .....	56 ...■
1.03 Business impact of rules on FDI .....	10 ...■	8.03 ATMs accepting Visa cards* .....	38 ...■
1.04 Visa requirements* .....	88 ...■		
1.05 Openness of bilateral Air Service Agreements* .....	n/a .....	<b>9th pillar: ICT infrastructure</b>	
1.06 Transparency of government policymaking .....	64 ...■	9.01 Extent of business Internet use .....	21 ...■
1.07 Time required to start a business* .....	9 ...■	9.02 Internet users* .....	61 ...■
1.08 Cost to start a business* .....	6 ...■	9.03 Telephone lines* .....	49 ...■
		9.04 Broadband Internet subscribers* .....	54 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	63 ...■
2.01 Stringency of environmental regulation .....	34 ...■		
2.02 Enforcement of environmental regulation .....	26 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.03 Sustainability of T&T industry development .....	22 ...■	10.01 Ticket taxes and airport charges* .....	5 ...■
2.04 Carbon dioxide emissions* .....	20 ...■	10.02 Purchasing power parity* .....	105 ...■
2.05 Particulate matter concentration* .....	22 ...■	10.03 Extent and effect of taxation .....	94 ...■
2.06 Threatened species* .....	97 ...■	10.04 Fuel price levels* .....	56 ...■
2.07 Environmental treaty ratification* .....	n/a .....	10.05 Hotel price index* .....	101 ...■
<b>3rd pillar: Safety and security</b>		<b>11th pillar: Human resources</b>	
3.01 Business costs of terrorism .....	22 ...■	11.01 Primary education enrollment* .....	n/a .....
3.02 Reliability of police services .....	37 ...■	11.02 2ndary education enrollment* .....	n/a .....
3.03 Business costs of crime and violence .....	67 ...■	11.03 Quality of the educational system .....	60 ...■
3.04 Road traffic accidents* .....	n/a .....	11.04 Local availability of research and training services .....	30 ...■
		11.05 Extent of staff training .....	26 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	85 ...■
4.01 Physician density* .....	49 ...■	11.07 Ease of hiring foreign labor .....	104 ...■
4.02 Access to improved sanitation* .....	n/a .....	11.08 HIV prevalence* .....	91 ...■
4.03 Access to improved drinking water* .....	45 ...■	11.09 Business impact of HIV/AIDS .....	71 ...■
4.04 Hospital beds* .....	62 ...■	11.10 Life expectancy* .....	28 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	14 ...■	12.01 Tourism openness* .....	n/a .....
5.02 T&T government expenditure* .....	42 ...■	12.02 Attitude of population toward foreign visitors .....	49 ...■
5.03 Effectiveness of marketing and branding .....	24 ...■	12.03 Extension of business trips recommended .....	50 ...■
5.04 T&T fair attendance* .....	93 ...■		
		<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	70 ...■
6.01 Quality of air transport infrastructure .....	19 ...■	13.02 Nationally protected areas* .....	107 ...■
6.02 Available seat kilometers* .....	33 ...■	13.03 Quality of the natural environment .....	43 ...■
6.03 Departures per 1,000 population* .....	9 ...■	13.04 Total known species* .....	110 ...■
6.04 Airport density* .....	10 ...■		
6.05 Number of operating airlines* .....	53 ...■	<b>14th pillar: Cultural resources</b>	
6.06 International air transport network .....	34 ...■	14.01 Number of World Heritage cultural sites* .....	108 ...■
		14.02 Sports stadiums* .....	54 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	68 ...■
7.01 Quality of roads .....	29 ...■		
7.02 Quality of railroad infrastructure .....	75 ...■		
7.03 Quality of port infrastructure .....	32 ...■		
7.04 Quality of domestic transport network .....	64 ...■		
7.05 Road density* .....	5 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Qatar

## Key indicators

Population (millions), 2006.....	0.9
Surface area (1,000 square kilometers).....	11.0
Gross domestic product (US\$ billions), 2006.....	52.7
Gross domestic product (PPP, US\$) per capita, 2006.....	36,632
Real GDP growth (percent), 2006.....	10.3

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

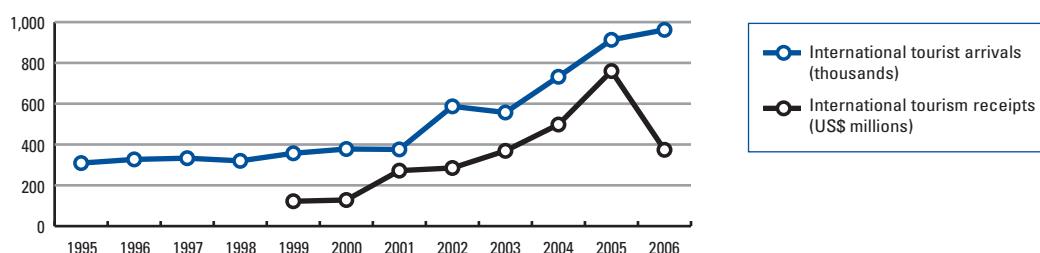
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions).....	1.6	6.1
Employment (1,000 jobs).....	2.3	2.6

### T&T economy, 2007 estimates

GDP (US\$ millions).....	6,802	12.7	4.7
Employment (1,000 jobs).....	62	13.0	1.6

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006.....	962
International tourism receipts (US\$ millions), 2006.....	374



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>37</b>	<b>4.4</b>
<b>T&amp;T regulatory framework</b> .....	<b>43</b>	<b>4.9</b>
Policy rules and regulations.....	86	4.0
Environmental sustainability.....	69	4.4
Safety and security.....	10	6.2
Health and hygiene.....	48	5.3
Prioritization of Travel & Tourism.....	42	4.7
<b>T&amp;T business environment and infrastructure</b> .....	<b>35</b>	<b>4.5</b>
Air transport infrastructure.....	23	4.6
Ground transport infrastructure.....	33	4.8
Tourism infrastructure.....	24	5.2
ICT infrastructure.....	40	3.6
Price competitiveness in the T&T industry.....	89	4.3
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>65</b>	<b>3.9</b>
Human resources.....	23	5.5
Education and training.....	29	5.3
Availability of qualified labor.....	20	5.7
Affinity for Travel & Tourism.....	49	5.0
Natural resources.....	121	2.2
Cultural resources.....	45	3.0

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....100... <span style="color: #808080;">■</span>	8.01	Hotel rooms* .....45... <span style="color: #808080;">■</span>
1.02	Property rights .....38... <span style="color: #808080;">■</span>	8.02	Presence of major car rental companies* .....1... <span style="color: #0056b3;">■</span>
1.03	Business impact of rules on FDI .....58... <span style="color: #808080;">■</span>	8.03	ATMs accepting Visa cards* .....22... <span style="color: #0056b3;">■</span>
1.04	Visa requirements* .....120... <span style="color: #808080;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....51... <span style="color: #808080;">■</span>	9.01	Extent of business Internet use .....60... <span style="color: #808080;">■</span>
1.06	Transparency of government policymaking .....36... <span style="color: #0056b3;">■</span>	9.02	Internet users* .....37... <span style="color: #808080;">■</span>
1.07	Time required to start a business* .....n/a.....	9.03	Telephone lines* .....47... <span style="color: #808080;">■</span>
1.08	Cost to start a business* .....n/a.....	9.04	Broadband Internet subscribers* .....40... <span style="color: #808080;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....16... <span style="color: #0056b3;">■</span>
2.01	Stringency of environmental regulation .....28... <span style="color: #0056b3;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....20... <span style="color: #0056b3;">■</span>	10.01	Ticket taxes and airport charges* .....9... <span style="color: #0056b3;">■</span>
2.03	Sustainability of T&T industry development .....15... <span style="color: #0056b3;">■</span>	10.02	Purchasing power parity* .....129... <span style="color: #808080;">■</span>
2.04	Carbon dioxide emissions* .....126... <span style="color: #808080;">■</span>	10.03	Extent and effect of taxation .....3... <span style="color: #0056b3;">■</span>
2.05	Particulate matter concentration* .....n/a.....	10.04	Fuel price levels* .....7... <span style="color: #0056b3;">■</span>
2.06	Threatened species* .....41... <span style="color: #808080;">■</span>	10.05	Hotel price index* .....111... <span style="color: #808080;">■</span>
2.07	Environmental treaty ratification* .....72... <span style="color: #808080;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....39... <span style="color: #808080;">■</span>
3.01	Business costs of terrorism .....46... <span style="color: #808080;">■</span>	11.02	2ndary education enrollment* .....25... <span style="color: #0056b3;">■</span>
3.02	Reliability of police services .....17... <span style="color: #0056b3;">■</span>	11.03	Quality of the educational system .....24... <span style="color: #0056b3;">■</span>
3.03	Business costs of crime and violence .....12... <span style="color: #0056b3;">■</span>	11.04	Local availability of research and training services .....55... <span style="color: #808080;">■</span>
3.04	Road traffic accidents* .....12... <span style="color: #0056b3;">■</span>	11.05	Extent of staff training .....46... <span style="color: #808080;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....51... <span style="color: #808080;">■</span>
4.01	Physician density* .....45... <span style="color: #808080;">■</span>	11.07	Ease of hiring foreign labor .....16... <span style="color: #0056b3;">■</span>
4.02	Access to improved sanitation* .....1... <span style="color: #0056b3;">■</span>	11.08	HIV prevalence* .....1... <span style="color: #0056b3;">■</span>
4.03	Access to improved drinking water* .....1... <span style="color: #0056b3;">■</span>	11.09	Business impact of HIV/AIDS .....17... <span style="color: #0056b3;">■</span>
4.04	Hospital beds* .....68... <span style="color: #808080;">■</span>	11.10	Life expectancy* .....50... <span style="color: #808080;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....30... <span style="color: #0056b3;">■</span>	12.01	Tourism openness* .....26... <span style="color: #0056b3;">■</span>
5.02	T&T government expenditure* .....28... <span style="color: #0056b3;">■</span>	12.02	Attitude of population toward foreign visitors .....87... <span style="color: #808080;">■</span>
5.03	Effectiveness of marketing and branding .....58... <span style="color: #808080;">■</span>	12.03	Extension of business trips recommended .....114... <span style="color: #808080;">■</span>
5.04	T&T fair attendance* .....56... <span style="color: #808080;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....70... <span style="color: #808080;">■</span>
6.01	Quality of air transport infrastructure .....29... <span style="color: #0056b3;">■</span>	13.02	Nationally protected areas* .....123... <span style="color: #808080;">■</span>
6.02	Available seat kilometers* .....37... <span style="color: #808080;">■</span>	13.03	Quality of the natural environment .....17... <span style="color: #0056b3;">■</span>
6.03	Departures per 1,000 population* .....3... <span style="color: #0056b3;">■</span>	13.04	Total known species* .....129... <span style="color: #808080;">■</span>
6.04	Airport density* .....20... <span style="color: #0056b3;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....60... <span style="color: #808080;">■</span>	14.01	Number of World Heritage cultural sites* .....108... <span style="color: #808080;">■</span>
6.06	International air transport network .....29... <span style="color: #0056b3;">■</span>	14.02	Sports stadiums* .....2... <span style="color: #0056b3;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....80... <span style="color: #808080;">■</span>
7.01	Quality of roads .....45... <span style="color: #808080;">■</span>		
7.02	Quality of railroad infrastructure .....n/a.....		
7.03	Quality of port infrastructure .....50... <span style="color: #808080;">■</span>		
7.04	Quality of domestic transport network .....62... <span style="color: #808080;">■</span>		
7.05	Road density* .....n/a.....		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# Romania

## Key indicators

Population (millions), 2006 .....	21.6
Surface area (1,000 square kilometers) .....	238.4
Gross domestic product (US\$ billions), 2006 .....	121.9
Gross domestic product (PPP, US\$) per capita, 2006 .....	10,125
Real GDP growth (percent), 2006 .....	7.7

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

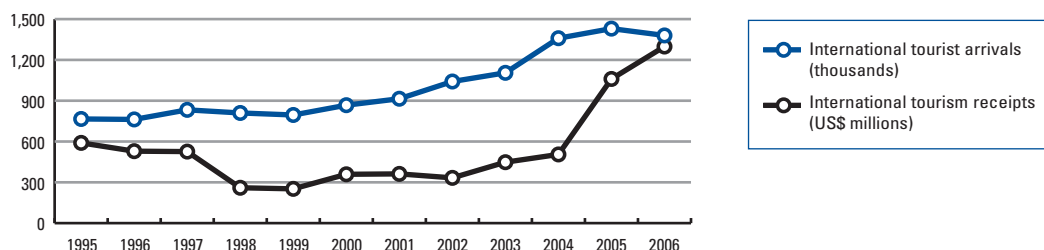
	Percent of total	2008–2017 annual growth (% forecast)	
GDP (US\$ millions) .....	3,100	2.1	7.9
Employment (1,000 jobs) .....	295	3.4	2.2

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	7,953	5.5	6.9
Employment (1,000 jobs) .....	575	6.6	1.8

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	1,380
International tourism receipts (US\$ millions), 2006 .....	1,298



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>69</b>	<b>3.9</b>
<b>T&amp;T regulatory framework</b> .....	<b>72</b>	<b>4.3</b>
Policy rules and regulations .....	48	4.6
Environmental sustainability .....	51	4.7
Safety and security .....	75	4.9
Health and hygiene .....	89	3.8
Prioritization of Travel & Tourism .....	102	3.6
<b>T&amp;T business environment and infrastructure</b> .....	<b>66</b>	<b>3.6</b>
Air transport infrastructure .....	88	2.6
Ground transport infrastructure .....	74	3.4
Tourism infrastructure .....	38	4.4
ICT infrastructure .....	48	3.2
Price competitiveness in the T&T industry .....	109	4.1
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>73</b>	<b>3.8</b>
Human resources .....	68	5.0
Education and training .....	58	4.7
Availability of qualified labor .....	84	5.2
Affinity for Travel & Tourism .....	101	4.4
Natural resources .....	96	2.7
Cultural resources .....	44	3.1

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	80 ...■	8.01 Hotel rooms* .....	51 ...■
1.02 Property rights .....	84 ...■	8.02 Presence of major car rental companies* .....	1 ...■
1.03 Business impact of rules on FDI .....	82 ...■	8.03 ATMs accepting Visa cards* .....	43 ...■
1.04 Visa requirements* .....	7 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	82 ...■	9.01 Extent of business Internet use .....	79 ...■
1.06 Transparency of government policymaking .....	126 ...■	9.02 Internet users* .....	39 ...■
1.07 Time required to start a business* .....	28 ...■	9.03 Telephone lines* .....	63 ...■
1.08 Cost to start a business* .....	30 ...■	9.04 Broadband Internet subscribers* .....	35 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	47 ...■
2.01 Stringency of environmental regulation .....	72 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	76 ...■	10.01 Ticket taxes and airport charges* .....	82 ...■
2.03 Sustainability of T&T industry development .....	122 ...■	10.02 Purchasing power parity* .....	70 ...■
2.04 Carbon dioxide emissions* .....	69 ...■	10.03 Extent and effect of taxation .....	108 ...■
2.05 Particulate matter concentration* .....	8 ...■	10.04 Fuel price levels* .....	102 ...■
2.06 Threatened species* .....	78 ...■	10.05 Hotel price index* .....	83 ...■
2.07 Environmental treaty ratification* .....	28 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	63 ...■
3.01 Business costs of terrorism .....	54 ...■	11.02 2ndary education enrollment* .....	70 ...■
3.02 Reliability of police services .....	82 ...■	11.03 Quality of the educational system .....	58 ...■
3.03 Business costs of crime and violence .....	94 ...■	11.04 Local availability of research and training services .....	49 ...■
3.04 Road traffic accidents* .....	80 ...■	11.05 Extent of staff training .....	84 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	80 ...■
4.01 Physician density* .....	59 ...■	11.07 Ease of hiring foreign labor .....	96 ...■
4.02 Access to improved sanitation* .....	97 ...■	11.08 HIV prevalence* .....	1 ...■
4.03 Access to improved drinking water* .....	113 ...■	11.09 Business impact of HIV/AIDS .....	49 ...■
4.04 Hospital beds* .....	19 ...■	11.10 Life expectancy* .....	68 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	119 ...■	12.01 Tourism openness* .....	101 ...■
5.02 T&T government expenditure* .....	40 ...■	12.02 Attitude of population toward foreign visitors .....	85 ...■
5.03 Effectiveness of marketing and branding .....	118 ...■	12.03 Extension of business trips recommended .....	87 ...■
5.04 T&T fair attendance* .....	56 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	39 ...■
6.01 Quality of air transport infrastructure .....	95 ...■	13.02 Nationally protected areas* .....	87 ...■
6.02 Available seat kilometers* .....	70 ...■	13.03 Quality of the natural environment .....	91 ...■
6.03 Departures per 1,000 population* .....	74 ...■	13.04 Total known species* .....	73 ...■
6.04 Airport density* .....	69 ...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	49 ...■	14.01 Number of World Heritage cultural sites* .....	30 ...■
6.06 International air transport network .....	91 ...■	14.02 Sports stadiums* .....	46 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	49 ...■
7.01 Quality of roads .....	123 ...■		
7.02 Quality of railroad infrastructure .....	57 ...■		
7.03 Quality of port infrastructure .....	99 ...■		
7.04 Quality of domestic transport network .....	87 ...■		
7.05 Road density* .....	32 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Russian Federation

## Key indicators

Population (millions), 2006 .....	142.5
Surface area (1,000 square kilometers) .....	17,098.2
Gross domestic product (US\$ billions), 2006 .....	984.9
Gross domestic product (PPP, US\$) per capita, 2006 .....	12,178
Real GDP growth (percent), 2006 .....	6.7

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

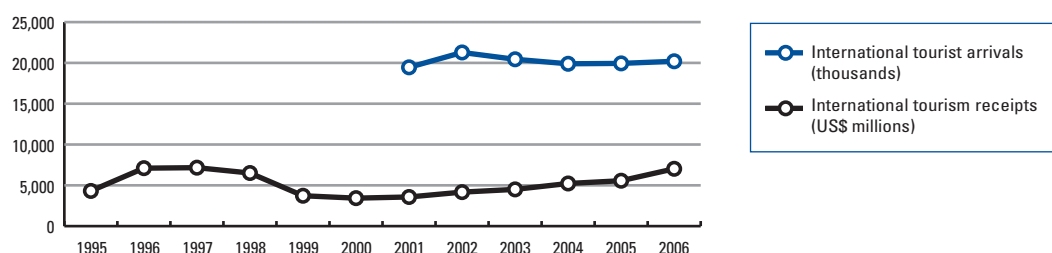
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	13,613	1.1	5.6
Employment (1,000 jobs) .....	684	1.0	-0.3

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	79,784	6.7	6.4
Employment (1,000 jobs) .....	3,913	5.7	0.5

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	20,199
International tourism receipts (US\$ millions), 2006 .....	7,025



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>64</b>	<b>4.0</b>
<b>T&amp;T regulatory framework</b> .....	<b>80</b>	<b>4.2</b>
Policy rules and regulations .....	110	3.5
Environmental sustainability .....	117	3.8
Safety and security .....	127	3.2
Health and hygiene .....	9	6.7
Prioritization of Travel & Tourism .....	80	4.0
<b>T&amp;T business environment and infrastructure</b> .....	<b>65</b>	<b>3.6</b>
Air transport infrastructure .....	33	4.1
Ground transport infrastructure .....	83	3.3
Tourism infrastructure .....	66	3.3
ICT infrastructure .....	51	3.1
Price competitiveness in the T&T industry .....	112	4.0
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>39</b>	<b>4.3</b>
Human resources .....	72	4.9
Education and training .....	55	4.8
Availability of qualified labor .....	91	5.1
Affinity for Travel & Tourism .....	111	4.3
Natural resources .....	22	4.6
Cultural resources .....	34	3.6

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>	
1.01 Prevalence of foreign ownership .....	128 ...■
1.02 Property rights .....	122 ...■
1.03 Business impact of rules on FDI .....	126 ...■
1.04 Visa requirements* .....	107 ...■
1.05 Openness of bilateral Air Service Agreements* .....	118 ...■
1.06 Transparency of government policymaking .....	118 ...■
1.07 Time required to start a business* .....	67 ...■
1.08 Cost to start a business* .....	24 ...■
<b>2nd pillar: Environmental sustainability</b>	
2.01 Stringency of environmental regulation .....	91 ...■
2.02 Enforcement of environmental regulation .....	94 ...■
2.03 Sustainability of T&T industry development .....	125 ...■
2.04 Carbon dioxide emissions* .....	109 ...■
2.05 Particulate matter concentration* .....	22 ...■
2.06 Threatened species* .....	112 ...■
2.07 Environmental treaty ratification* .....	88 ...■
<b>3rd pillar: Safety and security</b>	
3.01 Business costs of terrorism .....	108 ...■
3.02 Reliability of police services .....	110 ...■
3.03 Business costs of crime and violence .....	86 ...■
3.04 Road traffic accidents* .....	121 ...■
<b>4th pillar: Health and hygiene</b>	
4.01 Physician density* .....	2 ...■
4.02 Access to improved sanitation* .....	61 ...■
4.03 Access to improved drinking water* .....	45 ...■
4.04 Hospital beds* .....	2 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	125 ...■
5.02 T&T government expenditure* .....	80 ...■
5.03 Effectiveness of marketing and branding .....	120 ...■
5.04 T&T fair attendance* .....	5 ...■
<b>6th pillar: Air transport infrastructure</b>	
6.01 Quality of air transport infrastructure .....	79 ...■
6.02 Available seat kilometers* .....	14 ...■
6.03 Departures per 1,000 population* .....	62 ...■
6.04 Airport density* .....	68 ...■
6.05 Number of operating airlines* .....	6 ...■
6.06 International air transport network .....	79 ...■
<b>7th pillar: Ground transport infrastructure</b>	
7.01 Quality of roads .....	106 ...■
7.02 Quality of railroad infrastructure .....	29 ...■
7.03 Quality of port infrastructure .....	72 ...■
7.04 Quality of domestic transport network .....	96 ...■
7.05 Road density* .....	111 ...■

INDICATOR	RANK/130
<b>8th pillar: Tourism infrastructure</b>	
8.01 Hotel rooms* .....	82 ...■
8.02 Presence of major car rental companies* .....	56 ...■
8.03 ATMs accepting Visa cards* .....	48 ...■
<b>9th pillar: ICT infrastructure</b>	
9.01 Extent of business Internet use .....	54 ...■
9.02 Internet users* .....	59 ...■
9.03 Telephone lines* .....	44 ...■
9.04 Broadband Internet subscribers* .....	56 ...■
9.05 Mobile telephone subscribers* .....	45 ...■
<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
10.01 Ticket taxes and airport charges* .....	59 ...■
10.02 Purchasing power parity* .....	69 ...■
10.03 Extent and effect of taxation .....	97 ...■
10.04 Fuel price levels* .....	40 ...■
10.05 Hotel price index* .....	114 ...■
<b>11th pillar: Human resources</b>	
11.01 Primary education enrollment* .....	67 ...■
11.02 2ndary education enrollment* .....	47 ...■
11.03 Quality of the educational system .....	46 ...■
11.04 Local availability of research and training services .....	79 ...■
11.05 Extent of staff training .....	96 ...■
11.06 Hiring and firing practices .....	15 ...■
11.07 Ease of hiring foreign labor .....	122 ...■
11.08 HIV prevalence* .....	99 ...■
11.09 Business impact of HIV/AIDS .....	39 ...■
11.10 Life expectancy* .....	100 ...■
<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
12.01 Tourism openness* .....	90 ...■
12.02 Attitude of population toward foreign visitors .....	127 ...■
12.03 Extension of business trips recommended .....	51 ...■
<b>13th pillar: Natural resources</b>	
13.01 Number of World Heritage natural sites* .....	4 ...■
13.02 Nationally protected areas* .....	66 ...■
13.03 Quality of the natural environment .....	104 ...■
13.04 Total known species* .....	33 ...■
<b>14th pillar: Cultural resources</b>	
14.01 Number of World Heritage cultural sites* .....	10 ...■
14.02 Sports stadiums* .....	106 ...■
14.03 Number of international fairs and exhibitions* .....	39 ...■

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Saudi Arabia

## Key indicators

Population (millions), 2006 .....	25.2
Surface area (1,000 square kilometers) .....	2,149.7
Gross domestic product (US\$ billions), 2006 .....	349.1
Gross domestic product (PPP, US\$) per capita, 2006 .....	16,505
Real GDP growth (percent), 2006 .....	4.3

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

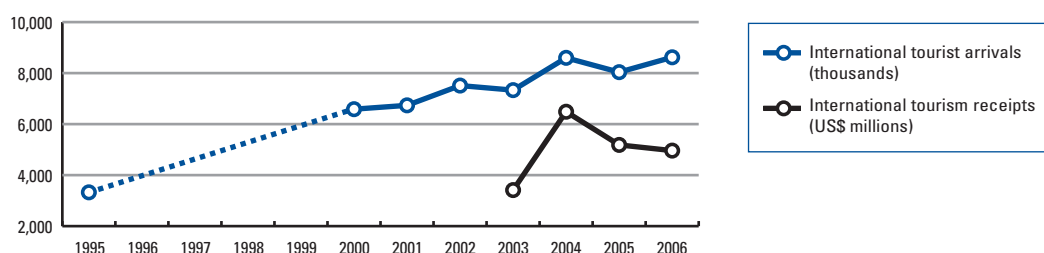
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	1.9	5.5
Employment (1,000 jobs) .....	2.6	3.2

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	8.1	5.3
Employment (1,000 jobs) .....	8.6	3.0

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	8,620
International tourism receipts (US\$ millions), 2006 .....	4,961



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>82</b>	<b>3.7</b>
<b>T&amp;T regulatory framework</b> .....	<b>106</b>	<b>3.8</b>
Policy rules and regulations .....	82	4.0
Environmental sustainability .....	127	3.4
Safety and security .....	59	5.1
Health and hygiene .....	105	2.9
Prioritization of Travel & Tourism .....	98	3.7
<b>T&amp;T business environment and infrastructure</b> .....	<b>55</b>	<b>3.8</b>
Air transport infrastructure .....	49	3.5
Ground transport infrastructure .....	60	3.8
Tourism infrastructure .....	68	3.3
ICT infrastructure .....	59	2.8
Price competitiveness in the T&T industry .....	8	5.5
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>107</b>	<b>3.4</b>
Human resources .....	83	4.8
Education and training .....	80	4.3
Availability of qualified labor .....	60	5.3
Affinity for Travel & Tourism .....	123	4.0
Natural resources .....	44	3.7
Cultural resources .....	126	1.2

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....121 ...■	8.01	Hotel rooms* .....54 ...■
1.02	Property rights .....47 ...■	8.02	Presence of major car rental companies* .....74 ...■
1.03	Business impact of rules on FDI .....105 ...■	8.03	ATMs accepting Visa cards* .....51 ...■
1.04	Visa requirements* .....112 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....74 ...■	9.01	Extent of business Internet use .....52 ...■
1.06	Transparency of government policymaking .....54 ...■	9.02	Internet users* .....57 ...■
1.07	Time required to start a business* .....31 ...■	9.03	Telephone lines* .....71 ...■
1.08	Cost to start a business* .....91 ...■	9.04	Broadband Internet subscribers* .....68 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....49 ...■
2.01	Stringency of environmental regulation .....106 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....84 ...■	10.01	Ticket taxes and airport charges* .....15 ...■
2.03	Sustainability of T&T industry development .....70 ...■	10.02	Purchasing power parity* .....98 ...■
2.04	Carbon dioxide emissions* .....117 ...■	10.03	Extent and effect of taxation .....7 ...■
2.05	Particulate matter concentration* .....115 ...■	10.04	Fuel price levels* .....2 ...■
2.06	Threatened species* .....70 ...■	10.05	Hotel price index* .....80 ...■
2.07	Environmental treaty ratification* .....72 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....111 ...■
3.01	Business costs of terrorism .....83 ...■	11.02	2ndary education enrollment* .....61 ...■
3.02	Reliability of police services .....46 ...■	11.03	Quality of the educational system .....79 ...■
3.03	Business costs of crime and violence .....44 ...■	11.04	Local availability of research and training services .....68 ...■
3.04	Road traffic accidents* .....94 ...■	11.05	Extent of staff training .....77 ...■
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....60 ...■
4.01	Physician density* .....70 ...■	11.07	Ease of hiring foreign labor .....90 ...■
4.02	Access to improved sanitation* .....n/a .....	11.08	HIV prevalence* .....1 ...■
4.03	Access to improved drinking water* .....n/a .....	11.09	Business impact of HIV/AIDS .....66 ...■
4.04	Hospital beds* .....72 ...■	11.10	Life expectancy* .....58 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....76 ...■	12.01	Tourism openness* .....109 ...■
5.02	T&T government expenditure* .....116 ...■	12.02	Attitude of population toward foreign visitors .....125 ...■
5.03	Effectiveness of marketing and branding .....81 ...■	12.03	Extension of business trips recommended .....111 ...■
5.04	T&T fair attendance* .....56 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....70 ...■
6.01	Quality of air transport infrastructure .....46 ...■	13.02	Nationally protected areas* .....5 ...■
6.02	Available seat kilometers* .....27 ...■	13.03	Quality of the natural environment .....67 ...■
6.03	Departures per 1,000 population* .....47 ...■	13.04	Total known species* .....70 ...■
6.04	Airport density* .....45 ...■	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....39 ...■	14.01	Number of World Heritage cultural sites* .....108 ...■
6.06	International air transport network .....59 ...■	14.02	Sports stadiums* .....101 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....105 ...■
7.01	Quality of roads .....39 ...■		
7.02	Quality of railroad infrastructure .....53 ...■		
7.03	Quality of port infrastructure .....43 ...■		
7.04	Quality of domestic transport network .....59 ...■		
7.05	Road density* .....98 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Senegal

## Key indicators

Population (millions), 2006 .....	11.9
Surface area (1,000 square kilometers) .....	196.7
Gross domestic product (US\$ billions), 2006 .....	9.2
Gross domestic product (PPP, US\$) per capita, 2006 .....	1,981
Real GDP growth (percent), 2006 .....	2.1

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

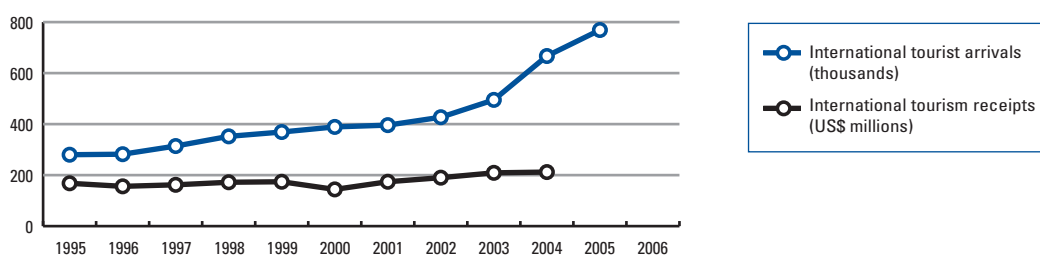
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	3.3	3.6
Employment (1,000 jobs) .....	2.7	1.8

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	7.6	3.7
Employment (1,000 jobs) .....	6.3	1.9

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2005 .....	769
International tourism receipts (US\$ millions), 2004 .....	212



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>108</b>	<b>3.4</b>
<b>T&amp;T regulatory framework</b> .....	<b>94</b>	<b>4.0</b>
Policy rules and regulations .....	118	3.2
Environmental sustainability .....	52	4.7
Safety and security .....	52	5.2
Health and hygiene .....	104	2.9
Prioritization of Travel & Tourism .....	69	4.2
<b>T&amp;T business environment and infrastructure</b> .....	<b>104</b>	<b>2.8</b>
Air transport infrastructure .....	78	2.7
Ground transport infrastructure .....	94	2.9
Tourism infrastructure .....	93	2.3
ICT infrastructure .....	100	1.9
Price competitiveness in the T&T industry .....	116	3.9
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>108</b>	<b>3.4</b>
Human resources .....	111	4.1
Education and training .....	118	3.3
Availability of qualified labor .....	104	4.9
Affinity for Travel & Tourism .....	115	4.2
Natural resources .....	51	3.5
Cultural resources .....	87	1.9

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	47 ...■	8.01 Hotel rooms* .....	85 ...■
1.02 Property rights .....	96 ...■	8.02 Presence of major car rental companies* .....	74 ...■
1.03 Business impact of rules on FDI .....	73 ...■	8.03 ATMs accepting Visa cards* .....	106 ...■
1.04 Visa requirements* .....	92 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	85 ...■	9.01 Extent of business Internet use .....	52 ...■
1.06 Transparency of government policymaking .....	106 ...■	9.02 Internet users* .....	103 ...■
1.07 Time required to start a business* .....	106 ...■	9.03 Telephone lines* .....	111 ...■
1.08 Cost to start a business* .....	114 ...■	9.04 Broadband Internet subscribers* .....	85 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	100 ...■
2.01 Stringency of environmental regulation .....	115 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	118 ...■	10.01 Ticket taxes and airport charges* .....	127 ...■
2.03 Sustainability of T&T industry development .....	68 ...■	10.02 Purchasing power parity* .....	40 ...■
2.04 Carbon dioxide emissions* .....	18 ...■	10.03 Extent and effect of taxation .....	93 ...■
2.05 Particulate matter concentration* .....	95 ...■	10.04 Fuel price levels* .....	87 ...■
2.06 Threatened species* .....	27 ...■	10.05 Hotel price index* .....	60 ...■
2.07 Environmental treaty ratification* .....	5 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	118 ...■
3.01 Business costs of terrorism .....	48 ...■	11.02 2ndary education enrollment* .....	120 ...■
3.02 Reliability of police services .....	48 ...■	11.03 Quality of the educational system .....	81 ...■
3.03 Business costs of crime and violence .....	70 ...■	11.04 Local availability of research and training services .....	46 ...■
3.04 Road traffic accidents* .....	83 ...■	11.05 Extent of staff training .....	110 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	54 ...■
4.01 Physician density* .....	121 ...■	11.07 Ease of hiring foreign labor .....	39 ...■
4.02 Access to improved sanitation* .....	91 ...■	11.08 HIV prevalence* .....	93 ...■
4.03 Access to improved drinking water* .....	102 ...■	11.09 Business impact of HIV/AIDS .....	83 ...■
4.04 Hospital beds* .....	n/a .....	11.10 Life expectancy* .....	110 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	37 ...■	12.01 Tourism openness* .....	122 ...■
5.02 T&T government expenditure* .....	53 ...■	12.02 Attitude of population toward foreign visitors .....	22 ...■
5.03 Effectiveness of marketing and branding .....	55 ...■	12.03 Extension of business trips recommended .....	108 ...■
5.04 T&T fair attendance* .....	76 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	21 ...■
6.01 Quality of air transport infrastructure .....	56 ...■	13.02 Nationally protected areas* .....	56 ...■
6.02 Available seat kilometers* .....	72 ...■	13.03 Quality of the natural environment .....	114 ...■
6.03 Departures per 1,000 population* .....	102 ...■	13.04 Total known species* .....	41 ...■
6.04 Airport density* .....	90 ...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	68 ...■	14.01 Number of World Heritage cultural sites* .....	54 ...■
6.06 International air transport network .....	61 ...■	14.02 Sports stadiums* .....	91 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	73 ...■
7.01 Quality of roads .....	96 ...■		
7.02 Quality of railroad infrastructure .....	102 ...■		
7.03 Quality of port infrastructure .....	75 ...■		
7.04 Quality of domestic transport network .....	66 ...■		
7.05 Road density* .....	100 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# Serbia

## Key indicators

Population (millions), 2006 .....	7.4
Surface area (1,000 square kilometers) .....	88.4
Gross domestic product (US\$ billions), 2006 .....	32.0
Gross domestic product (PPP, US\$) per capita, 2006 .....	6,702
Real GDP growth (percent), 2006 .....	5.7

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	1.1	3.6
Employment (1,000 jobs) .....	1.0	0.6

### T&T economy, 2007 estimates

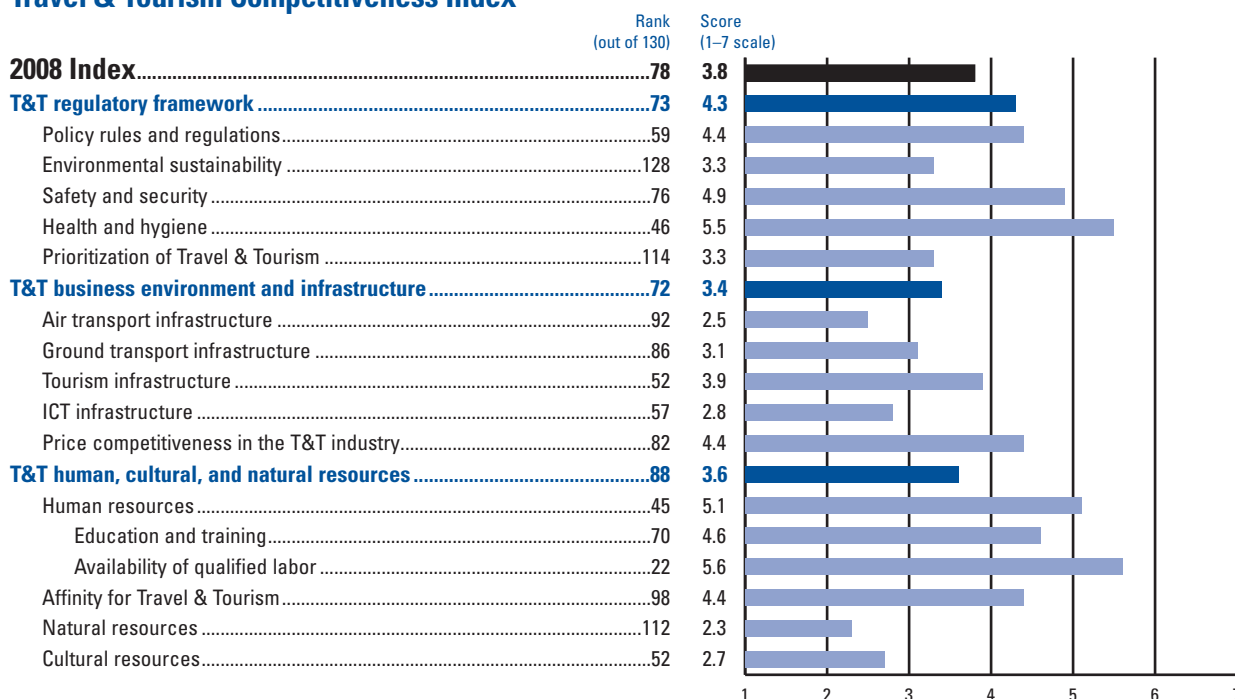
GDP (US\$ millions) .....	1,684	4.8	4.9
Employment (1,000 jobs) .....	91	4.3	1.8

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	469
International tourism receipts (US\$ millions), 2006 .....	398

Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index



Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	108 ...■	8.01 Hotel rooms* .....	64 ...■
1.02 Property rights .....	114 ...■	8.02 Presence of major car rental companies* .....	1 ...■
1.03 Business impact of rules on FDI .....	115 ...■	8.03 ATMs accepting Visa cards* .....	61 ...■
1.04 Visa requirements* .....	60 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	n/a .....	9.01 Extent of business Internet use .....	93 ...■
1.06 Transparency of government policymaking .....	73 ...■	9.02 Internet users* .....	58 ...■
1.07 Time required to start a business* .....	49 ...■	9.03 Telephone lines* .....	n/a .....
1.08 Cost to start a business* .....	53 ...■	9.04 Broadband Internet subscribers* .....	46 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	59 ...■
2.01 Stringency of environmental regulation .....	119 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	127 ...■	10.01 Ticket taxes and airport charges* .....	55 ...■
2.03 Sustainability of T&T industry development .....	108 ...■	10.02 Purchasing power parity* .....	77 ...■
2.04 Carbon dioxide emissions* .....	n/a .....	10.03 Extent and effect of taxation .....	40 ...■
2.05 Particulate matter concentration* .....	n/a .....	10.04 Fuel price levels* .....	n/a .....
2.06 Threatened species* .....	61 ...■	10.05 Hotel price index* .....	109 ...■
2.07 Environmental treaty ratification* .....	115 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	40 ...■
3.01 Business costs of terrorism .....	52 ...■	11.02 2ndary education enrollment* .....	85 ...■
3.02 Reliability of police services .....	70 ...■	11.03 Quality of the educational system .....	45 ...■
3.03 Business costs of crime and violence .....	63 ...■	11.04 Local availability of research and training services .....	63 ...■
3.04 Road traffic accidents* .....	n/a .....	11.05 Extent of staff training .....	121 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	25 ...■
4.01 Physician density* .....	51 ...■	11.07 Ease of hiring foreign labor .....	51 ...■
4.02 Access to improved sanitation* .....	61 ...■	11.08 HIV prevalence* .....	1 ...■
4.03 Access to improved drinking water* .....	60 ...■	11.09 Business impact of HIV/AIDS .....	45 ...■
4.04 Hospital beds* .....	27 ...■	11.10 Life expectancy* .....	58 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	79 ...■	12.01 Tourism openness* .....	122 ...■
5.02 T&T government expenditure* .....	117 ...■	12.02 Attitude of population toward foreign visitors .....	30 ...■
5.03 Effectiveness of marketing and branding .....	108 ...■	12.03 Extension of business trips recommended .....	49 ...■
5.04 T&T fair attendance* .....	76 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	70 ...■
6.01 Quality of air transport infrastructure .....	84 ...■	13.02 Nationally protected areas* .....	n/a .....
6.02 Available seat kilometers* .....	94 ...■	13.03 Quality of the natural environment .....	112 ...■
6.03 Departures per 1,000 population* .....	n/a .....	13.04 Total known species* .....	91 ...■
6.04 Airport density* .....	92 ...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	74 ...■	14.01 Number of World Heritage cultural sites* .....	46 ...■
6.06 International air transport network .....	110 ...■	14.02 Sports stadiums* .....	38 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	64 ...■
7.01 Quality of roads .....	99 ...■		
7.02 Quality of railroad infrastructure .....	82 ...■		
7.03 Quality of port infrastructure .....	78 ...■		
7.04 Quality of domestic transport network .....	104 ...■		
7.05 Road density* .....	n/a .....		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Singapore

## Key indicators

Population (millions), 2006 .....	4.4
Surface area (1,000 square kilometers) .....	0.7
Gross domestic product (US\$ billions), 2006 .....	132.2
Gross domestic product (PPP, US\$) per capita, 2006 .....	33,471
Real GDP growth (percent), 2006 .....	7.9

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

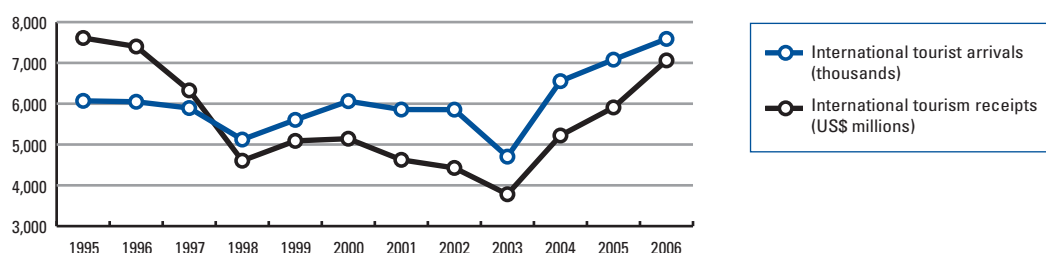
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	3,947	2.7	3.5
Employment (1,000 jobs) .....	66	2.8	1.2

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	15,524	10.7	4.4
Employment (1,000 jobs) .....	206	8.8	2.1

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	7,588
International tourism receipts (US\$ millions), 2006 .....	7,061



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>16</b>	<b>5.1</b>
<b>T&amp;T regulatory framework</b> .....	<b>7</b>	<b>5.7</b>
Policy rules and regulations .....	1	6.2
Environmental sustainability .....	27	5.0
Safety and security .....	8	6.2
Health and hygiene .....	53	5.1
Prioritization of Travel & Tourism .....	5	5.9
<b>T&amp;T business environment and infrastructure</b> .....	<b>13</b>	<b>5.1</b>
Air transport infrastructure .....	15	4.9
Ground transport infrastructure .....	1	6.6
Tourism infrastructure .....	43	4.3
ICT infrastructure .....	23	4.7
Price competitiveness in the T&T industry .....	25	5.2
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>37</b>	<b>4.4</b>
Human resources .....	1	6.2
Education and training .....	7	6.1
Availability of qualified labor .....	1	6.3
Affinity for Travel & Tourism .....	13	5.8
Natural resources .....	98	2.6
Cultural resources .....	47	3.0

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	2 ...■	8.01 Hotel rooms* .....	32 ...■
1.02 Property rights .....	5 ...■	8.02 Presence of major car rental companies* .....	74 ...■
1.03 Business impact of rules on FDI .....	2 ...■	8.03 ATMs accepting Visa cards* .....	30 ...■
1.04 Visa requirements* .....	1 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	28 ...■	9.01 Extent of business Internet use .....	19 ...■
1.06 Transparency of government policymaking .....	1 ...■	9.02 Internet users* .....	32 ...■
1.07 Time required to start a business* .....	4 ...■	9.03 Telephone lines* .....	30 ...■
1.08 Cost to start a business* .....	6 ...■	9.04 Broadband Internet subscribers* .....	20 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	17 ...■
2.01 Stringency of environmental regulation .....	13 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	6 ...■	10.01 Ticket taxes and airport charges* .....	33 ...■
2.03 Sustainability of T&T industry development .....	1 ...■	10.02 Purchasing power parity* .....	101 ...■
2.04 Carbon dioxide emissions* .....	112 ...■	10.03 Extent and effect of taxation .....	6 ...■
2.05 Particulate matter concentration* .....	68 ...■	10.04 Fuel price levels* .....	35 ...■
2.06 Threatened species* .....	47 ...■	10.05 Hotel price index* .....	53 ...■
2.07 Environmental treaty ratification* .....	97 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	36 ...■
3.01 Business costs of terrorism .....	85 ...■	11.02 2ndary education enrollment* .....	32 ...■
3.02 Reliability of police services .....	4 ...■	11.03 Quality of the educational system .....	1 ...■
3.03 Business costs of crime and violence .....	10 ...■	11.04 Local availability of research and training services .....	17 ...■
3.04 Road traffic accidents* .....	18 ...■	11.05 Extent of staff training .....	7 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	1 ...■
4.01 Physician density* .....	68 ...■	11.07 Ease of hiring foreign labor .....	7 ...■
4.02 Access to improved sanitation* .....	1 ...■	11.08 HIV prevalence* .....	63 ...■
4.03 Access to improved drinking water* .....	1 ...■	11.09 Business impact of HIV/AIDS .....	35 ...■
4.04 Hospital beds* .....	64 ...■	11.10 Life expectancy* .....	8 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	5 ...■	12.01 Tourism openness* .....	12 ...■
5.02 T&T government expenditure* .....	8 ...■	12.02 Attitude of population toward foreign visitors .....	4 ...■
5.03 Effectiveness of marketing and branding .....	3 ...■	12.03 Extension of business trips recommended .....	80 ...■
5.04 T&T fair attendance* .....	56 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	70 ...■
6.01 Quality of air transport infrastructure .....	1 ...■	13.02 Nationally protected areas* .....	108 ...■
6.02 Available seat kilometers* .....	16 ...■	13.03 Quality of the natural environment .....	12 ...■
6.03 Departures per 1,000 population* .....	17 ...■	13.04 Total known species* .....	75 ...■
6.04 Airport density* .....	87 ...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	24 ...■	14.01 Number of World Heritage cultural sites* .....	108 ...■
6.06 International air transport network .....	2 ...■	14.02 Sports stadiums* .....	72 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	18 ...■
7.01 Quality of roads .....	2 ...■		
7.02 Quality of railroad infrastructure .....	9 ...■		
7.03 Quality of port infrastructure .....	1 ...■		
7.04 Quality of domestic transport network .....	6 ...■		
7.05 Road density* .....	2 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Slovak Republic

## Key indicators

Population (millions), 2006 .....	5.4
Surface area (1,000 square kilometers) .....	49.0
Gross domestic product (US\$ billions), 2006 .....	55.1
Gross domestic product (PPP, US\$) per capita, 2006 .....	17,913
Real GDP growth (percent), 2006 .....	8.3

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

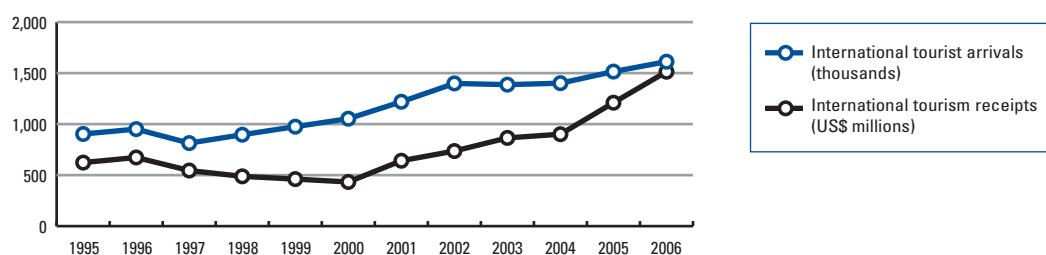
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	1,352	2.0
Employment (1,000 jobs) .....	45	1.9

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	10,284	14.9	5.5
Employment (1,000 jobs) .....	309	13.1	1.1

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	1,612
International tourism receipts (US\$ millions), 2006 .....	1,513



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>38</b>	<b>4.4</b>
<b>T&amp;T regulatory framework</b> .....	<b>33</b>	<b>5.1</b>
Policy rules and regulations .....	31	5.0
Environmental sustainability .....	23	5.1
Safety and security .....	30	5.7
Health and hygiene .....	13	6.5
Prioritization of Travel & Tourism .....	117	3.3
<b>T&amp;T business environment and infrastructure</b> .....	<b>46</b>	<b>3.9</b>
Air transport infrastructure .....	104	2.4
Ground transport infrastructure .....	37	4.6
Tourism infrastructure .....	28	4.9
ICT infrastructure .....	42	3.5
Price competitiveness in the T&T industry .....	84	4.4
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>51</b>	<b>4.2</b>
Human resources .....	29	5.4
Education and training .....	42	5.0
Availability of qualified labor .....	13	5.8
Affinity for Travel & Tourism .....	77	4.7
Natural resources .....	36	4.0
Cultural resources .....	53	2.7

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	4 ...■	8.01 Hotel rooms* .....	40 ...■
1.02 Property rights .....	52 ...■	8.02 Presence of major car rental companies* .....	1 ...■
1.03 Business impact of rules on FDI .....	4 ...■	8.03 ATMs accepting Visa cards* .....	32 ...■
1.04 Visa requirements* .....	46 ...■		
1.05 Openness of bilateral Air Service Agreements* .....	78 ...■	<b>9th pillar: ICT infrastructure</b>	
1.06 Transparency of government policymaking .....	41 ...■	9.01 Extent of business Internet use .....	50 ...■
1.07 Time required to start a business* .....	56 ...■	9.02 Internet users* .....	31 ...■
1.08 Cost to start a business* .....	26 ...■	9.03 Telephone lines* .....	58 ...■
		9.04 Broadband Internet subscribers* .....	39 ...■
		9.05 Mobile telephone subscribers* .....	39 ...■
<b>2nd pillar: Environmental sustainability</b>		<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.01 Stringency of environmental regulation .....	24 ...■	10.01 Ticket taxes and airport charges* .....	100 ...■
2.02 Enforcement of environmental regulation .....	36 ...■	10.02 Purchasing power parity* .....	71 ...■
2.03 Sustainability of T&T industry development .....	105 ...■	10.03 Extent and effect of taxation .....	10 ...■
2.04 Carbon dioxide emissions* .....	88 ...■	10.04 Fuel price levels* .....	121 ...■
2.05 Particulate matter concentration* .....	8 ...■	10.05 Hotel price index* .....	95 ...■
2.06 Threatened species* .....	42 ...■		
2.07 Environmental treaty ratification* .....	45 ...■	<b>11th pillar: Human resources</b>	
		11.01 Primary education enrollment* .....	70 ...■
<b>3rd pillar: Safety and security</b>		11.02 2ndary education enrollment* .....	44 ...■
3.01 Business costs of terrorism .....	5 ...■	11.03 Quality of the educational system .....	63 ...■
3.02 Reliability of police services .....	72 ...■	11.04 Local availability of research and training services .....	47 ...■
3.03 Business costs of crime and violence .....	34 ...■	11.05 Extent of staff training .....	44 ...■
3.04 Road traffic accidents* .....	5 ...■	11.06 Hiring and firing practices .....	27 ...■
		11.07 Ease of hiring foreign labor .....	12 ...■
		11.08 HIV prevalence* .....	1 ...■
		11.09 Business impact of HIV/AIDS .....	12 ...■
		11.10 Life expectancy* .....	50 ...■
<b>4th pillar: Health and hygiene</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
4.01 Physician density* .....	25 ...■	12.01 Tourism openness* .....	60 ...■
4.02 Access to improved sanitation* .....	37 ...■	12.02 Attitude of population toward foreign visitors .....	116 ...■
4.03 Access to improved drinking water* .....	1 ...■	12.03 Extension of business trips recommended .....	56 ...■
4.04 Hospital beds* .....	18 ...■		
		<b>13th pillar: Natural resources</b>	
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		13.01 Number of World Heritage natural sites* .....	21 ...■
5.01 Government prioritization of the T&T industry .....	115 ...■	13.02 Nationally protected areas* .....	16 ...■
5.02 T&T government expenditure* .....	92 ...■	13.03 Quality of the natural environment .....	75 ...■
5.03 Effectiveness of marketing and branding .....	121 ...■	13.04 Total known species* .....	79 ...■
5.04 T&T fair attendance* .....	56 ...■		
		<b>14th pillar: Cultural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		14.01 Number of World Heritage cultural sites* .....	46 ...■
6.01 Quality of air transport infrastructure .....	97 ...■	14.02 Sports stadiums* .....	45 ...■
6.02 Available seat kilometers* .....	95 ...■	14.03 Number of international fairs and exhibitions* .....	56 ...■
6.03 Departures per 1,000 population* .....	63 ...■		
6.04 Airport density* .....	59 ...■		
6.05 Number of operating airlines* .....	114 ...■		
6.06 International air transport network .....	88 ...■		
<b>7th pillar: Ground transport infrastructure</b>			
7.01 Quality of roads .....	65 ...■		
7.02 Quality of railroad infrastructure .....	27 ...■		
7.03 Quality of port infrastructure .....	44 ...■		
7.04 Quality of domestic transport network .....	21 ...■		
7.05 Road density* .....	30 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Slovenia

## Key indicators

Population (millions), 2006 .....	2.0
Surface area (1,000 square kilometers) .....	20.3
Gross domestic product (US\$ billions), 2006 .....	38.2
Gross domestic product (PPP, US\$) per capita, 2006 .....	24,571
Real GDP growth (percent), 2006 .....	5.7

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

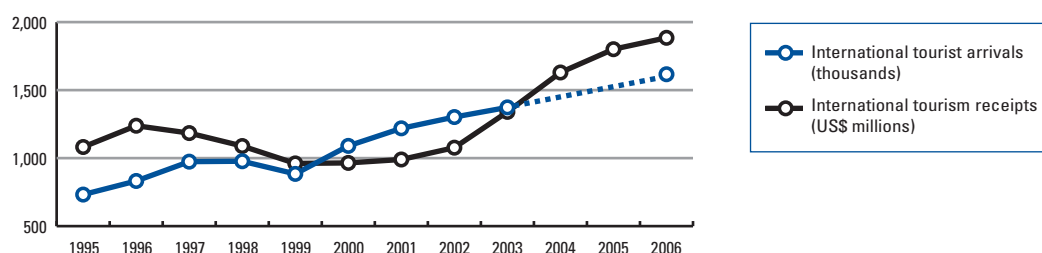
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	1,364	3.3	2.7
Employment (1,000 jobs) .....	37	4.4	-0.7

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	5,934	14.2	3.9
Employment (1,000 jobs) .....	137	16.4	0.1

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	1,617
International tourism receipts (US\$ millions), 2006 .....	1,885



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>36</b>	<b>4.5</b>
<b>T&amp;T regulatory framework</b> .....	<b>42</b>	<b>5.0</b>
Policy rules and regulations .....	87	4.0
Environmental sustainability .....	17	5.3
Safety and security .....	20	5.9
Health and hygiene .....	36	5.8
Prioritization of Travel & Tourism .....	84	3.9
<b>T&amp;T business environment and infrastructure</b> .....	<b>33</b>	<b>4.5</b>
Air transport infrastructure .....	70	2.9
Ground transport infrastructure .....	23	5.1
Tourism infrastructure .....	20	5.9
ICT infrastructure .....	26	4.5
Price competitiveness in the T&T industry .....	102	4.2
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>61</b>	<b>4.0</b>
Human resources .....	35	5.3
Education and training .....	27	5.4
Availability of qualified labor .....	81	5.2
Affinity for Travel & Tourism .....	53	4.9
Natural resources .....	76	3.0
Cultural resources .....	54	2.7

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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



INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....105...	8.01	Hotel rooms* .....36...
1.02	Property rights .....56...	8.02	Presence of major car rental companies* .....1...
1.03	Business impact of rules on FDI .....110...	8.03	ATMs accepting Visa cards* .....7...
1.04	Visa requirements* .....30...	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....119...	9.01	Extent of business Internet use .....35...
1.06	Transparency of government policymaking .....47...	9.02	Internet users* .....12...
1.07	Time required to start a business* .....108...	9.03	Telephone lines* .....28...
1.08	Cost to start a business* .....48...	9.04	Broadband Internet subscribers* .....28...
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....36...
2.01	Stringency of environmental regulation .....22...	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....24...	10.01	Ticket taxes and airport charges* .....95...
2.03	Sustainability of T&T industry development .....75...	10.02	Purchasing power parity* .....93...
2.04	Carbon dioxide emissions* .....91...	10.03	Extent and effect of taxation .....104...
2.05	Particulate matter concentration* .....42...	10.04	Fuel price levels* .....97...
2.06	Threatened species* .....33...	10.05	Hotel price index* .....28...
2.07	Environmental treaty ratification* .....5...	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....20...
3.01	Business costs of terrorism .....15...	11.02	2ndary education enrollment* .....26...
3.02	Reliability of police services .....47...	11.03	Quality of the educational system .....43...
3.03	Business costs of crime and violence .....22...	11.04	Local availability of research and training services .....35...
3.04	Road traffic accidents* .....20...	11.05	Extent of staff training .....37...
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....110...
4.01	Physician density* .....44...	11.07	Ease of hiring foreign labor .....89...
4.02	Access to improved sanitation* .....1...	11.08	HIV prevalence* .....1...
4.03	Access to improved drinking water* .....1...	11.09	Business impact of HIV/AIDS .....23...
4.04	Hospital beds* .....38...	11.10	Life expectancy* .....28...
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....91...	12.01	Tourism openness* .....35...
5.02	T&T government expenditure* .....41...	12.02	Attitude of population toward foreign visitors .....75...
5.03	Effectiveness of marketing and branding .....92...	12.03	Extension of business trips recommended .....92...
5.04	T&T fair attendance* .....76...	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....39...
6.01	Quality of air transport infrastructure .....64...	13.02	Nationally protected areas* .....72...
6.02	Available seat kilometers* .....115...	13.03	Quality of the natural environment .....21...
6.03	Departures per 1,000 population* .....36...	13.04	Total known species* .....87...
6.04	Airport density* .....47...	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....102...	14.01	Number of World Heritage cultural sites* .....108...
6.06	International air transport network .....74...	14.02	Sports stadiums* .....25...
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....38...
7.01	Quality of roads .....42...		
7.02	Quality of railroad infrastructure .....40...		
7.03	Quality of port infrastructure .....46...		
7.04	Quality of domestic transport network .....52...		
7.05	Road density* .....7...		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# South Africa

## Key indicators

Population (millions), 2006 .....	47.6
Surface area (1,000 square kilometers) .....	1,219.1
Gross domestic product (US\$ billions), 2006 .....	255.3
Gross domestic product (PPP, US\$) per capita, 2006 .....	13,018
Real GDP growth (percent), 2006 .....	5.0

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

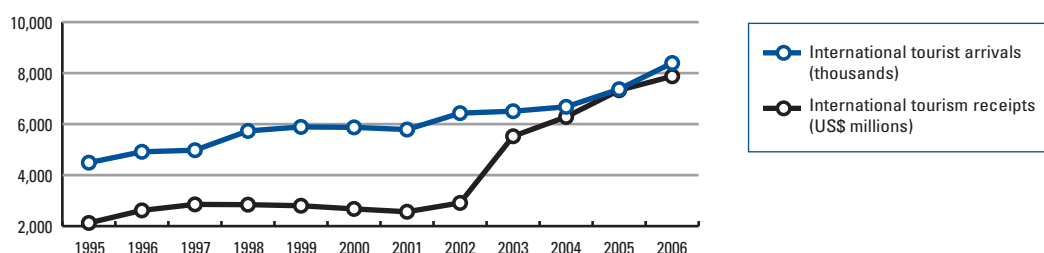
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	8,255	3.3	4.7
Employment (1,000 jobs) .....	425	3.3	3.3

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	20,993	8.3	4.8
Employment (1,000 jobs) .....	969	7.5	3.5

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	8,396
International tourism receipts (US\$ millions), 2006 .....	7,875



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>60</b>	<b>4.1</b>
<b>T&amp;T regulatory framework</b> .....	<b>70</b>	<b>4.3</b>
Policy rules and regulations .....	36	4.8
Environmental sustainability .....	35	4.9
Safety and security .....	123	3.6
Health and hygiene .....	84	4.0
Prioritization of Travel & Tourism .....	63	4.3
<b>T&amp;T business environment and infrastructure</b> .....	<b>51</b>	<b>3.8</b>
Air transport infrastructure .....	40	3.8
Ground transport infrastructure .....	59	3.9
Tourism infrastructure .....	51	3.9
ICT infrastructure .....	73	2.5
Price competitiveness in the T&T industry .....	29	5.1
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>52</b>	<b>4.2</b>
Human resources .....	118	3.8
Education and training .....	48	4.9
Availability of qualified labor .....	126	2.7
Affinity for Travel & Tourism .....	45	5.0
Natural resources .....	21	4.6
Cultural resources .....	40	3.3

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	56 ...■	8.01 Hotel rooms* .....	90 ...■
1.02 Property rights .....	22 ...■	8.02 Presence of major car rental companies* .....	1 ...■
1.03 Business impact of rules on FDI .....	79 ...■	8.03 ATMs accepting Visa cards* .....	45 ...■
1.04 Visa requirements* .....	23 ...■		
1.05 Openness of bilateral Air Service Agreements* .....	60 ...■	<b>9th pillar: ICT infrastructure</b>	
1.06 Transparency of government policymaking .....	30 ...■	9.01 Extent of business Internet use .....	46 ...■
1.07 Time required to start a business* .....	71 ...■	9.02 Internet users* .....	80 ...■
1.08 Cost to start a business* .....	41 ...■	9.03 Telephone lines* .....	87 ...■
		9.04 Broadband Internet subscribers* .....	80 ...■
		9.05 Mobile telephone subscribers* .....	56 ...■
<b>2nd pillar: Environmental sustainability</b>		<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.01 Stringency of environmental regulation .....	41 ...■	10.01 Ticket taxes and airport charges* .....	71 ...■
2.02 Enforcement of environmental regulation .....	41 ...■	10.02 Purchasing power parity* .....	51 ...■
2.03 Sustainability of T&T industry development .....	14 ...■	10.03 Extent and effect of taxation .....	26 ...■
2.04 Carbon dioxide emissions* .....	93 ...■	10.04 Fuel price levels* .....	62 ...■
2.05 Particulate matter concentration* .....	34 ...■	10.05 Hotel price index* .....	35 ...■
2.06 Threatened species* .....	99 ...■		
2.07 Environmental treaty ratification* .....	28 ...■	<b>11th pillar: Human resources</b>	
		11.01 Primary education enrollment* .....	92 ...■
<b>3rd pillar: Safety and security</b>		11.02 2ndary education enrollment* .....	51 ...■
3.01 Business costs of terrorism .....	43 ...■	11.03 Quality of the educational system .....	104 ...■
3.02 Reliability of police services .....	103 ...■	11.04 Local availability of research and training services .....	33 ...■
3.03 Business costs of crime and violence .....	125 ...■	11.05 Extent of staff training .....	21 ...■
3.04 Road traffic accidents* .....	114 ...■	11.06 Hiring and firing practices .....	128 ...■
		11.07 Ease of hiring foreign labor .....	127 ...■
		11.08 HIV prevalence* .....	125 ...■
		11.09 Business impact of HIV/AIDS .....	128 ...■
		11.10 Life expectancy* .....	117 ...■
<b>4th pillar: Health and hygiene</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
4.01 Physician density* .....	91 ...■	12.01 Tourism openness* .....	69 ...■
4.02 Access to improved sanitation* .....	84 ...■	12.02 Attitude of population toward foreign visitors .....	43 ...■
4.03 Access to improved drinking water* .....	75 ...■	12.03 Extension of business trips recommended .....	5 ...■
4.04 Hospital beds* .....	n/a .....		
		<b>13th pillar: Natural resources</b>	
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		13.01 Number of World Heritage natural sites* .....	10 ...■
5.01 Government prioritization of the T&T industry .....	21 ...■	13.02 Nationally protected areas* .....	80 ...■
5.02 T&T government expenditure* .....	120 ...■	13.03 Quality of the natural environment .....	53 ...■
5.03 Effectiveness of marketing and branding .....	21 ...■	13.04 Total known species* .....	24 ...■
5.04 T&T fair attendance* .....	45 ...■		
		<b>14th pillar: Cultural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		14.01 Number of World Heritage cultural sites* .....	38 ...■
6.01 Quality of air transport infrastructure .....	22 ...■	14.02 Sports stadiums* .....	66 ...■
6.02 Available seat kilometers* .....	21 ...■	14.03 Number of international fairs and exhibitions* .....	32 ...■
6.03 Departures per 1,000 population* .....	58 ...■		
6.04 Airport density* .....	90 ...■		
6.05 Number of operating airlines* .....	28 ...■		
6.06 International air transport network .....	11 ...■		
<b>7th pillar: Ground transport infrastructure</b>			
7.01 Quality of roads .....	38 ...■		
7.02 Quality of railroad infrastructure .....	41 ...■		
7.03 Quality of port infrastructure .....	48 ...■		
7.04 Quality of domestic transport network .....	99 ...■		
7.05 Road density* .....	56 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Spain

## Key indicators

Population (millions), 2006 .....	43.4
Surface area (1,000 square kilometers) .....	505.4
Gross domestic product (US\$ billions), 2006 .....	1,231.7
Gross domestic product (PPP, US\$) per capita, 2006 .....	27,914
Real GDP growth (percent), 2006 .....	3.9

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

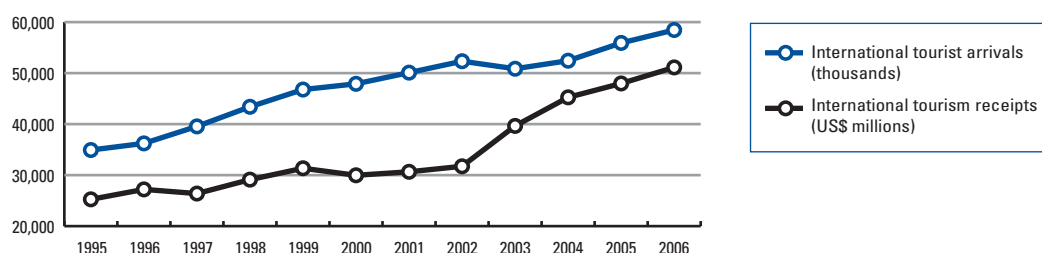
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	6.8	2.2
Employment (1,000 jobs) .....	7.7	1.3

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	18.2	2.9
Employment (1,000 jobs) .....	20.0	1.8

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	58,451
International tourism receipts (US\$ millions), 2006 .....	51,115



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>5</b>	<b>5.3</b>
<b>T&amp;T regulatory framework</b> .....	<b>28</b>	<b>5.2</b>
Policy rules and regulations .....	56	4.4
Environmental sustainability .....	33	5.0
Safety and security .....	58	5.1
Health and hygiene .....	32	5.9
Prioritization of Travel & Tourism .....	6	5.8
<b>T&amp;T business environment and infrastructure</b> .....	<b>5</b>	<b>5.3</b>
Air transport infrastructure .....	8	5.3
Ground transport infrastructure .....	16	5.5
Tourism infrastructure .....	1	7.0
ICT infrastructure .....	28	4.4
Price competitiveness in the T&T industry .....	88	4.3
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>4</b>	<b>5.3</b>
Human resources .....	31	5.3
Education and training .....	33	5.2
Availability of qualified labor .....	36	5.5
Affinity for Travel & Tourism .....	46	5.0
Natural resources .....	32	4.2
Cultural resources .....	1	6.8

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	40 <span style="color: #808080;">■</span>	8.01 Hotel rooms* .....	8 <span style="color: #0056b3;">■</span>
1.02 Property rights .....	32 <span style="color: #808080;">■</span>	8.02 Presence of major car rental companies* .....	1 <span style="color: #0056b3;">■</span>
1.03 Business impact of rules on FDI .....	59 <span style="color: #808080;">■</span>	8.03 ATMs accepting Visa cards* .....	1 <span style="color: #0056b3;">■</span>
1.04 Visa requirements* .....	30 <span style="color: #808080;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	83 <span style="color: #808080;">■</span>	9.01 Extent of business Internet use .....	47 <span style="color: #808080;">■</span>
1.06 Transparency of government policymaking .....	67 <span style="color: #808080;">■</span>	9.02 Internet users* .....	29 <span style="color: #808080;">■</span>
1.07 Time required to start a business* .....	100 <span style="color: #808080;">■</span>	9.03 Telephone lines* .....	29 <span style="color: #808080;">■</span>
1.08 Cost to start a business* .....	66 <span style="color: #808080;">■</span>	9.04 Broadband Internet subscribers* .....	24 <span style="color: #808080;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	23 <span style="color: #808080;">■</span>
2.01 Stringency of environmental regulation .....	42 <span style="color: #808080;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	43 <span style="color: #808080;">■</span>	10.01 Ticket taxes and airport charges* .....	24 <span style="color: #808080;">■</span>
2.03 Sustainability of T&T industry development .....	55 <span style="color: #808080;">■</span>	10.02 Purchasing power parity* .....	104 <span style="color: #808080;">■</span>
2.04 Carbon dioxide emissions* .....	89 <span style="color: #808080;">■</span>	10.03 Extent and effect of taxation .....	71 <span style="color: #808080;">■</span>
2.05 Particulate matter concentration* .....	48 <span style="color: #808080;">■</span>	10.04 Fuel price levels* .....	90 <span style="color: #808080;">■</span>
2.06 Threatened species* .....	101 <span style="color: #808080;">■</span>	10.05 Hotel price index* .....	55 <span style="color: #808080;">■</span>
2.07 Environmental treaty ratification* .....	1 <span style="color: #0056b3;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	6 <span style="color: #0056b3;">■</span>
3.01 Business costs of terrorism .....	107 <span style="color: #808080;">■</span>	11.02 2ndary education enrollment* .....	3 <span style="color: #0056b3;">■</span>
3.02 Reliability of police services .....	22 <span style="color: #808080;">■</span>	11.03 Quality of the educational system .....	52 <span style="color: #808080;">■</span>
3.03 Business costs of crime and violence .....	54 <span style="color: #808080;">■</span>	11.04 Local availability of research and training services .....	40 <span style="color: #808080;">■</span>
3.04 Road traffic accidents* .....	99 <span style="color: #808080;">■</span>	11.05 Extent of staff training .....	50 <span style="color: #808080;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	114 <span style="color: #808080;">■</span>
4.01 Physician density* .....	21 <span style="color: #808080;">■</span>	11.07 Ease of hiring foreign labor .....	38 <span style="color: #808080;">■</span>
4.02 Access to improved sanitation* .....	1 <span style="color: #0056b3;">■</span>	11.08 HIV prevalence* .....	83 <span style="color: #808080;">■</span>
4.03 Access to improved drinking water* .....	1 <span style="color: #0056b3;">■</span>	11.09 Business impact of HIV/AIDS .....	32 <span style="color: #808080;">■</span>
4.04 Hospital beds* .....	52 <span style="color: #808080;">■</span>	11.10 Life expectancy* .....	3 <span style="color: #0056b3;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	25 <span style="color: #808080;">■</span>	12.01 Tourism openness* .....	56 <span style="color: #808080;">■</span>
5.02 T&T government expenditure* .....	21 <span style="color: #808080;">■</span>	12.02 Attitude of population toward foreign visitors .....	47 <span style="color: #808080;">■</span>
5.03 Effectiveness of marketing and branding .....	20 <span style="color: #808080;">■</span>	12.03 Extension of business trips recommended .....	39 <span style="color: #808080;">■</span>
5.04 T&T fair attendance* .....	1 <span style="color: #0056b3;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	7 <span style="color: #0056b3;">■</span>
6.01 Quality of air transport infrastructure .....	25 <span style="color: #808080;">■</span>	13.02 Nationally protected areas* .....	71 <span style="color: #808080;">■</span>
6.02 Available seat kilometers* .....	7 <span style="color: #0056b3;">■</span>	13.03 Quality of the natural environment .....	72 <span style="color: #808080;">■</span>
6.03 Departures per 1,000 population* .....	26 <span style="color: #808080;">■</span>	13.04 Total known species* .....	61 <span style="color: #808080;">■</span>
6.04 Airport density* .....	50 <span style="color: #808080;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	7 <span style="color: #0056b3;">■</span>	14.01 Number of World Heritage cultural sites* .....	2 <span style="color: #0056b3;">■</span>
6.06 International air transport network .....	16 <span style="color: #808080;">■</span>	14.02 Sports stadiums* .....	15 <span style="color: #808080;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	3 <span style="color: #0056b3;">■</span>
7.01 Quality of roads .....	24 <span style="color: #808080;">■</span>		
7.02 Quality of railroad infrastructure .....	19 <span style="color: #808080;">■</span>		
7.03 Quality of port infrastructure .....	25 <span style="color: #808080;">■</span>		
7.04 Quality of domestic transport network .....	45 <span style="color: #808080;">■</span>		
7.05 Road density* .....	23 <span style="color: #808080;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Sri Lanka

## Key indicators

Population (millions), 2006 .....	20.9
Surface area (1,000 square kilometers) .....	65.6
Gross domestic product (US\$ billions), 2006 .....	27.0
Gross domestic product (PPP, US\$) per capita, 2006 .....	5,387
Real GDP growth (percent), 2006 .....	7.4

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

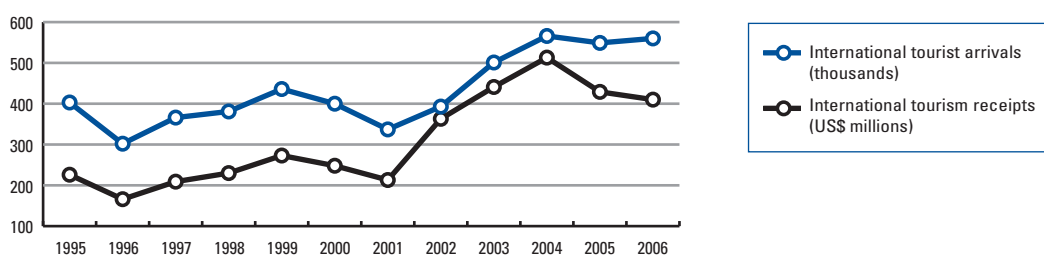
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	1,155	3.7	5.4
Employment (1,000 jobs) .....	240	3.0	2.0

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	3,028	9.8	5.6
Employment (1,000 jobs) .....	636	8.0	2.2

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	560
International tourism receipts (US\$ millions), 2006 .....	410



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>73</b>	<b>3.8</b>
<b>T&amp;T regulatory framework</b> .....	<b>79</b>	<b>4.2</b>
Policy rules and regulations .....	53	4.5
Environmental sustainability .....	115	3.8
Safety and security .....	104	4.4
Health and hygiene .....	85	4.0
Prioritization of Travel & Tourism .....	50	4.5
<b>T&amp;T business environment and infrastructure</b> .....	<b>81</b>	<b>3.2</b>
Air transport infrastructure .....	81	2.7
Ground transport infrastructure .....	42	4.5
Tourism infrastructure .....	111	1.8
ICT infrastructure .....	96	2.0
Price competitiveness in the T&T industry .....	26	5.1
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>63</b>	<b>4.0</b>
Human resources .....	62	5.0
Education and training .....	50	4.9
Availability of qualified labor .....	87	5.1
Affinity for Travel & Tourism .....	64	4.8
Natural resources .....	49	3.6
Cultural resources .....	64	2.4

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	71 ...■	8.01 Hotel rooms* .....	99 ...■
1.02 Property rights .....	60 ...■	8.02 Presence of major car rental companies* .....	103 ...■
1.03 Business impact of rules on FDI .....	39 ...■	8.03 ATMs accepting Visa cards* .....	89 ...■
1.04 Visa requirements* .....	19 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	81 ...■	9.01 Extent of business Internet use .....	59 ...■
1.06 Transparency of government policymaking .....	70 ...■	9.02 Internet users* .....	118 ...■
1.07 Time required to start a business* .....	90 ...■	9.03 Telephone lines* .....	90 ...■
1.08 Cost to start a business* .....	48 ...■	9.04 Broadband Internet subscribers* .....	93 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	99 ...■
2.01 Stringency of environmental regulation .....	56 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	52 ...■	10.01 Ticket taxes and airport charges* .....	118 ...■
2.03 Sustainability of T&T industry development .....	53 ...■	10.02 Purchasing power parity* .....	16 ...■
2.04 Carbon dioxide emissions* .....	20 ...■	10.03 Extent and effect of taxation .....	54 ...■
2.05 Particulate matter concentration* .....	108 ...■	10.04 Fuel price levels* .....	26 ...■
2.06 Threatened species* .....	124 ...■	10.05 Hotel price index* .....	14 ...■
2.07 Environmental treaty ratification* .....	45 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	28 ...■
3.01 Business costs of terrorism .....	129 ...■	11.02 2ndary education enrollment* .....	75 ...■
3.02 Reliability of police services .....	89 ...■	11.03 Quality of the educational system .....	55 ...■
3.03 Business costs of crime and violence .....	83 ...■	11.04 Local availability of research and training services .....	67 ...■
3.04 Road traffic accidents* .....	63 ...■	11.05 Extent of staff training .....	51 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	90 ...■
4.01 Physician density* .....	96 ...■	11.07 Ease of hiring foreign labor .....	110 ...■
4.02 Access to improved sanitation* .....	54 ...■	11.08 HIV prevalence* .....	1 ...■
4.03 Access to improved drinking water* .....	94 ...■	11.09 Business impact of HIV/AIDS .....	58 ...■
4.04 Hospital beds* .....	58 ...■	11.10 Life expectancy* .....	40 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	28 ...■	12.01 Tourism openness* .....	91 ...■
5.02 T&T government expenditure* .....	39 ...■	12.02 Attitude of population toward foreign visitors .....	46 ...■
5.03 Effectiveness of marketing and branding .....	53 ...■	12.03 Extension of business trips recommended .....	19 ...■
5.04 T&T fair attendance* .....	56 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	39 ...■
6.01 Quality of air transport infrastructure .....	70 ...■	13.02 Nationally protected areas* .....	32 ...■
6.02 Available seat kilometers* .....	58 ...■	13.03 Quality of the natural environment .....	59 ...■
6.03 Departures per 1,000 population* .....	77 ...■	13.04 Total known species* .....	58 ...■
6.04 Airport density* .....	96 ...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	74 ...■	14.01 Number of World Heritage cultural sites* .....	30 ...■
6.06 International air transport network .....	50 ...■	14.02 Sports stadiums* .....	107 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	66 ...■
7.01 Quality of roads .....	77 ...■		
7.02 Quality of railroad infrastructure .....	59 ...■		
7.03 Quality of port infrastructure .....	62 ...■		
7.04 Quality of domestic transport network .....	58 ...■		
7.05 Road density* .....	19 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Suriname

## Key indicators

Population (millions), 2006 .....	0.5
Surface area (1,000 square kilometers) .....	163.3
Gross domestic product (US\$ billions), 2006 .....	2.1
Gross domestic product (PPP, US\$) per capita, 2006 .....	6,571
Real GDP growth (percent), 2006 .....	5.8

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

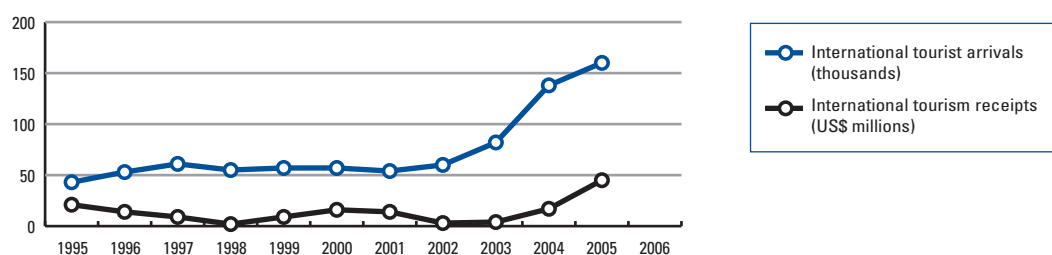
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	36	2.0
Employment (1,000 jobs) .....	3	1.9

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	101	5.6
Employment (1,000 jobs) .....	8	5.1

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2005 .....	160
International tourism receipts (US\$ millions), 2005 .....	45



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>95</b>	<b>3.6</b>
<b>T&amp;T regulatory framework</b> .....	<b>110</b>	<b>3.8</b>
Policy rules and regulations .....	129	2.8
Environmental sustainability .....	106	3.9
Safety and security .....	68	5.0
Health and hygiene .....	72	4.4
Prioritization of Travel & Tourism .....	125	2.7
<b>T&amp;T business environment and infrastructure</b> .....	<b>89</b>	<b>3.1</b>
Air transport infrastructure .....	93	2.5
Ground transport infrastructure .....	117	2.5
Tourism infrastructure .....	65	3.3
ICT infrastructure .....	79	2.4
Price competitiveness in the T&T industry .....	63	4.7
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>68</b>	<b>3.9</b>
Human resources .....	101	4.5
Education and training .....	100	4.1
Availability of qualified labor .....	107	4.9
Affinity for Travel & Tourism .....	106	4.4
Natural resources .....	41	3.8
Cultural resources .....	50	2.9

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	104 ...■	8.01 Hotel rooms* .....	25 ...■
1.02 Property rights .....	101 ...■	8.02 Presence of major car rental companies* .....	74 ...■
1.03 Business impact of rules on FDI .....	122 ...■	8.03 ATMs accepting Visa cards* .....	124 ...■
1.04 Visa requirements* .....	91 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	23 ...■	9.01 Extent of business Internet use .....	114 ...■
1.06 Transparency of government policymaking .....	121 ...■	9.02 Internet users* .....	96 ...■
1.07 Time required to start a business* .....	124 ...■	9.03 Telephone lines* .....	67 ...■
1.08 Cost to start a business* .....	119 ...■	9.04 Broadband Internet subscribers* .....	76 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	58 ...■
2.01 Stringency of environmental regulation .....	129 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	129 ...■	10.01 Ticket taxes and airport charges* .....	85 ...■
2.03 Sustainability of T&T industry development .....	117 ...■	10.02 Purchasing power parity* .....	43 ...■
2.04 Carbon dioxide emissions* .....	73 ...■	10.03 Extent and effect of taxation .....	114 ...■
2.05 Particulate matter concentration* .....	n/a .....	10.04 Fuel price levels* .....	n/a .....
2.06 Threatened species* .....	3 ...■	10.05 Hotel price index* .....	n/a .....
2.07 Environmental treaty ratification* .....	97 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	51 ...■
3.01 Business costs of terrorism .....	89 ...■	11.02 2ndary education enrollment* .....	64 ...■
3.02 Reliability of police services .....	62 ...■	11.03 Quality of the educational system .....	121 ...■
3.03 Business costs of crime and violence .....	109 ...■	11.04 Local availability of research and training services .....	122 ...■
3.04 Road traffic accidents* .....	10 ...■	11.05 Extent of staff training .....	111 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	129 ...■
4.01 Physician density* .....	101 ...■	11.07 Ease of hiring foreign labor .....	52 ...■
4.02 Access to improved sanitation* .....	47 ...■	11.08 HIV prevalence* .....	111 ...■
4.03 Access to improved drinking water* .....	66 ...■	11.09 Business impact of HIV/AIDS .....	105 ...■
4.04 Hospital beds* .....	57 ...■	11.10 Life expectancy* .....	86 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	118 ...■	12.01 Tourism openness* .....	87 ...■
5.02 T&T government expenditure* .....	104 ...■	12.02 Attitude of population toward foreign visitors .....	99 ...■
5.03 Effectiveness of marketing and branding .....	111 ...■	12.03 Extension of business trips recommended .....	106 ...■
5.04 T&T fair attendance* .....	122 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	39 ...■
6.01 Quality of air transport infrastructure .....	128 ...■	13.02 Nationally protected areas* .....	53 ...■
6.02 Available seat kilometers* .....	111 ...■	13.03 Quality of the natural environment .....	33 ...■
6.03 Departures per 1,000 population* .....	33 ...■	13.04 Total known species* .....	31 ...■
6.04 Airport density* .....	20 ...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	126 ...■	14.01 Number of World Heritage cultural sites* .....	83 ...■
6.06 International air transport network .....	129 ...■	14.02 Sports stadiums* .....	27 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	n/a .....
7.01 Quality of roads .....	86 ...■		
7.02 Quality of railroad infrastructure .....	106 ...■		
7.03 Quality of port infrastructure .....	112 ...■		
7.04 Quality of domestic transport network .....	127 ...■		
7.05 Road density* .....	n/a .....		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# Sweden

## Key indicators

Population (millions), 2006 .....	9.1
Surface area (1,000 square kilometers) .....	450.3
Gross domestic product (US\$ billions), 2006 .....	384.4
Gross domestic product (PPP, US\$) per capita, 2006 .....	34,735
Real GDP growth (percent), 2006 .....	4.2

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

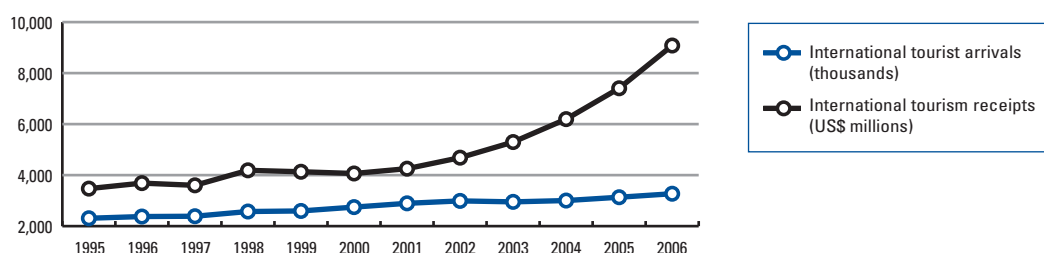
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	11,566	2.6
Employment (1,000 jobs) .....	123	2.8

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	34,930	8.0	2.8
Employment (1,000 jobs) .....	366	8.4	0.6

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	3,270
International tourism receipts (US\$ millions), 2006 .....	9,081



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>8</b>	<b>5.3</b>
<b>T&amp;T regulatory framework</b> .....	<b>9</b>	<b>5.6</b>
Policy rules and regulations .....	10	5.4
Environmental sustainability .....	1	6.1
Safety and security .....	13	6.1
Health and hygiene .....	21	6.3
Prioritization of Travel & Tourism .....	71	4.2
<b>T&amp;T business environment and infrastructure</b> .....	<b>15</b>	<b>5.0</b>
Air transport infrastructure .....	14	5.0
Ground transport infrastructure .....	12	5.8
Tourism infrastructure .....	26	5.0
ICT infrastructure .....	3	5.9
Price competitiveness in the T&T industry .....	123	3.6
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>8</b>	<b>5.2</b>
Human resources .....	15	5.7
Education and training .....	5	6.1
Availability of qualified labor .....	63	5.3
Affinity for Travel & Tourism .....	82	4.6
Natural resources .....	39	3.9
Cultural resources .....	3	6.4

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	5...■	8.01 Hotel rooms* .....	22...■
1.02 Property rights .....	9...■	8.02 Presence of major car rental companies* .....	33...■
1.03 Business impact of rules on FDI .....	9...■	8.03 ATMs accepting Visa cards* .....	36...■
1.04 Visa requirements* .....	30...■		
1.05 Openness of bilateral Air Service Agreements* .....	75...■	<b>9th pillar: ICT infrastructure</b>	
1.06 Transparency of government policymaking .....	7...■	9.01 Extent of business Internet use .....	3...■
1.07 Time required to start a business* .....	31...■	9.02 Internet users* .....	3...■
1.08 Cost to start a business* .....	4...■	9.03 Telephone lines* .....	6...■
		9.04 Broadband Internet subscribers* .....	8...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	24...■
2.01 Stringency of environmental regulation .....	3...■		
2.02 Enforcement of environmental regulation .....	3...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.03 Sustainability of T&T industry development .....	31...■	10.01 Ticket taxes and airport charges* .....	28...■
2.04 Carbon dioxide emissions* .....	83...■	10.02 Purchasing power parity* .....	122...■
2.05 Particulate matter concentration* .....	3...■	10.03 Extent and effect of taxation .....	125...■
2.06 Threatened species* .....	14...■	10.04 Fuel price levels* .....	122...■
2.07 Environmental treaty ratification* .....	1...■	10.05 Hotel price index* .....	79...■
<b>3rd pillar: Safety and security</b>		<b>11th pillar: Human resources</b>	
3.01 Business costs of terrorism .....	18...■	11.01 Primary education enrollment* .....	38...■
3.02 Reliability of police services .....	21...■	11.02 2ndary education enrollment* .....	18...■
3.03 Business costs of crime and violence .....	16...■	11.03 Quality of the educational system .....	16...■
3.04 Road traffic accidents* .....	40...■	11.04 Local availability of research and training services .....	4...■
		11.05 Extent of staff training .....	3...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	118...■
4.01 Physician density* .....	19...■	11.07 Ease of hiring foreign labor .....	71...■
4.02 Access to improved sanitation* .....	1...■	11.08 HIV prevalence* .....	49...■
4.03 Access to improved drinking water* .....	1...■	11.09 Business impact of HIV/AIDS .....	5...■
4.04 Hospital beds* .....	34...■	11.10 Life expectancy* .....	3...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	88...■	12.01 Tourism openness* .....	58...■
5.02 T&T government expenditure* .....	90...■	12.02 Attitude of population toward foreign visitors .....	20...■
5.03 Effectiveness of marketing and branding .....	74...■	12.03 Extension of business trips recommended .....	120...■
5.04 T&T fair attendance* .....	32...■		
		<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	15...■
6.01 Quality of air transport infrastructure .....	17...■	13.02 Nationally protected areas* .....	61...■
6.02 Available seat kilometers* .....	42...■	13.03 Quality of the natural environment .....	5...■
6.03 Departures per 1,000 population* .....	22...■	13.04 Total known species* .....	95...■
6.04 Airport density* .....	9...■		
6.05 Number of operating airlines* .....	22...■	<b>14th pillar: Cultural resources</b>	
6.06 International air transport network .....	17...■	14.01 Number of World Heritage cultural sites* .....	11...■
		14.02 Sports stadiums* .....	17...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	15...■
7.01 Quality of roads .....	17...■		
7.02 Quality of railroad infrastructure .....	10...■		
7.03 Quality of port infrastructure .....	9...■		
7.04 Quality of domestic transport network .....	7...■		
7.05 Road density* .....	27...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Switzerland

## Key indicators

Population (millions), 2006 .....	7.3
Surface area (1,000 square kilometers) .....	41.3
Gross domestic product (US\$ billions), 2006 .....	388.0
Gross domestic product (PPP, US\$) per capita, 2006 .....	38,706
Real GDP growth (percent), 2006 .....	3.2

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

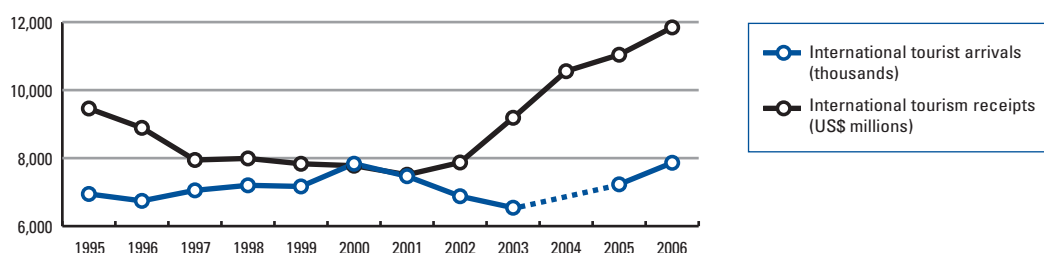
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	25,896	6.3
Employment (1,000 jobs) .....	361	8.3

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	60,964	14.8	2.0
Employment (1,000 jobs) .....	815	18.7	1.3

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	7,863
International tourism receipts (US\$ millions), 2006 .....	11,843



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>1</b>	<b>5.6</b>
<b>T&amp;T regulatory framework</b> .....	<b>1</b>	<b>5.9</b>
Policy rules and regulations .....	23	5.2
Environmental sustainability .....	2	5.9
Safety and security .....	6	6.3
Health and hygiene .....	15	6.5
Prioritization of Travel & Tourism .....	7	5.8
<b>T&amp;T business environment and infrastructure</b> .....	<b>2</b>	<b>5.5</b>
Air transport infrastructure .....	19	4.7
Ground transport infrastructure .....	5	6.6
Tourism infrastructure .....	7	6.7
ICT infrastructure .....	4	5.9
Price competitiveness in the T&T industry .....	118	3.9
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>3</b>	<b>5.4</b>
Human resources .....	2	6.2
Education and training .....	4	6.1
Availability of qualified labor .....	3	6.2
Affinity for Travel & Tourism .....	40	5.1
Natural resources .....	23	4.5
Cultural resources .....	9	5.8

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	27 ...■	8.01 Hotel rooms* .....	10 ...■
1.02 Property rights .....	3 ...■	8.02 Presence of major car rental companies* .....	33 ...■
1.03 Business impact of rules on FDI .....	17 ...■	8.03 ATMs accepting Visa cards* .....	5 ...■
1.04 Visa requirements* .....	85 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	63 ...■	9.01 Extent of business Internet use .....	8 ...■
1.06 Transparency of government policymaking .....	4 ...■	9.02 Internet users* .....	13 ...■
1.07 Time required to start a business* .....	43 ...■	9.03 Telephone lines* .....	1 ...■
1.08 Cost to start a business* .....	16 ...■	9.04 Broadband Internet subscribers* .....	4 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	26 ...■
2.01 Stringency of environmental regulation .....	7 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	4 ...■	10.01 Ticket taxes and airport charges* .....	72 ...■
2.03 Sustainability of T&T industry development .....	16 ...■	10.02 Purchasing power parity* .....	124 ...■
2.04 Carbon dioxide emissions* .....	77 ...■	10.03 Extent and effect of taxation .....	14 ...■
2.05 Particulate matter concentration* .....	30 ...■	10.04 Fuel price levels* .....	118 ...■
2.06 Threatened species* .....	8 ...■	10.05 Hotel price index* .....	96 ...■
2.07 Environmental treaty ratification* .....	18 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	58 ...■
3.01 Business costs of terrorism .....	38 ...■	11.02 2ndary education enrollment* .....	46 ...■
3.02 Reliability of police services .....	5 ...■	11.03 Quality of the educational system .....	3 ...■
3.03 Business costs of crime and violence .....	11 ...■	11.04 Local availability of research and training services .....	1 ...■
3.04 Road traffic accidents* .....	31 ...■	11.05 Extent of staff training .....	2 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	2 ...■
4.01 Physician density* .....	10 ...■	11.07 Ease of hiring foreign labor .....	23 ...■
4.02 Access to improved sanitation* .....	1 ...■	11.08 HIV prevalence* .....	72 ...■
4.03 Access to improved drinking water* .....	1 ...■	11.09 Business impact of HIV/AIDS .....	27 ...■
4.04 Hospital beds* .....	29 ...■	11.10 Life expectancy* .....	3 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	42 ...■	12.01 Tourism openness* .....	57 ...■
5.02 T&T government expenditure* .....	18 ...■	12.02 Attitude of population toward foreign visitors .....	37 ...■
5.03 Effectiveness of marketing and branding .....	22 ...■	12.03 Extension of business trips recommended .....	11 ...■
5.04 T&T fair attendance* .....	5 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	21 ...■
6.01 Quality of air transport infrastructure .....	12 ...■	13.02 Nationally protected areas* .....	12 ...■
6.02 Available seat kilometers* .....	26 ...■	13.03 Quality of the natural environment .....	10 ...■
6.03 Departures per 1,000 population* .....	16 ...■	13.04 Total known species* .....	90 ...■
6.04 Airport density* .....	54 ...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	10 ...■	14.01 Number of World Heritage cultural sites* .....	38 ...■
6.06 International air transport network .....	13 ...■	14.02 Sports stadiums* .....	16 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	13 ...■
7.01 Quality of roads .....	3 ...■		
7.02 Quality of railroad infrastructure .....	1 ...■		
7.03 Quality of port infrastructure .....	18 ...■		
7.04 Quality of domestic transport network .....	1 ...■		
7.05 Road density* .....	10 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Syria

## Key indicators

Population (millions), 2006 .....	19.5
Surface area (1,000 square kilometers) .....	185.2
Gross domestic product (US\$ billions), 2006 .....	34.9
Gross domestic product (PPP, US\$) per capita, 2006 .....	4,324
Real GDP growth (percent), 2006 .....	4.4

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

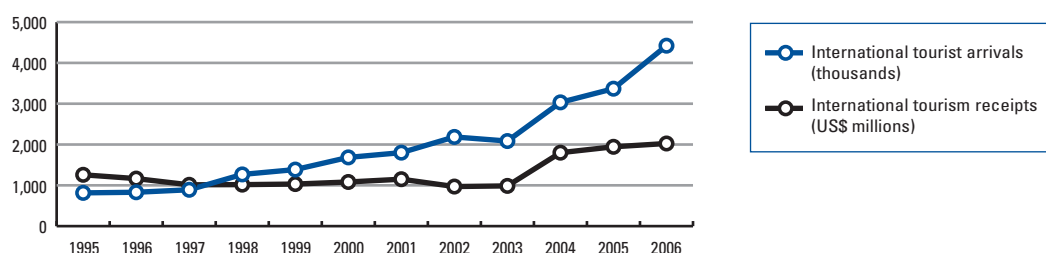
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	1,662	5.9	5.1
Employment (1,000 jobs) .....	476	6.7	5.8

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	3,810	13.4	4.7
Employment (1,000 jobs) .....	1,017	14.2	5.5

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	4,422
International tourism receipts (US\$ millions), 2006 .....	2,025



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>94</b>	<b>3.6</b>
<b>T&amp;T regulatory framework</b> .....	<b>74</b>	<b>4.3</b>
Policy rules and regulations .....	115	3.3
Environmental sustainability .....	98	4.0
Safety and security .....	22	5.8
Health and hygiene .....	74	4.3
Prioritization of Travel & Tourism .....	88	3.8
<b>T&amp;T business environment and infrastructure</b> .....	<b>97</b>	<b>2.9</b>
Air transport infrastructure .....	95	2.5
Ground transport infrastructure .....	70	3.6
Tourism infrastructure .....	104	2.0
ICT infrastructure .....	98	2.0
Price competitiveness in the T&T industry .....	66	4.7
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>95</b>	<b>3.6</b>
Human resources .....	97	4.6
Education and training .....	97	4.1
Availability of qualified labor .....	95	5.1
Affinity for Travel & Tourism .....	27	5.4
Natural resources .....	123	2.1
Cultural resources .....	77	2.2

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....127 ...■	8.01	Hotel rooms* .....94 ...■
1.02	Property rights .....31 ...■	8.02	Presence of major car rental companies* .....89 ...■
1.03	Business impact of rules on FDI .....112 ...■	8.03	ATMs accepting Visa cards* .....109 ...■
1.04	Visa requirements* .....124 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....85 ...■	9.01	Extent of business Internet use .....113 ...■
1.06	Transparency of government policymaking .....112 ...■	9.02	Internet users* .....91 ...■
1.07	Time required to start a business* .....94 ...■	9.03	Telephone lines* .....70 ...■
1.08	Cost to start a business* .....101 ...■	9.04	Broadband Internet subscribers* .....104 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....103 ...■
2.01	Stringency of environmental regulation .....100 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....87 ...■	10.01	Ticket taxes and airport charges* .....42 ...■
2.03	Sustainability of T&T industry development .....72 ...■	10.02	Purchasing power parity* .....128 ...■
2.04	Carbon dioxide emissions* .....56 ...■	10.03	Extent and effect of taxation .....42 ...■
2.05	Particulate matter concentration* .....99 ...■	10.04	Fuel price levels* .....4 ...■
2.06	Threatened species* .....74 ...■	10.05	Hotel price index* .....18 ...■
2.07	Environmental treaty ratification* .....72 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....50 ...■
3.01	Business costs of terrorism .....3 ...■	11.02	2ndary education enrollment* .....94 ...■
3.02	Reliability of police services .....84 ...■	11.03	Quality of the educational system .....102 ...■
3.03	Business costs of crime and violence .....1 ...■	11.04	Local availability of research and training services .....99 ...■
3.04	Road traffic accidents* .....74 ...■	11.05	Extent of staff training .....101 ...■
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....93 ...■
4.01	Physician density* .....69 ...■	11.07	Ease of hiring foreign labor .....117 ...■
4.02	Access to improved sanitation* .....58 ...■	11.08	HIV prevalence* .....1 ...■
4.03	Access to improved drinking water* .....60 ...■	11.09	Business impact of HIV/AIDS .....10 ...■
4.04	Hospital beds* .....91 ...■	11.10	Life expectancy* .....50 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....46 ...■	12.01	Tourism openness* .....30 ...■
5.02	T&T government expenditure* .....66 ...■	12.02	Attitude of population toward foreign visitors .....55 ...■
5.03	Effectiveness of marketing and branding .....84 ...■	12.03	Extension of business trips recommended .....18 ...■
5.04	T&T fair attendance* .....93 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....70 ...■
6.01	Quality of air transport infrastructure .....77 ...■	13.02	Nationally protected areas* .....111 ...■
6.02	Available seat kilometers* .....80 ...■	13.03	Quality of the natural environment .....99 ...■
6.03	Departures per 1,000 population* .....94 ...■	13.04	Total known species* .....101 ...■
6.04	Airport density* .....113 ...■	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....48 ...■	14.01	Number of World Heritage cultural sites* .....38 ...■
6.06	International air transport network .....97 ...■	14.02	Sports stadiums* .....100 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....113 ...■
7.01	Quality of roads .....70 ...■		
7.02	Quality of railroad infrastructure .....60 ...■		
7.03	Quality of port infrastructure .....96 ...■		
7.04	Quality of domestic transport network .....68 ...■		
7.05	Road density* .....42 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Taiwan, China

## Key indicators

Population (millions), 2006 .....	22.7
Surface area (1,000 square kilometers) .....	36.2
Gross domestic product (US\$ billions), 2006 .....	364.6
Gross domestic product (PPP, US\$) per capita, 2006 .....	30,687
Real GDP growth (percent), 2006 .....	4.7

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

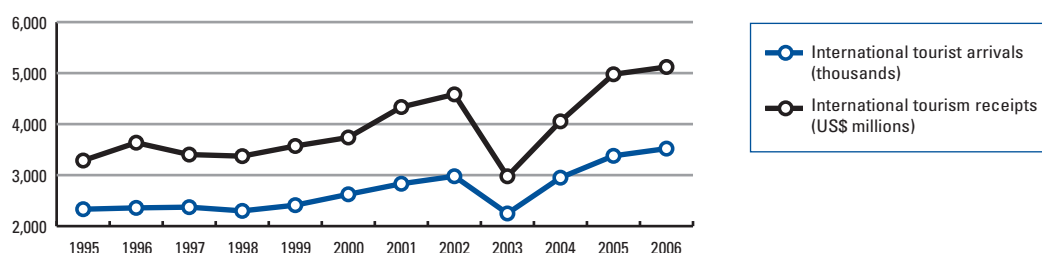
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	1.2	2.8
Employment (1,000 jobs) .....	1.6	0.1

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	4.5	3.8
Employment (1,000 jobs) .....	5.2	0.8

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	3,520
International tourism receipts (US\$ millions), 2006 .....	5,120



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>52</b>	<b>4.2</b>
<b>T&amp;T regulatory framework</b> .....	<b>69</b>	<b>4.3</b>
Policy rules and regulations .....	39	4.8
Environmental sustainability .....	75	4.3
Safety and security .....	49	5.3
Health and hygiene .....	101	3.2
Prioritization of Travel & Tourism .....	79	4.0
<b>T&amp;T business environment and infrastructure</b> .....	<b>29</b>	<b>4.6</b>
Air transport infrastructure .....	41	3.8
Ground transport infrastructure .....	13	5.8
Tourism infrastructure .....	74	3.1
ICT infrastructure .....	10	5.4
Price competitiveness in the T&T industry .....	30	5.1
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>79</b>	<b>3.7</b>
Human resources .....	13	5.7
Education and training .....	19	5.8
Availability of qualified labor .....	25	5.6
Affinity for Travel & Tourism .....	73	4.7
Natural resources .....	103	2.4
Cultural resources .....	78	2.1

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....45...■	8.01	Hotel rooms* .....97...■
1.02	Property rights .....39...■	8.02	Presence of major car rental companies* .....123...■
1.03	Business impact of rules on FDI .....48...■	8.03	ATMs accepting Visa cards* .....12...■
1.04	Visa requirements* .....87...■	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....n/a.....	9.01	Extent of business Internet use .....17...■
1.06	Transparency of government policymaking .....25...■	9.02	Internet users* .....11...■
1.07	Time required to start a business* .....101...■	9.03	Telephone lines* .....5...■
1.08	Cost to start a business* .....25...■	9.04	Broadband Internet subscribers* .....16...■
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....27...■
2.01	Stringency of environmental regulation .....20...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....23...■	10.01	Ticket taxes and airport charges* .....13...■
2.03	Sustainability of T&T industry development .....51...■	10.02	Purchasing power parity* .....64...■
2.04	Carbon dioxide emissions* .....n/a.....	10.03	Extent and effect of taxation .....24...■
2.05	Particulate matter concentration* .....90...■	10.04	Fuel price levels* .....46...■
2.06	Threatened species* .....109...■	10.05	Hotel price index* .....84...■
2.07	Environmental treaty ratification* .....n/a.....	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....3...■
3.01	Business costs of terrorism .....63...■	11.02	2ndary education enrollment* .....27...■
3.02	Reliability of police services .....38...■	11.03	Quality of the educational system .....18...■
3.03	Business costs of crime and violence .....28...■	11.04	Local availability of research and training services .....20...■
3.04	Road traffic accidents* .....n/a.....	11.05	Extent of staff training .....19...■
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....30...■
4.01	Physician density* .....66...■	11.07	Ease of hiring foreign labor .....91...■
4.02	Access to improved sanitation* .....n/a.....	11.08	HIV prevalence* .....48...■
4.03	Access to improved drinking water* .....n/a.....	11.09	Business impact of HIV/AIDS .....55...■
4.04	Hospital beds* .....n/a.....	11.10	Life expectancy* .....36...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....80...■	12.01	Tourism openness* .....79...■
5.02	T&T government expenditure* .....105...■	12.02	Attitude of population toward foreign visitors .....63...■
5.03	Effectiveness of marketing and branding .....75...■	12.03	Extension of business trips recommended .....65...■
5.04	T&T fair attendance* .....45...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....70...■
6.01	Quality of air transport infrastructure .....30...■	13.02	Nationally protected areas* .....82...■
6.02	Available seat kilometers* .....23...■	13.03	Quality of the natural environment .....102...■
6.03	Departures per 1,000 population* .....n/a.....	13.04	Total known species* .....63...■
6.04	Airport density* .....56...■	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....57...■	14.01	Number of World Heritage cultural sites* .....108...■
6.06	International air transport network .....46...■	14.02	Sports stadiums* .....69...■
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....34...■
7.01	Quality of roads .....15...■		
7.02	Quality of railroad infrastructure .....13...■		
7.03	Quality of port infrastructure .....19...■		
7.04	Quality of domestic transport network .....30...■		
7.05	Road density* .....n/a.....		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# Tajikistan

## Key indicators

Population (millions), 2006 .....	6.6
Surface area (1,000 square kilometers) .....	142.6
Gross domestic product (US\$ billions), 2006 .....	2.8
Gross domestic product (PPP, US\$) per capita, 2006 .....	1,494
Real GDP growth (percent), 2006 .....	7.0

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

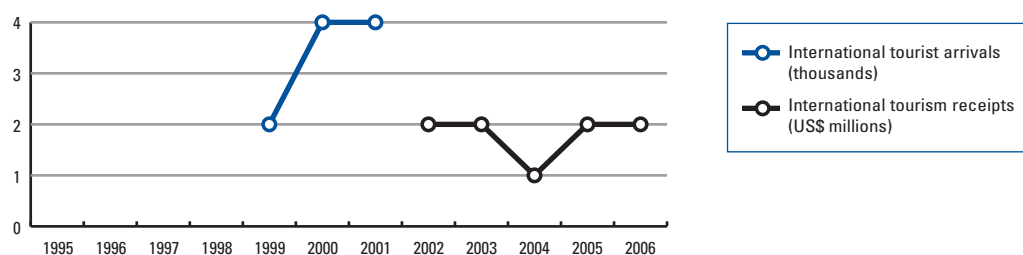
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	n/a	n/a
Employment (1,000 jobs) .....	n/a	n/a

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	n/a	n/a	n/a
Employment (1,000 jobs) .....	n/a	n/a	n/a

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2001 .....	4
International tourism receipts (US\$ millions), 2006 .....	2



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>114</b>	<b>3.2</b>
<b>T&amp;T regulatory framework</b> .....	<b>102</b>	<b>3.9</b>
Policy rules and regulations .....	108	3.6
Environmental sustainability .....	97	4.0
Safety and security .....	63	5.0
Health and hygiene .....	88	3.8
Prioritization of Travel & Tourism .....	116	3.3
<b>T&amp;T business environment and infrastructure</b> .....	<b>126</b>	<b>2.4</b>
Air transport infrastructure .....	121	2.0
Ground transport infrastructure .....	110	2.7
Tourism infrastructure .....	128	1.1
ICT infrastructure .....	118	1.6
Price competitiveness in the T&T industry .....	65	4.7
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>111</b>	<b>3.4</b>
Human resources .....	87	4.8
Education and training .....	90	4.2
Availability of qualified labor .....	57	5.3
Affinity for Travel & Tourism .....	91	4.5
Natural resources .....	56	3.2
Cultural resources .....	130	1.0

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....118... <span style="color: #808080;">■</span>	8.01	Hotel rooms* .....n/a..... <span style="color: #808080;">■</span>
1.02	Property rights .....80... <span style="color: #808080;">■</span>	8.02	Presence of major car rental companies* .....123... <span style="color: #808080;">■</span>
1.03	Business impact of rules on FDI .....108... <span style="color: #808080;">■</span>	8.03	ATMs accepting Visa cards* .....104... <span style="color: #808080;">■</span>
1.04	Visa requirements* .....104... <span style="color: #808080;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....n/a..... <span style="color: #808080;">■</span>	9.01	Extent of business Internet use .....98... <span style="color: #808080;">■</span>
1.06	Transparency of government policymaking .....99... <span style="color: #808080;">■</span>	9.02	Internet users* .....129... <span style="color: #808080;">■</span>
1.07	Time required to start a business* .....102... <span style="color: #808080;">■</span>	9.03	Telephone lines* .....104... <span style="color: #808080;">■</span>
1.08	Cost to start a business* .....94... <span style="color: #808080;">■</span>	9.04	Broadband Internet subscribers* .....117... <span style="color: #808080;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....126... <span style="color: #808080;">■</span>
2.01	Stringency of environmental regulation .....105... <span style="color: #808080;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....69... <span style="color: #808080;">■</span>	10.01	Ticket taxes and airport charges* .....112... <span style="color: #808080;">■</span>
2.03	Sustainability of T&T industry development .....73... <span style="color: #808080;">■</span>	10.02	Purchasing power parity* .....19... <span style="color: #0056b3;">■</span>
2.04	Carbon dioxide emissions* .....22... <span style="color: #0056b3;">■</span>	10.03	Extent and effect of taxation .....96... <span style="color: #808080;">■</span>
2.05	Particulate matter concentration* .....76... <span style="color: #808080;">■</span>	10.04	Fuel price levels* .....49... <span style="color: #0056b3;">■</span>
2.06	Threatened species* .....63... <span style="color: #808080;">■</span>	10.05	Hotel price index* .....n/a..... <span style="color: #808080;">■</span>
2.07	Environmental treaty ratification* .....125... <span style="color: #808080;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....26... <span style="color: #0056b3;">■</span>
3.01	Business costs of terrorism .....105... <span style="color: #808080;">■</span>	11.02	2ndary education enrollment* .....77... <span style="color: #808080;">■</span>
3.02	Reliability of police services .....67... <span style="color: #808080;">■</span>	11.03	Quality of the educational system .....109... <span style="color: #808080;">■</span>
3.03	Business costs of crime and violence .....76... <span style="color: #808080;">■</span>	11.04	Local availability of research and training services .....121... <span style="color: #808080;">■</span>
3.04	Road traffic accidents* .....19... <span style="color: #0056b3;">■</span>	11.05	Extent of staff training .....102... <span style="color: #808080;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....21... <span style="color: #0056b3;">■</span>
4.01	Physician density* .....54... <span style="color: #808080;">■</span>	11.07	Ease of hiring foreign labor .....59... <span style="color: #808080;">■</span>
4.02	Access to improved sanitation* .....97... <span style="color: #808080;">■</span>	11.08	HIV prevalence* .....24... <span style="color: #0056b3;">■</span>
4.03	Access to improved drinking water* .....111... <span style="color: #808080;">■</span>	11.09	Business impact of HIV/AIDS .....98... <span style="color: #808080;">■</span>
4.04	Hospital beds* .....25... <span style="color: #0056b3;">■</span>	11.10	Life expectancy* .....103... <span style="color: #808080;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....73... <span style="color: #808080;">■</span>	12.01	Tourism openness* .....121... <span style="color: #808080;">■</span>
5.02	T&T government expenditure* .....n/a..... <span style="color: #808080;">■</span>	12.02	Attitude of population toward foreign visitors .....61... <span style="color: #808080;">■</span>
5.03	Effectiveness of marketing and branding .....96... <span style="color: #808080;">■</span>	12.03	Extension of business trips recommended .....21... <span style="color: #0056b3;">■</span>
5.04	T&T fair attendance* .....128... <span style="color: #808080;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....70... <span style="color: #808080;">■</span>
6.01	Quality of air transport infrastructure .....119... <span style="color: #808080;">■</span>	13.02	Nationally protected areas* .....29... <span style="color: #0056b3;">■</span>
6.02	Available seat kilometers* .....108... <span style="color: #808080;">■</span>	13.03	Quality of the natural environment .....22... <span style="color: #0056b3;">■</span>
6.03	Departures per 1,000 population* .....87... <span style="color: #808080;">■</span>	13.04	Total known species* .....91... <span style="color: #808080;">■</span>
6.04	Airport density* .....107... <span style="color: #808080;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....82... <span style="color: #808080;">■</span>	14.01	Number of World Heritage cultural sites* .....108... <span style="color: #808080;">■</span>
6.06	International air transport network .....122... <span style="color: #808080;">■</span>	14.02	Sports stadiums* .....127... <span style="color: #808080;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....n/a..... <span style="color: #808080;">■</span>
7.01	Quality of roads .....112... <span style="color: #808080;">■</span>		
7.02	Quality of railroad infrastructure .....55... <span style="color: #808080;">■</span>		
7.03	Quality of port infrastructure .....130... <span style="color: #808080;">■</span>		
7.04	Quality of domestic transport network .....91... <span style="color: #808080;">■</span>		
7.05	Road density* .....68... <span style="color: #808080;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Tanzania

## Key indicators

Population (millions), 2006 .....	39.0
Surface area (1,000 square kilometers) .....	945.1
Gross domestic product (US\$ billions), 2006 .....	12.8
Gross domestic product (PPP, US\$) per capita, 2006 .....	.806
Real GDP growth (percent), 2006 .....	6.2

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

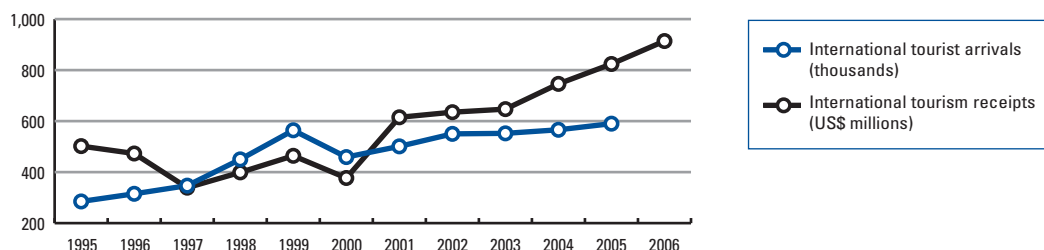
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	581	4.1	4.6
Employment (1,000 jobs) .....	291	3.2	2.0

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	1,329	9.4	4.6
Employment (1,000 jobs) .....	680	7.4	2.0

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2005 .....	590
International tourism receipts (US\$ millions), 2006 .....	914



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>88</b>	<b>3.7</b>
<b>T&amp;T regulatory framework</b> .....	<b>89</b>	<b>4.1</b>
Policy rules and regulations .....	79	4.1
Environmental sustainability .....	29	5.0
Safety and security .....	105	4.3
Health and hygiene .....	119	2.1
Prioritization of Travel & Tourism .....	33	4.9
<b>T&amp;T business environment and infrastructure</b> .....	<b>117</b>	<b>2.7</b>
Air transport infrastructure .....	107	2.3
Ground transport infrastructure .....	93	2.9
Tourism infrastructure .....	115	1.7
ICT infrastructure .....	115	1.6
Price competitiveness in the T&T industry .....	56	4.8
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>48</b>	<b>4.2</b>
Human resources .....	119	3.7
Education and training .....	112	3.5
Availability of qualified labor .....	123	4.0
Affinity for Travel & Tourism .....	28	5.3
Natural resources .....	1	6.1
Cultural resources .....	97	1.7

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	50 ■	8.01 Hotel rooms* .....	101 ■
1.02 Property rights .....	94 ■	8.02 Presence of major car rental companies* .....	103 ■
1.03 Business impact of rules on FDI .....	42 ■	8.03 ATMs accepting Visa cards* .....	124 ■
1.04 Visa requirements* .....	67 ■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	106 ■	9.01 Extent of business Internet use .....	91 ■
1.06 Transparency of government policymaking .....	37 ■	9.02 Internet users* .....	119 ■
1.07 Time required to start a business* .....	67 ■	9.03 Telephone lines* .....	125 ■
1.08 Cost to start a business* .....	99 ■	9.04 Broadband Internet subscribers* .....	120 ■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	110 ■
2.01 Stringency of environmental regulation .....	63 ■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	49 ■	10.01 Ticket taxes and airport charges* .....	75 ■
2.03 Sustainability of T&T industry development .....	17 ■	10.02 Purchasing power parity* .....	50 ■
2.04 Carbon dioxide emissions* .....	5 ■	10.03 Extent and effect of taxation .....	62 ■
2.05 Particulate matter concentration* .....	38 ■	10.04 Fuel price levels* .....	78 ■
2.06 Threatened species* .....	98 ■	10.05 Hotel price index* .....	44 ■
2.07 Environmental treaty ratification* .....	63 ■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	71 ■
3.01 Business costs of terrorism .....	71 ■	11.02 2ndary education enrollment* .....	129 ■
3.02 Reliability of police services .....	83 ■	11.03 Quality of the educational system .....	86 ■
3.03 Business costs of crime and violence .....	88 ■	11.04 Local availability of research and training services .....	81 ■
3.04 Road traffic accidents* .....	109 ■	11.05 Extent of staff training .....	92 ■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	77 ■
4.01 Physician density* .....	128 ■	11.07 Ease of hiring foreign labor .....	80 ■
4.02 Access to improved sanitation* .....	100 ■	11.08 HIV prevalence* .....	121 ■
4.03 Access to improved drinking water* .....	106 ■	11.09 Business impact of HIV/AIDS .....	124 ■
4.04 Hospital beds* .....	n/a	11.10 Life expectancy* .....	120 ■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	33 ■	12.01 Tourism openness* .....	19 ■
5.02 T&T government expenditure* .....	26 ■	12.02 Attitude of population toward foreign visitors .....	74 ■
5.03 Effectiveness of marketing and branding .....	36 ■	12.03 Extension of business trips recommended .....	67 ■
5.04 T&T fair attendance* .....	45 ■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	10 ■
6.01 Quality of air transport infrastructure .....	103 ■	13.02 Nationally protected areas* .....	4 ■
6.02 Available seat kilometers* .....	85 ■	13.03 Quality of the natural environment .....	54 ■
6.03 Departures per 1,000 population* .....	112 ■	13.04 Total known species* .....	12 ■
6.04 Airport density* .....	103 ■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	79 ■	14.01 Number of World Heritage cultural sites* .....	54 ■
6.06 International air transport network .....	86 ■	14.02 Sports stadiums* .....	110 ■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	91 ■
7.01 Quality of roads .....	87 ■		
7.02 Quality of railroad infrastructure .....	69 ■		
7.03 Quality of port infrastructure .....	92 ■		
7.04 Quality of domestic transport network .....	95 ■		
7.05 Road density* .....	95 ■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Thailand

## Key indicators

Population (millions), 2006.....	64.8
Surface area (1,000 square kilometers).....	513.1
Gross domestic product (US\$ billions), 2006.....	206.3
Gross domestic product (PPP, US\$) per capita, 2006.....	9,193
Real GDP growth (percent), 2006.....	5.0

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

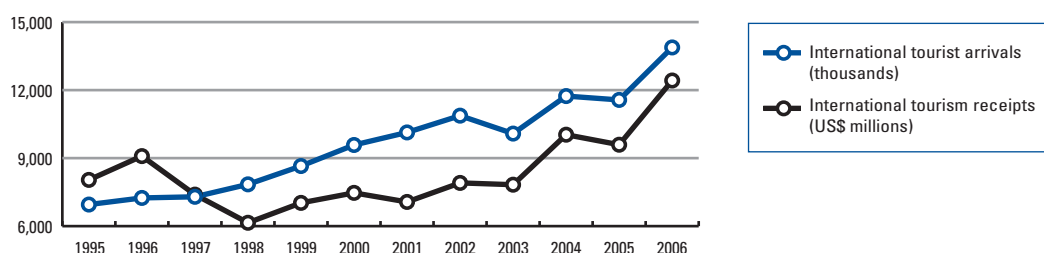
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions).....	15,903	6.7	4.8
Employment (1,000 jobs).....	1,946	5.3	1.0

### T&T economy, 2007 estimates

GDP (US\$ millions).....	35,241	14.9	5.2
Employment (1,000 jobs).....	4,110	11.3	1.5

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006.....	13,882
International tourism receipts (US\$ millions), 2006.....	12,423



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>42</b>	<b>4.4</b>
<b>T&amp;T regulatory framework</b> .....	<b>63</b>	<b>4.5</b>
Policy rules and regulations.....	52	4.5
Environmental sustainability.....	78	4.3
Safety and security.....	115	4.0
Health and hygiene.....	66	4.5
Prioritization of Travel & Tourism.....	25	5.1
<b>T&amp;T business environment and infrastructure</b> .....	<b>42</b>	<b>4.2</b>
Air transport infrastructure.....	27	4.3
Ground transport infrastructure.....	51	4.2
Tourism infrastructure.....	39	4.4
ICT infrastructure.....	67	2.6
Price competitiveness in the T&T industry.....	11	5.4
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>30</b>	<b>4.5</b>
Human resources.....	65	5.0
Education and training.....	62	4.7
Availability of qualified labor.....	74	5.3
Affinity for Travel & Tourism.....	20	5.5
Natural resources.....	20	4.6
Cultural resources.....	51	2.8

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	94 ...■	8.01 Hotel rooms* .....	46 ...■
1.02 Property rights .....	50 ...■	8.02 Presence of major car rental companies* .....	33 ...■
1.03 Business impact of rules on FDI .....	68 ...■	8.03 ATMs accepting Visa cards* .....	34 ...■
1.04 Visa requirements* .....	71 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	59 ...■	9.01 Extent of business Internet use .....	31 ...■
1.06 Transparency of government policymaking .....	39 ...■	9.02 Internet users* .....	73 ...■
1.07 Time required to start a business* .....	78 ...■	9.03 Telephone lines* .....	83 ...■
1.08 Cost to start a business* .....	35 ...■	9.04 Broadband Internet subscribers* .....	91 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	68 ...■
2.01 Stringency of environmental regulation .....	44 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	40 ...■	10.01 Ticket taxes and airport charges* .....	27 ...■
2.03 Sustainability of T&T industry development .....	24 ...■	10.02 Purchasing power parity* .....	31 ...■
2.04 Carbon dioxide emissions* .....	66 ...■	10.03 Extent and effect of taxation .....	21 ...■
2.05 Particulate matter concentration* .....	94 ...■	10.04 Fuel price levels* .....	38 ...■
2.06 Threatened species* .....	85 ...■	10.05 Hotel price index* .....	30 ...■
2.07 Environmental treaty ratification* .....	109 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	86 ...■
3.01 Business costs of terrorism .....	102 ...■	11.02 2ndary education enrollment* .....	90 ...■
3.02 Reliability of police services .....	51 ...■	11.03 Quality of the educational system .....	41 ...■
3.03 Business costs of crime and violence .....	50 ...■	11.04 Local availability of research and training services .....	62 ...■
3.04 Road traffic accidents* .....	117 ...■	11.05 Extent of staff training .....	36 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	47 ...■
4.01 Physician density* .....	104 ...■	11.07 Ease of hiring foreign labor .....	92 ...■
4.02 Access to improved sanitation* .....	37 ...■	11.08 HIV prevalence* .....	103 ...■
4.03 Access to improved drinking water* .....	39 ...■	11.09 Business impact of HIV/AIDS .....	90 ...■
4.04 Hospital beds* .....	73 ...■	11.10 Life expectancy* .....	73 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	12 ...■	12.01 Tourism openness* .....	28 ...■
5.02 T&T government expenditure* .....	76 ...■	12.02 Attitude of population toward foreign visitors .....	10 ...■
5.03 Effectiveness of marketing and branding .....	10 ...■	12.03 Extension of business trips recommended .....	13 ...■
5.04 T&T fair attendance* .....	22 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	21 ...■
6.01 Quality of air transport infrastructure .....	28 ...■	13.02 Nationally protected areas* .....	27 ...■
6.02 Available seat kilometers* .....	15 ...■	13.03 Quality of the natural environment .....	90 ...■
6.03 Departures per 1,000 population* .....	73 ...■	13.04 Total known species* .....	18 ...■
6.04 Airport density* .....	88 ...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	13 ...■	14.01 Number of World Heritage cultural sites* .....	54 ...■
6.06 International air transport network .....	32 ...■	14.02 Sports stadiums* .....	113 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	24 ...■
7.01 Quality of roads .....	26 ...■		
7.02 Quality of railroad infrastructure .....	38 ...■		
7.03 Quality of port infrastructure .....	42 ...■		
7.04 Quality of domestic transport network .....	44 ...■		
7.05 Road density* .....	86 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Trinidad and Tobago

## Key indicators

Population (millions), 2006 .....	1.3
Surface area (1,000 square kilometers) .....	5.1
Gross domestic product (US\$ billions), 2006 .....	18.2
Gross domestic product (PPP, US\$) per capita, 2006 .....	17,494
Real GDP growth (percent), 2006 .....	12.0

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

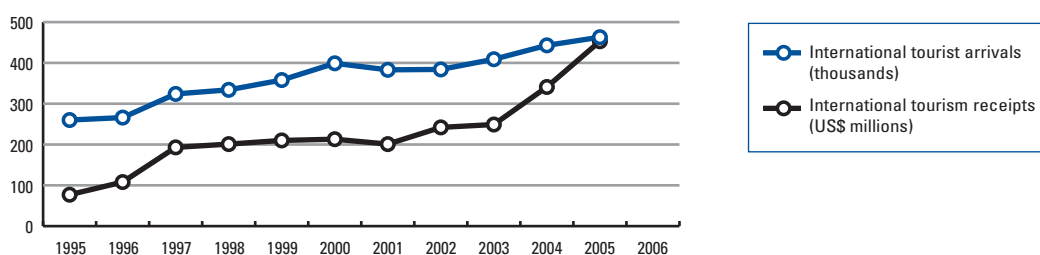
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	4.8	4.4
Employment (1,000 jobs) .....	5.5	2.3

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	3,172	17.2	2.7
Employment (1,000 jobs) .....	127	20.0	0.6

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2005 .....	463
International tourism receipts (US\$ millions), 2005 .....	453



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>74</b>	<b>3.8</b>
<b>T&amp;T regulatory framework</b> .....	<b>87</b>	<b>4.1</b>
Policy rules and regulations .....	46	4.6
Environmental sustainability .....	129	3.3
Safety and security .....	107	4.1
Health and hygiene .....	61	4.7
Prioritization of Travel & Tourism .....	92	3.8
<b>T&amp;T business environment and infrastructure</b> .....	<b>50</b>	<b>3.9</b>
Air transport infrastructure .....	58	3.2
Ground transport infrastructure .....	44	4.5
Tourism infrastructure .....	69	3.3
ICT infrastructure .....	49	3.2
Price competitiveness in the T&T industry .....	24	5.2
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>104</b>	<b>3.4</b>
Human resources .....	75	4.9
Education and training .....	61	4.7
Availability of qualified labor .....	92	5.1
Affinity for Travel & Tourism .....	113	4.3
Natural resources .....	111	2.3
Cultural resources .....	73	2.3

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	39...■	8.01 Hotel rooms* .....	53...■
1.02 Property rights .....	64...■	8.02 Presence of major car rental companies* .....	74...■
1.03 Business impact of rules on FDI .....	28...■	8.03 ATMs accepting Visa cards* .....	59...■
1.04 Visa requirements* .....	60...■		
1.05 Openness of bilateral Air Service Agreements* .....	42...■	<b>9th pillar: ICT infrastructure</b>	
1.06 Transparency of government policymaking .....	63...■	9.01 Extent of business Internet use .....	80...■
1.07 Time required to start a business* .....	94...■	9.02 Internet users* .....	75...■
1.08 Cost to start a business* .....	10...■	9.03 Telephone lines* .....	53...■
		9.04 Broadband Internet subscribers* .....	62...■
		9.05 Mobile telephone subscribers* .....	4...■
<b>2nd pillar: Environmental sustainability</b>		<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.01 Stringency of environmental regulation .....	94...■	10.01 Ticket taxes and airport charges* .....	56...■
2.02 Enforcement of environmental regulation .....	106...■	10.02 Purchasing power parity* .....	97...■
2.03 Sustainability of T&T industry development .....	110...■	10.03 Extent and effect of taxation .....	23...■
2.04 Carbon dioxide emissions* .....	121...■	10.04 Fuel price levels* .....	10...■
2.05 Particulate matter concentration* .....	110...■	10.05 Hotel price index* .....	45...■
2.06 Threatened species* .....	10...■		
2.07 Environmental treaty ratification* .....	63...■	<b>11th pillar: Human resources</b>	
		11.01 Primary education enrollment* .....	77...■
<b>3rd pillar: Safety and security</b>		11.02 2ndary education enrollment* .....	60...■
3.01 Business costs of terrorism .....	113...■	11.03 Quality of the educational system .....	48...■
3.02 Reliability of police services .....	122...■	11.04 Local availability of research and training services .....	86...■
3.03 Business costs of crime and violence .....	124...■	11.05 Extent of staff training .....	52...■
3.04 Road traffic accidents* .....	13...■	11.06 Hiring and firing practices .....	61...■
		11.07 Ease of hiring foreign labor .....	88...■
		11.08 HIV prevalence* .....	115...■
		11.09 Business impact of HIV/AIDS .....	118...■
		11.10 Life expectancy* .....	86...■
<b>4th pillar: Health and hygiene</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
4.01 Physician density* .....	90...■	12.01 Tourism openness* .....	76...■
4.02 Access to improved sanitation* .....	1...■	12.02 Attitude of population toward foreign visitors .....	114...■
4.03 Access to improved drinking water* .....	70...■	12.03 Extension of business trips recommended .....	113...■
4.04 Hospital beds* .....	55...■		
		<b>13th pillar: Natural resources</b>	
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		13.01 Number of World Heritage natural sites* .....	70...■
5.01 Government prioritization of the T&T industry .....	101...■	13.02 Nationally protected areas* .....	112...■
5.02 T&T government expenditure* .....	29...■	13.03 Quality of the natural environment .....	103...■
5.03 Effectiveness of marketing and branding .....	94...■	13.04 Total known species* .....	55...■
5.04 T&T fair attendance* .....	93...■		
		<b>14th pillar: Cultural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		14.01 Number of World Heritage cultural sites* .....	108...■
6.01 Quality of air transport infrastructure .....	63...■	14.02 Sports stadiums* .....	22...■
6.02 Available seat kilometers* .....	89...■	14.03 Number of international fairs and exhibitions* .....	89...■
6.03 Departures per 1,000 population* .....	32...■		
6.04 Airport density* .....	28...■		
6.05 Number of operating airlines* .....	85...■		
6.06 International air transport network .....	67...■		
<b>7th pillar: Ground transport infrastructure</b>			
7.01 Quality of roads .....	74...■		
7.02 Quality of railroad infrastructure .....	n/a .....		
7.03 Quality of port infrastructure .....	93...■		
7.04 Quality of domestic transport network .....	107...■		
7.05 Road density* .....	16...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# Tunisia

## Key indicators

Population (millions), 2006 .....	10.2
Surface area (1,000 square kilometers) .....	163.6
Gross domestic product (US\$ billions), 2006 .....	30.8
Gross domestic product (PPP, US\$) per capita, 2006 .....	8,975
Real GDP growth (percent), 2006 .....	5.4

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

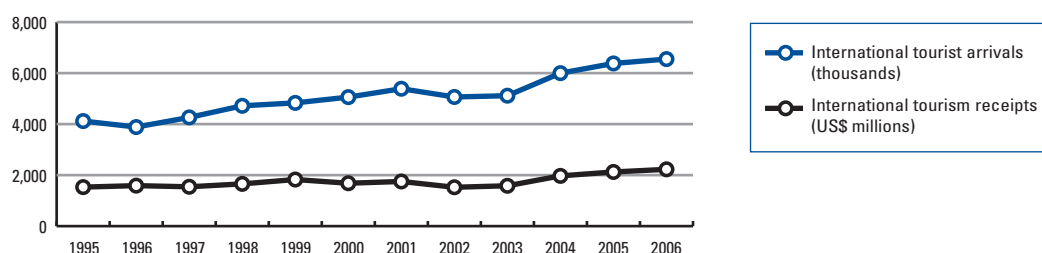
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	3,424	9.3	3.5
Employment (1,000 jobs) .....	282	9.1	1.0

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	6,679	18.1	3.7
Employment (1,000 jobs) .....	524	17.0	1.2

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	6,550
International tourism receipts (US\$ millions), 2006 .....	2,227



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>39</b>	<b>4.4</b>
<b>T&amp;T regulatory framework</b> .....	<b>25</b>	<b>5.3</b>
Policy rules and regulations .....	25	5.1
Environmental sustainability .....	13	5.4
Safety and security .....	25	5.8
Health and hygiene .....	75	4.3
Prioritization of Travel & Tourism .....	8	5.8
<b>T&amp;T business environment and infrastructure</b> .....	<b>49</b>	<b>3.9</b>
Air transport infrastructure .....	68	2.9
Ground transport infrastructure .....	47	4.4
Tourism infrastructure .....	48	4.0
ICT infrastructure .....	69	2.6
Price competitiveness in the T&T industry .....	13	5.4
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>57</b>	<b>4.1</b>
Human resources .....	28	5.4
Education and training .....	26	5.4
Availability of qualified labor .....	35	5.5
Affinity for Travel & Tourism .....	30	5.3
Natural resources .....	94	2.7
Cultural resources .....	49	2.9

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	58 <span style="color: #808080;">■</span>	8.01 Hotel rooms* .....	20 <span style="color: #0056b3;">■</span>
1.02 Property rights .....	34 <span style="color: #0056b3;">■</span>	8.02 Presence of major car rental companies* .....	56 <span style="color: #808080;">■</span>
1.03 Business impact of rules on FDI .....	37 <span style="color: #0056b3;">■</span>	8.03 ATMs accepting Visa cards* .....	78 <span style="color: #808080;">■</span>
1.04 Visa requirements* .....	12 <span style="color: #0056b3;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	58 <span style="color: #808080;">■</span>	9.01 Extent of business Internet use .....	48 <span style="color: #808080;">■</span>
1.06 Transparency of government policymaking .....	13 <span style="color: #0056b3;">■</span>	9.02 Internet users* .....	74 <span style="color: #808080;">■</span>
1.07 Time required to start a business* .....	19 <span style="color: #0056b3;">■</span>	9.03 Telephone lines* .....	80 <span style="color: #808080;">■</span>
1.08 Cost to start a business* .....	45 <span style="color: #808080;">■</span>	9.04 Broadband Internet subscribers* .....	90 <span style="color: #808080;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	55 <span style="color: #808080;">■</span>
2.01 Stringency of environmental regulation .....	26 <span style="color: #0056b3;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	19 <span style="color: #0056b3;">■</span>	10.01 Ticket taxes and airport charges* .....	108 <span style="color: #808080;">■</span>
2.03 Sustainability of T&T industry development .....	4 <span style="color: #0056b3;">■</span>	10.02 Purchasing power parity* .....	28 <span style="color: #0056b3;">■</span>
2.04 Carbon dioxide emissions* .....	51 <span style="color: #808080;">■</span>	10.03 Extent and effect of taxation .....	20 <span style="color: #0056b3;">■</span>
2.05 Particulate matter concentration* .....	48 <span style="color: #808080;">■</span>	10.04 Fuel price levels* .....	28 <span style="color: #0056b3;">■</span>
2.06 Threatened species* .....	67 <span style="color: #808080;">■</span>	10.05 Hotel price index* .....	10 <span style="color: #0056b3;">■</span>
2.07 Environmental treaty ratification* .....	45 <span style="color: #808080;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	31 <span style="color: #0056b3;">■</span>
3.01 Business costs of terrorism .....	39 <span style="color: #808080;">■</span>	11.02 2ndary education enrollment* .....	79 <span style="color: #808080;">■</span>
3.02 Reliability of police services .....	23 <span style="color: #0056b3;">■</span>	11.03 Quality of the educational system .....	12 <span style="color: #0056b3;">■</span>
3.03 Business costs of crime and violence .....	25 <span style="color: #0056b3;">■</span>	11.04 Local availability of research and training services .....	26 <span style="color: #0056b3;">■</span>
3.04 Road traffic accidents* .....	82 <span style="color: #808080;">■</span>	11.05 Extent of staff training .....	32 <span style="color: #0056b3;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	37 <span style="color: #0056b3;">■</span>
4.01 Physician density* .....	72 <span style="color: #808080;">■</span>	11.07 Ease of hiring foreign labor .....	74 <span style="color: #808080;">■</span>
4.02 Access to improved sanitation* .....	66 <span style="color: #808080;">■</span>	11.08 HIV prevalence* .....	24 <span style="color: #0056b3;">■</span>
4.03 Access to improved drinking water* .....	60 <span style="color: #808080;">■</span>	11.09 Business impact of HIV/AIDS .....	7 <span style="color: #0056b3;">■</span>
4.04 Hospital beds* .....	83 <span style="color: #808080;">■</span>	11.10 Life expectancy* .....	58 <span style="color: #808080;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	7 <span style="color: #0056b3;">■</span>	12.01 Tourism openness* .....	33 <span style="color: #0056b3;">■</span>
5.02 T&T government expenditure* .....	17 <span style="color: #0056b3;">■</span>	12.02 Attitude of population toward foreign visitors .....	64 <span style="color: #808080;">■</span>
5.03 Effectiveness of marketing and branding .....	11 <span style="color: #0056b3;">■</span>	12.03 Extension of business trips recommended .....	30 <span style="color: #0056b3;">■</span>
5.04 T&T fair attendance* .....	22 <span style="color: #0056b3;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	39 <span style="color: #808080;">■</span>
6.01 Quality of air transport infrastructure .....	43 <span style="color: #808080;">■</span>	13.02 Nationally protected areas* .....	117 <span style="color: #808080;">■</span>
6.02 Available seat kilometers* .....	75 <span style="color: #808080;">■</span>	13.03 Quality of the natural environment .....	30 <span style="color: #0056b3;">■</span>
6.03 Departures per 1,000 population* .....	67 <span style="color: #808080;">■</span>	13.04 Total known species* .....	80 <span style="color: #808080;">■</span>
6.04 Airport density* .....	74 <span style="color: #808080;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	62 <span style="color: #808080;">■</span>	14.01 Number of World Heritage cultural sites* .....	23 <span style="color: #0056b3;">■</span>
6.06 International air transport network .....	48 <span style="color: #808080;">■</span>	14.02 Sports stadiums* .....	68 <span style="color: #808080;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	70 <span style="color: #808080;">■</span>
7.01 Quality of roads .....	34 <span style="color: #0056b3;">■</span>		
7.02 Quality of railroad infrastructure .....	21 <span style="color: #0056b3;">■</span>		
7.03 Quality of port infrastructure .....	36 <span style="color: #0056b3;">■</span>		
7.04 Quality of domestic transport network .....	35 <span style="color: #0056b3;">■</span>		
7.05 Road density* .....	82 <span style="color: #808080;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Turkey

## Key indicators

Population (millions), 2006 .....	74.2
Surface area (1,000 square kilometers) .....	783.6
Gross domestic product (US\$ billions), 2006 .....	401.8
Gross domestic product (PPP, US\$) per capita, 2006 .....	9,240
Real GDP growth (percent), 2006 .....	6.1

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

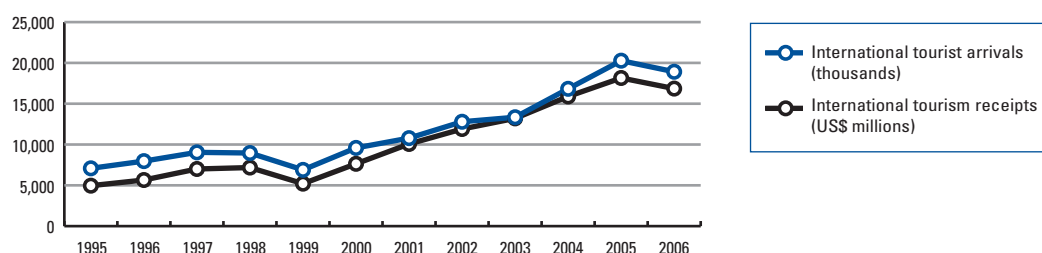
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	4.9	3.3
Employment (1,000 jobs) .....	2.8	-0.9

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	11.9	3.9
Employment (1,000 jobs) .....	6.9	-0.3

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	18,916
International tourism receipts (US\$ millions), 2006 .....	16,853



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>54</b>	<b>4.2</b>
<b>T&amp;T regulatory framework</b> .....	<b>56</b>	<b>4.6</b>
Policy rules and regulations .....	43	4.7
Environmental sustainability .....	90	4.1
Safety and security .....	79	4.8
Health and hygiene .....	62	4.6
Prioritization of Travel & Tourism .....	45	4.6
<b>T&amp;T business environment and infrastructure</b> .....	<b>57</b>	<b>3.7</b>
Air transport infrastructure .....	44	3.7
Ground transport infrastructure .....	63	3.8
Tourism infrastructure .....	50	4.0
ICT infrastructure .....	55	3.0
Price competitiveness in the T&T industry .....	103	4.2
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>44</b>	<b>4.3</b>
Human resources .....	73	4.9
Education and training .....	65	4.7
Availability of qualified labor .....	85	5.2
Affinity for Travel & Tourism .....	38	5.1
Natural resources .....	79	3.0
Cultural resources .....	28	4.1

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	52 ...■	8.01 Hotel rooms* .....	63 ...■
1.02 Property rights .....	58 ...■	8.02 Presence of major car rental companies* .....	1 ...■
1.03 Business impact of rules on FDI .....	55 ...■	8.03 ATMs accepting Visa cards* .....	52 ...■
1.04 Visa requirements* .....	73 ...■		
1.05 Openness of bilateral Air Service Agreements* .....	42 ...■	<b>9th pillar: ICT infrastructure</b>	
1.06 Transparency of government policymaking .....	59 ...■	9.01 Extent of business Internet use .....	56 ...■
1.07 Time required to start a business* .....	6 ...■	9.02 Internet users* .....	66 ...■
1.08 Cost to start a business* .....	73 ...■	9.03 Telephone lines* .....	51 ...■
		9.04 Broadband Internet subscribers* .....	50 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	57 ...■
2.01 Stringency of environmental regulation .....	57 ...■		
2.02 Enforcement of environmental regulation .....	67 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.03 Sustainability of T&T industry development .....	56 ...■	10.01 Ticket taxes and airport charges* .....	21 ...■
2.04 Carbon dioxide emissions* .....	58 ...■	10.02 Purchasing power parity* .....	74 ...■
2.05 Particulate matter concentration* .....	72 ...■	10.03 Extent and effect of taxation .....	103 ...■
2.06 Threatened species* .....	104 ...■	10.04 Fuel price levels* .....	125 ...■
2.07 Environmental treaty ratification* .....	121 ...■	10.05 Hotel price index* .....	48 ...■
<b>3rd pillar: Safety and security</b>		<b>11th pillar: Human resources</b>	
3.01 Business costs of terrorism .....	100 ...■	11.01 Primary education enrollment* .....	79 ...■
3.02 Reliability of police services .....	52 ...■	11.02 2ndary education enrollment* .....	81 ...■
3.03 Business costs of crime and violence .....	58 ...■	11.03 Quality of the educational system .....	70 ...■
3.04 Road traffic accidents* .....	97 ...■	11.04 Local availability of research and training services .....	43 ...■
		11.05 Extent of staff training .....	47 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	87 ...■
4.01 Physician density* .....	77 ...■	11.07 Ease of hiring foreign labor .....	77 ...■
4.02 Access to improved sanitation* .....	60 ...■	11.08 HIV prevalence* .....	1 ...■
4.03 Access to improved drinking water* .....	51 ...■	11.09 Business impact of HIV/AIDS .....	16 ...■
4.04 Hospital beds* .....	66 ...■	11.10 Life expectancy* .....	73 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	58 ...■	12.01 Tourism openness* .....	61 ...■
5.02 T&T government expenditure* .....	118 ...■	12.02 Attitude of population toward foreign visitors .....	39 ...■
5.03 Effectiveness of marketing and branding .....	63 ...■	12.03 Extension of business trips recommended .....	3 ...■
5.04 T&T fair attendance* .....	5 ...■		
		<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	21 ...■
6.01 Quality of air transport infrastructure .....	49 ...■	13.02 Nationally protected areas* .....	96 ...■
6.02 Available seat kilometers* .....	25 ...■	13.03 Quality of the natural environment .....	106 ...■
6.03 Departures per 1,000 population* .....	71 ...■	13.04 Total known species* .....	60 ...■
6.04 Airport density* .....	85 ...■		
6.05 Number of operating airlines* .....	14 ...■	<b>14th pillar: Cultural resources</b>	
6.06 International air transport network .....	43 ...■	14.01 Number of World Heritage cultural sites* .....	17 ...■
		14.02 Sports stadiums* .....	80 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	31 ...■
7.01 Quality of roads .....	50 ...■		
7.02 Quality of railroad infrastructure .....	66 ...■		
7.03 Quality of port infrastructure .....	83 ...■		
7.04 Quality of domestic transport network .....	46 ...■		
7.05 Road density* .....	41 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Uganda

## Key indicators

Population (millions), 2006 .....	29.9
Surface area (1,000 square kilometers) .....	241.0
Gross domestic product (US\$ billions), 2006 .....	9.4
Gross domestic product (PPP, US\$) per capita, 2006 .....	1,643
Real GDP growth (percent), 2006 .....	5.4

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

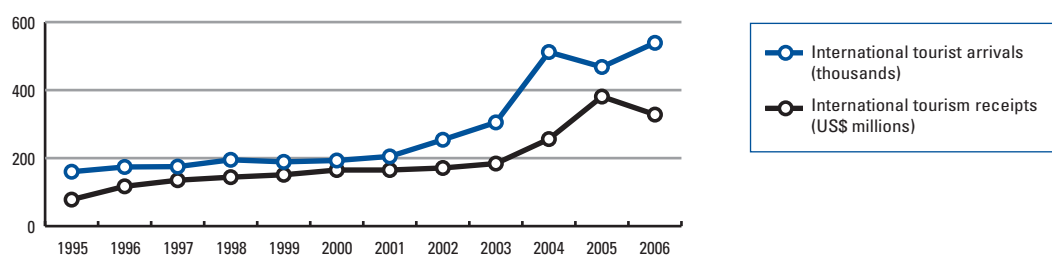
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	531	5.0	4.4
Employment (1,000 jobs) .....	220	4.0	2.4

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	1,046	9.9	4.6
Employment (1,000 jobs) .....	437	7.9	2.6

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	539
International tourism receipts (US\$ millions), 2006 .....	328



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>110</b>	<b>3.4</b>
<b>T&amp;T regulatory framework</b> .....	<b>113</b>	<b>3.7</b>
Policy rules and regulations .....	103	3.7
Environmental sustainability .....	28	5.0
Safety and security .....	114	4.0
Health and hygiene .....	120	1.8
Prioritization of Travel & Tourism .....	87	3.8
<b>T&amp;T business environment and infrastructure</b> .....	<b>112</b>	<b>2.7</b>
Air transport infrastructure .....	120	2.0
Ground transport infrastructure .....	87	3.1
Tourism infrastructure .....	108	1.9
ICT infrastructure .....	116	1.6
Price competitiveness in the T&T industry .....	59	4.8
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>83</b>	<b>3.7</b>
Human resources .....	114	4.0
Education and training .....	122	3.1
Availability of qualified labor .....	111	4.8
Affinity for Travel & Tourism .....	70	4.7
Natural resources .....	11	5.0
Cultural resources .....	121	1.2

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	16... <span style="color: #0056b3;">■</span>	8.01 Hotel rooms* .....	n/a... <span style="color: #808080;">■</span>
1.02 Property rights .....	112... <span style="color: #808080;">■</span>	8.02 Presence of major car rental companies* .....	103... <span style="color: #808080;">■</span>
1.03 Business impact of rules on FDI .....	23... <span style="color: #0056b3;">■</span>	8.03 ATMs accepting Visa cards* .....	108... <span style="color: #808080;">■</span>
1.04 Visa requirements* .....	86... <span style="color: #808080;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	99... <span style="color: #808080;">■</span>	9.01 Extent of business Internet use .....	85... <span style="color: #808080;">■</span>
1.06 Transparency of government policymaking .....	66... <span style="color: #808080;">■</span>	9.02 Internet users* .....	116... <span style="color: #808080;">■</span>
1.07 Time required to start a business* .....	65... <span style="color: #808080;">■</span>	9.03 Telephone lines* .....	126... <span style="color: #808080;">■</span>
1.08 Cost to start a business* .....	113... <span style="color: #808080;">■</span>	9.04 Broadband Internet subscribers* .....	113... <span style="color: #808080;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	122... <span style="color: #808080;">■</span>
2.01 Stringency of environmental regulation .....	82... <span style="color: #808080;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	75... <span style="color: #808080;">■</span>	10.01 Ticket taxes and airport charges* .....	80... <span style="color: #808080;">■</span>
2.03 Sustainability of T&T industry development .....	42... <span style="color: #0056b3;">■</span>	10.02 Purchasing power parity* .....	7... <span style="color: #0056b3;">■</span>
2.04 Carbon dioxide emissions* .....	5... <span style="color: #0056b3;">■</span>	10.03 Extent and effect of taxation .....	111... <span style="color: #808080;">■</span>
2.05 Particulate matter concentration* .....	14... <span style="color: #0056b3;">■</span>	10.04 Fuel price levels* .....	80... <span style="color: #808080;">■</span>
2.06 Threatened species* .....	40... <span style="color: #0056b3;">■</span>	10.05 Hotel price index* .....	32... <span style="color: #0056b3;">■</span>
2.07 Environmental treaty ratification* .....	88... <span style="color: #808080;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	n/a... <span style="color: #808080;">■</span>
3.01 Business costs of terrorism .....	125... <span style="color: #808080;">■</span>	11.02 2ndary education enrollment* .....	123... <span style="color: #808080;">■</span>
3.02 Reliability of police services .....	90... <span style="color: #808080;">■</span>	11.03 Quality of the educational system .....	74... <span style="color: #808080;">■</span>
3.03 Business costs of crime and violence .....	100... <span style="color: #808080;">■</span>	11.04 Local availability of research and training services .....	65... <span style="color: #808080;">■</span>
3.04 Road traffic accidents* .....	100... <span style="color: #808080;">■</span>	11.05 Extent of staff training .....	82... <span style="color: #808080;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	11... <span style="color: #0056b3;">■</span>
4.01 Physician density* .....	118... <span style="color: #808080;">■</span>	11.07 Ease of hiring foreign labor .....	18... <span style="color: #0056b3;">■</span>
4.02 Access to improved sanitation* .....	106... <span style="color: #808080;">■</span>	11.08 HIV prevalence* .....	122... <span style="color: #808080;">■</span>
4.03 Access to improved drinking water* .....	110... <span style="color: #808080;">■</span>	11.09 Business impact of HIV/AIDS .....	121... <span style="color: #808080;">■</span>
4.04 Hospital beds* .....	105... <span style="color: #808080;">■</span>	11.10 Life expectancy* .....	114... <span style="color: #808080;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	61... <span style="color: #808080;">■</span>	12.01 Tourism openness* .....	63... <span style="color: #808080;">■</span>
5.02 T&T government expenditure* .....	89... <span style="color: #808080;">■</span>	12.02 Attitude of population toward foreign visitors .....	14... <span style="color: #0056b3;">■</span>
5.03 Effectiveness of marketing and branding .....	45... <span style="color: #0056b3;">■</span>	12.03 Extension of business trips recommended .....	101... <span style="color: #808080;">■</span>
5.04 T&T fair attendance* .....	93... <span style="color: #808080;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	21... <span style="color: #0056b3;">■</span>
6.01 Quality of air transport infrastructure .....	112... <span style="color: #808080;">■</span>	13.02 Nationally protected areas* .....	15... <span style="color: #0056b3;">■</span>
6.02 Available seat kilometers* .....	96... <span style="color: #808080;">■</span>	13.03 Quality of the natural environment .....	105... <span style="color: #808080;">■</span>
6.03 Departures per 1,000 population* .....	120... <span style="color: #808080;">■</span>	13.04 Total known species* .....	16... <span style="color: #0056b3;">■</span>
6.04 Airport density* .....	122... <span style="color: #808080;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	91... <span style="color: #808080;">■</span>	14.01 Number of World Heritage cultural sites* .....	83... <span style="color: #808080;">■</span>
6.06 International air transport network .....	109... <span style="color: #808080;">■</span>	14.02 Sports stadiums* .....	129... <span style="color: #808080;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	79... <span style="color: #808080;">■</span>
7.01 Quality of roads .....	101... <span style="color: #808080;">■</span>		
7.02 Quality of railroad infrastructure .....	99... <span style="color: #808080;">■</span>		
7.03 Quality of port infrastructure .....	65... <span style="color: #808080;">■</span>		
7.04 Quality of domestic transport network .....	84... <span style="color: #808080;">■</span>		
7.05 Road density* .....	50... <span style="color: #0056b3;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Ukraine

## Key indicators

Population (millions), 2006 .....	46.0
Surface area (1,000 square kilometers) .....	603.7
Gross domestic product (US\$ billions), 2006 .....	106.5
Gross domestic product (PPP, US\$) per capita, 2006 .....	7,832
Real GDP growth (percent), 2006 .....	7.1

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

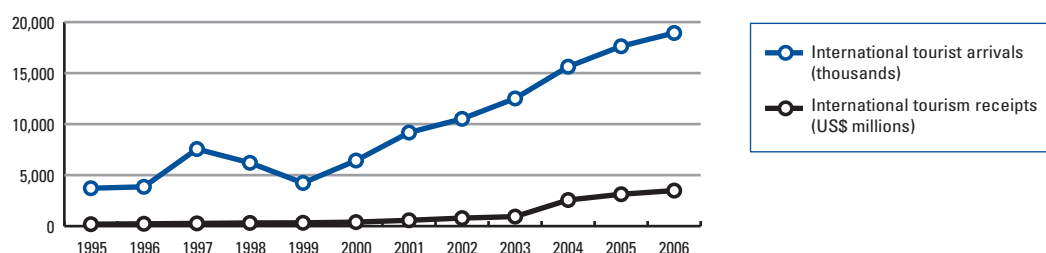
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	2,198	1.9
Employment (1,000 jobs) .....	313	1.5

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	11,348	9.7
Employment (1,000 jobs) .....	1,651	7.9

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	18,936
International tourism receipts (US\$ millions), 2006 .....	3,485



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>77</b>	<b>3.8</b>
<b>T&amp;T regulatory framework</b> .....	<b>59</b>	<b>4.5</b>
Policy rules and regulations .....	100	3.7
Environmental sustainability .....	83	4.2
Safety and security .....	93	4.5
Health and hygiene .....	17	6.4
Prioritization of Travel & Tourism .....	96	3.8
<b>T&amp;T business environment and infrastructure</b> .....	<b>78</b>	<b>3.2</b>
Air transport infrastructure .....	98	2.4
Ground transport infrastructure .....	84	3.2
Tourism infrastructure .....	62	3.5
ICT infrastructure .....	52	3.1
Price competitiveness in the T&T industry .....	115	3.9
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>100</b>	<b>3.5</b>
Human resources .....	80	4.9
Education and training .....	77	4.5
Availability of qualified labor .....	68	5.3
Affinity for Travel & Tourism .....	62	4.8
Natural resources .....	104	2.4
Cultural resources .....	84	1.9

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....123... <span style="color: #808080;">■</span>	8.01	Hotel rooms* .....104... <span style="color: #808080;">■</span>
1.02	Property rights .....118... <span style="color: #808080;">■</span>	8.02	Presence of major car rental companies* .....56... <span style="color: #808080;">■</span>
1.03	Business impact of rules on FDI .....123... <span style="color: #808080;">■</span>	8.03	ATMs accepting Visa cards* .....33... <span style="color: #0056b3;">■</span>
1.04	Visa requirements* .....81... <span style="color: #808080;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....102... <span style="color: #808080;">■</span>	9.01	Extent of business Internet use .....77... <span style="color: #808080;">■</span>
1.06	Transparency of government policymaking .....119... <span style="color: #808080;">■</span>	9.02	Internet users* .....78... <span style="color: #808080;">■</span>
1.07	Time required to start a business* .....62... <span style="color: #808080;">■</span>	9.03	Telephone lines* .....48... <span style="color: #0056b3;">■</span>
1.08	Cost to start a business* .....44... <span style="color: #0056b3;">■</span>	9.04	Broadband Internet subscribers* .....63... <span style="color: #808080;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....22... <span style="color: #0056b3;">■</span>
2.01	Stringency of environmental regulation .....114... <span style="color: #808080;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....110... <span style="color: #808080;">■</span>	10.01	Ticket taxes and airport charges* .....87... <span style="color: #808080;">■</span>
2.03	Sustainability of T&T industry development .....120... <span style="color: #808080;">■</span>	10.02	Purchasing power parity* .....22... <span style="color: #0056b3;">■</span>
2.04	Carbon dioxide emissions* .....87... <span style="color: #808080;">■</span>	10.03	Extent and effect of taxation .....122... <span style="color: #808080;">■</span>
2.05	Particulate matter concentration* .....36... <span style="color: #0056b3;">■</span>	10.04	Fuel price levels* .....68... <span style="color: #808080;">■</span>
2.06	Threatened species* .....87... <span style="color: #808080;">■</span>	10.05	Hotel price index* .....112... <span style="color: #808080;">■</span>
2.07	Environmental treaty ratification* .....45... <span style="color: #0056b3;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....105... <span style="color: #808080;">■</span>
3.01	Business costs of terrorism .....66... <span style="color: #808080;">■</span>	11.02	2ndary education enrollment* .....54... <span style="color: #808080;">■</span>
3.02	Reliability of police services .....104... <span style="color: #808080;">■</span>	11.03	Quality of the educational system .....47... <span style="color: #0056b3;">■</span>
3.03	Business costs of crime and violence .....72... <span style="color: #808080;">■</span>	11.04	Local availability of research and training services .....85... <span style="color: #808080;">■</span>
3.04	Road traffic accidents* .....98... <span style="color: #808080;">■</span>	11.05	Extent of staff training .....98... <span style="color: #808080;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....16... <span style="color: #0056b3;">■</span>
4.01	Physician density* .....30... <span style="color: #0056b3;">■</span>	11.07	Ease of hiring foreign labor .....107... <span style="color: #808080;">■</span>
4.02	Access to improved sanitation* .....44... <span style="color: #0056b3;">■</span>	11.08	HIV prevalence* .....103... <span style="color: #808080;">■</span>
4.03	Access to improved drinking water* .....51... <span style="color: #808080;">■</span>	11.09	Business impact of HIV/AIDS .....88... <span style="color: #808080;">■</span>
4.04	Hospital beds* .....3... <span style="color: #0056b3;">■</span>	11.10	Life expectancy* .....91... <span style="color: #808080;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....120... <span style="color: #808080;">■</span>	12.01	Tourism openness* .....45... <span style="color: #0056b3;">■</span>
5.02	T&T government expenditure* .....34... <span style="color: #0056b3;">■</span>	12.02	Attitude of population toward foreign visitors .....117... <span style="color: #808080;">■</span>
5.03	Effectiveness of marketing and branding .....112... <span style="color: #808080;">■</span>	12.03	Extension of business trips recommended .....58... <span style="color: #808080;">■</span>
5.04	T&T fair attendance* .....56... <span style="color: #808080;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....39... <span style="color: #0056b3;">■</span>
6.01	Quality of air transport infrastructure .....116... <span style="color: #808080;">■</span>	13.02	Nationally protected areas* .....100... <span style="color: #808080;">■</span>
6.02	Available seat kilometers* .....60... <span style="color: #808080;">■</span>	13.03	Quality of the natural environment .....121... <span style="color: #808080;">■</span>
6.03	Departures per 1,000 population* .....93... <span style="color: #808080;">■</span>	13.04	Total known species* .....77... <span style="color: #808080;">■</span>
6.04	Airport density* .....101... <span style="color: #808080;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....29... <span style="color: #0056b3;">■</span>	14.01	Number of World Heritage cultural sites* .....54... <span style="color: #808080;">■</span>
6.06	International air transport network .....120... <span style="color: #808080;">■</span>	14.02	Sports stadiums* .....85... <span style="color: #808080;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....70... <span style="color: #808080;">■</span>
7.01	Quality of roads .....116... <span style="color: #808080;">■</span>		
7.02	Quality of railroad infrastructure .....31... <span style="color: #0056b3;">■</span>		
7.03	Quality of port infrastructure .....86... <span style="color: #808080;">■</span>		
7.04	Quality of domestic transport network .....103... <span style="color: #808080;">■</span>		
7.05	Road density* .....59... <span style="color: #808080;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# United Arab Emirates

## Key indicators

Population (millions), 2006 .....	4.7
Surface area (1,000 square kilometers) .....	83.6
Gross domestic product (US\$ billions), 2006 .....	163.3
Gross domestic product (PPP, US\$) per capita, 2006 .....	34,109
Real GDP growth (percent), 2006 .....	9.4

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

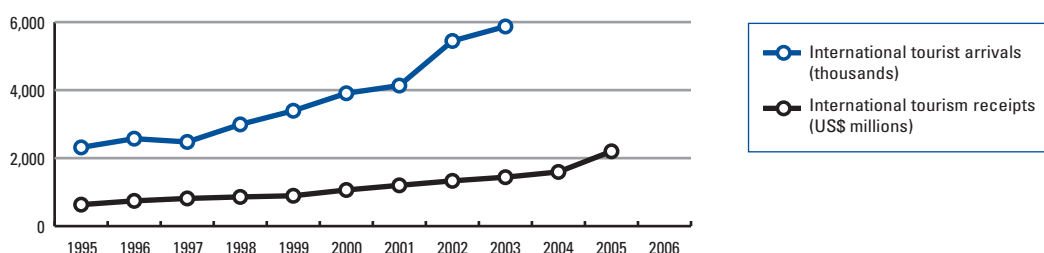
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	1,553	0.9	6.7
Employment (1,000 jobs) .....	40	1.3	4.3

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	20,226	11.9	3.5
Employment (1,000 jobs) .....	348	11.3	1.6

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2003.....5,871  
International tourism receipts (US\$ millions), 2005 .....2,200



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>40</b>	<b>4.4</b>
<b>T&amp;T regulatory framework</b> .....	<b>44</b>	<b>4.9</b>
Policy rules and regulations .....	81	4.0
Environmental sustainability .....	122	3.7
Safety and security .....	14	6.1
Health and hygiene .....	51	5.1
Prioritization of Travel & Tourism .....	18	5.4
<b>T&amp;T business environment and infrastructure</b> .....	<b>27</b>	<b>4.7</b>
Air transport infrastructure .....	5	5.5
Ground transport infrastructure .....	49	4.3
Tourism infrastructure .....	32	4.8
ICT infrastructure .....	36	3.8
Price competitiveness in the T&T industry .....	28	5.1
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>89</b>	<b>3.6</b>
Human resources .....	42	5.1
Education and training .....	87	4.2
Availability of qualified labor .....	5	6.0
Affinity for Travel & Tourism .....	36	5.2
Natural resources .....	108	2.3
Cultural resources .....	90	1.8

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	86 ...■	8.01 Hotel rooms* .....	29 ...■
1.02 Property rights .....	45 ...■	8.02 Presence of major car rental companies* .....	33 ...■
1.03 Business impact of rules on FDI .....	47 ...■	8.03 ATMs accepting Visa cards* .....	37 ...■
1.04 Visa requirements* .....	83 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	44 ...■	9.01 Extent of business Internet use .....	43 ...■
1.06 Transparency of government policymaking .....	20 ...■	9.02 Internet users* .....	33 ...■
1.07 Time required to start a business* .....	109 ...■	9.03 Telephone lines* .....	43 ...■
1.08 Cost to start a business* .....	92 ...■	9.04 Broadband Internet subscribers* .....	43 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	10 ...■
2.01 Stringency of environmental regulation .....	35 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	34 ...■	10.01 Ticket taxes and airport charges* .....	6 ...■
2.03 Sustainability of T&T industry development .....	2 ...■	10.02 Purchasing power parity* .....	117 ...■
2.04 Carbon dioxide emissions* .....	125 ...■	10.03 Extent and effect of taxation .....	2 ...■
2.05 Particulate matter concentration* .....	112 ...■	10.04 Fuel price levels* .....	22 ...■
2.06 Threatened species* .....	89 ...■	10.05 Hotel price index* .....	97 ...■
2.07 Environmental treaty ratification* .....	88 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	117 ...■
3.01 Business costs of terrorism .....	55 ...■	11.02 2ndary education enrollment* .....	97 ...■
3.02 Reliability of police services .....	10 ...■	11.03 Quality of the educational system .....	39 ...■
3.03 Business costs of crime and violence .....	14 ...■	11.04 Local availability of research and training services .....	50 ...■
3.04 Road traffic accidents* .....	59 ...■	11.05 Extent of staff training .....	39 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	19 ...■
4.01 Physician density* .....	56 ...■	11.07 Ease of hiring foreign labor .....	9 ...■
4.02 Access to improved sanitation* .....	40 ...■	11.08 HIV prevalence* .....	49 ...■
4.03 Access to improved drinking water* .....	1 ...■	11.09 Business impact of HIV/AIDS .....	42 ...■
4.04 Hospital beds* .....	73 ...■	11.10 Life expectancy* .....	16 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	4 ...■	12.01 Tourism openness* .....	59 ...■
5.02 T&T government expenditure* .....	99 ...■	12.02 Attitude of population toward foreign visitors .....	6 ...■
5.03 Effectiveness of marketing and branding .....	1 ...■	12.03 Extension of business trips recommended .....	9 ...■
5.04 T&T fair attendance* .....	5 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	70 ...■
6.01 Quality of air transport infrastructure .....	4 ...■	13.02 Nationally protected areas* .....	95 ...■
6.02 Available seat kilometers* .....	17 ...■	13.03 Quality of the natural environment .....	29 ...■
6.03 Departures per 1,000 population* .....	14 ...■	13.04 Total known species* .....	126 ...■
6.04 Airport density* .....	31 ...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	9 ...■	14.01 Number of World Heritage cultural sites* .....	108 ...■
6.06 International air transport network .....	5 ...■	14.02 Sports stadiums* .....	50 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	59 ...■
7.01 Quality of roads .....	9 ...■		
7.02 Quality of railroad infrastructure .....	77 ...■		
7.03 Quality of port infrastructure .....	8 ...■		
7.04 Quality of domestic transport network .....	17 ...■		
7.05 Road density* .....	116 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# United Kingdom

## Key indicators

Population (millions), 2006 .....	59.8
Surface area (1,000 square kilometers) .....	243.6
Gross domestic product (US\$ billions), 2006 .....	2,399.0
Gross domestic product (PPP, US\$) per capita, 2006 .....	35,486
Real GDP growth (percent), 2006 .....	2.8

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

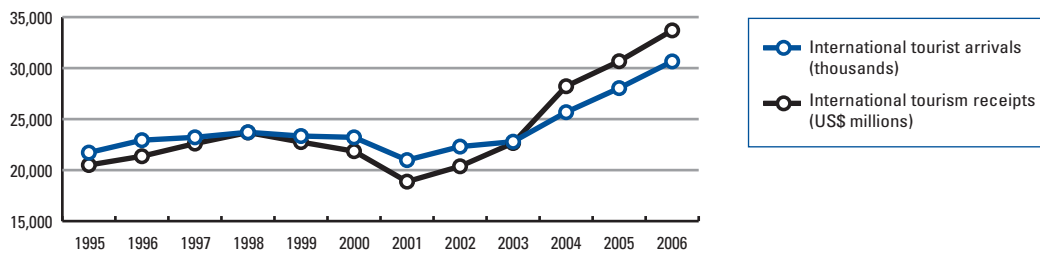
		Percent of total	2008-2017 annual growth (% forecast)
GDP (US\$ millions) .....	91,520	3.4	2.7
Employment (1,000 jobs) .....	988	3.2	0.5

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	243,601	9.1	3.1
Employment (1,000 jobs) .....	2,669	8.5	1.0

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	30,654
International tourism receipts (US\$ millions), 2006 .....	33,695



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1-7 scale)
<b>2008 Index</b> .....	<b>6</b>	<b>5.3</b>
<b>T&amp;T regulatory framework</b> .....	<b>26</b>	<b>5.3</b>
Policy rules and regulations .....	5	5.5
Environmental sustainability .....	10	5.6
Safety and security .....	65	5.0
Health and hygiene .....	41	5.6
Prioritization of Travel & Tourism .....	43	4.7
<b>T&amp;T business environment and infrastructure</b> .....	<b>6</b>	<b>5.3</b>
Air transport infrastructure .....	4	5.7
Ground transport infrastructure .....	11	5.8
Tourism infrastructure .....	16	6.2
ICT infrastructure .....	9	5.5
Price competitiveness in the T&T industry .....	127	3.4
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>5</b>	<b>5.3</b>
Human resources .....	7	5.9
Education and training .....	13	5.9
Availability of qualified labor .....	12	5.8
Affinity for Travel & Tourism .....	90	4.5
Natural resources .....	27	4.3
Cultural resources .....	4	6.3

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	6 ...■	8.01 Hotel rooms* .....	27 ...■
1.02 Property rights .....	18 ...■	8.02 Presence of major car rental companies* .....	1 ...■
1.03 Business impact of rules on FDI .....	6 ...■	8.03 ATMs accepting Visa cards* .....	13 ...■
1.04 Visa requirements* .....	6 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	38 ...■	9.01 Extent of business Internet use .....	4 ...■
1.06 Transparency of government policymaking .....	24 ...■	9.02 Internet users* .....	18 ...■
1.07 Time required to start a business* .....	24 ...■	9.03 Telephone lines* .....	9 ...■
1.08 Cost to start a business* .....	6 ...■	9.04 Broadband Internet subscribers* .....	11 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	11 ...■
2.01 Stringency of environmental regulation .....	14 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	14 ...■	10.01 Ticket taxes and airport charges* .....	104 ...■
2.03 Sustainability of T&T industry development .....	49 ...■	10.02 Purchasing power parity* .....	115 ...■
2.04 Carbon dioxide emissions* .....	100 ...■	10.03 Extent and effect of taxation .....	45 ...■
2.05 Particulate matter concentration* .....	6 ...■	10.04 Fuel price levels* .....	127 ...■
2.06 Threatened species* .....	34 ...■	10.05 Hotel price index* .....	99 ...■
2.07 Environmental treaty ratification* .....	5 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	11 ...■
3.01 Business costs of terrorism .....	120 ...■	11.02 2ndary education enrollment* .....	16 ...■
3.02 Reliability of police services .....	29 ...■	11.03 Quality of the educational system .....	30 ...■
3.03 Business costs of crime and violence .....	64 ...■	11.04 Local availability of research and training services .....	5 ...■
3.04 Road traffic accidents* .....	86 ...■	11.05 Extent of staff training .....	17 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	48 ...■
4.01 Physician density* .....	46 ...■	11.07 Ease of hiring foreign labor .....	17 ...■
4.02 Access to improved sanitation* .....	1 ...■	11.08 HIV prevalence* .....	49 ...■
4.03 Access to improved drinking water* .....	1 ...■	11.09 Business impact of HIV/AIDS .....	48 ...■
4.04 Hospital beds* .....	47 ...■	11.10 Life expectancy* .....	16 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	67 ...■	12.01 Tourism openness* .....	74 ...■
5.02 T&T government expenditure* .....	75 ...■	12.02 Attitude of population toward foreign visitors .....	66 ...■
5.03 Effectiveness of marketing and branding .....	27 ...■	12.03 Extension of business trips recommended .....	104 ...■
5.04 T&T fair attendance* .....	22 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	7 ...■
6.01 Quality of air transport infrastructure .....	10 ...■	13.02 Nationally protected areas* .....	51 ...■
6.02 Available seat kilometers* .....	3 ...■	13.03 Quality of the natural environment .....	48 ...■
6.03 Departures per 1,000 population* .....	20 ...■	13.04 Total known species* .....	95 ...■
6.04 Airport density* .....	40 ...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	1 ...■	14.01 Number of World Heritage cultural sites* .....	7 ...■
6.06 International air transport network .....	7 ...■	14.02 Sports stadiums* .....	20 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	4 ...■
7.01 Quality of roads .....	21 ...■		
7.02 Quality of railroad infrastructure .....	20 ...■		
7.03 Quality of port infrastructure .....	21 ...■		
7.04 Quality of domestic transport network .....	19 ...■		
7.05 Road density* .....	18 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# United States

## Key indicators

Population (millions), 2006 .....	301.0
Surface area (1,000 square kilometers) .....	9,629.1
Gross domestic product (US\$ billions), 2006 .....	13,194.7
Gross domestic product (PPP, US\$) per capita, 2006 .....	43,223
Real GDP growth (percent), 2006 .....	2.9

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

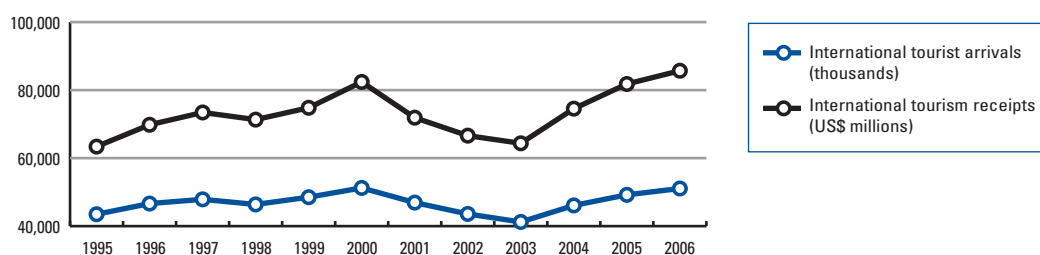
	Percent of total	2008-2017 annual growth (% forecast)
GDP (US\$ millions) .....	524,516	3.8
Employment (1,000 jobs) .....	5,701	3.9

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	1,404,825	10.2
Employment (1,000 jobs) .....	15,040	10.3

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	51,063
International tourism receipts (US\$ millions), 2006 .....	85,694



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1-7 scale)
<b>2008 Index</b> .....	<b>7</b>	<b>5.3</b>
<b>T&amp;T regulatory framework</b> .....	<b>49</b>	<b>4.7</b>
Policy rules and regulations .....	19	5.2
Environmental sustainability .....	100	4.0
Safety and security .....	119	3.7
Health and hygiene .....	44	5.5
Prioritization of Travel & Tourism .....	21	5.3
<b>T&amp;T business environment and infrastructure</b> .....	<b>1</b>	<b>5.6</b>
Air transport infrastructure .....	2	6.3
Ground transport infrastructure .....	19	5.5
Tourism infrastructure .....	6	6.7
ICT infrastructure .....	13	5.2
Price competitiveness in the T&T industry .....	105	4.2
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>2</b>	<b>5.5</b>
Human resources .....	5	5.9
Education and training .....	16	5.9
Availability of qualified labor .....	7	6.0
Affinity for Travel & Tourism .....	114	4.3
Natural resources .....	2	6.0
Cultural resources .....	7	5.8

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	46 ...■	8.01 Hotel rooms* .....	15 ...■
1.02 Property rights .....	30 ...■	8.02 Presence of major car rental companies* .....	1 ...■
1.03 Business impact of rules on FDI .....	51 ...■	8.03 ATMs accepting Visa cards* .....	2 ...■
1.04 Visa requirements* .....	88 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	8 ...■	9.01 Extent of business Internet use .....	6 ...■
1.06 Transparency of government policymaking .....	31 ...■	9.02 Internet users* .....	7 ...■
1.07 Time required to start a business* .....	6 ...■	9.03 Telephone lines* .....	7 ...■
1.08 Cost to start a business* .....	5 ...■	9.04 Broadband Internet subscribers* .....	17 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	50 ...■
2.01 Stringency of environmental regulation .....	27 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	25 ...■	10.01 Ticket taxes and airport charges* .....	119 ...■
2.03 Sustainability of T&T industry development .....	39 ...■	10.02 Purchasing power parity* .....	105 ...■
2.04 Carbon dioxide emissions* .....	120 ...■	10.03 Extent and effect of taxation .....	48 ...■
2.05 Particulate matter concentration* .....	27 ...■	10.04 Fuel price levels* .....	44 ...■
2.06 Threatened species* .....	113 ...■	10.05 Hotel price index* .....	82 ...■
2.07 Environmental treaty ratification* .....	97 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	68 ...■
3.01 Business costs of terrorism .....	123 ...■	11.02 2ndary education enrollment* .....	42 ...■
3.02 Reliability of police services .....	20 ...■	11.03 Quality of the educational system .....	17 ...■
3.03 Business costs of crime and violence .....	74 ...■	11.04 Local availability of research and training services .....	2 ...■
3.04 Road traffic accidents* .....	122 ...■	11.05 Extent of staff training .....	11 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	9 ...■
4.01 Physician density* .....	43 ...■	11.07 Ease of hiring foreign labor .....	36 ...■
4.02 Access to improved sanitation* .....	1 ...■	11.08 HIV prevalence* .....	83 ...■
4.03 Access to improved drinking water* .....	1 ...■	11.09 Business impact of HIV/AIDS .....	86 ...■
4.04 Hospital beds* .....	55 ...■	11.10 Life expectancy* .....	28 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	84 ...■	12.01 Tourism openness* .....	115 ...■
5.02 T&T government expenditure* .....	31 ...■	12.02 Attitude of population toward foreign visitors .....	102 ...■
5.03 Effectiveness of marketing and branding .....	34 ...■	12.03 Extension of business trips recommended .....	79 ...■
5.04 T&T fair attendance* .....	5 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	2 ...■
6.01 Quality of air transport infrastructure .....	9 ...■	13.02 Nationally protected areas* .....	19 ...■
6.02 Available seat kilometers* .....	1 ...■	13.03 Quality of the natural environment .....	70 ...■
6.03 Departures per 1,000 population* .....	10 ...■	13.04 Total known species* .....	11 ...■
6.04 Airport density* .....	18 ...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	2 ...■	14.01 Number of World Heritage cultural sites* .....	19 ...■
6.06 International air transport network .....	14 ...■	14.02 Sports stadiums* .....	23 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	1 ...■
7.01 Quality of roads .....	8 ...■		
7.02 Quality of railroad infrastructure .....	14 ...■		
7.03 Quality of port infrastructure .....	11 ...■		
7.04 Quality of domestic transport network .....	22 ...■		
7.05 Road density* .....	37 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Uruguay

## Key indicators

Population (millions), 2006 .....	3.5
Surface area (1,000 square kilometers) .....	176.2
Gross domestic product (US\$ billions), 2006 .....	19.1
Gross domestic product (PPP, US\$) per capita, 2006 .....	11,969
Real GDP growth (percent), 2006 .....	7.0

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

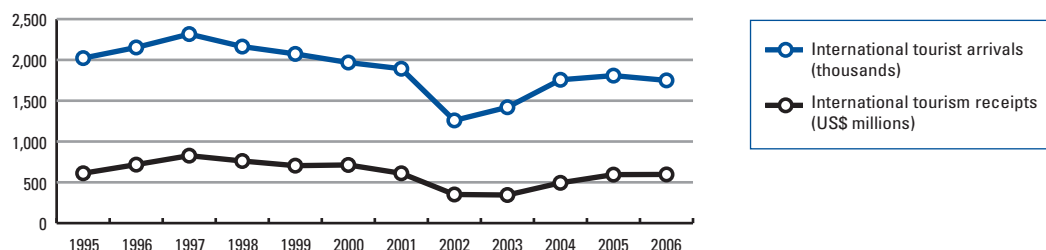
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	4.1	3.5
Employment (1,000 jobs) .....	4.9	1.1

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	2,053	9.9	3.7
Employment (1,000 jobs) .....	175	10.9	1.3

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	1,749
International tourism receipts (US\$ millions), 2006 .....	597



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>61</b>	<b>4.1</b>
<b>T&amp;T regulatory framework</b> .....	<b>47</b>	<b>4.8</b>
Policy rules and regulations .....	73	4.1
Environmental sustainability .....	63	4.5
Safety and security .....	48	5.3
Health and hygiene .....	35	5.8
Prioritization of Travel & Tourism .....	56	4.4
<b>T&amp;T business environment and infrastructure</b> .....	<b>71</b>	<b>3.4</b>
Air transport infrastructure .....	111	2.2
Ground transport infrastructure .....	66	3.7
Tourism infrastructure .....	75	3.1
ICT infrastructure .....	56	3.0
Price competitiveness in the T&T industry .....	43	4.9
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>56</b>	<b>4.1</b>
Human resources .....	46	5.1
Education and training .....	52	4.8
Availability of qualified labor .....	41	5.4
Affinity for Travel & Tourism .....	54	4.9
Natural resources .....	89	2.8
Cultural resources .....	35	3.6

Note: For descriptions of variables and detailed sources, please refer to "How to Read Country/Economy Profiles."

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

■ Competitive Advantage
■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	43 ... <span style="color: #0056b3;">■</span>	8.01 Hotel rooms* .....	57 ... <span style="color: #808080;">■</span>
1.02 Property rights .....	61 ... <span style="color: #808080;">■</span>	8.02 Presence of major car rental companies* .....	56 ... <span style="color: #808080;">■</span>
1.03 Business impact of rules on FDI .....	69 ... <span style="color: #808080;">■</span>	8.03 ATMs accepting Visa cards* .....	85 ... <span style="color: #808080;">■</span>
1.04 Visa requirements* .....	24 ... <span style="color: #0056b3;">■</span>	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	45 ... <span style="color: #0056b3;">■</span>	9.01 Extent of business Internet use .....	70 ... <span style="color: #808080;">■</span>
1.06 Transparency of government policymaking .....	68 ... <span style="color: #808080;">■</span>	9.02 Internet users* .....	55 ... <span style="color: #808080;">■</span>
1.07 Time required to start a business* .....	97 ... <span style="color: #808080;">■</span>	9.03 Telephone lines* .....	42 ... <span style="color: #0056b3;">■</span>
1.08 Cost to start a business* .....	96 ... <span style="color: #808080;">■</span>	9.04 Broadband Internet subscribers* .....	53 ... <span style="color: #808080;">■</span>
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	64 ... <span style="color: #808080;">■</span>
2.01 Stringency of environmental regulation .....	47 ... <span style="color: #0056b3;">■</span>	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	44 ... <span style="color: #0056b3;">■</span>	10.01 Ticket taxes and airport charges* .....	35 ... <span style="color: #0056b3;">■</span>
2.03 Sustainability of T&T industry development .....	65 ... <span style="color: #808080;">■</span>	10.02 Purchasing power parity* .....	65 ... <span style="color: #808080;">■</span>
2.04 Carbon dioxide emissions* .....	41 ... <span style="color: #0056b3;">■</span>	10.03 Extent and effect of taxation .....	107 ... <span style="color: #808080;">■</span>
2.05 Particulate matter concentration* .....	116 ... <span style="color: #808080;">■</span>	10.04 Fuel price levels* .....	75 ... <span style="color: #808080;">■</span>
2.06 Threatened species* .....	81 ... <span style="color: #808080;">■</span>	10.05 Hotel price index* .....	6 ... <span style="color: #0056b3;">■</span>
2.07 Environmental treaty ratification* .....	18 ... <span style="color: #0056b3;">■</span>	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	60 ... <span style="color: #808080;">■</span>
3.01 Business costs of terrorism .....	4 ... <span style="color: #0056b3;">■</span>	11.02 2ndary education enrollment* .....	13 ... <span style="color: #0056b3;">■</span>
3.02 Reliability of police services .....	86 ... <span style="color: #808080;">■</span>	11.03 Quality of the educational system .....	69 ... <span style="color: #808080;">■</span>
3.03 Business costs of crime and violence .....	85 ... <span style="color: #808080;">■</span>	11.04 Local availability of research and training services .....	73 ... <span style="color: #808080;">■</span>
3.04 Road traffic accidents* .....	26 ... <span style="color: #0056b3;">■</span>	11.05 Extent of staff training .....	89 ... <span style="color: #808080;">■</span>
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	107 ... <span style="color: #808080;">■</span>
4.01 Physician density* .....	8 ... <span style="color: #0056b3;">■</span>	11.07 Ease of hiring foreign labor .....	22 ... <span style="color: #0056b3;">■</span>
4.02 Access to improved sanitation* .....	1 ... <span style="color: #0056b3;">■</span>	11.08 HIV prevalence* .....	76 ... <span style="color: #808080;">■</span>
4.03 Access to improved drinking water* .....	1 ... <span style="color: #0056b3;">■</span>	11.09 Business impact of HIV/AIDS .....	46 ... <span style="color: #0056b3;">■</span>
4.04 Hospital beds* .....	68 ... <span style="color: #808080;">■</span>	11.10 Life expectancy* .....	37 ... <span style="color: #0056b3;">■</span>
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	48 ... <span style="color: #0056b3;">■</span>	12.01 Tourism openness* .....	66 ... <span style="color: #808080;">■</span>
5.02 T&T government expenditure* .....	32 ... <span style="color: #0056b3;">■</span>	12.02 Attitude of population toward foreign visitors .....	31 ... <span style="color: #0056b3;">■</span>
5.03 Effectiveness of marketing and branding .....	56 ... <span style="color: #808080;">■</span>	12.03 Extension of business trips recommended .....	36 ... <span style="color: #0056b3;">■</span>
5.04 T&T fair attendance* .....	76 ... <span style="color: #808080;">■</span>	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	70 ... <span style="color: #808080;">■</span>
6.01 Quality of air transport infrastructure .....	110 ... <span style="color: #808080;">■</span>	13.02 Nationally protected areas* .....	125 ... <span style="color: #808080;">■</span>
6.02 Available seat kilometers* .....	97 ... <span style="color: #808080;">■</span>	13.03 Quality of the natural environment .....	6 ... <span style="color: #0056b3;">■</span>
6.03 Departures per 1,000 population* .....	64 ... <span style="color: #808080;">■</span>	13.04 Total known species* .....	59 ... <span style="color: #808080;">■</span>
6.04 Airport density* .....	76 ... <span style="color: #808080;">■</span>	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	103 ... <span style="color: #808080;">■</span>	14.01 Number of World Heritage cultural sites* .....	83 ... <span style="color: #808080;">■</span>
6.06 International air transport network .....	105 ... <span style="color: #808080;">■</span>	14.02 Sports stadiums* .....	7 ... <span style="color: #0056b3;">■</span>
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	44 ... <span style="color: #0056b3;">■</span>
7.01 Quality of roads .....	49 ... <span style="color: #0056b3;">■</span>		
7.02 Quality of railroad infrastructure .....	95 ... <span style="color: #808080;">■</span>		
7.03 Quality of port infrastructure .....	51 ... <span style="color: #808080;">■</span>		
7.04 Quality of domestic transport network .....	32 ... <span style="color: #0056b3;">■</span>		
7.05 Road density* .....	52 ... <span style="color: #808080;">■</span>		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# Uzbekistan

## Key indicators

Population (millions), 2006 .....	27.0
Surface area (1,000 square kilometers) .....	447.4
Gross domestic product (US\$ billions), 2006 .....	17.0
Gross domestic product (PPP, US\$) per capita, 2006 .....	2,304
Real GDP growth (percent), 2006 .....	7.3

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

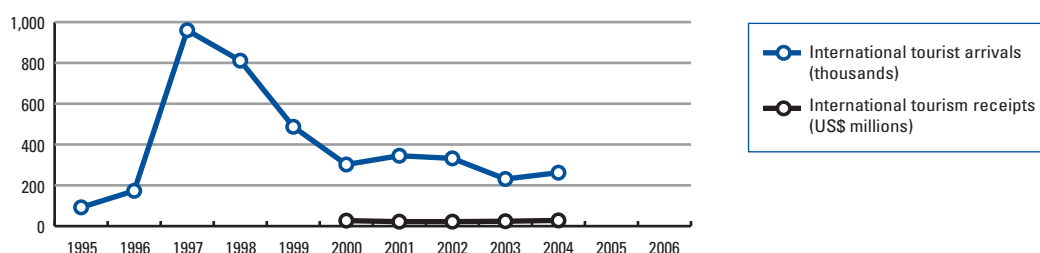
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	n/a	n/a
Employment (1,000 jobs) .....	n/a	n/a

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	n/a	n/a
Employment (1,000 jobs) .....	n/a	n/a

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2004 .....	262
International tourism receipts (US\$ millions), 2004 .....	28



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>90</b>	<b>3.6</b>
<b>T&amp;T regulatory framework</b> .....	<b>64</b>	<b>4.4</b>
Policy rules and regulations .....	67	4.2
Environmental sustainability .....	111	3.9
Safety and security .....	69	4.9
Health and hygiene .....	56	4.9
Prioritization of Travel & Tourism .....	64	4.3
<b>T&amp;T business environment and infrastructure</b> .....	<b>98</b>	<b>2.9</b>
Air transport infrastructure .....	80	2.7
Ground transport infrastructure .....	73	3.5
Tourism infrastructure .....	130	1.0
ICT infrastructure .....	99	1.9
Price competitiveness in the T&T industry .....	12	5.4
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>101</b>	<b>3.5</b>
Human resources .....	44	5.1
Education and training .....	63	4.7
Availability of qualified labor .....	32	5.5
Affinity for Travel & Tourism .....	81	4.6
Natural resources .....	105	2.4
Cultural resources .....	86	1.9

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....83...■	8.01	Hotel rooms* .....114...■
1.02	Property rights .....95...■	8.02	Presence of major car rental companies* .....123...■
1.03	Business impact of rules on FDI .....74...■	8.03	ATMs accepting Visa cards* .....120...■
1.04	Visa requirements* .....110...■	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....61...■	9.01	Extent of business Internet use .....33...■
1.06	Transparency of government policymaking .....89...■	9.02	Internet users* .....98...■
1.07	Time required to start a business* .....24...■	9.03	Telephone lines* .....98...■
1.08	Cost to start a business* .....65...■	9.04	Broadband Internet subscribers* .....102...■
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....128...■
2.01	Stringency of environmental regulation .....53...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....47...■	10.01	Ticket taxes and airport charges* .....43...■
2.03	Sustainability of T&T industry development .....34...■	10.02	Purchasing power parity* .....17...■
2.04	Carbon dioxide emissions* .....71...■	10.03	Extent and effect of taxation .....84...■
2.05	Particulate matter concentration* .....95...■	10.04	Fuel price levels* .....24...■
2.06	Threatened species* .....82...■	10.05	Hotel price index* .....7...■
2.07	Environmental treaty ratification* .....123...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....n/a...■
3.01	Business costs of terrorism .....112...■	11.02	2ndary education enrollment* .....43...■
3.02	Reliability of police services .....55...■	11.03	Quality of the educational system .....32...■
3.03	Business costs of crime and violence .....71...■	11.04	Local availability of research and training services .....58...■
3.04	Road traffic accidents* .....73...■	11.05	Extent of staff training .....70...■
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....12...■
4.01	Physician density* .....33...■	11.07	Ease of hiring foreign labor .....58...■
4.02	Access to improved sanitation* .....83...■	11.08	HIV prevalence* .....49...■
4.03	Access to improved drinking water* .....89...■	11.09	Business impact of HIV/AIDS .....95...■
4.04	Hospital beds* .....34...■	11.10	Life expectancy* .....97...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....24...■	12.01	Tourism openness* .....122...■
5.02	T&T government expenditure* .....n/a...■	12.02	Attitude of population toward foreign visitors .....68...■
5.03	Effectiveness of marketing and branding .....57...■	12.03	Extension of business trips recommended .....2...■
5.04	T&T fair attendance* .....111...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....70...■
6.01	Quality of air transport infrastructure .....44...■	13.02	Nationally protected areas* .....91...■
6.02	Available seat kilometers* .....78...■	13.03	Quality of the natural environment .....73...■
6.03	Departures per 1,000 population* .....95...■	13.04	Total known species* .....84...■
6.04	Airport density* .....89...■	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....77...■	14.01	Number of World Heritage cultural sites* .....46...■
6.06	International air transport network .....75...■	14.02	Sports stadiums* .....109...■
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....119...■
7.01	Quality of roads .....54...■		
7.02	Quality of railroad infrastructure .....24...■		
7.03	Quality of port infrastructure .....123...■		
7.04	Quality of domestic transport network .....94...■		
7.05	Road density* .....72...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Venezuela

## Key indicators

Population (millions), 2006.....	27.2
Surface area (1,000 square kilometers).....	912.1
Gross domestic product (US\$ billions), 2006.....	181.6
Gross domestic product (PPP, US\$) per capita, 2006.....	7,480
Real GDP growth (percent), 2006.....	10.3

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

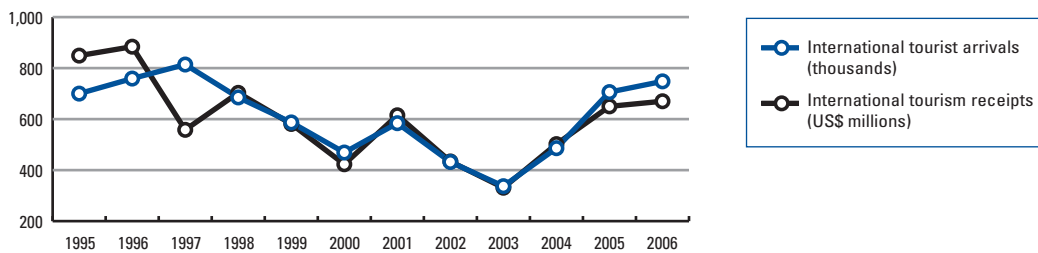
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions).....	3,044	1.7	6.8
Employment (1,000 jobs).....	198	1.8	5.2

### T&T economy, 2007 estimates

GDP (US\$ millions).....	15,062	8.3	5.4
Employment (1,000 jobs).....	847	7.5	3.9

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006.....	748
International tourism receipts (US\$ millions), 2006.....	670



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index.....</b>	<b>103</b>	<b>3.5</b>
<b>T&amp;T regulatory framework.....</b>	<b>123</b>	<b>3.4</b>
Policy rules and regulations.....	124	2.9
Environmental sustainability.....	72	4.4
Safety and security.....	125	3.5
Health and hygiene.....	90	3.7
Prioritization of Travel & Tourism.....	123	2.7
<b>T&amp;T business environment and infrastructure.....</b>	<b>82</b>	<b>3.2</b>
Air transport infrastructure.....	71	2.9
Ground transport infrastructure.....	112	2.7
Tourism infrastructure.....	76	3.0
ICT infrastructure.....	68	2.6
Price competitiveness in the T&T industry.....	47	4.8
<b>T&amp;T human, cultural, and natural resources.....</b>	<b>75</b>	<b>3.8</b>
Human resources.....	102	4.4
Education and training.....	96	4.2
Availability of qualified labor.....	113	4.7
Affinity for Travel & Tourism.....	130	3.5
Natural resources.....	9	5.2
Cultural resources.....	85	1.9

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01	Prevalence of foreign ownership .....120...■	8.01	Hotel rooms* .....67...■
1.02	Property rights .....129...■	8.02	Presence of major car rental companies* .....56...■
1.03	Business impact of rules on FDI .....129...■	8.03	ATMs accepting Visa cards* .....77...■
1.04	Visa requirements* .....58...■	<b>9th pillar: ICT infrastructure</b>	
1.05	Openness of bilateral Air Service Agreements* .....88...■	9.01	Extent of business Internet use .....81...■
1.06	Transparency of government policymaking .....129...■	9.02	Internet users* .....67...■
1.07	Time required to start a business* .....122...■	9.03	Telephone lines* .....72...■
1.08	Cost to start a business* .....84...■	9.04	Broadband Internet subscribers* .....57...■
<b>2nd pillar: Environmental sustainability</b>		9.05	Mobile telephone subscribers* .....62...■
2.01	Stringency of environmental regulation .....84...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02	Enforcement of environmental regulation .....89...■	10.01	Ticket taxes and airport charges* .....115...■
2.03	Sustainability of T&T industry development .....129...■	10.02	Purchasing power parity* .....102...■
2.04	Carbon dioxide emissions* .....79...■	10.03	Extent and effect of taxation .....89...■
2.05	Particulate matter concentration* .....1...■	10.04	Fuel price levels* .....1...■
2.06	Threatened species* .....76...■	10.05	Hotel price index* .....33...■
2.07	Environmental treaty ratification* .....72...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01	Primary education enrollment* .....72...■
3.01	Business costs of terrorism .....101...■	11.02	2ndary education enrollment* .....89...■
3.02	Reliability of police services .....130...■	11.03	Quality of the educational system .....116...■
3.03	Business costs of crime and violence .....126...■	11.04	Local availability of research and training services .....102...■
3.04	Road traffic accidents* .....101...■	11.05	Extent of staff training .....87...■
<b>4th pillar: Health and hygiene</b>		11.06	Hiring and firing practices .....130...■
4.01	Physician density* .....58...■	11.07	Ease of hiring foreign labor .....113...■
4.02	Access to improved sanitation* .....81...■	11.08	HIV prevalence* .....89...■
4.03	Access to improved drinking water* .....86...■	11.09	Business impact of HIV/AIDS .....99...■
4.04	Hospital beds* .....100...■	11.10	Life expectancy* .....50...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01	Government prioritization of the T&T industry .....127...■	12.01	Tourism openness* .....114...■
5.02	T&T government expenditure* .....58...■	12.02	Attitude of population toward foreign visitors .....129...■
5.03	Effectiveness of marketing and branding .....128...■	12.03	Extension of business trips recommended .....129...■
5.04	T&T fair attendance* .....111...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01	Number of World Heritage natural sites* .....39...■
6.01	Quality of air transport infrastructure .....93...■	13.02	Nationally protected areas* .....1...■
6.02	Available seat kilometers* .....53...■	13.03	Quality of the natural environment .....62...■
6.03	Departures per 1,000 population* .....46...■	13.04	Total known species* .....7...■
6.04	Airport density* .....44...■	<b>14th pillar: Cultural resources</b>	
6.05	Number of operating airlines* .....50...■	14.01	Number of World Heritage cultural sites* .....69...■
6.06	International air transport network .....77...■	14.02	Sports stadiums* .....67...■
<b>7th pillar: Ground transport infrastructure</b>		14.03	Number of international fairs and exhibitions* .....66...■
7.01	Quality of roads .....92...■		
7.02	Quality of railroad infrastructure .....103...■		
7.03	Quality of port infrastructure .....117...■		
7.04	Quality of domestic transport network .....85...■		
7.05	Road density* .....86...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Vietnam

## Key indicators

Population (millions), 2006 .....	85.3
Surface area (1,000 square kilometers) .....	331.7
Gross domestic product (US\$ billions), 2006 .....	61.0
Gross domestic product (PPP, US\$) per capita, 2006 .....	3,393
Real GDP growth (percent), 2006 .....	8.2

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

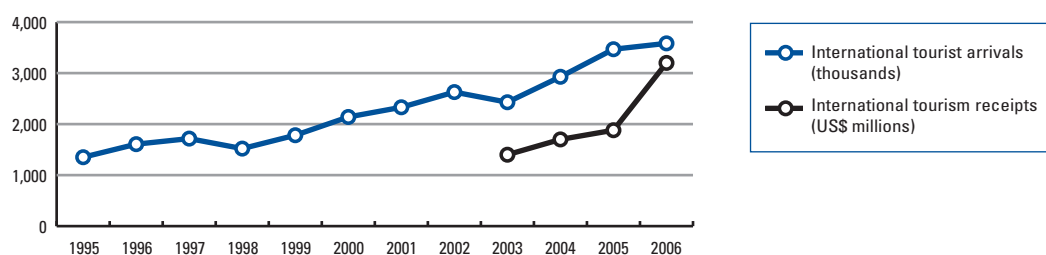
		Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	2,111	3.1	5.8
Employment (1,000 jobs) .....	932	2.4	1.2

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	7,645	11.2	6.9
Employment (1,000 jobs) .....	3,520	9.0	2.3

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006 .....	3,583
International tourism receipts (US\$ millions), 2006 .....	3,200



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>96</b>	<b>3.6</b>
<b>T&amp;T regulatory framework</b> .....	<b>97</b>	<b>4.0</b>
Policy rules and regulations .....	98	3.8
Environmental sustainability .....	94	4.1
Safety and security .....	94	4.5
Health and hygiene .....	100	3.2
Prioritization of Travel & Tourism .....	47	4.6
<b>T&amp;T business environment and infrastructure</b> .....	<b>92</b>	<b>3.0</b>
Air transport infrastructure .....	83	2.6
Ground transport infrastructure .....	78	3.4
Tourism infrastructure .....	124	1.2
ICT infrastructure .....	88	2.1
Price competitiveness in the T&T industry .....	7	5.5
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>84</b>	<b>3.7</b>
Human resources .....	84	4.8
Education and training .....	88	4.2
Availability of qualified labor .....	46	5.4
Affinity for Travel & Tourism .....	87	4.6
Natural resources .....	48	3.6
Cultural resources .....	88	1.9

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	114 ...■	8.01 Hotel rooms* .....	78 ...■
1.02 Property rights .....	79 ...■	8.02 Presence of major car rental companies* .....	123 ...■
1.03 Business impact of rules on FDI .....	67 ...■	8.03 ATMs accepting Visa cards* .....	103 ...■
1.04 Visa requirements* .....	103 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	88 ...■	9.01 Extent of business Internet use .....	103 ...■
1.06 Transparency of government policymaking .....	87 ...■	9.02 Internet users* .....	64 ...■
1.07 Time required to start a business* .....	103 ...■	9.03 Telephone lines* .....	65 ...■
1.08 Cost to start a business* .....	72 ...■	9.04 Broadband Internet subscribers* .....	74 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	108 ...■
2.01 Stringency of environmental regulation .....	102 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	92 ...■	10.01 Ticket taxes and airport charges* .....	18 ...■
2.03 Sustainability of T&T industry development .....	44 ...■	10.02 Purchasing power parity* .....	10 ...■
2.04 Carbon dioxide emissions* .....	27 ...■	10.03 Extent and effect of taxation .....	60 ...■
2.05 Particulate matter concentration* .....	83 ...■	10.04 Fuel price levels* .....	22 ...■
2.06 Threatened species* .....	107 ...■	10.05 Hotel price index* .....	24 ...■
2.07 Environmental treaty ratification* .....	97 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	87 ...■
3.01 Business costs of terrorism .....	84 ...■	11.02 2ndary education enrollment* .....	87 ...■
3.02 Reliability of police services .....	50 ...■	11.03 Quality of the educational system .....	112 ...■
3.03 Business costs of crime and violence .....	60 ...■	11.04 Local availability of research and training services .....	74 ...■
3.04 Road traffic accidents* .....	113 ...■	11.05 Extent of staff training .....	83 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	49 ...■
4.01 Physician density* .....	98 ...■	11.07 Ease of hiring foreign labor .....	67 ...■
4.02 Access to improved sanitation* .....	87 ...■	11.08 HIV prevalence* .....	76 ...■
4.03 Access to improved drinking water* .....	81 ...■	11.09 Business impact of HIV/AIDS .....	64 ...■
4.04 Hospital beds* .....	88 ...■	11.10 Life expectancy* .....	73 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	47 ...■	12.01 Tourism openness* .....	54 ...■
5.02 T&T government expenditure* .....	107 ...■	12.02 Attitude of population toward foreign visitors .....	69 ...■
5.03 Effectiveness of marketing and branding .....	66 ...■	12.03 Extension of business trips recommended .....	117 ...■
5.04 T&T fair attendance* .....	13 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	21 ...■
6.01 Quality of air transport infrastructure .....	90 ...■	13.02 Nationally protected areas* .....	98 ...■
6.02 Available seat kilometers* .....	40 ...■	13.03 Quality of the natural environment .....	117 ...■
6.03 Departures per 1,000 population* .....	99 ...■	13.04 Total known species* .....	23 ...■
6.04 Airport density* .....	116 ...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	41 ...■	14.01 Number of World Heritage cultural sites* .....	54 ...■
6.06 International air transport network .....	84 ...■	14.02 Sports stadiums* .....	119 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	52 ...■
7.01 Quality of roads .....	97 ...■		
7.02 Quality of railroad infrastructure .....	71 ...■		
7.03 Quality of port infrastructure .....	106 ...■		
7.04 Quality of domestic transport network .....	65 ...■		
7.05 Road density* .....	35 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

# Zambia

## Key indicators

Population (millions), 2006 .....	11.9
Surface area (1,000 square kilometers) .....	752.6
Gross domestic product (US\$ billions), 2006 .....	10.9
Gross domestic product (PPP, US\$) per capita, 2006 .....	1,088
Real GDP growth (percent), 2006 .....	5.9

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

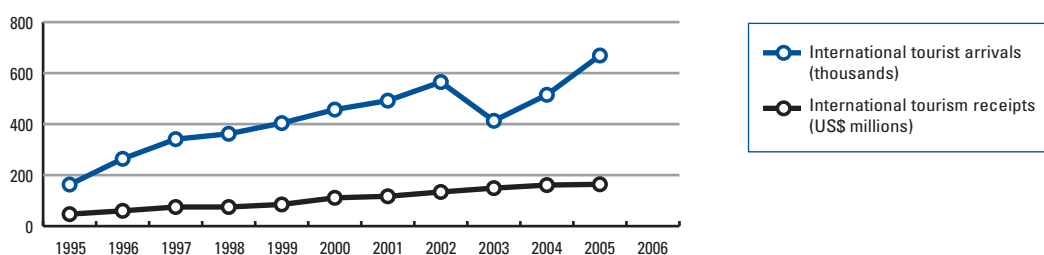
	Percent of total	2008–2017 annual growth (% forecast)
GDP (US\$ millions) .....	1.1	6.8
Employment (1,000 jobs) .....	0.9	2.6

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	4.0	7.4
Employment (1,000 jobs) .....	3.3	3.2

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2005 .....	669
International tourism receipts (US\$ millions), 2005 .....	164



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1–7 scale)
<b>2008 Index</b> .....	<b>107</b>	<b>3.4</b>
<b>T&amp;T regulatory framework</b> .....	<b>91</b>	<b>4.1</b>
Policy rules and regulations .....	55	4.5
Environmental sustainability .....	66	4.5
Safety and security .....	62	5.0
Health and hygiene .....	115	2.2
Prioritization of Travel & Tourism .....	77	4.1
<b>T&amp;T business environment and infrastructure</b> .....	<b>118</b>	<b>2.6</b>
Air transport infrastructure .....	96	2.5
Ground transport infrastructure .....	103	2.8
Tourism infrastructure .....	112	1.8
ICT infrastructure .....	113	1.7
Price competitiveness in the T&T industry .....	96	4.3
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>90</b>	<b>3.6</b>
Human resources .....	121	3.6
Education and training .....	113	3.4
Availability of qualified labor .....	124	3.7
Affinity for Travel & Tourism .....	57	4.9
Natural resources .....	17	4.8
Cultural resources .....	119	1.3

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

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

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	18...■	8.01 Hotel rooms* .....	108...■
1.02 Property rights .....	67...■	8.02 Presence of major car rental companies* .....	103...■
1.03 Business impact of rules on FDI .....	14...■	8.03 ATMs accepting Visa cards* .....	84...■
1.04 Visa requirements* .....	72...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	64...■	9.01 Extent of business Internet use .....	92...■
1.06 Transparency of government policymaking .....	29...■	9.02 Internet users* .....	106...■
1.07 Time required to start a business* .....	78...■	9.03 Telephone lines* .....	118...■
1.08 Cost to start a business* .....	89...■	9.04 Broadband Internet subscribers* .....	108...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	111...■
2.01 Stringency of environmental regulation .....	110...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	109...■	10.01 Ticket taxes and airport charges* .....	36...■
2.03 Sustainability of T&T industry development .....	23...■	10.02 Purchasing power parity* .....	96...■
2.04 Carbon dioxide emissions* .....	12...■	10.03 Extent and effect of taxation .....	118...■
2.05 Particulate matter concentration* .....	79...■	10.04 Fuel price levels* .....	98...■
2.06 Threatened species* .....	12...■	10.05 Hotel price index* .....	29...■
2.07 Environmental treaty ratification* .....	109...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	80...■
3.01 Business costs of terrorism .....	24...■	11.02 2ndary education enrollment* .....	118...■
3.02 Reliability of police services .....	73...■	11.03 Quality of the educational system .....	62...■
3.03 Business costs of crime and violence .....	104...■	11.04 Local availability of research and training services .....	119...■
3.04 Road traffic accidents* .....	58...■	11.05 Extent of staff training .....	128...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	8...■
4.01 Physician density* .....	115...■	11.07 Ease of hiring foreign labor .....	44...■
4.02 Access to improved sanitation* .....	92...■	11.08 HIV prevalence* .....	124...■
4.03 Access to improved drinking water* .....	112...■	11.09 Business impact of HIV/AIDS .....	122...■
4.04 Hospital beds* .....	80...■	11.10 Life expectancy* .....	127...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	16...■	12.01 Tourism openness* .....	85...■
5.02 T&T government expenditure* .....	95...■	12.02 Attitude of population toward foreign visitors .....	16...■
5.03 Effectiveness of marketing and branding .....	28...■	12.03 Extension of business trips recommended .....	35...■
5.04 T&T fair attendance* .....	93...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	39...■
6.01 Quality of air transport infrastructure .....	81...■	13.02 Nationally protected areas* .....	3...■
6.02 Available seat kilometers* .....	102...■	13.03 Quality of the natural environment .....	52...■
6.03 Departures per 1,000 population* .....	103...■	13.04 Total known species* .....	27...■
6.04 Airport density* .....	58...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	98...■	14.01 Number of World Heritage cultural sites* .....	108...■
6.06 International air transport network .....	71...■	14.02 Sports stadiums* .....	86...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	91...■
7.01 Quality of roads .....	111...■		
7.02 Quality of railroad infrastructure .....	88...■		
7.03 Quality of port infrastructure .....	70...■		
7.04 Quality of domestic transport network .....	98...■		
7.05 Road density* .....	82...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



# Zimbabwe

## Key indicators

Population (millions), 2006.....	13.1
Surface area (1,000 square kilometers) .....	390.8
Gross domestic product (US\$ billions), 2006 .....	5.5
Gross domestic product (PPP, US\$) per capita, 2006 .....	2,488
Real GDP growth (percent), 2006.....	-4.8

Source: World Bank, *World Development Indicators Online Database* (December 2007); IMF, *World Economic Outlook Database* (October 2007 edition); national sources

## Travel & Tourism indicators

### T&T Industry, 2007 estimates

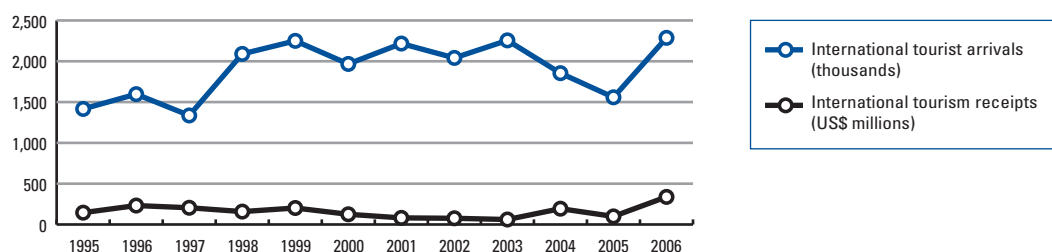
	Percent of total	2008-2017 annual growth (% forecast)
GDP (US\$ millions) .....	1.8	-1.3
Employment (1,000 jobs).....	1.6	-3.4

### T&T economy, 2007 estimates

GDP (US\$ millions) .....	4.8	0.2
Employment (1,000 jobs).....	4.2	-2.0

Source: World Travel & Tourism Council, TSA Research 2007

International tourist arrivals (thousands), 2006.....	2,287
International tourism receipts (US\$ millions), 2006 .....	338



Source: United Nations World Tourism Organization

## Travel & Tourism Competitiveness Index

	Rank (out of 130)	Score (1-7 scale)
<b>2008 Index</b> .....	<b>117</b>	<b>3.2</b>
<b>T&amp;T regulatory framework</b> .....	<b>118</b>	<b>3.6</b>
Policy rules and regulations.....	128	2.8
Environmental sustainability .....	89	4.1
Safety and security .....	85	4.7
Health and hygiene .....	103	3.1
Prioritization of Travel & Tourism .....	115	3.3
<b>T&amp;T business environment and infrastructure</b> .....	<b>113</b>	<b>2.7</b>
Air transport infrastructure .....	123	2.0
Ground transport infrastructure .....	97	2.9
Tourism infrastructure .....	105	2.0
ICT infrastructure .....	119	1.6
Price competitiveness in the T&T industry.....	39	5.0
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>114</b>	<b>3.4</b>
Human resources .....	128	2.9
Education and training.....	106	3.7
Availability of qualified labor .....	130	2.1
Affinity for Travel & Tourism.....	80	4.6
Natural resources .....	33	4.1
Cultural resources.....	93	1.8

Note: For descriptions of variables and detailed sources, please refer to "How to the Read Country/Economy Profiles."

## The Travel & Tourism Competitiveness Index in detail

■ Competitive Advantage ■ Competitive Disadvantage

INDICATOR	RANK/130	INDICATOR	RANK/130
<b>1st pillar: Policy rules and regulations</b>		<b>8th pillar: Tourism infrastructure</b>	
1.01 Prevalence of foreign ownership .....	125 ...■	8.01 Hotel rooms* .....	109 ...■
1.02 Property rights .....	130 ...■	8.02 Presence of major car rental companies* .....	89 ...■
1.03 Business impact of rules on FDI .....	130 ...■	8.03 ATMs accepting Visa cards* .....	105 ...■
1.04 Visa requirements* .....	83 ...■	<b>9th pillar: ICT infrastructure</b>	
1.05 Openness of bilateral Air Service Agreements* .....	94 ...■	9.01 Extent of business Internet use .....	122 ...■
1.06 Transparency of government policymaking .....	105 ...■	9.02 Internet users* .....	85 ...■
1.07 Time required to start a business* .....	118 ...■	9.03 Telephone lines* .....	110 ...■
1.08 Cost to start a business* .....	76 ...■	9.04 Broadband Internet subscribers* .....	97 ...■
<b>2nd pillar: Environmental sustainability</b>		9.05 Mobile telephone subscribers* .....	123 ...■
2.01 Stringency of environmental regulation .....	98 ...■	<b>10th pillar: Price competitiveness in the T&amp;T industry</b>	
2.02 Enforcement of environmental regulation .....	108 ...■	10.01 Ticket taxes and airport charges* .....	65 ...■
2.03 Sustainability of T&T industry development .....	118 ...■	10.02 Purchasing power parity* .....	1 ...■
2.04 Carbon dioxide emissions* .....	27 ...■	10.03 Extent and effect of taxation .....	124 ...■
2.05 Particulate matter concentration* .....	38 ...■	10.04 Fuel price levels* .....	38 ...■
2.06 Threatened species* .....	32 ...■	10.05 Hotel price index* .....	n/a .....
2.07 Environmental treaty ratification* .....	125 ...■	<b>11th pillar: Human resources</b>	
<b>3rd pillar: Safety and security</b>		11.01 Primary education enrollment* .....	106 ...■
3.01 Business costs of terrorism .....	20 ...■	11.02 2ndary education enrollment* .....	113 ...■
3.02 Reliability of police services .....	123 ...■	11.03 Quality of the educational system .....	40 ...■
3.03 Business costs of crime and violence .....	98 ...■	11.04 Local availability of research and training services .....	120 ...■
3.04 Road traffic accidents* .....	69 ...■	11.05 Extent of staff training .....	63 ...■
<b>4th pillar: Health and hygiene</b>		11.06 Hiring and firing practices .....	123 ...■
4.01 Physician density* .....	111 ...■	11.07 Ease of hiring foreign labor .....	129 ...■
4.02 Access to improved sanitation* .....	95 ...■	11.08 HIV prevalence* .....	127 ...■
4.03 Access to improved drinking water* .....	92 ...■	11.09 Business impact of HIV/AIDS .....	129 ...■
4.04 Hospital beds* .....	n/a .....	11.10 Life expectancy* .....	128 ...■
<b>5th pillar: Prioritization of Travel &amp; Tourism</b>		<b>12th pillar: Affinity for Travel &amp; Tourism</b>	
5.01 Government prioritization of the T&T industry .....	109 ...■	12.01 Tourism openness* .....	43 ...■
5.02 T&T government expenditure* .....	86 ...■	12.02 Attitude of population toward foreign visitors .....	123 ...■
5.03 Effectiveness of marketing and branding .....	113 ...■	12.03 Extension of business trips recommended .....	86 ...■
5.04 T&T fair attendance* .....	76 ...■	<b>13th pillar: Natural resources</b>	
<b>6th pillar: Air transport infrastructure</b>		13.01 Number of World Heritage natural sites* .....	21 ...■
6.01 Quality of air transport infrastructure .....	114 ...■	13.02 Nationally protected areas* .....	41 ...■
6.02 Available seat kilometers* .....	105 ...■	13.03 Quality of the natural environment .....	49 ...■
6.03 Departures per 1,000 population* .....	107 ...■	13.04 Total known species* .....	36 ...■
6.04 Airport density* .....	115 ...■	<b>14th pillar: Cultural resources</b>	
6.05 Number of operating airlines* .....	108 ...■	14.01 Number of World Heritage cultural sites* .....	54 ...■
6.06 International air transport network .....	113 ...■	14.02 Sports stadiums* .....	94 ...■
<b>7th pillar: Ground transport infrastructure</b>		14.03 Number of international fairs and exhibitions* .....	113 ...■
7.01 Quality of roads .....	69 ...■		
7.02 Quality of railroad infrastructure .....	58 ...■		
7.03 Quality of port infrastructure .....	60 ...■		
7.04 Quality of domestic transport network .....	130 ...■		
7.05 Road density* .....	64 ...■		

\* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.



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# 2.2

## Data Tables



# How to Read the Data Tables

The following pages present the data for all of the variables included in the Travel & Tourism Competitiveness Index 2008 (TTCI) for all 130 economies covered by the study.

The tables are organized in 14 sections, which correspond to the 14 pillars of the TTCI. The number preceding the title of each variable serves to identify the pillar to which the variable belongs.

Two types of data are used in the TTCI: Survey data and hard data.

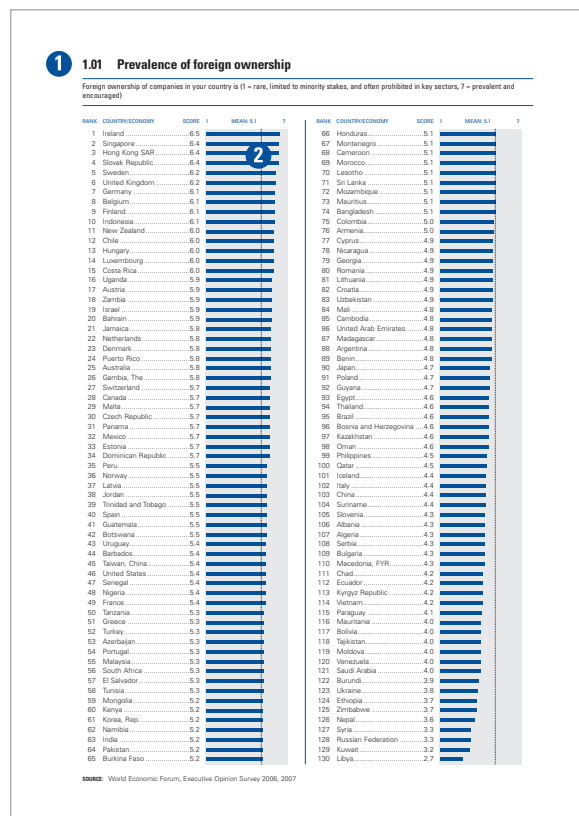
- **Survey data:** average responses in each economy to questions included in the World Economic Forum's Executive Opinion Survey, conducted in the early months of 2006 and 2007.
- **Hard data:** indicators obtained from a variety of sources.

## Survey data

1 Data yielded from the World Economic Forum's Executive Opinion Survey are presented in blue-colored bar graphs. Questions from the Survey asked for responses on a scale of 1 to 7, where an answer of 1 corresponds to the lowest possible score and an answer of 7 corresponds to the highest possible score. For each Survey variable, the original question and the two extreme answers are shown.

We report the average score for each economy—that is, the arithmetic mean of responses from each economy. Variable 5.01, for example, asks about the government's prioritization of the T&T industry in the respondent's economy. On this particular variable, Mauritius with a score of 6.7 ranks first, and therefore appears at the top; it is followed by Barbados, second with a score of 6.6. We report responses rounded to one decimal point, but use the exact figures to determine rankings. For example, for the same variable 5.01, Montenegro's average score is 6.444, the United Arab Emirates' average score is 6.357, and Singapore's average score is 6.356. These economies are therefore ranked 3rd, 4th, and 5th, respectively, although they are all listed with the same rounded score of 6.4.

2 A dotted line on the graph indicates the mean score across the sample of 130 economies.



### 3 1.04 Visa requirements (hard data)

Number of countries requiring visas to enter the country for tourism and/or business trips as a percentage of UN countries | 2007

RANK	COUNTRY/ECONOMY	HARD DATA	RANK	COUNTRY/ECONOMY	HARD DATA
1	Singapore	15.2	66	Canada	74.1
2	Malaysia	16.0	67	Tanzania	74.6
3	Philippines	23.9	68	Macedonia, FYR	75.1
4	Hong Kong SAR	24.9	69	Panama	75.1
5	Barbados	42.6	70	Georgia	76.1
6	United Kingdom	45.7	71	Thailand	76.6
7	Romania	48.0	72	Zambia	77.2
8	Peru	51.3	73	Turkey	77.7
9	Costa Rica	53.3	74	Gambia, The	78.2
10	Indonesia	54.6	75	Paraguay	78.2
11	Jamaica	57.4	76	Albania	78.7
12	Luxembourg	58.0	76	Bolivia	78.7
13	Chile	60.4	78	Mexico	78.7
13	El Salvador	60.4	78	Moldova	78.7
15	Mauritius	60.4	80	Kenya	79.2
16	Guatemala	60.9	81	Guyana	80.2
16	Honduras	60.9	81	Ukraine	80.2
18	Nicaragua	60.9	83	United Arab Emirates	81.7
19	Sri Lanka	61.4	83	Zimbabwe	81.7
20	Argentina	61.9	85	Switzerland	82.2
21	Botswana	62.9	86	Uganda	83.8
21	Israel	62.9	87	Taiwan, China	84.3
23	South Africa	64.0	88	Puerto Rico	85.3
24	Uruguay	64.6	88	United States	85.3
25	Laos	65.0	90	Mauritania	86.8
26	Croatia	65.5	91	Suriname	87.3
27	Morocco	66.0	92	Senegal	87.8
28	Colombia	66.5	93	Mali	88.3
28	Germany	66.5	94	Bahin	90.4
30	Austria	67.0	95	Bangladesh	90.9
30	Belgium	67.0	95	Libya	90.9
30	Finland	67.0	97	Burkina Faso	91.9
30	France	67.0	97	Kazakhstan	91.9
30	Greece	67.0	99	Kyrgyz Republic	92.4
30	Iceland	67.0	99	Nigeria	92.4
30	Ireland	67.0	101	Armenia	92.9
30	Korea, Rep.	67.0	101	Egypt	92.9
30	Luxembourg	67.0	102	Vietnam	93.4
30	Netherlands	67.0	104	Indonesia	93.9
30	Norway	67.0	104	Tajikistan	93.9
30	Portugal	67.0	106	Azerbaijan	94.4
30	Slovenia	67.0	107	Algeria	94.9
30	Spain	67.0	107	Mongolia	94.9
30	Sweden	67.0	107	Russian Federation	94.9
45	Denmark	67.5	110	Dominican Republic	95.4
45	Cuba	68.0	110	Uzbekistan	95.4
46	Czech Republic	68.0	112	Saudi Arabia	96.4
46	Estonia	68.0	113	Bahrain	97.0
46	Hungary	68.0	113	Cameroon	97.0
46	Latvia	68.0	113	Kuwait	97.0
46	Lithuania	68.0	116	Cambodia	97.5
46	Malta	68.0	117	Burundi	98.0
46	Poland	68.0	117	Mozambique	98.0
46	Slovak Republic	68.0	119	Ethiopia	98.5
55	Japan	68.5	120	Australia	99.0
56	Bulgaria	69.0	120	China	99.0
57	Ecuador	69.5	120	Nepal	99.0
58	Brazil	70.0	120	Qatar	99.0
58	Nepal	70.0	124	Chad	99.5
60	New Zealand	71.1	124	India	99.5
60	Senegal	71.1	124	Jordan	99.5
60	Trinidad and Tobago	71.1	124	Madagascar	99.5
63	Montenegro	72.6	124	Oman	99.5
63	Namibia	72.6	124	Pakistan	99.5
65	Bosnia and Herzegovina	73.6	124	Syria	99.5

SOURCE: United Nations World Tourism Organization

## Hard data

While Survey data provide qualitative information, hard data provide objective quantitative measures (for example, surface of protected areas, number of airports, life expectancy, and so on). Several hard data indicators were computed or provided by partners to the project (Booz Allen Hamilton, the International Air Transport Association, the United Nations World Tourism Organization, the International Union for Conservation of Nature, and the World Travel & Tourism Council). Other hard data indicators entering the TTCI were obtained from international organizations (for example, the International Monetary Fund, the World Bank, the International Telecommunication Union, the World Trade Organization, and so on), and, in some cases, from national sources. In the following pages, hard data variables are presented in black bar graphs. A detailed description and full source for each variable can be found in the Technical Notes and Sources section at the end of this Report.

When data are not available or are out of date, “n/a” is used in lieu of the rank and the value.

In the case of hard data, true ties between two or more countries are possible. In such cases, shared rankings are indicated accordingly. For example, both China and the Netherlands have 84 operating airlines on their territory. Therefore, these two countries share the 11th rank on variable 6.05.

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1st pillar

Policy rules and regulations

## 1.01 Prevalence of foreign ownership

Foreign ownership of companies in your country is (1 = rare, limited to minority stakes, and often prohibited in key sectors, 7 = prevalent and encouraged)

RANK	COUNTRY/ECONOMY	SCORE	1	MEAN: 5.1	7	RANK	COUNTRY/ECONOMY	SCORE	1	MEAN: 5.1	7
1	Ireland	6.5				66	Honduras	5.1			
2	Singapore	6.4				67	Montenegro	5.1			
3	Hong Kong SAR	6.4				68	Cameroon	5.1			
4	Slovak Republic	6.4				69	Morocco	5.1			
5	Sweden	6.2				70	Lesotho	5.1			
6	United Kingdom	6.2				71	Sri Lanka	5.1			
7	Germany	6.1				72	Mozambique	5.1			
8	Belgium	6.1				73	Mauritius	5.1			
9	Finland	6.1				74	Bangladesh	5.1			
10	Indonesia	6.1				75	Colombia	5.0			
11	New Zealand	6.0				76	Armenia	5.0			
12	Chile	6.0				77	Cyprus	4.9			
13	Hungary	6.0				78	Nicaragua	4.9			
14	Luxembourg	6.0				79	Georgia	4.9			
15	Costa Rica	6.0				80	Romania	4.9			
16	Uganda	5.9				81	Lithuania	4.9			
17	Austria	5.9				82	Croatia	4.9			
18	Zambia	5.9				83	Uzbekistan	4.9			
19	Israel	5.9				84	Mali	4.8			
20	Bahrain	5.9				85	Cambodia	4.8			
21	Jamaica	5.8				86	United Arab Emirates	4.8			
22	Netherlands	5.8				87	Madagascar	4.8			
23	Denmark	5.8				88	Argentina	4.8			
24	Puerto Rico	5.8				89	Benin	4.8			
25	Australia	5.8				90	Japan	4.7			
26	Gambia, The	5.8				91	Poland	4.7			
27	Switzerland	5.7				92	Guyana	4.7			
28	Canada	5.7				93	Egypt	4.6			
29	Malta	5.7				94	Thailand	4.6			
30	Czech Republic	5.7				95	Brazil	4.6			
31	Panama	5.7				96	Bosnia and Herzegovina	4.6			
32	Mexico	5.7				97	Kazakhstan	4.6			
33	Estonia	5.7				98	Oman	4.6			
34	Dominican Republic	5.7				99	Philippines	4.5			
35	Peru	5.5				100	Qatar	4.5			
36	Norway	5.5				101	Iceland	4.4			
37	Latvia	5.5				102	Italy	4.4			
38	Jordan	5.5				103	China	4.4			
39	Trinidad and Tobago	5.5				104	Suriname	4.4			
40	Spain	5.5				105	Slovenia	4.3			
41	Guatemala	5.5				106	Albania	4.3			
42	Botswana	5.5				107	Algeria	4.3			
43	Uruguay	5.4				108	Serbia	4.3			
44	Barbados	5.4				109	Bulgaria	4.3			
45	Taiwan, China	5.4				110	Macedonia, FYR	4.3			
46	United States	5.4				111	Chad	4.2			
47	Senegal	5.4				112	Ecuador	4.2			
48	Nigeria	5.4				113	Kyrgyz Republic	4.2			
49	France	5.4				114	Vietnam	4.2			
50	Tanzania	5.3				115	Paraguay	4.1			
51	Greece	5.3				116	Mauritania	4.0			
52	Turkey	5.3				117	Bolivia	4.0			
53	Azerbaijan	5.3				118	Tajikistan	4.0			
54	Portugal	5.3				119	Moldova	4.0			
55	Malaysia	5.3				120	Venezuela	4.0			
56	South Africa	5.3				121	Saudi Arabia	4.0			
57	El Salvador	5.3				122	Burundi	3.9			
58	Tunisia	5.3				123	Ukraine	3.8			
59	Mongolia	5.2				124	Ethiopia	3.7			
60	Kenya	5.2				125	Zimbabwe	3.7			
61	Korea, Rep.	5.2				126	Nepal	3.6			
62	Namibia	5.2				127	Syria	3.3			
63	India	5.2				128	Russian Federation	3.3			
64	Pakistan	5.2				129	Kuwait	3.2			
65	Burkina Faso	5.2				130	Libya	2.7			

SOURCE: World Economic Forum, Executive Opinion Survey 2006, 2007

## 1.02 Property rights

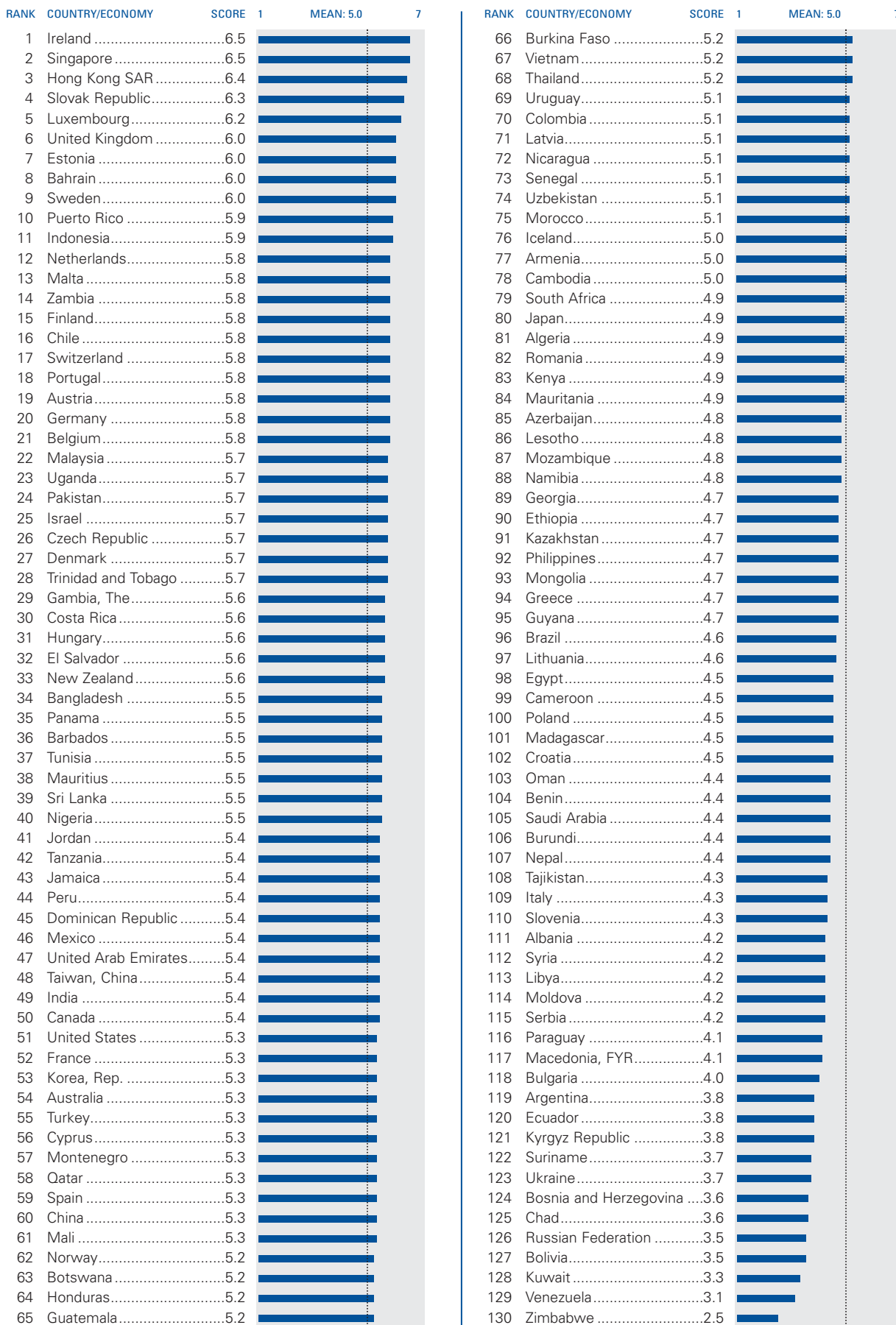
Property rights, including over financial assets (1 = are poorly defined and not protected by law, 7 = are clearly defined and well protected by law)



SOURCE: World Economic Forum, Executive Opinion Survey 2006, 2007

## 1.03 Business impact of rules on FDI

In your country, rules governing foreign direct investment are (1 = damaging and discourage foreign direct investment, 7 = beneficial and encourage foreign direct investment)



SOURCE: World Economic Forum, Executive Opinion Survey 2006, 2007

## 1.04 Visa requirements (hard data)

Number of countries requiring visas to enter the country for tourism and/or business trips as a percentage of UN countries | 2007

RANK	COUNTRY/ECONOMY	HARD DATA	RANK	COUNTRY/ECONOMY	HARD DATA
1	Singapore	15.2	66	Canada	74.1
2	Malaysia	16.2	67	Tanzania	74.6
3	Philippines	23.9	68	Macedonia, FYR	75.1
4	Hong Kong SAR	24.9	68	Panama	75.1
5	Barbados	42.6	70	Georgia	76.1
6	United Kingdom	45.7	71	Thailand	76.6
7	Romania	49.2	72	Zambia	77.2
8	Peru	51.3	73	Turkey	77.7
9	Costa Rica	53.3	74	Gambia, The	78.2
10	Ireland	54.8	74	Paraguay	78.2
11	Jamaica	57.4	76	Albania	78.7
12	Tunisia	59.4	76	Bolivia	78.7
13	Chile	60.4	76	Mexico	78.7
13	El Salvador	60.4	76	Moldova	78.7
13	Mauritius	60.4	80	Kenya	79.2
16	Guatemala	60.9	81	Guyana	80.2
16	Honduras	60.9	81	Ukraine	80.2
16	Nicaragua	60.9	83	United Arab Emirates	81.7
19	Sri Lanka	61.4	83	Zimbabwe	81.7
20	Argentina	61.9	85	Switzerland	82.2
21	Botswana	62.9	86	Uganda	83.8
21	Israel	62.9	87	Taiwan, China	84.3
23	South Africa	64.0	88	Puerto Rico	85.3
24	Uruguay	64.5	88	United States	85.3
25	Lesotho	65.0	90	Mauritania	86.8
26	Croatia	65.5	91	Suriname	87.3
27	Morocco	66.0	92	Senegal	87.8
28	Colombia	66.5	93	Mali	88.3
28	Germany	66.5	94	Benin	90.4
30	Austria	67.0	95	Bangladesh	90.9
30	Belgium	67.0	95	Libya	90.9
30	Finland	67.0	97	Burkina Faso	91.9
30	France	67.0	97	Kazakhstan	91.9
30	Greece	67.0	99	Kyrgyz Republic	92.4
30	Iceland	67.0	99	Nigeria	92.4
30	Italy	67.0	101	Armenia	92.9
30	Korea, Rep.	67.0	101	Egypt	92.9
30	Luxembourg	67.0	103	Vietnam	93.4
30	Netherlands	67.0	104	Indonesia	93.9
30	Norway	67.0	104	Tajikistan	93.9
30	Portugal	67.0	106	Azerbaijan	94.4
30	Slovenia	67.0	107	Algeria	94.9
30	Spain	67.0	107	Mongolia	94.9
30	Sweden	67.0	107	Russian Federation	94.9
45	Denmark	67.5	110	Dominican Republic	95.4
46	Cyprus	68.0	110	Uzbekistan	95.4
46	Czech Republic	68.0	112	Saudi Arabia	96.4
46	Estonia	68.0	113	Bahrain	97.0
46	Hungary	68.0	113	Cameroon	97.0
46	Latvia	68.0	113	Kuwait	97.0
46	Lithuania	68.0	116	Cambodia	97.5
46	Malta	68.0	117	Burundi	98.0
46	Poland	68.0	117	Mozambique	98.0
46	Slovak Republic	68.0	119	Ethiopia	98.5
55	Japan	68.5	120	Australia	99.0
56	Bulgaria	69.0	120	China	99.0
57	Ecuador	69.5	120	Nepal	99.0
58	Brazil	70.1	120	Qatar	99.0
58	Venezuela	70.1	124	Chad	99.5
60	New Zealand	71.1	124	India	99.5
60	Serbia	71.1	124	Jordan	99.5
60	Trinidad and Tobago	71.1	124	Madagascar	99.5
63	Montenegro	72.6	124	Oman	99.5
63	Namibia	72.6	124	Pakistan	99.5
65	Bosnia and Herzegovina	73.6	124	Syria	99.5

SOURCE: United Nations World Tourism Organization

## 1.05 Openness of bilateral Air Service Agreements (hard data)

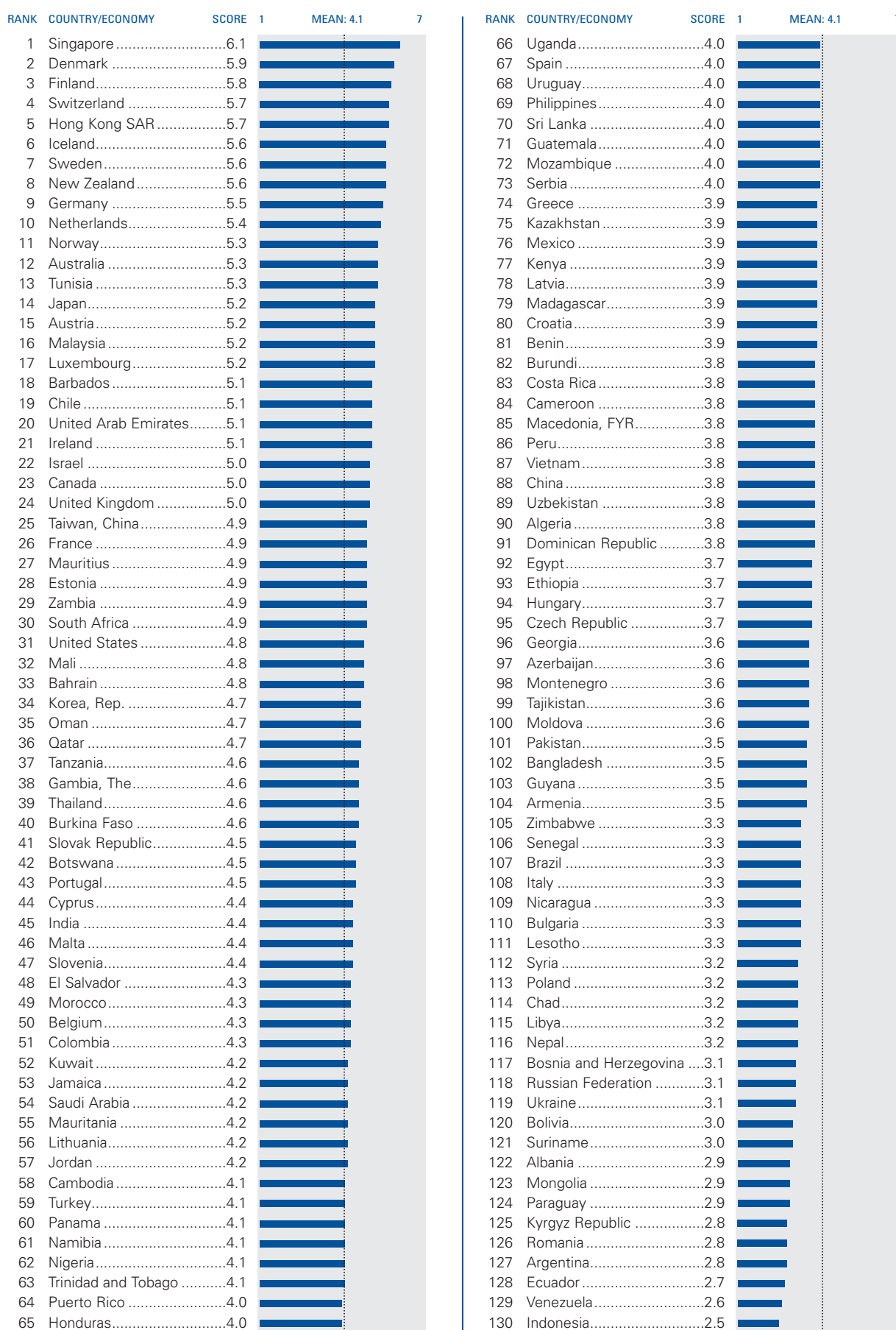
Index of openness of bilateral Air Service Agreements | 2005

RANK	COUNTRY/ECONOMY	HARD DATA	RANK	COUNTRY/ECONOMY	HARD DATA
1	El Salvador	33.7	66	Bolivia	9.5
2	Honduras	32.7	66	Egypt	9.5
3	Guatemala	31.9	68	Albania	9.5
4	Dominican Republic	28.9	69	Chad	9.4
5	Nicaragua	26.5	70	Norway	9.4
6	Jamaica	24.7	71	France	9.4
7	Peru	22.7	72	Bosnia and Herzegovina	9.3
8	United States	22.6	72	Malta	9.3
9	Costa Rica	22.0	74	Saudi Arabia	9.2
10	Canada	20.2	75	Australia	9.0
11	Panama	19.2	75	Gambia, The	9.0
12	Chile	18.9	75	Sweden	9.0
12	Poland	18.9	78	Argentina	8.8
14	Luxembourg	16.5	78	Mozambique	8.8
15	Germany	16.4	78	Slovak Republic	8.8
16	Iceland	15.6	81	Sri Lanka	8.6
17	Denmark	15.3	82	Romania	8.5
18	Portugal	15.1	83	Spain	8.3
19	Japan	14.8	84	Mauritania	8.2
19	Netherlands	14.8	85	Cambodia	8.1
21	Mexico	14.6	85	Senegal	8.1
22	Barbados	14.1	85	Syria	8.1
23	Suriname	13.6	88	Armenia	8.0
24	Hong Kong SAR	13.5	88	Lithuania	8.0
25	New Zealand	13.4	88	Venezuela	8.0
26	Ireland	13.3	88	Vietnam	8.0
27	Philippines	13.1	92	India	7.9
28	Italy	13.0	93	Madagascar	7.7
28	Singapore	13.0	94	Nigeria	7.5
30	Indonesia	12.9	94	Zimbabwe	7.5
31	Czech Republic	12.8	96	Oman	7.3
32	Belgium	12.6	97	Bulgaria	7.0
33	Ecuador	12.5	98	Kazakhstan	6.9
34	Finland	12.4	99	Uganda	6.7
35	Paraguay	12.2	100	Botswana	6.5
36	Brazil	12.1	101	Mauritius	6.2
36	Jordan	12.1	102	Algeria	6.1
38	United Kingdom	12.0	102	Mali	6.1
39	Israel	11.9	102	Ukraine	6.1
40	Colombia	11.8	105	Guyana	6.0
41	Korea, Rep.	11.7	106	Bangladesh	5.8
42	Trinidad and Tobago	11.5	106	Tanzania	5.8
42	Turkey	11.5	108	Mongolia	5.7
44	United Arab Emirates	11.3	109	China	5.5
45	Croatia	11.2	110	Burundi	5.4
45	Hungary	11.2	110	Latvia	5.4
45	Uruguay	11.2	112	Kenya	5.2
48	Azerbaijan	11.1	113	Macedonia, FYR	5.1
49	Namibia	10.9	114	Georgia	4.9
50	Greece	10.8	115	Cyprus	4.6
51	Malaysia	10.7	116	Kyrgyz Republic	4.5
51	Qatar	10.7	117	Moldova	4.4
53	Austria	10.6	118	Russian Federation	4.2
54	Morocco	10.5	119	Benin	3.9
55	Ethiopia	10.4	119	Slovenia	3.9
56	Libya	10.3	121	Estonia	3.0
57	Bahrain	10.2	121	Nepal	3.0
58	Tunisia	9.9	123	Kuwait	2.3
59	Thailand	9.9	124	Burkina Faso	1.9
60	South Africa	9.9	125	Lesotho	0.1
61	Uzbekistan	9.8	n/a	Montenegro	n/a
62	Cameroon	9.8	n/a	Puerto Rico	n/a
63	Switzerland	9.8	n/a	Serbia	n/a
64	Pakistan	9.6	n/a	Taiwan, China	n/a
64	Zambia	9.6	n/a	Tajikistan	n/a

SOURCE: World Trade Organization

## 1.06 Transparency of government policymaking

Are firms in your country usually informed clearly by the government on changes in policies and regulations affecting your industry? (1 = never informed; 7 = always informed)



SOURCE: World Economic Forum, Executive Opinion Survey 2006, 2007



## 1.07 Time required to start a business (hard data)

Number of days required to start a business | 2007

RANK	COUNTRY/ECONOMY	HARD DATA	RANK	COUNTRY/ECONOMY	HARD DATA
1	Australia	2.0	65	Uganda	28.0
2	Canada	3.0	67	Mozambique	29.0
3	Belgium	4.0	67	Russian Federation	29.0
4	Iceland	5.0	67	Tanzania	29.0
4	Singapore	5.0	70	Azerbaijan	30.0
6	Denmark	6.0	71	Argentina	31.0
6	Turkey	6.0	71	Benin	31.0
6	United States	6.0	71	Nepal	31.0
9	Estonia	7.0	71	Poland	31.0
9	France	7.0	71	South Africa	31.0
9	Madagascar	7.0	76	Bulgaria	32.0
9	Mauritius	7.0	76	Gambia, The	32.0
9	Portugal	7.0	78	India	33.0
9	Puerto Rico	7.0	78	Thailand	33.0
15	Jamaica	8.0	78	Zambia	33.0
16	Egypt	9.0	81	Israel	34.0
17	Netherlands	10.0	81	Nigeria	34.0
17	Norway	10.0	81	Oman	34.0
19	Georgia	11.0	84	China	35.0
19	Hong Kong SAR	11.0	84	Kuwait	35.0
19	Tunisia	11.0	84	Paraguay	35.0
22	Morocco	12.0	87	Albania	36.0
22	New Zealand	12.0	88	Cameroon	37.0
24	Ireland	13.0	89	Greece	38.0
24	Italy	13.0	90	Nicaragua	39.0
24	United Kingdom	13.0	90	Sri Lanka	39.0
24	Uzbekistan	13.0	92	Croatia	40.0
28	Finland	14.0	93	Colombia	42.0
28	Jordan	14.0	94	Burundi	43.0
28	Romania	14.0	94	Syria	43.0
31	Macedonia, FYR	15.0	94	Trinidad and Tobago	43.0
31	Saudi Arabia	15.0	97	Guyana	44.0
31	Sweden	15.0	97	Kenya	44.0
34	Ethiopia	16.0	97	Uruguay	44.0
34	Hungary	16.0	100	Spain	47.0
34	Latvia	16.0	101	Taiwan, China	48.0
37	Czech Republic	17.0	102	Tajikistan	49.0
37	Korea, Rep.	17.0	103	Bolivia	50.0
39	Armenia	18.0	103	Vietnam	50.0
39	Burkina Faso	18.0	105	Bosnia and Herzegovina	54.0
39	Germany	18.0	106	Philippines	58.0
42	Panama	19.0	106	Senegal	58.0
43	Mongolia	20.0	108	Slovenia	60.0
43	Switzerland	20.0	109	United Arab Emirates	62.0
45	Honduras	21.0	110	Ecuador	65.0
45	Kazakhstan	21.0	110	Mauritania	65.0
45	Kyrgyz Republic	21.0	112	Peru	72.0
48	Dominican Republic	22.0	113	Lesotho	73.0
49	Japan	23.0	114	Bangladesh	74.0
49	Moldova	23.0	115	Chad	75.0
49	Serbia	23.0	116	Costa Rica	77.0
52	Algeria	24.0	117	Cambodia	86.0
52	Malaysia	24.0	118	Zimbabwe	96.0
52	Montenegro	24.0	119	Namibia	99.0
52	Pakistan	24.0	120	Indonesia	105.0
56	Slovak Republic	25.0	121	Botswana	108.0
57	El Salvador	26.0	122	Venezuela	141.0
57	Guatemala	26.0	123	Brazil	152.0
57	Lithuania	26.0	124	Suriname	694.0
57	Luxembourg	26.0	n/a	Bahrain	n/a
57	Mali	26.0	n/a	Barbados	n/a
62	Chile	27.0	n/a	Cyprus	n/a
62	Mexico	27.0	n/a	Libya	n/a
62	Ukraine	27.0	n/a	Malta	n/a
65	Austria	28.0	n/a	Qatar	n/a

SOURCE: World Bank, *Doing Business 2008*

## 1.08 Cost to start a business (hard data)

Cost to start a business as percentage of GNI per capita | 2007

RANK	COUNTRY/ECONOMY	HARD DATA	RANK	COUNTRY/ECONOMY	HARD DATA
1	Denmark	0.0	66	Spain	15.1
2	New Zealand	0.1	67	Korea, Rep.	16.9
3	Ireland	0.3	68	Hungary	17.7
4	Sweden	0.6	69	Malaysia	18.1
5	United States	0.7	70	Italy	18.7
6	Australia	0.8	71	Colombia	19.3
6	Puerto Rico	0.8	72	Vietnam	20.0
6	Singapore	0.8	73	Turkey	20.7
6	United Kingdom	0.8	74	Albania	20.9
10	Canada	0.9	75	Poland	21.2
10	Trinidad and Tobago	0.9	76	Costa Rica	21.3
12	Finland	1.0	76	Zimbabwe	21.3
13	France	1.1	78	Mozambique	21.6
14	Kuwait	1.6	79	Panama	22.0
15	Estonia	2.0	80	Namibia	22.3
16	Switzerland	2.1	81	Madagascar	22.7
17	Luxembourg	2.3	82	Greece	23.3
17	Norway	2.3	83	Philippines	26.8
19	Iceland	2.7	84	Venezuela	28.2
20	Latvia	3.0	85	Egypt	28.6
20	Lithuania	3.0	86	Ecuador	29.2
22	Hong Kong SAR	3.1	87	Peru	29.9
23	Portugal	3.4	88	Bosnia and Herzegovina	30.1
24	Russian Federation	3.7	89	Zambia	30.5
25	Taiwan, China	4.1	90	Dominican Republic	31.1
26	Slovak Republic	4.2	91	Saudi Arabia	32.3
27	Mongolia	4.3	92	United Arab Emirates	36.9
27	Oman	4.3	93	Lesotho	37.4
29	Israel	4.4	94	Tajikistan	39.6
30	Romania	4.7	95	Ethiopia	41.3
31	Armenia	4.8	96	Uruguay	46.0
32	Belgium	5.3	97	Kenya	46.1
32	Mauritius	5.3	98	Bangladesh	46.2
34	Austria	5.4	99	Tanzania	47.1
35	Thailand	5.6	100	Guatemala	47.3
36	Germany	5.7	101	Syria	55.7
37	Netherlands	6.0	102	Mauritania	56.2
38	Montenegro	6.2	103	Nigeria	56.6
39	Macedonia, FYR	6.6	104	Honduras	59.9
40	Azerbaijan	6.9	105	Jordan	66.2
41	South Africa	7.1	106	El Salvador	73.1
42	Japan	7.5	107	Nepal	73.9
43	Kazakhstan	7.6	108	India	74.6
44	Ukraine	7.8	109	Paraguay	77.6
45	Tunisia	8.3	110	Indonesia	80.0
46	Bulgaria	8.4	111	Burkina Faso	82.1
46	China	8.4	112	Guyana	87.2
48	Slovenia	8.5	113	Uganda	92.0
48	Sri Lanka	8.5	114	Senegal	107.0
50	Chile	8.6	115	Nicaragua	119.1
51	Jamaica	8.7	116	Cameroon	129.2
52	Kyrgyz Republic	8.8	117	Mali	132.1
53	Serbia	8.9	118	Bolivia	134.1
54	Georgia	9.5	119	Suriname	141.8
55	Argentina	9.7	120	Chad	188.8
56	Botswana	9.9	121	Cambodia	190.3
57	Brazil	10.4	122	Benin	195.0
58	Czech Republic	10.6	123	Burundi	251.0
59	Moldova	11.5	124	Gambia, The	279.0
59	Morocco	11.5	n/a	Bahrain	n/a
61	Croatia	11.7	n/a	Barbados	n/a
62	Algeria	13.2	n/a	Cyprus	n/a
63	Mexico	13.3	n/a	Libya	n/a
64	Pakistan	14.0	n/a	Malta	n/a
65	Uzbekistan	14.2	n/a	Qatar	n/a

SOURCE: World Bank, *Doing Business 2008*

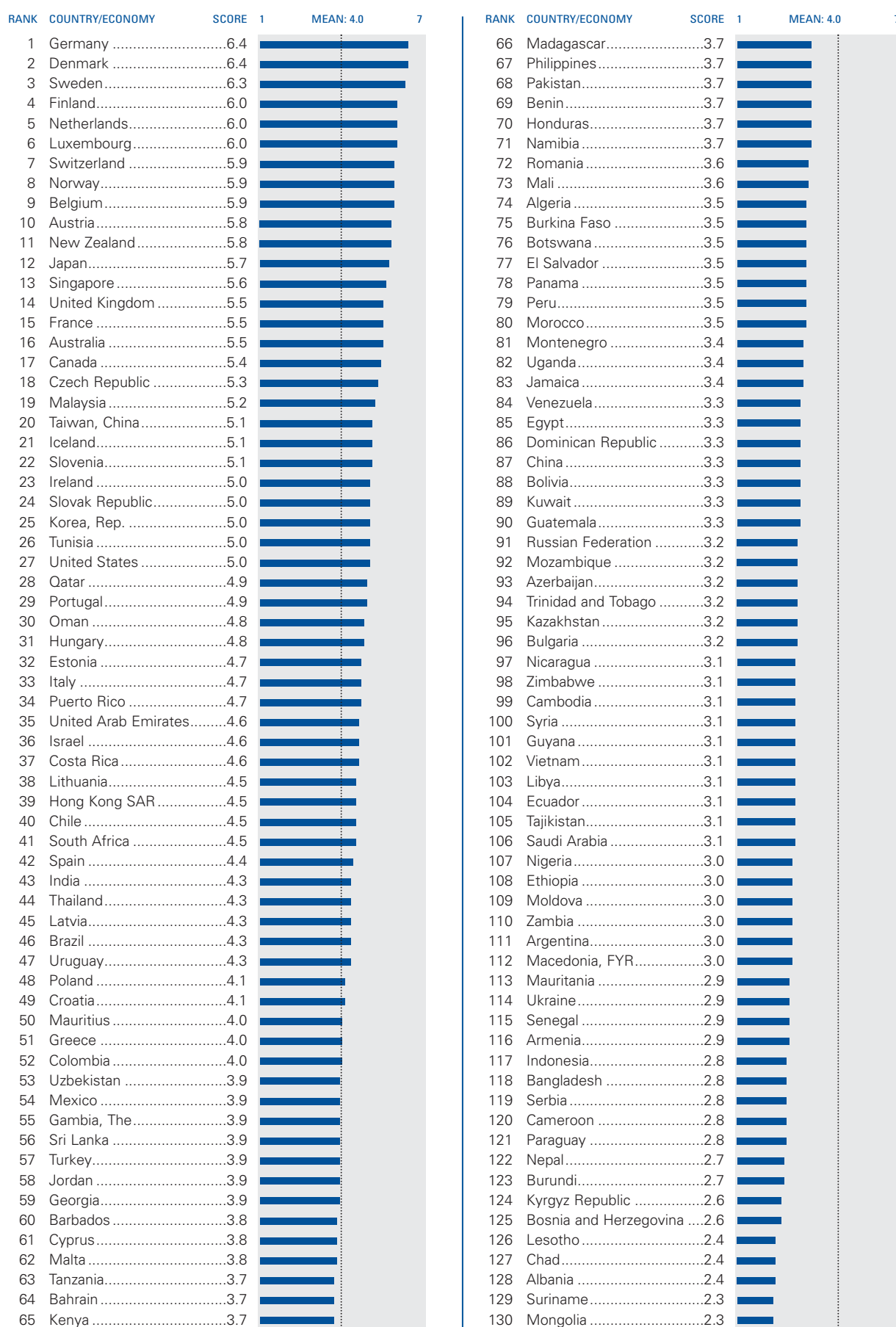


2nd pillar

Environmental sustainability

## 2.01 Stringency of environmental regulation

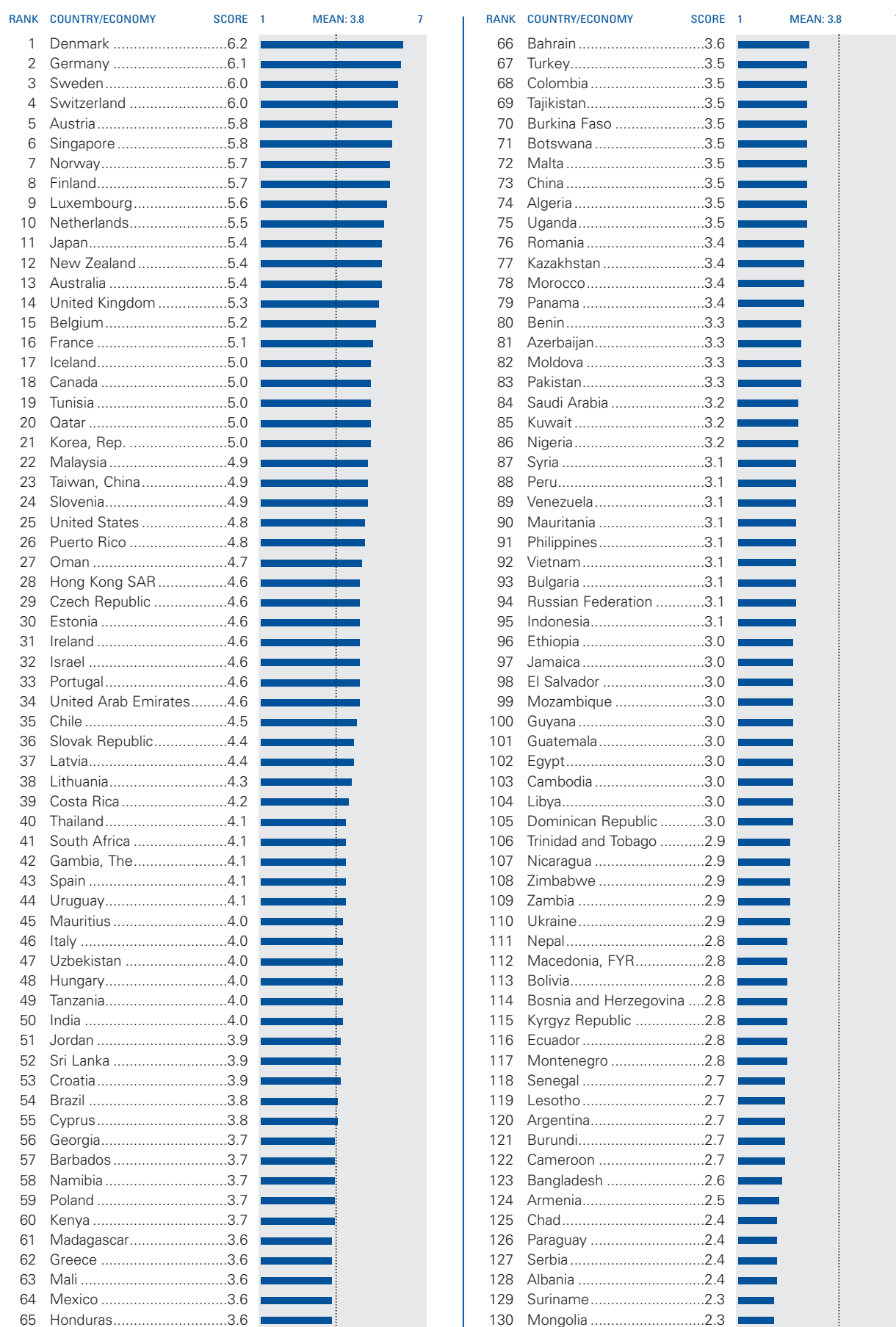
How stringent is your country's environmental regulation? (1 = lax compared to most countries, among the world's most stringent)



SOURCE: World Economic Forum, Executive Opinion Survey 2006, 2007

## 2.02 Enforcement of environmental regulation

Environmental regulations in your country are (1 = confusing and enforced erratically, 7 = stable and enforced consistently and fairly)



SOURCE: World Economic Forum, Executive Opinion Survey 2006, 2007

## 2.03 Sustainability of T&T industry development

Is your country's government taking the necessary steps to ensure that the Travel and Tourism sector is being developed in a sustainable way? (1 = no, development of the sector does not take into account issues related to environmental protection and sustainable development, 7 = yes, sustainable development issues are at the core of the government's strategy with regard to the industry's development)

RANK	COUNTRY/ECONOMY	SCORE	1	MEAN: 4.7	7	RANK	COUNTRY/ECONOMY	SCORE	1	MEAN: 4.7	7
1	Singapore	6.3				66	Honduras	4.9			
2	United Arab Emirates	6.2				67	Croatia	4.8			
3	Austria	6.0				68	Senegal	4.8			
4	Tunisia	6.0				69	Malta	4.8			
5	Hong Kong SAR	6.0				70	Saudi Arabia	4.8			
6	Malaysia	5.9				71	Colombia	4.8			
7	New Zealand	5.9				72	Syria	4.7			
8	Barbados	5.9				73	Tajikistan	4.7			
9	Mauritius	5.8				74	Dominican Republic	4.7			
10	Morocco	5.7				75	Slovenia	4.6			
11	Gambia, The	5.7				76	Guatemala	4.6			
12	Australia	5.6				77	Benin	4.6			
13	Mali	5.6				78	El Salvador	4.6			
14	South Africa	5.6				79	Japan	4.6			
15	Qatar	5.6				80	China	4.6			
16	Switzerland	5.6				81	Czech Republic	4.6			
17	Tanzania	5.5				82	Bahrain	4.6			
18	Portugal	5.5				83	Mozambique	4.6			
19	Kenya	5.5				84	Hungary	4.5			
20	France	5.4				85	Peru	4.5			
21	Ireland	5.4				86	Georgia	4.5			
22	Puerto Rico	5.4				87	Nepal	4.5			
23	Zambia	5.4				88	Guyana	4.4			
24	Thailand	5.4				89	Philippines	4.4			
25	Canada	5.4				90	Chile	4.4			
26	Denmark	5.4				91	Algeria	4.3			
27	Iceland	5.4				92	Latvia	4.3			
28	Finland	5.3				93	Nicaragua	4.3			
29	Germany	5.3				94	Azerbaijan	4.3			
30	Botswana	5.3				95	Lesotho	4.2			
31	Sweden	5.3				96	Kazakhstan	4.2			
32	Indonesia	5.3				97	Armenia	4.2			
33	Netherlands	5.2				98	Lithuania	4.2			
34	Uzbekistan	5.2				99	Argentina	4.1			
35	Greece	5.2				100	Brazil	4.1			
36	Burkina Faso	5.2				101	Mauritania	4.1			
37	Luxembourg	5.2				102	Ethiopia	4.1			
38	Egypt	5.2				103	Pakistan	4.0			
39	United States	5.2				104	Bulgaria	4.0			
40	Jordan	5.1				105	Slovak Republic	3.9			
41	Korea, Rep.	5.1				106	Kyrgyz Republic	3.8			
42	Uganda	5.1				107	Ecuador	3.8			
43	Belgium	5.1				108	Serbia	3.7			
44	Vietnam	5.1				109	Moldova	3.7			
45	Norway	5.1				110	Trinidad and Tobago	3.7			
46	Israel	5.1				111	Mongolia	3.7			
47	Cyprus	5.1				112	Chad	3.7			
48	Mexico	5.1				113	Italy	3.7			
49	United Kingdom	5.0				114	Poland	3.7			
50	Costa Rica	5.0				115	Libya	3.6			
51	Taiwan, China	5.0				116	Cameroon	3.6			
52	Estonia	5.0				117	Suriname	3.5			
53	Sri Lanka	5.0				118	Zimbabwe	3.5			
54	Madagascar	5.0				119	Macedonia, FYR	3.4			
55	Spain	5.0				120	Ukraine	3.4			
56	Turkey	5.0				121	Burundi	3.4			
57	Namibia	5.0				122	Romania	3.4			
58	Oman	5.0				123	Albania	3.3			
59	Panama	4.9				124	Bangladesh	3.3			
60	Jamaica	4.9				125	Russian Federation	3.3			
61	Cambodia	4.9				126	Kuwait	3.1			
62	Nigeria	4.9				127	Bosnia and Herzegovina	2.9			
63	India	4.9				128	Bolivia	2.7			
64	Montenegro	4.9				129	Venezuela	2.7			
65	Uruguay	4.9				130	Paraguay	2.7			

SOURCE: World Economic Forum, Executive Opinion Survey 2006, 2007

## 2.04 Carbon dioxide emissions (hard data)

Carbon dioxide emissions per capita in metric tons | 2003

RANK	COUNTRY/ECONOMY	HARD DATA	RANK	COUNTRY/ECONOMY	HARD DATA
1	Burundi	0.0	66	Thailand	3.9
1	Cambodia	0.0	67	Jamaica	4.1
1	Chad	0.0	67	Mexico	4.1
1	Mali	0.0	69	Romania	4.2
5	Burkina Faso	0.1	70	Barbados	4.4
5	Ethiopia	0.1	71	Uzbekistan	4.8
5	Madagascar	0.1	72	Bosnia and Herzegovina	4.9
5	Mozambique	0.1	73	Suriname	5.0
5	Nepal	0.1	74	Algeria	5.1
5	Tanzania	0.1	75	Macedonia, FYR	5.2
5	Uganda	0.1	76	Croatia	5.4
12	Cameroon	0.2	77	Portugal	5.5
12	Gambia, The	0.2	77	Switzerland	5.5
12	Zambia	0.2	79	Bulgaria	5.6
15	Bangladesh	0.3	79	Hong Kong SAR	5.6
15	Benin	0.3	79	Venezuela	5.6
15	Kenya	0.3	82	Hungary	5.7
18	Nigeria	0.4	83	Sweden	5.9
18	Senegal	0.4	84	France	6.2
20	Puerto Rico	0.5	84	Malta	6.2
20	Sri Lanka	0.5	86	Malaysia	6.4
22	Paraguay	0.7	87	Ukraine	6.6
22	Tajikistan	0.7	88	Slovak Republic	7.0
24	Georgia	0.8	89	Spain	7.4
24	Nicaragua	0.8	90	Iceland	7.6
24	Pakistan	0.8	91	Italy	7.7
27	Bolivia	0.9	91	Slovenia	7.7
27	Guatemala	0.9	93	South Africa	7.9
27	Honduras	0.9	94	Poland	8.0
27	Mauritania	0.9	95	Austria	8.7
27	Vietnam	0.9	95	Greece	8.7
27	Zimbabwe	0.9	95	Netherlands	8.7
33	Albania	1.0	95	New Zealand	8.7
33	El Salvador	1.0	99	Libya	8.9
33	Peru	1.0	100	United Kingdom	9.4
33	Philippines	1.0	101	Korea, Rep.	9.5
37	Armenia	1.1	102	Japan	9.6
37	Kyrgyz Republic	1.1	103	Germany	9.8
39	India	1.2	104	Belgium	9.9
39	Namibia	1.2	104	Norway	9.9
41	Colombia	1.3	106	Cyprus	10.1
41	Morocco	1.3	106	Denmark	10.1
41	Uruguay	1.3	108	Israel	10.2
44	Indonesia	1.4	109	Russian Federation	10.3
45	Costa Rica	1.5	110	Ireland	10.4
46	Brazil	1.6	111	Kazakhstan	10.7
47	Moldova	1.7	112	Czech Republic	11.4
48	Ecuador	1.8	112	Singapore	11.4
49	Panama	1.9	114	Oman	12.8
50	Egypt	2.0	115	Finland	13.0
51	Tunisia	2.1	116	Estonia	13.5
52	Guyana	2.2	117	Saudi Arabia	13.7
53	Botswana	2.3	118	Australia	17.8
54	Dominican Republic	2.5	119	Canada	17.9
55	Mauritius	2.6	120	United States	19.9
56	Syria	2.7	121	Luxembourg	22.1
57	Latvia	2.9	121	Trinidad and Tobago	22.1
58	Turkey	3.1	123	Bahrain	31.0
59	China	3.2	124	Kuwait	32.7
59	Mongolia	3.2	125	United Arab Emirates	33.4
61	Jordan	3.3	126	Qatar	63.0
62	Argentina	3.4	n/a	Lesotho	n/a
63	Azerbaijan	3.5	n/a	Montenegro	n/a
64	Chile	3.7	n/a	Serbia	n/a
64	Lithuania	3.7	n/a	Taiwan, China	n/a

SOURCE: World Bank, *World Development Indicators 2007*



## 2.05 Particulate matter concentration (hard data)

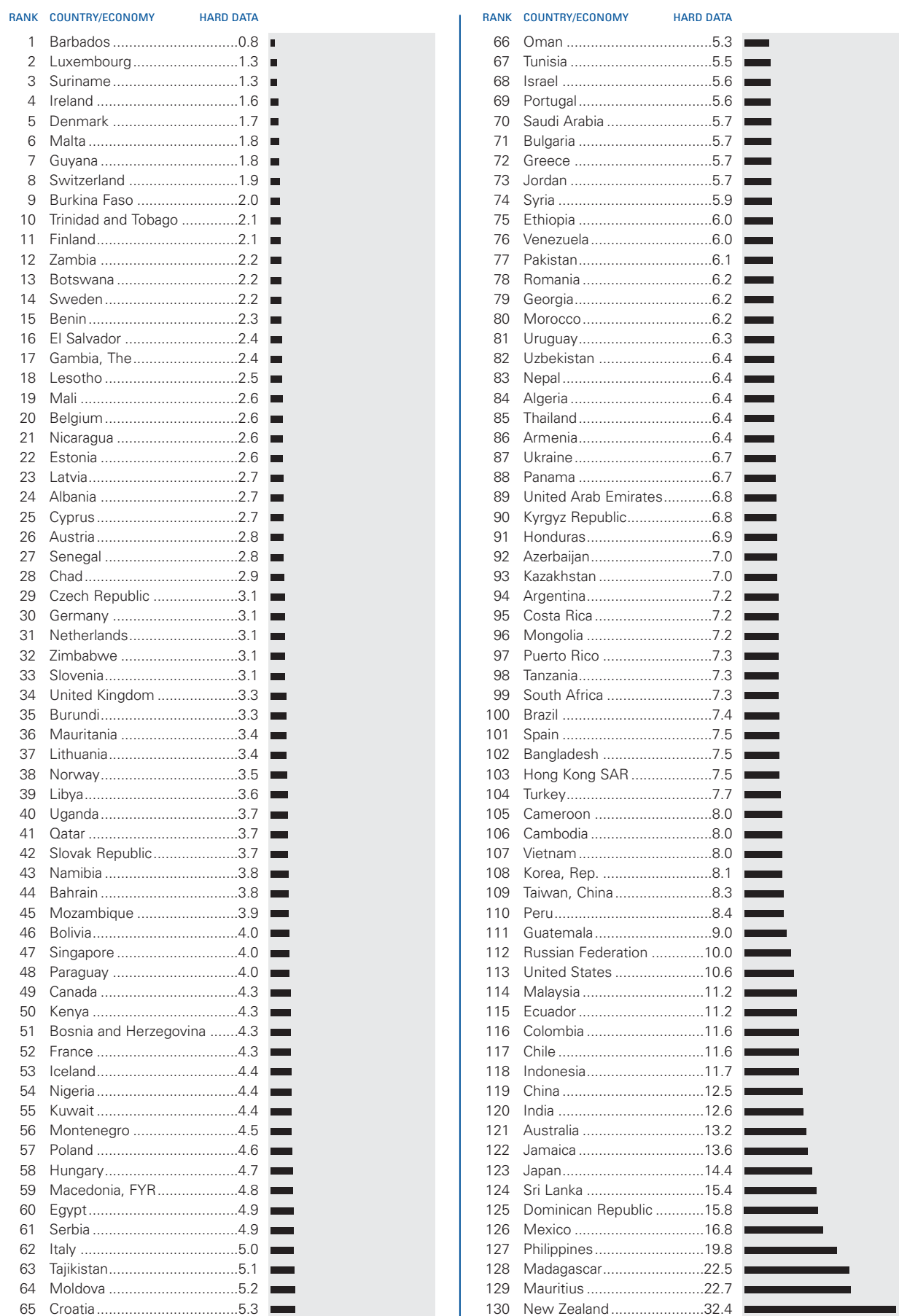
Urban-population-weighted PM10 micrograms per cubic meter | 2004

RANK	COUNTRY/ECONOMY	HARD DATA	RANK	COUNTRY/ECONOMY	HARD DATA
1	Venezuela	7.0	66	Benin	43.0
2	Lithuania	10.0	66	Namibia	43.0
3	Norway	12.0	68	Singapore	44.0
3	Sweden	12.0	69	Georgia	45.0
5	France	14.0	69	Madagascar	45.0
6	New Zealand	15.0	71	Honduras	47.0
6	United Kingdom	15.0	72	Turkey	48.0
8	Australia	16.0	73	Jordan	50.0
8	Estonia	16.0	74	Chile	54.0
8	Latvia	16.0	74	Lesotho	54.0
8	Mauritius	16.0	76	Bulgaria	55.0
8	Romania	16.0	76	Tajikistan	55.0
8	Slovak Republic	16.0	78	Albania	56.0
14	Uganda	17.0	79	Zambia	58.0
15	Hungary	18.0	80	Azerbaijan	59.0
16	Bosnia and Herzegovina	19.0	81	Cambodia	64.0
16	Canada	19.0	81	Cameroon	64.0
16	Finland	19.0	83	Peru	65.0
16	Germany	19.0	83	Vietnam	65.0
16	Ireland	19.0	85	Guatemala	67.0
16	Kazakhstan	19.0	85	Nigeria	67.0
22	Denmark	20.0	87	Mongolia	68.0
22	Macedonia, FYR	20.0	88	Armenia	69.0
22	Morocco	20.0	88	Botswana	69.0
22	Puerto Rico	20.0	90	China	72.0
22	Russian Federation	20.0	90	Hong Kong SAR	72.0
27	Colombia	23.0	90	India	72.0
27	Czech Republic	23.0	90	Taiwan, China	72.0
27	United States	23.0	94	Thailand	73.0
30	Kyrgyz Republic	24.0	95	Ethiopia	76.0
30	Switzerland	24.0	95	Senegal	76.0
32	Belgium	25.0	95	Uzbekistan	76.0
32	Ecuador	25.0	98	Argentina	78.0
34	Portugal	26.0	99	Bolivia	86.0
34	South Africa	26.0	99	Syria	86.0
36	Italy	27.0	101	Algeria	88.0
36	Ukraine	27.0	102	Burkina Faso	94.0
38	Brazil	28.0	103	Gambia, The	95.0
38	Tanzania	28.0	104	Libya	98.0
38	Zimbabwe	28.0	105	Paraguay	101.0
41	Malaysia	29.0	106	Indonesia	102.0
42	Dominican Republic	30.0	107	Mauritania	103.0
42	Slovenia	30.0	108	Sri Lanka	104.0
44	Croatia	31.0	109	Kuwait	108.0
44	Japan	31.0	110	Trinidad and Tobago	114.0
44	Nicaragua	31.0	111	Oman	120.0
47	Philippines	32.0	112	United Arab Emirates	126.0
48	Spain	33.0	113	Chad	127.0
48	Tunisia	33.0	114	Pakistan	128.0
50	Netherlands	34.0	115	Saudi Arabia	133.0
51	Austria	35.0	116	Uruguay	134.0
51	El Salvador	35.0	117	Egypt	135.0
53	Panama	37.0	118	Bangladesh	140.0
54	Israel	38.0	119	Mali	165.0
54	Korea, Rep.	38.0	n/a	Bahrain	n/a
54	Poland	38.0	n/a	Barbados	n/a
57	Burundi	39.0	n/a	Cyprus	n/a
57	Costa Rica	39.0	n/a	Guyana	n/a
57	Kenya	39.0	n/a	Iceland	n/a
57	Mexico	39.0	n/a	Luxembourg	n/a
57	Moldova	39.0	n/a	Malta	n/a
57	Mozambique	39.0	n/a	Montenegro	n/a
57	Nepal	39.0	n/a	Qatar	n/a
64	Greece	41.0	n/a	Serbia	n/a
65	Jamaica	42.0	n/a	Suriname	n/a

SOURCE: World Bank, *World Development Indicators 2007*

## 2.06 Threatened species (hard data)

Threatened species as a percentage of total species (mammals, birds, amphibians) | 2007



SOURCE: The International Union for Conservation of Nature (IUCN), Red List of Threatened Species 2007

## 2.07 Environmental treaty ratification (hard data)

Total number of ratified environmental treaties | 2007

RANK	COUNTRY/ECONOMY	HARD DATA	RANK	COUNTRY/ECONOMY	HARD DATA
1	France	23.0	63	Korea, Rep.	18.0
1	Greece	23.0	63	Mongolia	18.0
1	Spain	23.0	63	Morocco	18.0
1	Sweden	23.0	63	Pakistan	18.0
5	Denmark	22.0	63	Tanzania	18.0
5	Finland	22.0	63	Trinidad and Tobago	18.0
5	Germany	22.0	72	Barbados	17.0
5	Ireland	22.0	72	Burkina Faso	17.0
5	Japan	22.0	72	Cameroon	17.0
5	Kenya	22.0	72	Georgia	17.0
5	Netherlands	22.0	72	Guatemala	17.0
5	New Zealand	22.0	72	Honduras	17.0
5	Norway	22.0	72	Malaysia	17.0
5	Portugal	22.0	72	Mali	17.0
5	Senegal	22.0	72	Moldova	17.0
5	Slovenia	22.0	72	Nicaragua	17.0
5	United Kingdom	22.0	72	Oman	17.0
18	Australia	21.0	72	Paraguay	17.0
18	Belgium	21.0	72	Qatar	17.0
18	Bulgaria	21.0	72	Saudi Arabia	17.0
18	Chile	21.0	72	Syria	17.0
18	India	21.0	72	Venezuela	17.0
18	Italy	21.0	88	Albania	16.0
18	Jordan	21.0	88	Dominican Republic	16.0
18	Luxembourg	21.0	88	Estonia	16.0
18	Switzerland	21.0	88	Gambia, The	16.0
18	Uruguay	21.0	88	Kuwait	16.0
28	Austria	20.0	88	Mozambique	16.0
28	Brazil	20.0	88	Russian Federation	16.0
28	Cyprus	20.0	88	Uganda	16.0
28	Czech Republic	20.0	88	United Arab Emirates	16.0
28	Egypt	20.0	97	Armenia	15.0
28	Latvia	20.0	97	Azerbaijan	15.0
28	Libya	20.0	97	Cambodia	15.0
28	Lithuania	20.0	97	Indonesia	15.0
28	Madagascar	20.0	97	Lesotho	15.0
28	Mauritania	20.0	97	Macedonia, FYR	15.0
28	Mauritius	20.0	97	Montenegro	15.0
28	Nigeria	20.0	97	Nepal	15.0
28	Panama	20.0	97	Singapore	15.0
28	Philippines	20.0	97	Suriname	15.0
28	Poland	20.0	97	United States	15.0
28	Romania	20.0	97	Vietnam	15.0
28	South Africa	20.0	109	Botswana	14.0
45	Argentina	19.0	109	Chad	14.0
45	Bangladesh	19.0	109	El Salvador	14.0
45	Benin	19.0	109	Israel	14.0
45	Canada	19.0	109	Thailand	14.0
45	China	19.0	109	Zambia	14.0
45	Costa Rica	19.0	115	Bahrain	13.0
45	Croatia	19.0	115	Burundi	13.0
45	Ecuador	19.0	115	Ethiopia	13.0
45	Hungary	19.0	115	Guyana	13.0
45	Iceland	19.0	115	Kyrgyz Republic	13.0
45	Malta	19.0	115	Serbia	13.0
45	Mexico	19.0	121	Colombia	12.0
45	Namibia	19.0	121	Turkey	12.0
45	Peru	19.0	123	Bosnia and Herzegovina	11.0
45	Slovak Republic	19.0	123	Uzbekistan	11.0
45	Sri Lanka	19.0	125	Kazakhstan	10.0
45	Tunisia	19.0	125	Tajikistan	10.0
45	Ukraine	19.0	125	Zimbabwe	10.0
63	Algeria	18.0	n/a	Hong Kong SAR	n/a
63	Bolivia	18.0	n/a	Puerto Rico	n/a
63	Jamaica	18.0	n/a	Taiwan, China	n/a

SOURCE: The International Union for Conservation of Nature (IUCN) Environmental Law Centre *ELIS Treaty Database*

3rd pillar  
Safety and security

### 3.01 Business costs of terrorism

The threat of terrorism in your country (1 = imposes significant costs on business, 7 = does not impose significant costs on business)

RANK	COUNTRY/ECONOMY	SCORE	1	MEAN: 5.3	7	RANK	COUNTRY/ECONOMY	SCORE	1	MEAN: 5.3	7
1	Finland.....	6.6				66	Ukraine.....	5.4			
2	Libya.....	6.6				67	Honduras.....	5.4			
3	Syria.....	6.4				68	Ethiopia.....	5.4			
4	Uruguay.....	6.4				69	Kuwait.....	5.4			
5	Slovak Republic.....	6.3				70	Panama.....	5.4			
6	Mauritius.....	6.3				71	Tanzania.....	5.4			
7	Montenegro.....	6.3				72	Belgium.....	5.4			
8	Austria.....	6.2				73	Azerbaijan.....	5.4			
9	Bosnia and Herzegovina.....	6.2				74	France.....	5.4			
10	Brazil.....	6.2				75	Jordan.....	5.3			
11	Hungary.....	6.2				76	Oman.....	5.3			
12	Argentina.....	6.2				77	Benin.....	5.3			
13	Hong Kong SAR.....	6.1				78	Korea, Rep.....	5.3			
14	Iceland.....	6.1				79	Australia.....	5.3			
15	Slovenia.....	6.1				80	Burkina Faso.....	5.3			
16	Czech Republic.....	6.1				81	Mozambique.....	5.2			
17	New Zealand.....	6.1				82	Kazakhstan.....	5.2			
18	Sweden.....	6.1				83	Saudi Arabia.....	5.2			
19	Croatia.....	6.0				84	Vietnam.....	5.2			
20	Zimbabwe.....	6.0				85	Singapore.....	5.2			
21	Luxembourg.....	6.0				86	Italy.....	5.2			
22	Puerto Rico.....	6.0				87	Canada.....	5.1			
23	Portugal.....	6.0				88	Bahrain.....	5.1			
24	Zambia.....	6.0				89	Suriname.....	5.1			
25	Malta.....	6.0				90	Madagascar.....	5.1			
26	Lithuania.....	6.0				91	Netherlands.....	5.0			
27	Estonia.....	6.0				92	Morocco.....	5.0			
28	Chile.....	6.0				93	India.....	4.9			
29	Norway.....	5.9				94	Cambodia.....	4.9			
30	Indonesia.....	5.9				95	Lesotho.....	4.9			
31	Gambia, The.....	5.9				96	Poland.....	4.9			
32	Namibia.....	5.9				97	Peru.....	4.9			
33	Botswana.....	5.9				98	Guatemala.....	4.8			
34	Dominican Republic.....	5.8				99	Albania.....	4.8			
35	Ireland.....	5.8				100	Turkey.....	4.8			
36	Greece.....	5.8				101	Venezuela.....	4.8			
37	Costa Rica.....	5.8				102	Thailand.....	4.8			
38	Switzerland.....	5.8				103	Bulgaria.....	4.7			
39	Tunisia.....	5.8				104	Japan.....	4.7			
40	Armenia.....	5.8				105	Tajikistan.....	4.7			
41	Georgia.....	5.8				106	Egypt.....	4.7			
42	Mongolia.....	5.8				107	Spain.....	4.7			
43	South Africa.....	5.8				108	Russian Federation.....	4.7			
44	Latvia.....	5.7				109	China.....	4.6			
45	Cameroon.....	5.7				110	Kyrgyz Republic.....	4.6			
46	Qatar.....	5.7				111	Macedonia, FYR.....	4.5			
47	Germany.....	5.7				112	Uzbekistan.....	4.5			
48	Senegal.....	5.7				113	Trinidad and Tobago.....	4.5			
49	Mauritania.....	5.6				114	Guyana.....	4.4			
50	Cyprus.....	5.6				115	Chad.....	4.4			
51	Denmark.....	5.6				116	El Salvador.....	4.3			
52	Serbia.....	5.6				117	Algeria.....	4.3			
53	Mexico.....	5.6				118	Burundi.....	4.2			
54	Romania.....	5.6				119	Bangladesh.....	4.2			
55	United Arab Emirates.....	5.6				120	United Kingdom.....	4.1			
56	Paraguay.....	5.5				121	Nigeria.....	4.1			
57	Jamaica.....	5.5				122	Pakistan.....	3.9			
58	Moldova.....	5.5				123	United States.....	3.9			
59	Malaysia.....	5.5				124	Kenya.....	3.8			
60	Mali.....	5.5				125	Uganda.....	3.7			
61	Ecuador.....	5.5				126	Philippines.....	3.7			
62	Barbados.....	5.5				127	Israel.....	3.5			
63	Taiwan, China.....	5.5				128	Colombia.....	3.1			
64	Bolivia.....	5.5				129	Sri Lanka.....	3.0			
65	Nicaragua.....	5.5				130	Nepal.....	2.1			

SOURCE: World Economic Forum, Executive Opinion Survey 2006, 2007

## 3.02 Reliability of police services

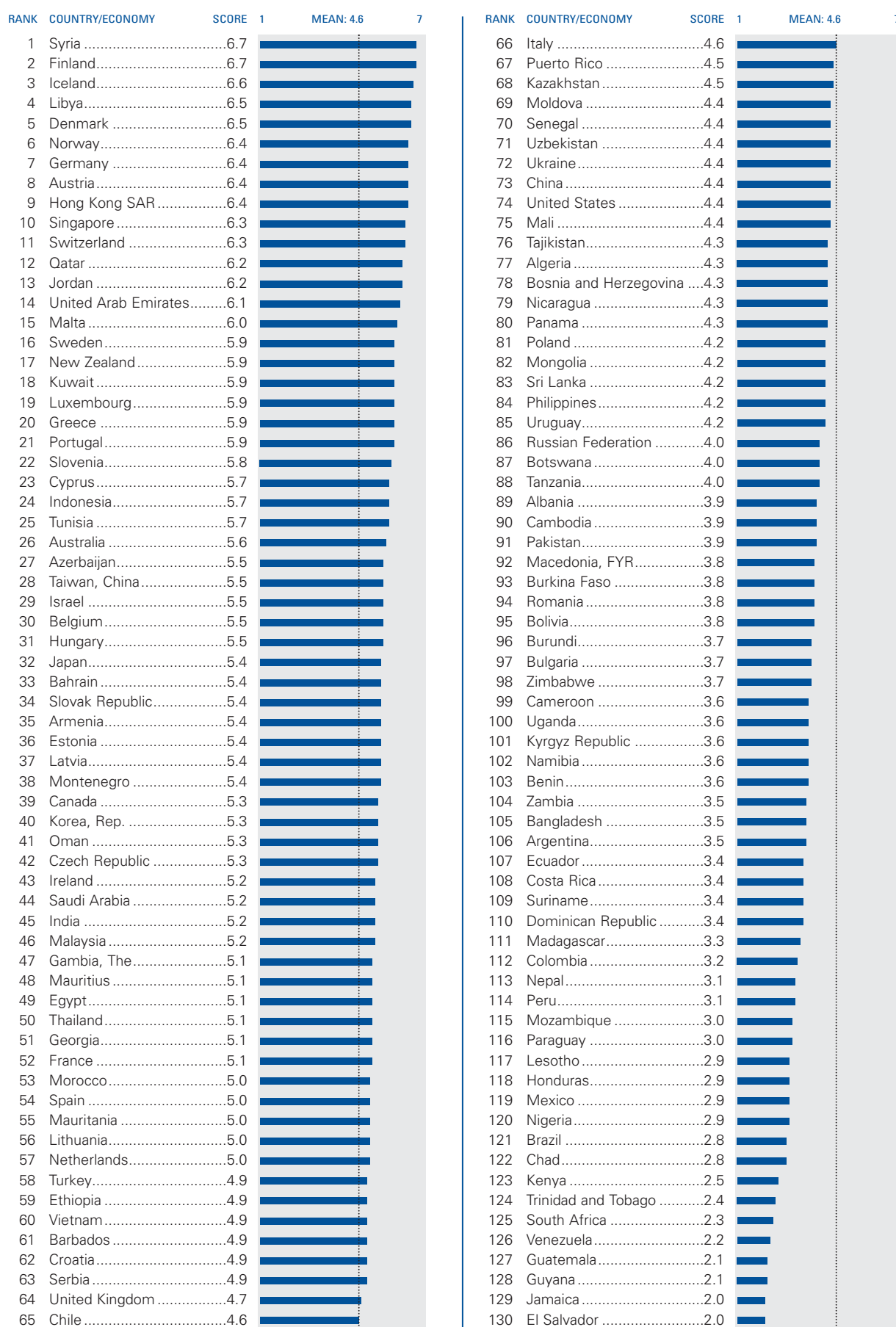
Police services (1 = cannot be relied upon to protect businesses from criminals, 7 = can be relied upon to protect businesses from criminals)



SOURCE: World Economic Forum, Executive Opinion Survey 2006, 2007

### 3.03 Business costs of crime and violence

The incidence of common crime and violence (e.g., street muggings, firms being looted) (1 = imposes significant costs on businesses, 7 = does not impose significant costs on businesses)



SOURCE: World Economic Forum, Executive Opinion Survey 2006, 2007

### 3.04 Road traffic accidents (hard data)

Estimated deaths per 100,000 population due to road traffic accidents | 2002

RANK	COUNTRY/ECONOMY	HARD DATA	RANK	COUNTRY/ECONOMY	HARD DATA
1	Malta	0.0	66	Burundi	1.8
2	Barbados	0.0	67	Ecuador	1.9
3	Iceland	0.0	68	El Salvador	1.9
4	Jamaica	0.1	69	Zimbabwe	1.9
5	Slovak Republic	0.1	70	Benin	2.1
6	Luxembourg	0.1	71	Dominican Republic	2.1
7	Albania	0.1	72	Greece	2.2
8	Guyana	0.1	73	Uzbekistan	2.2
9	Bahrain	0.1	74	Syria	2.3
10	Suriname	0.1	75	Chile	2.3
11	Macedonia, FYR	0.1	76	Kazakhstan	2.5
12	Qatar	0.1	77	Mozambique	2.6
13	Trinidad and Tobago	0.2	78	Canada	2.7
14	Bosnia and Herzegovina	0.2	79	Cambodia	2.8
15	Mauritius	0.2	80	Romania	2.8
16	Estonia	0.2	81	Chad	2.9
17	Cyprus	0.2	82	Tunisia	3.0
18	Singapore	0.2	83	Senegal	3.1
19	Tajikistan	0.3	84	Malaysia	3.5
20	Slovenia	0.3	85	Nepal	3.8
21	Botswana	0.3	86	United Kingdom	3.9
22	Georgia	0.3	87	Peru	4.2
23	Armenia	0.3	88	Argentina	4.4
24	Norway	0.3	89	Mali	4.9
25	Oman	0.3	90	Burkina Faso	5.1
26	Uruguay	0.4	91	Madagascar	5.1
27	Kuwait	0.4	92	Cameroon	5.2
28	Ireland	0.4	93	Algeria	5.4
29	Gambia, The	0.4	94	Saudi Arabia	5.6
30	Lesotho	0.4	95	Morocco	5.7
31	Switzerland	0.4	96	Poland	6.0
32	Panama	0.4	97	Turkey	6.2
33	Finland	0.4	98	Ukraine	6.3
34	Azerbaijan	0.4	99	Spain	6.5
35	Namibia	0.4	100	Uganda	6.9
36	Denmark	0.5	101	Venezuela	6.9
37	New Zealand	0.5	102	Kenya	7.1
38	Israel	0.5	103	Germany	7.1
39	Paraguay	0.5	104	Italy	7.6
40	Sweden	0.6	105	Philippines	7.9
41	Croatia	0.6	106	Colombia	8.1
42	Latvia	0.6	107	France	8.3
43	Kyrgyz Republic	0.6	108	Egypt	8.7
44	Moldova	0.7	109	Tanzania	10.1
45	Lithuania	0.7	110	Korea, Rep.	10.6
46	Costa Rica	0.7	111	Japan	11.1
47	Guatemala	0.8	112	Mexico	12.3
48	Austria	0.8	113	Vietnam	12.4
49	Nicaragua	0.9	114	South Africa	13.6
50	Libya	1.0	115	Pakistan	17.7
51	Bulgaria	1.0	116	Ethiopia	18.0
52	Honduras	1.0	117	Thailand	18.7
53	Czech Republic	1.0	118	Bangladesh	19.3
54	Netherlands	1.0	119	Nigeria	32.3
55	Mauritania	1.1	120	Brazil	34.9
56	Mongolia	1.1	121	Russian Federation	44.6
57	Belgium	1.4	122	United States	45.1
58	Zambia	1.4	123	Indonesia	51.9
59	United Arab Emirates	1.5	124	India	189.0
60	Jordan	1.5	125	China	250.0
61	Bolivia	1.5	n/a	Hong Kong SAR	n/a
62	Hungary	1.6	n/a	Montenegro	n/a
63	Sri Lanka	1.6	n/a	Puerto Rico	n/a
64	Australia	1.7	n/a	Serbia	n/a
65	Portugal	1.7	n/a	Taiwan, China	n/a

SOURCE: World Health Organization, *World Health Statistics 2007*





4th pillar  
Health and hygiene

## 4.01 Physician density (hard data)

Physician density per 1,000 people | 2004 or most recent year available

RANK	COUNTRY/ECONOMY	HARD DATA	RANK	COUNTRY/ECONOMY	HARD DATA
1	Greece	4.4	66	Taiwan, China	1.5
2	Russian Federation	4.3	67	Ecuador	1.5
3	Italy	4.2	68	Singapore	1.4
4	Georgia	4.1	69	Syria	1.4
5	Lithuania	4.0	70	Saudi Arabia	1.4
6	Belgium	3.9	71	Colombia	1.4
7	Israel	3.8	72	Tunisia	1.3
8	Uruguay	3.7	73	Bosnia and Herzegovina	1.3
9	Iceland	3.6	74	Costa Rica	1.3
10	Switzerland	3.6	75	Oman	1.3
11	Armenia	3.6	76	Albania	1.3
12	Bulgaria	3.6	77	Turkey	1.3
13	Azerbaijan	3.5	78	El Salvador	1.2
14	Kazakhstan	3.5	79	Bolivia	1.2
15	Czech Republic	3.5	80	Barbados	1.2
16	Austria	3.4	81	Peru	1.2
16	Germany	3.4	82	Philippines	1.2
18	France	3.4	83	Algeria	1.1
19	Portugal	3.3	84	Paraguay	1.1
19	Sweden	3.3	85	Chile	1.1
21	Hungary	3.2	86	Bahrain	1.1
21	Spain	3.2	87	Mauritius	1.1
23	Malta	3.2	88	Guatemala	0.9
24	Estonia	3.2	89	Jamaica	0.8
25	Netherlands	3.1	90	Trinidad and Tobago	0.8
25	Norway	3.1	91	South Africa	0.8
25	Slovak Republic	3.1	92	Pakistan	0.7
28	Latvia	3.0	93	Malaysia	0.7
29	Argentina	3.0	94	India	0.6
30	Ukraine	3.0	95	Honduras	0.6
31	Denmark	2.9	96	Sri Lanka	0.5
32	Ireland	2.8	97	Egypt	0.5
33	Uzbekistan	2.7	98	Vietnam	0.5
34	Luxembourg	2.7	99	Morocco	0.5
35	Moldova	2.6	100	Guyana	0.5
36	Mongolia	2.6	101	Suriname	0.4
37	Finland	2.6	102	Botswana	0.4
38	Australia	2.5	103	Nicaragua	0.4
38	Kyrgyz Republic	2.5	104	Thailand	0.4
38	Poland	2.5	105	Namibia	0.3
41	Croatia	2.4	106	Madagascar	0.3
42	Cyprus	2.3	107	Nigeria	0.3
43	United States	2.3	108	Bangladesh	0.3
44	Slovenia	2.3	109	Nepal	0.2
45	Qatar	2.2	110	Cameroon	0.2
46	New Zealand	2.2	111	Zimbabwe	0.2
46	United Kingdom	2.2	112	Cambodia	0.2
48	Macedonia, FYR	2.2	113	Kenya	0.1
49	Canada	2.1	114	Indonesia	0.1
49	Puerto Rico	2.1	115	Zambia	0.1
51	Montenegro	2.1	116	Gambia, The	0.1
51	Serbia	2.1	117	Mauritania	0.1
53	Brazil	2.1	118	Uganda	0.1
54	Tajikistan	2.0	119	Mali	0.1
55	Jordan	2.0	120	Burkina Faso	0.1
56	United Arab Emirates	2.0	121	Senegal	0.1
57	Japan	2.0	122	Lesotho	0.0
58	Venezuela	1.9	123	Benin	0.0
59	Romania	1.9	124	Chad	0.0
60	Dominican Republic	1.9	125	Burundi	0.0
61	China	1.6	126	Ethiopia	0.0
62	Korea, Rep.	1.6	127	Mozambique	0.0
63	Kuwait	1.5	128	Tanzania	0.0
64	Panama	1.5	n/a	Hong Kong SAR	n/a
65	Mexico	1.5	n/a	Libya	n/a

SOURCE: World Health Organization, *World Health Statistics 2007*, national sources

## 4.02 Access to improved sanitation (hard data)

Access to adequate sanitation as a percentage of total population | 2004

RANK	COUNTRY/ECONOMY	HARD DATA
1	Australia	100.0
1	Austria	100.0
1	Bahrain	100.0
1	Barbados	100.0
1	Belgium	100.0
1	Canada	100.0
1	Croatia	100.0
1	Cyprus	100.0
1	Denmark	100.0
1	Finland	100.0
1	France	100.0
1	Germany	100.0
1	Greece	100.0
1	Hong Kong SAR	100.0
1	Iceland	100.0
1	Ireland	100.0
1	Israel	100.0
1	Italy	100.0
1	Japan	100.0
1	Korea, Rep.	100.0
1	Kuwait	100.0
1	Luxembourg	100.0
1	Netherlands	100.0
1	New Zealand	100.0
1	Norway	100.0
1	Portugal	100.0
1	Qatar	100.0
1	Singapore	100.0
1	Slovenia	100.0
1	Spain	100.0
1	Sweden	100.0
1	Switzerland	100.0
1	Trinidad and Tobago	100.0
1	United Kingdom	100.0
1	United States	100.0
1	Uruguay	100.0
37	Bulgaria	99.0
37	Slovak Republic	99.0
37	Thailand	99.0
40	Czech Republic	98.0
40	United Arab Emirates	98.0
42	Estonia	97.0
42	Libya	97.0
44	Ukraine	96.0
45	Bosnia and Herzegovina	95.0
45	Hungary	95.0
47	Georgia	94.0
47	Malaysia	94.0
47	Mauritius	94.0
47	Suriname	94.0
51	Jordan	93.0
52	Algeria	92.0
52	Costa Rica	92.0
54	Albania	91.0
54	Argentina	91.0
54	Chile	91.0
54	Sri Lanka	91.0
58	Syria	90.0
59	Ecuador	89.0
60	Turkey	88.0
61	Montenegro	87.0
61	Russian Federation	87.0
61	Serbia	87.0
64	Colombia	86.0
64	Guatemala	86.0
66	Tunisia	85.0
67	Armenia	83.0
68	Jamaica	80.0
68	Paraguay	80.0
70	Mexico	79.0
71	Dominican Republic	78.0
71	Latvia	78.0
73	Brazil	75.0
74	Morocco	73.0
74	Panama	73.0
76	Kazakhstan	72.0
76	Philippines	72.0
78	Egypt	70.0
78	Guyana	70.0
80	Honduras	69.0
81	Moldova	68.0
81	Venezuela	68.0
83	Uzbekistan	67.0
84	South Africa	65.0
85	Peru	63.0
86	El Salvador	62.0
87	Vietnam	61.0
88	Kyrgyz Republic	59.0
88	Mongolia	59.0
88	Pakistan	59.0
91	Senegal	57.0
92	Indonesia	55.0
92	Zambia	55.0
94	Azerbaijan	54.0
95	Gambia, The	53.0
95	Zimbabwe	53.0
97	Cameroon	51.0
97	Romania	51.0
97	Tajikistan	51.0
100	Nicaragua	47.0
100	Tanzania	47.0
102	Bolivia	46.0
102	Mali	46.0
104	China	44.0
104	Nigeria	44.0
106	Kenya	43.0
106	Uganda	43.0
108	Botswana	42.0
109	Bangladesh	39.0
110	Lesotho	37.0
111	Burundi	36.0
112	Nepal	35.0
113	Mauritania	34.0
114	Benin	33.0
114	India	33.0
116	Madagascar	32.0
116	Mozambique	32.0
118	Namibia	25.0
119	Cambodia	17.0
120	Burkina Faso	13.0
120	Ethiopia	13.0
122	Chad	9.0
n/a	Lithuania	n/a
n/a	Macedonia, FYR	n/a
n/a	Malta	n/a
n/a	Oman	n/a
n/a	Poland	n/a
n/a	Puerto Rico	n/a
n/a	Saudi Arabia	n/a
n/a	Taiwan, China	n/a

SOURCE: World Health Organization/UNICEF Joint Monitoring Programme

## 4.03 Access to improved drinking water (hard data)

Access to safe drinking water as a percentage of total population | 2004

RANK	COUNTRY/ECONOMY	HARD DATA	RANK	COUNTRY/ECONOMY	HARD DATA
1	Australia .....	100.0	66	Armenia.....	92.0
1	Austria .....	100.0	66	Korea, Rep. ....	92.0
1	Barbados .....	100.0	66	Moldova .....	92.0
1	Belgium .....	100.0	66	Suriname.....	92.0
1	Canada .....	100.0	70	Pakistan.....	91.0
1	Croatia.....	100.0	70	Trinidad and Tobago .....	91.0
1	Cyprus.....	100.0	72	Brazil .....	90.0
1	Czech Republic .....	100.0	72	Nepal.....	90.0
1	Denmark .....	100.0	72	Panama .....	90.0
1	Estonia .....	100.0	75	South Africa .....	88.0
1	Finland.....	100.0	76	Honduras.....	87.0
1	France .....	100.0	76	Namibia .....	87.0
1	Germany .....	100.0	78	India .....	86.0
1	Greece .....	100.0	78	Kazakhstan.....	86.0
1	Hong Kong SAR .....	100.0	78	Paraguay .....	86.0
1	Iceland.....	100.0	81	Algeria .....	85.0
1	Ireland.....	100.0	81	Bolivia.....	85.0
1	Israel .....	100.0	81	Philippines.....	85.0
1	Italy .....	100.0	81	Vietnam .....	85.0
1	Japan.....	100.0	85	El Salvador .....	84.0
1	Luxembourg.....	100.0	86	Guyana .....	83.0
1	Malta .....	100.0	86	Peru.....	83.0
1	Mauritius.....	100.0	86	Venezuela.....	83.0
1	Netherlands.....	100.0	89	Gambia, The.....	82.0
1	New Zealand.....	100.0	89	Georgia.....	82.0
1	Norway.....	100.0	89	Uzbekistan .....	82.0
1	Portugal.....	100.0	92	Morocco.....	81.0
1	Qatar .....	100.0	92	Zimbabwe .....	81.0
1	Singapore .....	100.0	94	Burundi.....	79.0
1	Slovak Republic.....	100.0	94	Lesotho .....	79.0
1	Slovenia.....	100.0	94	Nicaragua .....	79.0
1	Spain .....	100.0	94	Sri Lanka .....	79.0
1	Sweden .....	100.0	98	Azerbaijan.....	77.0
1	Switzerland .....	100.0	98	China .....	77.0
1	United Arab Emirates.....	100.0	98	Indonesia.....	77.0
1	United Kingdom .....	100.0	98	Kyrgyz Republic.....	77.0
1	United States .....	100.0	102	Senegal .....	76.0
1	Uruguay.....	100.0	103	Bangladesh .....	74.0
39	Bulgaria .....	99.0	104	Benin .....	67.0
39	Hungary.....	99.0	105	Cameroon .....	66.0
39	Latvia.....	99.0	106	Mongolia .....	62.0
39	Malaysia.....	99.0	106	Tanzania.....	62.0
39	Thailand.....	99.0	108	Burkina Faso .....	61.0
44	Egypt.....	98.0	108	Kenya .....	61.0
45	Bosnia and Herzegovina .....	97.0	110	Uganda.....	60.0
45	Costa Rica .....	97.0	111	Tajikistan.....	59.0
45	Jordan .....	97.0	112	Zambia .....	58.0
45	Mexico .....	97.0	113	Romania .....	57.0
45	Puerto Rico .....	97.0	114	Mauritania .....	53.0
45	Russian Federation .....	97.0	115	Mali .....	50.0
51	Albania .....	96.0	116	Nigeria.....	48.0
51	Argentina.....	96.0	117	Madagascar.....	46.0
51	Turkey.....	96.0	118	Mozambique .....	43.0
51	Ukraine.....	96.0	119	Chad.....	42.0
55	Botswana .....	95.0	120	Cambodia .....	41.0
55	Chile .....	95.0	121	Ethiopia .....	22.0
55	Dominican Republic.....	95.0	n/a	Bahrain.....	n/a
55	Guatemala.....	95.0	n/a	Kuwait .....	n/a
59	Ecuador .....	94.0	n/a	Libya.....	n/a
60	Colombia.....	93.0	n/a	Lithuania.....	n/a
60	Jamaica .....	93.0	n/a	Macedonia, FYR .....	n/a
60	Montenegro .....	93.0	n/a	Oman .....	n/a
60	Serbia .....	93.0	n/a	Poland .....	n/a
60	Syria .....	93.0	n/a	Saudi Arabia .....	n/a
60	Tunisia .....	93.0	n/a	Taiwan, China .....	n/a

SOURCE: World Health Organization/UNICEF Joint Monitoring Programme

## 4.04 Hospital beds (hard data)

Hospital beds per 10,000 population | 2005 or most recent year available

RANK	COUNTRY/ECONOMY	HARD DATA
1	Japan	129.0
2	Russian Federation	97.0
3	Ukraine	87.0
4	Czech Republic	84.0
4	Germany	84.0
6	Azerbaijan	82.0
7	Lithuania	81.0
8	Hungary	79.0
9	Kazakhstan	78.0
10	Austria	77.0
10	Latvia	77.0
12	France	75.0
12	Iceland	75.0
12	Malta	75.0
12	Mongolia	75.0
16	Barbados	73.0
17	Finland	70.0
18	Slovak Republic	69.0
19	Korea, Rep.	66.0
19	Romania	66.0
21	Bulgaria	64.0
21	Moldova	64.0
23	Israel	63.0
23	Luxembourg	63.0
25	Tajikistan	62.0
26	New Zealand	60.0
27	Serbia	59.0
28	Estonia	58.0
29	Ireland	57.0
29	Switzerland	57.0
31	Croatia	55.0
32	Belgium	53.0
32	Poland	53.0
34	Sweden	52.0
34	Uzbekistan	52.0
36	Kyrgyz Republic	51.0
37	Netherlands	50.0
38	Slovenia	48.0
39	Greece	47.0
39	Macedonia, FYR	47.0
41	Armenia	45.0
42	Montenegro	42.0
42	Norway	42.0
44	Argentina	41.0
45	Australia	40.0
45	Italy	40.0
47	United Kingdom	39.0
48	Denmark	38.0
48	Georgia	38.0
50	Portugal	37.0
51	Canada	36.0
52	Spain	35.0
53	Cyprus	34.0
53	Libya	34.0
55	Trinidad and Tobago	33.0
55	United States	33.0
57	Suriname	31.0
58	Albania	30.0
58	Bosnia and Herzegovina	30.0
58	Mauritius	30.0
58	Sri Lanka	30.0
62	Puerto Rico	29.3
63	Guyana	29.0
64	Bahrain	28.0
64	Singapore	28.0
66	Brazil	26.0
66	Turkey	26.0
68	Chile	24.0
68	Panama	24.0
68	Qatar	24.0
68	Uruguay	24.0
72	Saudi Arabia	23.0
73	Botswana	22.0
73	China	22.0
73	Dominican Republic	22.0
73	Egypt	22.0
73	Thailand	22.0
73	United Arab Emirates	22.0
79	Oman	21.0
80	Zambia	20.0
81	Kenya	19.0
81	Kuwait	19.0
83	Malaysia	18.0
83	Tunisia	18.0
85	Algeria	17.0
85	Jamaica	17.0
85	Jordan	17.0
88	Costa Rica	14.0
88	Ecuador	14.0
88	Vietnam	14.0
91	Syria	13.0
92	Colombia	12.0
92	Nigeria	12.0
92	Paraguay	12.0
92	Philippines	12.0
96	Peru	11.0
97	Bolivia	10.0
97	Honduras	10.0
97	Mexico	10.0
100	El Salvador	9.0
100	Morocco	9.0
100	Nicaragua	9.0
100	Venezuela	9.0
104	Gambia, The	8.0
105	Burundi	7.0
105	Guatemala	7.0
105	India	7.0
105	Pakistan	7.0
105	Uganda	7.0
110	Cambodia	6.0
110	Indonesia	6.0
110	Mauritania	6.0
113	Benin	5.0
114	Chad	4.0
115	Bangladesh	3.0
116	Ethiopia	2.0
116	Nepal	2.0
n/a	Burkina Faso	n/a
n/a	Cameroon	n/a
n/a	Hong Kong SAR	n/a
n/a	Lesotho	n/a
n/a	Madagascar	n/a
n/a	Mali	n/a
n/a	Mozambique	n/a
n/a	Namibia	n/a
n/a	Senegal	n/a
n/a	South Africa	n/a
n/a	Taiwan, China	n/a
n/a	Tanzania	n/a
n/a	Zimbabwe	n/a

SOURCE: World Health Organization, *World Health Statistics 2007*



5th pillar

## Prioritization of Travel & Tourism



## 5.01 Government prioritization of the T&T industry

Is the Travel and Tourism industry given due consideration/priority compared with other sectors when your government sets policy on investment and development? (1 = no, the Travel and Tourism industry is not a priority for the government, 7 = yes, nurturing and developing the Travel and Tourism industry is a top priority for the government)

RANK	COUNTRY/ECONOMY	SCORE	1	MEAN: 5.1	7	RANK	COUNTRY/ECONOMY	SCORE	1	MEAN: 5.1	7
1	Mauritius	6.7				66	China	5.2			
2	Barbados	6.6				67	United Kingdom	5.1			
3	Montenegro	6.4				68	Estonia	5.1			
4	United Arab Emirates	6.4				69	Kyrgyz Republic	5.1			
5	Singapore	6.4				70	Korea, Rep.	5.1			
6	Hong Kong SAR	6.3				71	Nicaragua	5.1			
7	Tunisia	6.2				72	Mauritania	5.1			
8	New Zealand	6.2				73	Tajikistan	5.1			
9	Malaysia	6.2				74	Guyana	5.1			
10	Gambia, The	6.2				75	Philippines	5.1			
11	Cyprus	6.1				76	Saudi Arabia	5.1			
12	Thailand	6.1				77	Norway	5.0			
13	Portugal	6.1				78	Colombia	5.0			
14	Puerto Rico	6.1				79	Serbia	5.0			
15	Ireland	6.0				80	Taiwan, China	5.0			
16	Zambia	6.0				81	Oman	5.0			
17	Malta	6.0				82	Peru	4.9			
18	Austria	6.0				83	Argentina	4.9			
19	Greece	6.0				84	United States	4.8			
20	Jamaica	6.0				85	Bulgaria	4.8			
21	South Africa	5.9				86	Mongolia	4.8			
22	Cambodia	5.9				87	Japan	4.8			
23	Morocco	5.9				88	Sweden	4.8			
24	Uzbekistan	5.9				89	Netherlands	4.7			
25	Spain	5.9				90	Albania	4.7			
26	Australia	5.8				91	Slovenia	4.7			
27	Kenya	5.7				92	Czech Republic	4.7			
28	Sri Lanka	5.7				93	Benin	4.7			
29	Botswana	5.7				94	Nigeria	4.7			
30	Qatar	5.7				95	Azerbaijan	4.6			
31	Egypt	5.7				96	Belgium	4.5			
32	Indonesia	5.7				97	Italy	4.5			
33	Tanzania	5.7				98	Luxembourg	4.5			
34	Mali	5.7				99	Finland	4.5			
35	Dominican Republic	5.6				100	Kazakhstan	4.4			
36	Costa Rica	5.6				101	Trinidad and Tobago	4.4			
37	Senegal	5.6				102	Libya	4.4			
38	Mexico	5.6				103	Pakistan	4.3			
39	Madagascar	5.6				104	Germany	4.3			
40	Honduras	5.5				105	Lesotho	4.3			
41	Croatia	5.5				106	Chile	4.3			
42	Switzerland	5.5				107	Latvia	4.3			
43	France	5.5				108	Algeria	4.3			
44	Nepal	5.5				109	Zimbabwe	4.2			
45	Jordan	5.4				110	Ethiopia	4.1			
46	Syria	5.4				111	Lithuania	4.1			
47	Vietnam	5.4				112	Moldova	4.1			
48	Uruguay	5.4				113	Brazil	4.1			
49	Iceland	5.4				114	Macedonia, FYR	3.9			
50	El Salvador	5.4				115	Slovak Republic	3.9			
51	India	5.4				116	Ecuador	3.9			
52	Burkina Faso	5.4				117	Bangladesh	3.8			
53	Namibia	5.4				118	Suriname	3.7			
54	Guatemala	5.4				119	Romania	3.7			
55	Panama	5.3				120	Ukraine	3.6			
56	Canada	5.3				121	Bosnia and Herzegovina	3.6			
57	Hungary	5.3				122	Poland	3.6			
58	Turkey	5.3				123	Cameroon	3.5			
59	Mozambique	5.3				124	Chad	3.5			
60	Georgia	5.3				125	Russian Federation	3.4			
61	Uganda	5.3				126	Burundi	3.2			
62	Bahrain	5.3				127	Venezuela	3.1			
63	Denmark	5.3				128	Bolivia	3.1			
64	Israel	5.2				129	Kuwait	3.0			
65	Armenia	5.2				130	Paraguay	2.9			

SOURCE: World Economic Forum, Executive Opinion Survey 2006, 2007

## 5.02 T&T government expenditure (hard data)

T&T government expenditure as percentage of total budget | 2007

RANK	COUNTRY/ECONOMY	HARD DATA	RANK	COUNTRY/ECONOMY	HARD DATA
1	Dominican Republic	21.1	66	Syria	3.1
2	Jamaica	16.8	67	Azerbaijan	3.1
3	Mauritius	16.0	68	Benin	3.0
4	Barbados	15.8	69	Latvia	3.0
5	Iceland	11.8	70	Lithuania	3.0
6	Malta	11.2	71	France	3.0
7	Jordan	10.4	72	Finland	3.0
8	Singapore	10.2	73	Namibia	2.9
9	Gambia, The	9.5	74	Brazil	2.8
10	Cambodia	9.2	75	United Kingdom	2.7
11	Cyprus	9.1	76	Thailand	2.7
12	Indonesia	9.0	77	Peru	2.7
13	Greece	8.1	78	Poland	2.7
14	Estonia	8.0	79	Libya	2.7
15	Paraguay	7.9	80	Russian Federation	2.7
16	Hong Kong SAR	7.5	81	El Salvador	2.6
17	Tunisia	7.3	82	Korea, Rep.	2.5
18	Switzerland	7.0	83	Luxembourg	2.5
19	Kenya	6.9	84	Argentina	2.4
20	Egypt	6.6	85	Denmark	2.4
21	Spain	6.5	86	Zimbabwe	2.4
22	Costa Rica	6.1	87	Ethiopia	2.4
23	Portugal	6.0	88	Botswana	2.3
24	Guyana	5.9	89	Uganda	2.3
25	Norway	5.6	90	Sweden	2.2
26	Tanzania	5.5	91	Netherlands	2.2
27	Madagascar	5.5	92	Slovak Republic	2.1
28	Qatar	5.5	93	Bangladesh	2.1
29	Trinidad and Tobago	5.3	94	Nicaragua	2.1
30	Hungary	5.1	95	Zambia	2.1
31	United States	5.1	96	Israel	2.1
32	Uruguay	5.1	97	Germany	2.0
33	Nepal	5.1	98	Colombia	2.0
34	Ukraine	5.0	99	United Arab Emirates	2.0
35	Panama	4.8	100	Pakistan	2.0
36	Austria	4.7	101	Burkina Faso	1.9
37	Mexico	4.7	102	Cameroon	1.7
38	Guatemala	4.6	103	Malaysia	1.7
39	Sri Lanka	4.4	104	Suriname	1.7
40	Romania	4.4	105	Taiwan, China	1.7
41	Slovenia	4.2	106	Mali	1.7
42	Puerto Rico	4.2	107	Vietnam	1.4
43	Chile	4.1	108	Croatia	1.4
44	Japan	4.1	109	Macedonia, FYR	1.2
45	Canada	4.1	110	Oman	1.2
46	Honduras	4.0	111	Lesotho	1.2
47	Bahrain	3.9	112	Kuwait	1.2
48	China	3.8	113	Algeria	1.1
49	Chad	3.8	114	Bosnia and Herzegovina	1.1
50	Albania	3.8	115	India	1.0
51	Ecuador	3.8	116	Saudi Arabia	0.9
52	Armenia	3.7	117	Serbia	0.8
53	Senegal	3.7	118	Turkey	0.7
54	Czech Republic	3.6	119	Burundi	0.7
55	Morocco	3.6	120	South Africa	0.5
56	Philippines	3.6	121	Nigeria	0.3
57	Italy	3.5	n/a	Georgia	n/a
58	Venezuela	3.5	n/a	Kazakhstan	n/a
59	Australia	3.4	n/a	Kyrgyz Republic	n/a
60	Montenegro	3.4	n/a	Mauritania	n/a
61	Ireland	3.4	n/a	Moldova	n/a
62	New Zealand	3.3	n/a	Mongolia	n/a
63	Bulgaria	3.2	n/a	Mozambique	n/a
64	Belgium	3.1	n/a	Tajikistan	n/a
65	Bolivia	3.1	n/a	Uzbekistan	n/a

SOURCE: World Travel & Tourism Council, Tourism Satellite Accounting Research 2007

## 5.03 Effectiveness of marketing and branding to attract tourists

Does your country carry out effective marketing and branding to attract inbound tourists? (1 = no, tourism marketing is nonexistent or completely ineffective, 7 = yes, tourism marketing is excellent, and is very effective in attracting tourists)



SOURCE: World Economic Forum, Executive Opinion Survey 2006, 2007

## 5.04 T&T fair attendance (hard data)

Index of country presence at 13 major T&T fairs, 2006–2007



SOURCE: Booz Allen Hamilton Inc.



6th pillar

## Air transport infrastructure

## 6.01 Quality of air transport infrastructure

Passenger air transport in your country is (1 = infrequent, limited, and inefficient, 7 = as frequent, extensive, and efficient as the world's best)

RANK	COUNTRY/ECONOMY	SCORE	1	MEAN: 4.6	7	RANK	COUNTRY/ECONOMY	SCORE	1	MEAN: 4.6	7
1	Singapore	6.9				66	Costa Rica	4.6			
2	Hong Kong SAR	6.7				67	Guatemala	4.5			
3	Germany	6.7				68	Montenegro	4.5			
4	United Arab Emirates	6.5				69	Honduras	4.5			
5	France	6.5				70	Sri Lanka	4.5			
6	Denmark	6.5				71	Italy	4.4			
7	Netherlands	6.4				72	Hungary	4.4			
8	Finland	6.3				73	Lithuania	4.4			
9	United States	6.3				74	Gambia, The	4.4			
10	United Kingdom	6.2				75	Croatia	4.3			
11	Iceland	6.2				76	Ecuador	4.3			
12	Switzerland	6.2				77	Syria	4.2			
13	Norway	6.1				78	Pakistan	4.2			
14	Australia	6.1				79	Russian Federation	4.2			
15	Malaysia	6.0				80	Nicaragua	4.1			
16	Canada	6.0				81	Zambia	4.1			
17	Sweden	6.0				82	Philippines	4.1			
18	Barbados	6.0				83	Cambodia	4.1			
19	Puerto Rico	6.0				84	Serbia	4.1			
20	Belgium	6.0				85	Indonesia	4.1			
21	Austria	5.9				86	China	4.1			
22	South Africa	5.9				87	Brazil	4.0			
23	Israel	5.9				88	Armenia	3.9			
24	New Zealand	5.9				89	Moldova	3.9			
25	Spain	5.7				90	Vietnam	3.9			
26	Korea, Rep.	5.7				91	Madagascar	3.9			
27	Bahrain	5.7				92	Kazakhstan	3.9			
28	Thailand	5.7				93	Venezuela	3.8			
29	Qatar	5.7				94	Botswana	3.8			
30	Taiwan, China	5.7				95	Romania	3.7			
31	Chile	5.7				96	Algeria	3.7			
32	Japan	5.6				97	Slovak Republic	3.7			
33	Portugal	5.6				98	Peru	3.7			
34	El Salvador	5.6				99	Georgia	3.6			
35	Greece	5.5				100	Mali	3.6			
36	Jordan	5.5				101	Poland	3.6			
37	Dominican Republic	5.4				102	Albania	3.6			
38	Panama	5.4				103	Tanzania	3.6			
39	Mauritius	5.4				104	Benin	3.5			
40	Jamaica	5.4				105	Nigeria	3.5			
41	Malta	5.4				106	Bulgaria	3.5			
42	Latvia	5.4				107	Mozambique	3.4			
43	Tunisia	5.4				108	Nepal	3.4			
44	Uzbekistan	5.3				109	Burkina Faso	3.4			
45	Ireland	5.3				110	Uruguay	3.3			
46	Saudi Arabia	5.3				111	Kyrgyz Republic	3.3			
47	Luxembourg	5.2				112	Uganda	3.3			
48	Czech Republic	5.2				113	Argentina	3.2			
49	Turkey	5.1				114	Zimbabwe	3.2			
50	Azerbaijan	5.1				115	Guyana	3.2			
51	Kenya	5.1				116	Ukraine	3.2			
52	Kuwait	5.1				117	Mauritania	3.1			
53	Estonia	5.0				118	Bolivia	3.1			
54	Oman	5.0				119	Tajikistan	3.0			
55	Cyprus	4.9				120	Macedonia, FYR	3.0			
56	Senegal	4.9				121	Bangladesh	3.0			
57	Ethiopia	4.9				122	Libya	3.0			
58	Namibia	4.9				123	Burundi	2.9			
59	Egypt	4.9				124	Mongolia	2.8			
60	Mexico	4.8				125	Chad	2.8			
61	India	4.8				126	Bosnia and Herzegovina	2.8			
62	Colombia	4.7				127	Cameroon	2.7			
63	Trinidad and Tobago	4.7				128	Suriname	2.7			
64	Slovenia	4.7				129	Paraguay	2.6			
65	Morocco	4.7				130	Lesotho	2.2			

SOURCE: World Economic Forum, Executive Opinion Survey 2006, 2007

## 6.02 Available seat kilometers (hard data)

Scheduled available seat kilometers per week originating in country (in millions) | January 2007 and July 2007 average

RANK	COUNTRY/ECONOMY	SCORE	RANK	COUNTRY/ECONOMY	SCORE
1	United States	33,200.4	66	Panama	127.6
2	China	6,660.8	67	Cyprus	120.1
3	United Kingdom	6,086.4	68	Jamaica	117.9
4	Japan	5,175.0	69	Ethiopia	116.6
5	Germany	4,253.4	70	Romania	115.9
6	France	3,332.4	71	Costa Rica	115.8
7	Spain	3,107.3	72	Senegal	111.6
8	Australia	2,923.8	73	Oman	102.7
9	Canada	2,841.7	74	Algeria	99.3
10	India	2,160.9	75	Tunisia	93.1
11	Italy	2,047.5	76	Barbados	81.5
12	Brazil	2,008.2	77	Iceland	79.3
13	Hong Kong SAR	1,953.5	78	Uzbekistan	79.2
14	Russian Federation	1,935.0	79	Libya	75.5
15	Thailand	1,927.9	80	Syria	74.4
16	Singapore	1,795.4	81	El Salvador	68.6
17	United Arab Emirates	1,757.9	82	Bulgaria	62.7
18	Mexico	1,698.8	83	Bolivia	59.7
19	Korea, Rep.	1,588.4	84	Latvia	52.8
20	Netherlands	1,515.1	85	Tanzania	51.3
21	South Africa	1,003.5	86	Guatemala	51.1
22	Malaysia	991.5	87	Malta	45.5
23	Taiwan, China	916.3	88	Cambodia	44.6
24	Indonesia	893.8	89	Trinidad and Tobago	44.0
25	Turkey	764.9	90	Croatia	43.0
26	Switzerland	722.3	91	Azerbaijan	42.1
27	Saudi Arabia	685.9	92	Nepal	37.1
28	New Zealand	636.4	93	Madagascar	36.5
29	Argentina	605.7	94	Serbia	35.9
30	Philippines	593.6	95	Slovak Republic	34.5
31	Portugal	540.2	96	Uganda	34.4
32	Greece	465.0	97	Uruguay	32.9
33	Puerto Rico	461.7	98	Armenia	32.5
34	Ireland	441.9	99	Cameroon	31.4
35	Egypt	413.9	100	Lithuania	31.2
36	Austria	392.8	101	Mozambique	30.4
37	Qatar	387.9	102	Zambia	29.3
38	Chile	382.5	103	Namibia	29.1
39	Denmark	382.2	104	Honduras	24.4
40	Vietnam	380.2	105	Zimbabwe	22.0
41	Israel	369.8	106	Mali	21.9
42	Sweden	362.7	107	Nicaragua	20.2
43	Pakistan	354.8	108	Tajikistan	19.9
44	Norway	349.1	109	Kyrgyz Republic	19.8
45	Colombia	324.4	110	Estonia	19.7
46	Belgium	323.4	111	Suriname	19.0
47	Finland	308.5	112	Luxembourg	18.6
48	Peru	283.9	113	Georgia	17.1
49	Morocco	273.1	114	Albania	16.4
50	Poland	266.5	115	Slovenia	15.8
51	Dominican Republic	248.3	116	Mongolia	14.2
52	Kenya	218.9	117	Benin	12.4
53	Venezuela	213.7	118	Paraguay	11.8
54	Kuwait	192.1	119	Guyana	8.3
55	Nigeria	190.6	120	Mauritania	8.2
56	Bahrain	185.4	121	Burkina Faso	8.0
57	Czech Republic	177.9	122	Moldova	8.0
58	Sri Lanka	164.5	123	Macedonia, FYR	7.8
59	Mauritius	159.3	124	Chad	6.5
60	Ukraine	158.9	125	Montenegro	6.0
61	Bangladesh	146.0	126	Bosnia and Herzegovina	4.4
62	Hungary	144.5	127	Gambia, The	3.9
63	Ecuador	137.9	128	Botswana	2.9
64	Kazakhstan	135.4	129	Burundi	1.2
65	Jordan	131.9	130	Lesotho	0.2

SOURCE: International Air Transport Association, SRS Analyser, national sources



## 6.03 Departures per 1,000 population (hard data)

Number of departures per 1,000 population | 2006

RANK	COUNTRY/ECONOMY	HARD DATA	RANK	COUNTRY/ECONOMY	HARD DATA
1	Luxembourg	92.6	66	Peru	2.2
2	Ireland	73.0	67	Tunisia	2.1
3	Qatar	56.5	68	Argentina	2.1
4	New Zealand	51.1	69	Mongolia	2.1
5	Norway	50.6	70	Poland	2.1
6	Iceland	39.8	71	Turkey	2.0
7	Bahrain	37.4	72	Armenia	2.0
8	Malta	36.6	73	Thailand	1.9
9	Puerto Rico	35.7	74	Romania	1.8
10	United States	33.6	75	Paraguay	1.7
11	Canada	31.5	76	Morocco	1.6
12	Denmark	29.6	77	Sri Lanka	1.5
13	Cyprus	23.0	78	Azerbaijan	1.5
14	United Arab Emirates	21.1	79	Indonesia	1.5
15	Finland	20.4	80	Libya	1.4
16	Switzerland	18.1	81	Algeria	1.4
17	Singapore	17.8	82	Albania	1.4
18	Hong Kong SAR	17.7	83	Bulgaria	1.3
19	Austria	17.2	84	Bosnia and Herzegovina	1.2
20	United Kingdom	16.9	85	Kazakhstan	1.1
21	Australia	16.8	86	Macedonia, FYR	1.1
22	Sweden	16.2	87	Tajikistan	1.1
23	Netherlands	14.8	88	Georgia	1.0
24	Belgium	14.5	89	Moldova	1.0
25	Portugal	14.1	90	China	1.0
26	Spain	13.5	91	Kyrgyz Republic	1.0
27	Germany	12.4	92	Madagascar	1.0
28	Oman	12.1	93	Ukraine	0.9
29	France	12.0	94	Syria	0.9
30	Mauritius	11.9	95	Uzbekistan	0.8
31	Greece	11.8	96	Kenya	0.8
32	Trinidad and Tobago	11.0	97	Philippines	0.7
33	Suriname	10.8	98	Cameroon	0.7
34	Latvia	10.0	99	Vietnam	0.7
35	Panama	9.4	100	Egypt	0.6
36	Slovenia	9.0	101	Mauritania	0.6
37	Costa Rica	8.3	102	Senegal	0.6
38	Jamaica	8.2	103	Zambia	0.5
39	Italy	7.6	104	Mozambique	0.5
40	Kuwait	7.5	105	Ethiopia	0.4
41	Czech Republic	7.4	106	Guyana	0.4
42	Malaysia	6.9	107	Zimbabwe	0.3
43	Estonia	6.2	108	Pakistan	0.3
44	Chile	5.7	109	India	0.3
45	Japan	5.1	110	Nepal	0.2
46	Venezuela	5.1	111	Cambodia	0.2
47	Saudi Arabia	5.0	112	Tanzania	0.2
48	Croatia	5.0	113	Burkina Faso	0.1
49	Israel	4.9	114	Nicaragua	0.1
50	Hungary	4.7	115	Benin	0.1
51	Botswana	4.6	116	Chad	0.1
52	Korea, Rep.	4.6	117	Nigeria	0.1
53	Jordan	3.6	118	Mali	0.1
54	Colombia	3.6	119	Bangladesh	0.1
55	Lithuania	3.5	120	Uganda	0.0
56	El Salvador	3.5	n/a	Barbados	n/a
57	Mexico	3.2	n/a	Burundi	n/a
58	South Africa	3.2	n/a	Dominican Republic	n/a
59	Namibia	3.1	n/a	Gambia, The	n/a
60	Bolivia	2.8	n/a	Guatemala	n/a
61	Brazil	2.8	n/a	Honduras	n/a
62	Russian Federation	2.7	n/a	Lesotho	n/a
63	Slovak Republic	2.6	n/a	Montenegro	n/a
64	Uruguay	2.6	n/a	Serbia	n/a
65	Ecuador	2.3	n/a	Taiwan, China	n/a

SOURCE: Booz Allen Hamilton Inc.

## 6.04 Airport density (hard data)

Number of airports per million population | 2006

RANK	COUNTRY/ECONOMY	HARD DATA
1	Iceland.....	30.0
2	Norway.....	10.9
3	Canada.....	7.8
4	Australia.....	7.4
5	Panama.....	7.3
6	New Zealand.....	6.6
7	Mongolia.....	5.2
8	Malta.....	5.0
9	Sweden.....	4.5
10	Puerto Rico.....	4.3
11	Finland.....	4.2
12	Namibia.....	3.8
13	Cyprus.....	3.8
14	Costa Rica.....	3.6
15	Barbados.....	3.6
16	Greece.....	3.4
17	Montenegro.....	3.2
18	United States.....	2.4
19	Estonia.....	2.3
20	Botswana.....	2.2
20	Qatar.....	2.2
20	Suriname.....	2.2
23	Ireland.....	2.1
24	Luxembourg.....	2.0
25	Denmark.....	1.9
26	Croatia.....	1.7
27	Madagascar.....	1.7
28	Mauritius.....	1.5
28	Trinidad and Tobago.....	1.5
30	Portugal.....	1.5
31	United Arab Emirates.....	1.5
32	Honduras.....	1.5
33	Malaysia.....	1.4
34	Guyana.....	1.4
35	Bolivia.....	1.4
36	Bahrain.....	1.4
37	Argentina.....	1.3
38	Libya.....	1.2
39	Oman.....	1.2
40	United Kingdom.....	1.1
41	Colombia.....	1.1
42	Chile.....	1.1
43	Kazakhstan.....	1.1
44	Venezuela.....	1.1
45	Saudi Arabia.....	1.0
46	France.....	1.0
47	Macedonia, FYR.....	1.0
47	Slovenia.....	1.0
49	Ecuador.....	1.0
50	Spain.....	0.9
51	Lithuania.....	0.9
52	Latvia.....	0.9
53	Algeria.....	0.8
54	Switzerland.....	0.8
55	Nepal.....	0.8
56	Taiwan, China.....	0.8
57	Bosnia and Herzegovina.....	0.8
58	Zambia.....	0.8
59	Jamaica.....	0.7
59	Slovak Republic.....	0.7
61	Israel.....	0.7
62	Austria.....	0.7
63	Nicaragua.....	0.7
64	Georgia.....	0.7
65	Italy.....	0.7
66	Armenia.....	0.7
66	Dominican Republic.....	0.7
68	Russian Federation.....	0.7
69	Romania.....	0.6
70	Mozambique.....	0.6
71	Peru.....	0.6
72	Gambia, The.....	0.6
72	Mauritania.....	0.6
74	Tunisia.....	0.6
75	Mexico.....	0.6
76	Uruguay.....	0.6
77	Japan.....	0.6
78	Lesotho.....	0.6
79	Philippines.....	0.5
80	Jordan.....	0.5
81	Brazil.....	0.5
82	Morocco.....	0.5
83	Czech Republic.....	0.5
84	Paraguay.....	0.5
85	Turkey.....	0.5
86	Germany.....	0.5
87	Singapore.....	0.5
88	Thailand.....	0.4
89	Uzbekistan.....	0.4
90	Senegal.....	0.4
90	South Africa.....	0.4
92	Serbia.....	0.4
93	Hungary.....	0.4
94	Bulgaria.....	0.4
95	Belgium.....	0.4
96	Sri Lanka.....	0.4
97	Kyrgyz Republic.....	0.4
98	Cameroon.....	0.4
99	Kuwait.....	0.4
100	Azerbaijan.....	0.4
101	Ukraine.....	0.3
102	Kenya.....	0.3
103	Tanzania.....	0.3
104	Albania.....	0.3
105	Korea, Rep.....	0.3
106	Netherlands.....	0.3
107	Tajikistan.....	0.3
108	Ethiopia.....	0.3
109	Poland.....	0.3
110	Hong Kong SAR.....	0.3
111	Cambodia.....	0.3
112	Indonesia.....	0.3
113	Syria.....	0.3
114	Moldova.....	0.2
115	Zimbabwe.....	0.2
116	Vietnam.....	0.2
117	Egypt.....	0.2
118	Guatemala.....	0.2
119	Pakistan.....	0.1
120	Burkina Faso.....	0.1
121	El Salvador.....	0.1
122	Uganda.....	0.1
123	Burundi.....	0.1
124	Benin.....	0.1
125	China.....	0.1
126	Chad.....	0.1
127	Nigeria.....	0.1
128	Mali.....	0.1
129	India.....	0.1
130	Bangladesh.....	0.1

SOURCE: International Air Transport Association, SRS Analyser; national sources

## 6.05 Number of operating airlines (hard data)

Number of airlines with scheduled flights originating in country | January 2007 and July 2007 average

RANK	COUNTRY/ECONOMY	HARD DATA	RANK	COUNTRY/ECONOMY	HARD DATA
1	United Kingdom	172.0	65	Kazakhstan	23.5
2	United States	165.0	65	Oman	23.5
3	France	164.0	68	Jamaica	22.0
4	Germany	150.0	68	Libya	22.0
5	Italy	139.5	68	Senegal	22.0
6	Russian Federation	109.5	71	Cambodia	21.5
7	Spain	109.0	72	New Zealand	21.0
8	Canada	92.5	72	Peru	21.0
9	United Arab Emirates	86.0	74	Chile	20.0
10	Switzerland	85.0	74	Serbia	20.0
11	China	84.0	74	Sri Lanka	20.0
11	Netherlands	84.0	77	Uzbekistan	19.5
13	Thailand	81.0	78	Bangladesh	19.0
14	Turkey	80.0	79	Tanzania	18.5
15	India	75.0	80	Costa Rica	17.5
16	Greece	68.5	80	Ecuador	17.5
16	Japan	68.5	82	Tajikistan	16.5
18	Austria	66.5	83	Algeria	16.0
19	Belgium	61.5	83	Latvia	16.0
19	Hong Kong SAR	61.5	85	Georgia	15.0
21	Australia	58.5	85	Nepal	15.0
22	Portugal	56.0	85	Trinidad and Tobago	15.0
22	Sweden	56.0	88	Estonia	14.0
24	Singapore	55.5	88	Guatemala	14.0
25	Denmark	55.0	88	Kyrgyz Republic	14.0
26	Egypt	54.5	91	Albania	13.5
27	Malaysia	53.0	91	Uganda	13.5
28	South Africa	50.0	93	Barbados	13.0
29	Czech Republic	48.0	93	Mali	13.0
29	Mexico	48.0	95	Cameroon	12.5
29	Ukraine	48.0	95	Mauritius	12.5
32	Korea, Rep.	46.0	95	Panama	12.5
33	Brazil	43.5	98	Ethiopia	12.0
34	Norway	41.5	98	Zambia	12.0
35	Indonesia	41.0	100	Lithuania	11.5
36	Hungary	40.0	100	Malta	11.5
36	Ireland	40.0	102	Slovenia	11.0
36	Morocco	40.0	103	Benin	10.5
39	Saudi Arabia	38.0	103	Honduras	10.5
40	Cyprus	37.5	103	Uruguay	10.5
41	Vietnam	37.0	106	Bosnia and Herzegovina	10.0
42	Israel	36.0	106	Macedonia, FYR	10.0
43	Poland	35.0	108	Luxembourg	9.5
44	Philippines	34.5	108	Zimbabwe	9.5
45	Kuwait	33.5	110	Bolivia	9.0
46	Argentina	33.0	111	Nicaragua	8.5
47	Dominican Republic	32.5	112	Burkina Faso	8.0
48	Syria	32.0	112	El Salvador	8.0
49	Romania	31.0	114	Iceland	7.5
50	Venezuela	30.5	114	Madagascar	7.5
51	Bulgaria	29.0	114	Slovak Republic	7.5
52	Kenya	28.5	117	Montenegro	7.0
53	Puerto Rico	28.0	117	Mozambique	7.0
54	Armenia	27.5	119	Mauritania	6.5
55	Bahrain	27.0	120	Gambia, The	6.0
55	Pakistan	27.0	120	Moldova	6.0
57	Nigeria	26.0	120	Mongolia	6.0
57	Taiwan, China	26.0	123	Namibia	5.0
59	Jordan	25.5	124	Burundi	4.5
60	Croatia	25.0	124	Guyana	4.5
60	Qatar	25.0	126	Suriname	4.0
62	Finland	24.5	127	Botswana	3.5
62	Tunisia	24.5	128	Chad	3.0
64	Azerbaijan	24.0	129	Paraguay	2.5
65	Colombia	23.5	130	Lesotho	1.0

SOURCE: International Air Transport Association, SRS Analyser, national sources

## 6.06 International air transport network

Does the air transport network in your country offer you good connections to the overseas markets that offer your business greatest potential? (1 = no, not at all, 7 = yes, to all of my key business markets)



SOURCE: World Economic Forum, Executive Opinion Survey 2006, 2007

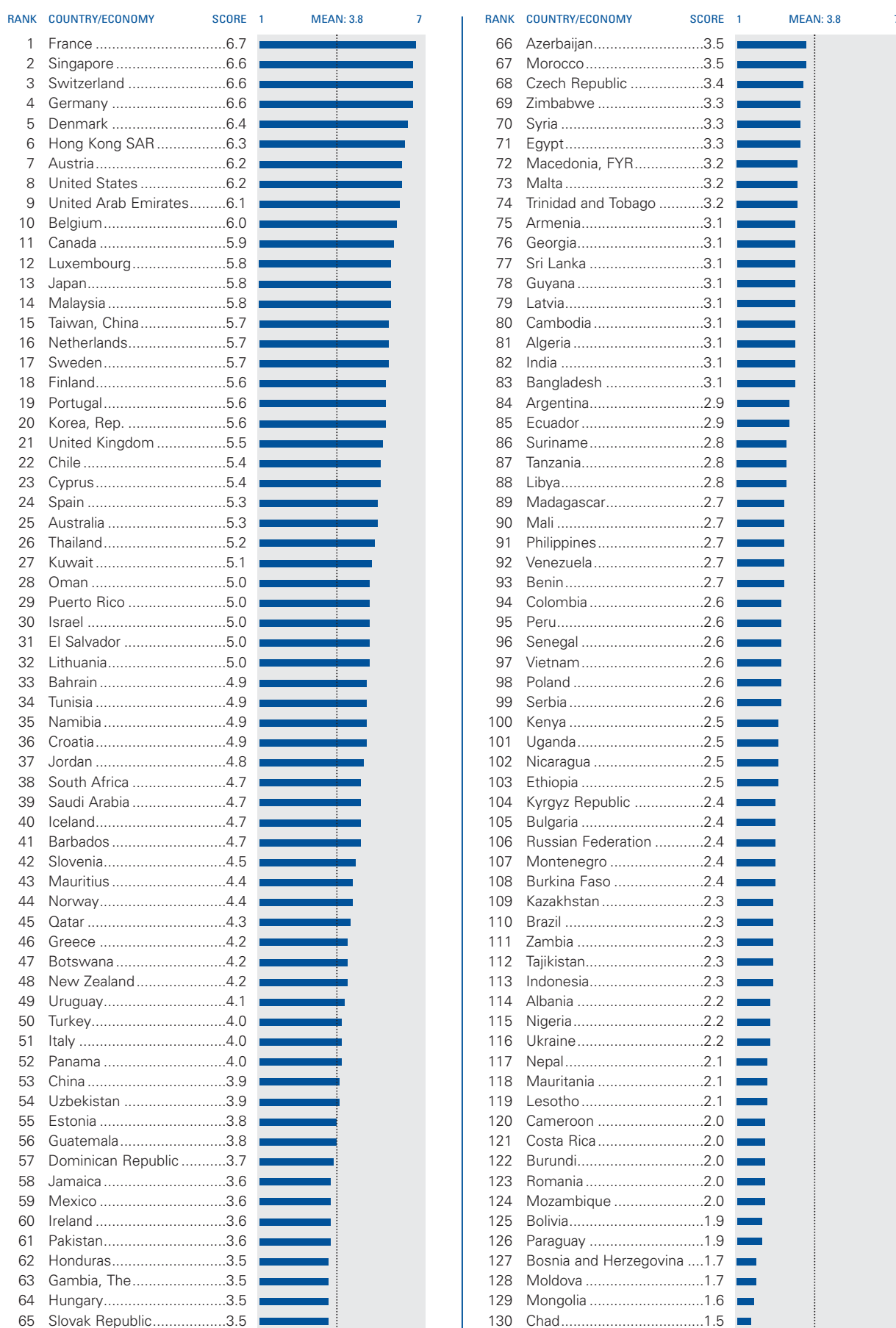


7th pillar

## Ground transport infrastructure

## 7.01 Quality of roads

Roads in your country are (1 = underdeveloped, 7 = extensive and efficient by international standards)



SOURCE: World Economic Forum, Executive Opinion Survey 2006, 2007

## 7.02 Quality of railroad infrastructure

Railroads in your country are (1 = underdeveloped, 7 = as extensive and efficient as the world's best)



SOURCE: World Economic Forum, Executive Opinion Survey 2006, 2007



## 7.03 Quality of port infrastructure

Port facilities and inland waterways in your country are (1 = underdeveloped, 7 = as developed as the world's best)\*

RANK	COUNTRY/ECONOMY	SCORE	1	MEAN: 4.0	7	RANK	COUNTRY/ECONOMY	SCORE	1	MEAN: 4.0	7
1	Singapore	6.8				66	China	4.0			
2	Netherlands	6.7				67	Burkina Faso <sup>1</sup>	3.9			
3	Hong Kong SAR	6.5				68	Pakistan	3.7			
4	Germany	6.5				69	Mali <sup>1</sup>	3.7			
5	Denmark	6.4				70	Zambia <sup>1</sup>	3.7			
6	Belgium	6.4				71	Hungary <sup>1</sup>	3.7			
7	Finland	6.2				72	Russian Federation	3.7			
8	United Arab Emirates	6.0				73	Guatemala	3.7			
9	Sweden	5.9				74	Dominican Republic	3.6			
10	France	5.9				75	Senegal	3.6			
11	United States	5.8				76	Bulgaria	3.6			
12	Iceland	5.7				77	Georgia	3.6			
13	Malaysia	5.7				78	Serbia <sup>1</sup>	3.5			
14	Canada	5.7				79	Egypt	3.5			
15	Panama	5.7				80	India	3.5			
16	Norway	5.6				81	El Salvador	3.5			
17	Japan	5.5				82	Macedonia, FYR <sup>1</sup>	3.5			
18	Switzerland <sup>1</sup>	5.5				83	Turkey	3.4			
19	Taiwan, China	5.5				84	Cambodia	3.4			
20	Korea, Rep.	5.5				85	Kenya	3.4			
21	United Kingdom	5.4				86	Ukraine	3.4			
22	New Zealand	5.4				87	Bolivia <sup>1</sup>	3.3			
23	Barbados	5.4				88	Kazakhstan <sup>1</sup>	3.3			
24	Luxembourg <sup>1</sup>	5.4				89	Croatia	3.3			
25	Spain	5.3				90	Algeria	3.3			
26	Estonia	5.3				91	Mexico	3.3			
27	Bahrain	5.3				92	Tanzania	3.2			
28	Jamaica	5.2				93	Trinidad and Tobago	3.2			
29	Australia	5.1				94	Argentina	3.2			
30	Namibia	5.0				95	Poland	3.2			
31	Austria <sup>1</sup>	5.0				96	Syria	3.1			
32	Puerto Rico	4.9				97	Italy	3.1			
33	Malta	4.9				98	Burundi <sup>1</sup>	3.0			
34	Chile	4.8				99	Romania	3.0			
35	Oman	4.8				100	Nepal <sup>1</sup>	3.0			
36	Tunisia	4.8				101	Benin	2.9			
37	Israel	4.8				102	Philippines	2.8			
38	Portugal	4.8				103	Ecuador	2.8			
39	Cyprus	4.8				104	Armenia <sup>1</sup>	2.8			
40	Honduras	4.7				105	Chad <sup>1</sup>	2.8			
41	Mauritius	4.7				106	Vietnam	2.8			
42	Thailand	4.7				107	Lesotho <sup>1</sup>	2.8			
43	Saudi Arabia	4.5				108	Colombia	2.7			
44	Slovak Republic <sup>1</sup>	4.5				109	Mozambique	2.7			
45	Latvia	4.5				110	Guyana	2.7			
46	Slovenia	4.5				111	Nigeria	2.7			
47	Azerbaijan <sup>1</sup>	4.4				112	Suriname	2.7			
48	South Africa	4.4				113	Indonesia	2.7			
49	Greece	4.4				114	Libya	2.7			
50	Qatar	4.4				115	Mauritania	2.6			
51	Uruguay	4.3				116	Brazil	2.6			
52	Montenegro	4.3				117	Venezuela	2.6			
53	Czech Republic <sup>1</sup>	4.3				118	Cameroon	2.6			
54	Jordan	4.3				119	Mongolia <sup>1</sup>	2.5			
55	Kuwait	4.2				120	Madagascar	2.4			
56	Ethiopia <sup>1</sup>	4.1				121	Bangladesh	2.4			
57	Botswana <sup>1</sup>	4.1				122	Peru	2.4			
58	Gambia, The	4.1				123	Uzbekistan <sup>1</sup>	2.3			
59	Paraguay <sup>1</sup>	4.1				124	Nicaragua	2.3			
60	Zimbabwe <sup>1</sup>	4.1				125	Costa Rica	2.2			
61	Lithuania	4.1				126	Albania	2.1			
62	Sri Lanka	4.1				127	Moldova <sup>1</sup>	2.0			
63	Morocco	4.1				128	Bosnia and Herzegovina	1.6			
64	Ireland	4.0				129	Kyrgyz Republic <sup>1</sup>	1.5			
65	Uganda <sup>1</sup>	4.0				130	Tajikistan <sup>1</sup>	1.4			

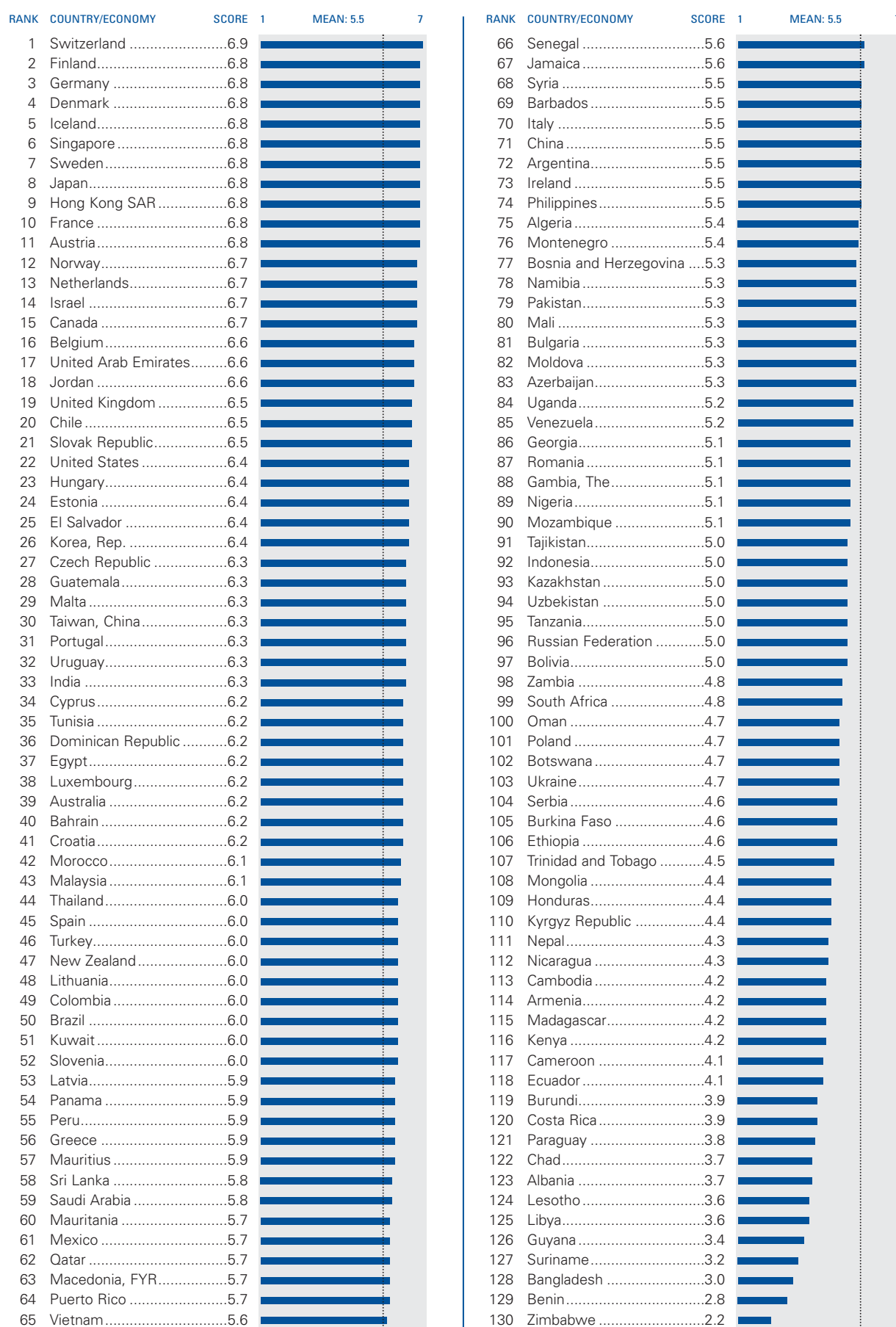
SOURCE: World Economic Forum, Executive Opinion Survey 2006, 2007

\*For landlocked countries, this measures the ease of access to port facilities and inland waterways.

<sup>1</sup> landlocked

## 7.04 Quality of domestic transport network

Does your country's national transport network (domestic flights, buses, trains, taxis, etc.) offer efficient, accessible transportation to a wide range of travelers to key business centers and tourist attractions within your country? (1 = no, not at all, 7 = yes, it is equal to the best in the world)



SOURCE: World Economic Forum, Executive Opinion Survey 2006, 2007

## 7.05 Road density (hard data)

Kilometers of road per 100 square kilometers of land | 2004

RANK	COUNTRY/ECONOMY	HARD DATA	RANK	COUNTRY/ECONOMY	HARD DATA
1	Belgium	498.0	66	Brazil	21.0
2	Singapore	463.0	66	Nigeria	21.0
3	Netherlands	372.0	68	China	20.0
4	Japan	323.0	68	Indonesia	20.0
5	Puerto Rico	289.0	68	Lesotho	20.0
6	Jamaica	194.0	68	Tajikistan	20.0
7	Slovenia	191.0	72	Uzbekistan	19.0
8	Hong Kong SAR	186.0	73	Mexico	18.0
9	Bangladesh	184.0	74	Benin	17.0
10	Hungary	178.0	75	Ecuador	16.0
10	Switzerland	178.0	75	Panama	16.0
12	France	173.0	77	Argentina	15.0
13	Denmark	169.0	77	Canada	15.0
14	Czech Republic	165.0	77	Nicaragua	15.0
14	Italy	165.0	80	Guatemala	13.0
16	Austria	162.0	80	Morocco	13.0
16	Trinidad and Tobago	162.0	82	Honduras	12.0
18	United Kingdom	160.0	82	Nepal	12.0
19	Sri Lanka	151.0	82	Tunisia	12.0
20	Ireland	140.0	82	Zambia	12.0
21	Poland	138.0	86	Australia	11.0
22	Estonia	134.0	86	Cameroon	11.0
23	Spain	133.0	86	Chile	11.0
24	Lithuania	127.0	86	Kenya	11.0
25	India	114.0	86	Oman	11.0
26	Latvia	112.0	86	Thailand	11.0
27	Sweden	104.0	86	Venezuela	11.0
28	Korea, Rep.	102.0	93	Colombia	10.0
29	Mauritius	99.0	93	Kyrgyz Republic	10.0
30	Greece	89.0	95	Egypt	9.0
30	Slovak Republic	89.0	95	Madagascar	9.0
32	Portugal	86.0	95	Tanzania	9.0
32	Romania	86.0	98	Jordan	8.0
34	Israel	81.0	98	Saudi Arabia	8.0
35	Azerbaijan	72.0	100	Paraguay	7.0
35	Vietnam	72.0	100	Senegal	7.0
37	United States	70.0	102	Bolivia	6.0
38	Costa Rica	69.0	102	Burkina Faso	6.0
39	Philippines	67.0	102	Peru	6.0
40	Albania	66.0	105	Algeria	5.0
41	Turkey	55.0	105	Libya	5.0
42	Syria	52.0	105	Namibia	5.0
43	Croatia	51.0	108	Botswana	4.0
44	Burundi	48.0	108	Ethiopia	4.0
44	El Salvador	48.0	108	Mozambique	4.0
46	Bosnia and Herzegovina	43.0	111	Chad	3.0
47	Bulgaria	40.0	111	Kazakhstan	3.0
48	Moldova	39.0	111	Mongolia	3.0
49	Gambia, The	37.0	111	Russian Federation	3.0
50	Uganda	36.0	115	Mali	2.0
51	New Zealand	35.0	116	Mauritania	1.0
52	Macedonia, FYR	34.0	116	United Arab Emirates	1.0
52	Pakistan	34.0	n/a	Bahrain	n/a
52	Uruguay	34.0	n/a	Barbados	n/a
55	Kuwait	32.0	n/a	Cyprus	n/a
56	Malaysia	30.0	n/a	Germany	n/a
56	Norway	30.0	n/a	Guyana	n/a
56	South Africa	30.0	n/a	Iceland	n/a
59	Georgia	29.0	n/a	Luxembourg	n/a
59	Ukraine	29.0	n/a	Malta	n/a
61	Armenia	27.0	n/a	Montenegro	n/a
62	Dominican Republic	26.0	n/a	Qatar	n/a
62	Finland	26.0	n/a	Serbia	n/a
64	Zimbabwe	25.0	n/a	Suriname	n/a
65	Cambodia	22.0	n/a	Taiwan, China	n/a

SOURCE: World Bank, *World Development Indicators 2007*

8th pillar  
Tourism infrastructure

## 8.01 Hotel rooms (hard data)

Number of hotel rooms per 100 population | 2006 or most recent year available

RANK	COUNTRY/ECONOMY	HARD DATA	RANK	COUNTRY/ECONOMY	HARD DATA
1	Cyprus	5.6	66	Oman	0.3
2	Malta	4.9	67	Venezuela	0.3
3	Austria	3.4	68	Egypt	0.2
4	Greece	3.3	69	Bosnia and Herzegovina	0.2
5	Montenegro	2.9	70	Poland	0.2
6	Iceland	2.7	71	Botswana	0.2
7	Barbados	2.4	72	Georgia	0.2
8	Spain	1.9	73	Bolivia	0.2
9	Italy	1.8	74	Libya	0.2
10	Switzerland	1.7	75	Gambia, The	0.2
11	Croatia	1.7	76	Morocco	0.2
12	Norway	1.5	77	Cambodia	0.2
13	Ireland	1.5	78	Vietnam	0.2
14	Luxembourg	1.5	79	Kuwait	0.2
15	United States	1.5	80	Colombia	0.2
16	Estonia	1.4	81	Guatemala	0.2
17	Japan	1.2	82	Russian Federation	0.1
18	Canada	1.2	83	Namibia	0.1
19	Australia	1.1	84	Albania	0.1
20	Tunisia	1.1	85	Senegal	0.1
21	Portugal	1.1	86	Cameroon	0.1
22	Sweden	1.1	87	Azerbaijan	0.1
23	Germany	1.1	88	Indonesia	0.1
24	Finland	1.0	89	Korea, Rep.	0.1
25	Suriname	1.0	90	South Africa	0.1
26	France	1.0	91	Nicaragua	0.1
27	United Kingdom	1.0	92	Kazakhstan	0.1
28	Czech Republic	1.0	93	Armenia	0.1
29	United Arab Emirates	1.0	94	Syria	0.1
30	Bahrain	0.9	95	China	0.1
31	Costa Rica	0.9	96	Lesotho	0.1
32	Singapore	0.8	97	Taiwan, China	0.1
33	Jamaica	0.8	98	El Salvador	0.1
34	Mauritius	0.8	99	Sri Lanka	0.1
35	Denmark	0.8	100	Paraguay	0.1
36	Slovenia	0.8	101	Tanzania	0.1
37	Hong Kong SAR	0.7	102	Benin	0.1
38	Dominican Republic	0.7	103	Nepal	0.1
39	Israel	0.7	104	Ukraine	0.1
40	Slovak Republic	0.7	105	Moldova	0.1
41	Hungary	0.7	106	Kenya	0.1
42	Belgium	0.7	107	Madagascar	0.1
43	Malaysia	0.6	108	Zambia	0.0
44	Netherlands	0.6	109	Zimbabwe	0.0
45	Qatar	0.6	110	Kyrgyz Republic	0.0
46	Thailand	0.6	111	Mali	0.0
47	New Zealand	0.5	112	Mozambique	0.0
48	Mexico	0.5	113	Philippines	0.0
49	Argentina	0.5	114	Uzbekistan	0.0
50	Peru	0.5	115	Pakistan	0.0
51	Romania	0.5	116	Chad	0.0
52	Panama	0.5	117	India	0.0
53	Trinidad and Tobago	0.5	118	Ethiopia	0.0
54	Saudi Arabia	0.5	119	Bangladesh	0.0
55	Latvia	0.4	120	Burundi	0.0
56	Puerto Rico	0.4	n/a	Algeria	n/a
57	Uruguay	0.4	n/a	Brazil	n/a
58	Jordan	0.4	n/a	Bulgaria	n/a
59	Macedonia, FYR	0.4	n/a	Burkina Faso	n/a
60	Ecuador	0.3	n/a	Guyana	n/a
61	Chile	0.3	n/a	Mauritania	n/a
62	Lithuania	0.3	n/a	Mongolia	n/a
63	Turkey	0.3	n/a	Nigeria	n/a
64	Serbia	0.3	n/a	Tajikistan	n/a
65	Honduras	0.3	n/a	Uganda	n/a

SOURCE: United Nations World Tourism Organization

## 8.02 Presence of major car rental companies (hard data)

Index of presence of major car rental companies | 2007

RANK	COUNTRY/ECONOMY	HARD DATA
1	Australia	7.0
1	Austria	7.0
1	Bosnia and Herzegovina	7.0
1	Canada	7.0
1	Costa Rica	7.0
1	Croatia	7.0
1	Cyprus	7.0
1	Czech Republic	7.0
1	Dominican Republic	7.0
1	Estonia	7.0
1	France	7.0
1	Germany	7.0
1	Greece	7.0
1	Hungary	7.0
1	Ireland	7.0
1	Israel	7.0
1	Italy	7.0
1	Jordan	7.0
1	Kuwait	7.0
1	Latvia	7.0
1	Malta	7.0
1	Portugal	7.0
1	Qatar	7.0
1	Romania	7.0
1	Serbia	7.0
1	Slovak Republic	7.0
1	Slovenia	7.0
1	South Africa	7.0
1	Spain	7.0
1	Turkey	7.0
1	United Kingdom	7.0
1	United States	7.0
33	Argentina	6.0
33	Bahrain	6.0
33	Belgium	6.0
33	Brazil	6.0
33	Bulgaria	6.0
33	Denmark	6.0
33	Finland	6.0
33	Iceland	6.0
33	India	6.0
33	Macedonia, FYR	6.0
33	Mauritius	6.0
33	Mexico	6.0
33	Morocco	6.0
33	Netherlands	6.0
33	New Zealand	6.0
33	Nicaragua	6.0
33	Norway	6.0
33	Oman	6.0
33	Poland	6.0
33	Sweden	6.0
33	Switzerland	6.0
33	Thailand	6.0
33	United Arab Emirates	6.0
56	Benin	5.0
56	Chile	5.0
56	Egypt	5.0
56	El Salvador	5.0
56	Guatemala	5.0
56	Jamaica	5.0
56	Lithuania	5.0
56	Luxembourg	5.0
56	Madagascar	5.0
56	Montenegro	5.0
56	Panama	5.0
56	Peru	5.0
56	Puerto Rico	5.0
56	Russian Federation	5.0
56	Tunisia	5.0
56	Ukraine	5.0
56	Uruguay	5.0
56	Venezuela	5.0
74	Albania	4.0
74	Botswana	4.0
74	Colombia	4.0
74	Honduras	4.0
74	Japan	4.0
74	Kenya	4.0
74	Moldova	4.0
74	Namibia	4.0
74	Pakistan	4.0
74	Philippines	4.0
74	Saudi Arabia	4.0
74	Senegal	4.0
74	Singapore	4.0
74	Suriname	4.0
74	Trinidad and Tobago	4.0
89	Algeria	3.0
89	Azerbaijan	3.0
89	Bolivia	3.0
89	Burkina Faso	3.0
89	Ecuador	3.0
89	Gambia, The	3.0
89	Georgia	3.0
89	Korea, Rep.	3.0
89	Malaysia	3.0
89	Mozambique	3.0
89	Nigeria	3.0
89	Paraguay	3.0
89	Syria	3.0
89	Zimbabwe	3.0
103	Barbados	2.0
103	Cameroon	2.0
103	Ethiopia	2.0
103	Hong Kong SAR	2.0
103	Indonesia	2.0
103	Kazakhstan	2.0
103	Lesotho	2.0
103	Libya	2.0
103	Mali	2.0
103	Mongolia	2.0
103	Sri Lanka	2.0
103	Tanzania	2.0
103	Uganda	2.0
103	Zambia	2.0
117	Armenia	1.0
117	Bangladesh	1.0
117	Burundi	1.0
117	Chad	1.0
117	China	1.0
117	Mauritania	1.0
123	Cambodia	0.0
123	Guyana	0.0
123	Kyrgyz Republic	0.0
123	Nepal	0.0
123	Taiwan, China	0.0
123	Tajikistan	0.0
123	Uzbekistan	0.0
123	Vietnam	0.0

SOURCE: Individual rental car company websites

## 8.03 ATMs accepting Visa cards (hard data)

Number of automated teller machines (ATMs) accepting Visa credit cards per million population | 2007

RANK	COUNTRY/ECONOMY	HARD DATA	RANK	COUNTRY/ECONOMY	HARD DATA
1	Spain	1,355.6	66	Macedonia, FYR	148.5
2	United States	1,314.6	67	Dominican Republic	143.0
3	Portugal	1,101.5	68	Brazil	140.5
4	Austria	1,063.3	69	Jamaica	139.3
5	Switzerland	929.5	70	Botswana	136.1
6	Luxembourg	880.0	71	Montenegro	133.3
7	Slovenia	826.5	72	Namibia	125.2
8	Iceland	816.7	73	Azerbaijan	123.8
9	France	793.6	74	Bosnia and Herzegovina	119.5
10	Australia	792.4	75	Jordan	116.7
11	Ireland	771.6	76	Georgia	111.8
12	Taiwan, China	727.8	77	Venezuela	104.5
13	United Kingdom	721.8	78	Tunisia	88.5
14	Cyprus	683.8	79	Ecuador	86.8
15	Italy	656.9	80	Morocco	83.8
16	Estonia	613.1	81	Moldova	81.2
17	Canada	607.1	82	Albania	79.7
18	Germany	598.8	83	El Salvador	63.5
19	Croatia	591.5	84	Zambia	57.5
20	Greece	584.3	85	Uruguay	55.7
21	Denmark	581.1	86	Guatemala	53.7
22	Qatar	545.6	87	Armenia	53.7
23	New Zealand	497.3	88	Indonesia	53.5
24	Norway	478.1	89	Sri Lanka	47.2
25	Netherlands	452.6	90	China	45.9
26	Panama	446.7	91	Honduras	40.9
27	Latvia	445.7	92	Peru	39.7
28	Bulgaria	432.4	93	Philippines	35.1
29	Korea, Rep.	429.1	94	Nicaragua	33.0
30	Singapore	406.4	95	Bolivia	31.9
31	Hungary	389.0	96	Egypt	29.4
32	Slovak Republic	380.4	97	Paraguay	24.7
33	Ukraine	358.5	98	Kenya	21.3
34	Thailand	343.7	99	India	20.9
35	Malta	340.0	100	Lesotho	19.4
36	Sweden	334.7	101	Guyana	18.6
37	United Arab Emirates	334.0	102	Mozambique	18.4
38	Puerto Rico	327.8	103	Vietnam	17.8
39	Lithuania	320.3	104	Tajikistan	17.0
40	Finland	314.5	105	Zimbabwe	16.0
41	Hong Kong SAR	309.2	106	Senegal	14.8
42	Czech Republic	305.8	107	Mongolia	14.8
43	Romania	296.7	108	Uganda	7.0
44	Belgium	287.4	109	Syria	5.6
45	South Africa	283.5	110	Pakistan	5.1
46	Costa Rica	278.9	111	Cambodia	4.7
47	Barbados	266.7	112	Kyrgyz Republic	4.5
48	Russian Federation	254.3	113	Burkina Faso	3.9
49	Israel	245.3	114	Libya	3.3
50	Mexico	239.5	115	Nepal	3.2
51	Saudi Arabia	225.3	116	Benin	2.3
52	Turkey	219.3	117	Madagascar	1.7
53	Poland	217.3	118	Mali	1.7
54	Bahrain	217.1	119	Bangladesh	1.5
55	Malaysia	216.0	120	Uzbekistan	1.5
56	Mauritius	214.6	121	Cameroon	1.4
57	Japan	213.9	122	Nigeria	0.2
58	Argentina	210.9	123	Ethiopia	0.1
59	Trinidad and Tobago	209.2	124	Algeria	0.0
60	Kuwait	203.6	124	Burundi	0.0
61	Serbia	194.7	124	Chad	0.0
62	Chile	194.4	124	Gambia, The	0.0
63	Kazakhstan	174.7	124	Mauritania	0.0
64	Oman	169.6	124	Suriname	0.0
65	Colombia	155.2	124	Tanzania	0.0

SOURCE: Visa International

9th pillar  
ICT infrastructure



## 9.01 Extent of business Internet use

In your country, companies use the Internet extensively for buying/selling goods and services and for interaction with customers  
(1 = strongly disagree, 7 = strongly agree)

RANK	COUNTRY/ECONOMY	SCORE	1	MEAN: 4.0	7	RANK	COUNTRY/ECONOMY	SCORE	1	MEAN: 4.0	7
1	Korea, Rep.	6.1				66	Croatia	3.9			
2	Estonia	6.1				67	Barbados	3.9			
3	Sweden	6.0				68	Philippines	3.9			
4	United Kingdom	6.0				69	El Salvador	3.9			
5	Germany	5.9				70	Uruguay	3.8			
6	United States	5.9				71	Peru	3.8			
7	Denmark	5.8				72	Costa Rica	3.8			
8	Switzerland	5.7				73	Dominican Republic	3.7			
9	Japan	5.7				74	Argentina	3.7			
10	Iceland	5.6				75	Colombia	3.7			
11	Canada	5.6				76	Kenya	3.7			
12	Netherlands	5.6				77	Ukraine	3.7			
13	Finland	5.6				78	Kazakhstan	3.7			
14	Israel	5.5				79	Romania	3.7			
15	Norway	5.5				80	Trinidad and Tobago	3.7			
16	Austria	5.5				81	Venezuela	3.6			
17	Taiwan, China	5.4				82	Nigeria	3.6			
18	Australia	5.4				83	Bosnia and Herzegovina	3.6			
19	Singapore	5.3				84	Bahrain	3.6			
20	Czech Republic	5.3				85	Uganda	3.6			
21	Puerto Rico	5.2				86	Pakistan	3.6			
22	Hong Kong SAR	5.2				87	Gambia, The	3.5			
23	France	5.1				88	Bulgaria	3.5			
24	Ireland	5.0				89	Mauritius	3.5			
25	New Zealand	5.0				90	Mali	3.4			
26	Belgium	4.9				91	Tanzania	3.4			
27	Chile	4.9				92	Zambia	3.4			
28	Brazil	4.8				93	Serbia	3.4			
29	Malaysia	4.8				94	Namibia	3.4			
30	Luxembourg	4.8				95	Mauritania	3.4			
31	Thailand	4.8				96	Guyana	3.4			
32	Malta	4.7				97	Georgia	3.4			
33	Uzbekistan	4.7				98	Tajikistan	3.4			
34	Lithuania	4.7				99	Greece	3.3			
35	Slovenia	4.6				100	Burkina Faso	3.3			
36	India	4.6				101	Cambodia	3.3			
37	Portugal	4.5				102	Mongolia	3.2			
38	Guatemala	4.5				103	Vietnam	3.2			
39	Poland	4.4				104	Botswana	3.2			
40	Latvia	4.3				105	Nepal	3.1			
41	Panama	4.3				106	Benin	3.1			
42	Jordan	4.3				107	Morocco	3.1			
43	United Arab Emirates	4.2				108	Ethiopia	3.1			
44	Jamaica	4.2				109	Ecuador	3.1			
45	Oman	4.2				110	Nicaragua	3.1			
46	South Africa	4.2				111	Armenia	3.1			
47	Spain	4.2				112	Bangladesh	3.1			
48	Tunisia	4.2				113	Syria	3.0			
49	Cyprus	4.2				114	Suriname	3.0			
50	Slovak Republic	4.2				115	Mozambique	2.9			
51	Hungary	4.2				116	Bolivia	2.9			
52	Saudi Arabia	4.2				117	Albania	2.9			
52	Senegal	4.2				118	Kyrgyz Republic	2.9			
54	Russian Federation	4.1				119	Libya	2.9			
55	Italy	4.1				120	Madagascar	2.9			
56	Turkey	4.1				121	Moldova	2.9			
57	Indonesia	4.1				122	Zimbabwe	2.8			
58	Egypt	4.1				123	Paraguay	2.7			
59	Sri Lanka	4.0				124	Lesotho	2.7			
60	Qatar	4.0				125	Macedonia, FYR	2.6			
61	China	4.0				126	Cameroon	2.6			
62	Kuwait	4.0				127	Montenegro	2.4			
63	Azerbaijan	4.0				128	Burundi	2.4			
64	Honduras	3.9				129	Algeria	2.2			
65	Mexico	3.9				130	Chad	2.2			

SOURCE: World Economic Forum, Executive Opinion Survey 2006, 2007

## 9.02 Internet users (hard data)

Internet users per 100 population | 2006 or most recent year available

RANK	COUNTRY/ECONOMY	HARD DATA
1	Netherlands.....	88.9
2	New Zealand.....	78.8
3	Sweden.....	77.0
4	Australia.....	75.1
5	Luxembourg.....	72.0
6	Korea, Rep.....	71.1
7	United States.....	69.1
8	Japan.....	68.3
9	Canada.....	67.9
10	Iceland.....	65.3
11	Taiwan, China.....	63.7
12	Slovenia.....	63.6
13	Switzerland.....	60.0
14	Barbados.....	59.5
15	Norway.....	58.5
16	Denmark.....	58.2
17	Estonia.....	57.4
18	United Kingdom.....	56.0
19	Finland.....	53.3
20	Hong Kong SAR.....	53.0
21	Austria.....	51.2
22	Italy.....	49.6
23	France.....	49.6
24	Germany.....	46.7
25	Latvia.....	46.6
26	Jamaica.....	46.5
27	Belgium.....	45.7
28	Malaysia.....	43.8
29	Spain.....	42.8
30	Cyprus.....	42.2
31	Slovak Republic.....	41.8
32	Singapore.....	39.2
33	United Arab Emirates.....	36.7
34	Hungary.....	34.8
35	Czech Republic.....	34.7
36	Croatia.....	34.6
37	Qatar.....	34.5
38	Ireland.....	34.1
39	Romania.....	32.4
40	Malta.....	31.7
41	Lithuania.....	31.7
42	Portugal.....	30.5
43	Kuwait.....	29.5
44	Poland.....	28.6
45	Costa Rica.....	27.6
46	Chile.....	25.2
47	Israel.....	24.4
48	Bulgaria.....	24.4
49	Bosnia and Herzegovina.....	24.3
50	Dominican Republic.....	22.2
51	Peru.....	21.5
52	Bahrain.....	21.3
53	Guyana.....	21.3
54	Argentina.....	20.9
55	Uruguay.....	20.6
56	Morocco.....	19.8
57	Saudi Arabia.....	18.7
58	Serbia.....	18.5
59	Russian Federation.....	18.0
60	Greece.....	18.0
61	Puerto Rico.....	17.6
62	Moldova.....	17.3
63	Brazil.....	17.2
64	Vietnam.....	17.2
65	Mexico.....	16.9
66	Turkey.....	16.6
67	Venezuela.....	15.2
68	Albania.....	15.0
69	Mauritius.....	14.5
70	Colombia.....	14.5
71	Jordan.....	13.7
72	Macedonia, FYR.....	13.2
73	Thailand.....	13.1
74	Tunisia.....	12.7
75	Trinidad and Tobago.....	12.5
76	Montenegro.....	12.3
77	Oman.....	12.2
78	Ukraine.....	12.1
79	Ecuador.....	11.5
80	South Africa.....	10.8
81	China.....	10.4
82	Guatemala.....	10.2
83	Mongolia.....	10.1
84	Azerbaijan.....	9.8
85	Zimbabwe.....	9.3
86	El Salvador.....	9.3
87	Kazakhstan.....	8.4
88	Benin.....	8.0
89	Egypt.....	8.0
90	Kenya.....	7.9
91	Syria.....	7.7
92	Pakistan.....	7.6
93	Georgia.....	7.5
94	Algeria.....	7.4
95	Indonesia.....	7.2
96	Suriname.....	7.1
97	Panama.....	6.7
98	Uzbekistan.....	6.3
99	Bolivia.....	6.2
100	Armenia.....	5.7
101	Kyrgyz Republic.....	5.6
102	Philippines.....	5.5
103	Senegal.....	5.4
104	India.....	5.4
105	Honduras.....	4.6
106	Zambia.....	4.2
107	Paraguay.....	4.1
108	Namibia.....	4.0
109	Libya.....	4.0
110	Gambia, The.....	3.8
111	Nigeria.....	3.8
112	Botswana.....	3.4
113	Mauritania.....	3.2
114	Lesotho.....	2.9
115	Nicaragua.....	2.8
116	Uganda.....	2.5
117	Cameroon.....	2.2
118	Sri Lanka.....	2.0
119	Tanzania.....	1.0
120	Nepal.....	0.9
121	Mozambique.....	0.9
122	Burundi.....	0.8
123	Chad.....	0.6
124	Burkina Faso.....	0.6
125	Madagascar.....	0.5
126	Mali.....	0.5
127	Cambodia.....	0.3
128	Bangladesh.....	0.3
129	Tajikistan.....	0.3
130	Ethiopia.....	0.2

SOURCE: International Telecommunication Union, *World Telecommunication Indicators 2007*

## 9.03 Telephone lines (hard data)

Telephone lines per 100 inhabitants | 2006 or most recent year available

RANK	COUNTRY/ECONOMY	HARD DATA	RANK	COUNTRY/ECONOMY	HARD DATA
1	Switzerland	69.4	66	Mexico	18.3
2	Germany	65.5	67	Suriname	18.0
3	Iceland	65.2	68	Colombia	17.0
4	Canada	64.1	69	Malaysia	16.8
5	Taiwan, China	63.6	70	Syria	16.6
6	Sweden	59.5	71	Saudi Arabia	15.7
7	United States	57.1	72	Venezuela	15.5
8	Denmark	56.9	73	El Salvador	14.8
9	United Kingdom	56.1	74	Guyana	14.7
10	Korea, Rep.	56.0	75	Egypt	14.3
11	France	55.8	76	Azerbaijan	14.0
12	Greece	55.5	77	Panama	13.2
13	Hong Kong SAR	54.1	78	Ecuador	13.1
14	Luxembourg	52.4	79	Georgia	12.5
15	Malta	50.2	80	Tunisia	12.4
16	Barbados	50.1	81	Jamaica	12.0
17	Ireland	49.8	82	Albania	11.3
18	Australia	48.8	83	Thailand	10.9
19	Cyprus	48.3	84	Oman	10.7
20	Netherlands	46.6	85	Jordan	10.5
21	Belgium	45.2	86	Guatemala	10.5
22	Norway	44.3	87	South Africa	10.0
23	Israel	43.9	88	Dominican Republic	9.9
24	Austria	43.4	89	Honduras	9.6
25	Italy	43.1	90	Sri Lanka	9.0
26	Japan	43.0	91	Algeria	8.5
27	New Zealand	42.9	92	Kyrgyz Republic	8.4
28	Slovenia	42.6	93	Peru	8.2
29	Spain	42.4	94	Libya	8.1
30	Singapore	42.3	95	Botswana	7.8
31	Estonia	40.9	96	Bolivia	7.1
32	Croatia	40.2	97	Namibia	6.8
33	Portugal	40.1	98	Uzbekistan	6.7
34	Finland	36.5	99	Indonesia	6.6
35	Hungary	33.3	100	Mongolia	5.9
36	Czech Republic	31.5	101	Paraguay	5.3
37	Bulgaria	31.3	102	India	4.5
38	Costa Rica	30.7	103	Nicaragua	4.4
39	Poland	29.8	104	Tajikistan	4.3
40	Latvia	28.6	105	Philippines	4.3
41	Mauritius	28.5	106	Morocco	4.1
42	Uruguay	28.3	107	Gambia, The	3.4
43	United Arab Emirates	28.1	108	Pakistan	3.3
44	Russian Federation	27.9	109	Lesotho	2.7
45	China	27.8	110	Zimbabwe	2.5
46	Montenegro	27.6	111	Senegal	2.4
47	Qatar	27.2	112	Nepal	2.2
48	Ukraine	26.8	113	Nigeria	1.3
49	Puerto Rico	26.2	114	Mauritania	1.1
50	Bahrain	26.2	115	Ethiopia	0.9
51	Turkey	25.4	116	Benin	0.9
52	Bosnia and Herzegovina	25.3	117	Kenya	0.8
53	Trinidad and Tobago	24.9	118	Zambia	0.8
54	Moldova	24.3	119	Bangladesh	0.8
55	Argentina	24.2	120	Burkina Faso	0.7
56	Macedonia, FYR	24.1	121	Madagascar	0.7
57	Lithuania	23.2	122	Cameroon	0.6
58	Slovak Republic	21.6	123	Mali	0.6
59	Brazil	21.4	124	Burundi	0.4
60	Chile	20.2	125	Tanzania	0.4
61	Kazakhstan	19.8	126	Uganda	0.4
62	Armenia	19.7	127	Mozambique	0.3
63	Romania	19.4	128	Cambodia	0.2
64	Kuwait	19.0	129	Chad	0.1
65	Vietnam	18.8	n/a	Serbia	n/a

SOURCE: International Telecommunication Union, *World Telecommunication Indicators 2007*

## 9.04 Broadband Internet subscribers (hard data)

Broadband Internet subscribers per 100 population | 2006 or most recent year available

RANK	COUNTRY/ECONOMY	HARD DATA	RANK	COUNTRY/ECONOMY	HARD DATA
1	Denmark	31.7	66	Bosnia and Herzegovina	1.0
2	Netherlands	31.7	67	Kuwait	0.9
3	Iceland	29.5	68	Saudi Arabia	0.9
4	Switzerland	29.5	69	Jordan	0.8
5	Korea, Rep.	29.3	70	Morocco	0.8
6	Norway	27.5	71	Dominican Republic	0.7
7	Finland	27.1	72	El Salvador	0.6
8	Sweden	25.9	73	Georgia	0.6
9	Hong Kong SAR	25.2	74	Vietnam	0.6
10	Canada	23.6	75	Algeria	0.6
11	United Kingdom	21.7	76	Suriname	0.6
12	France	20.9	77	Oman	0.6
13	Israel	20.8	78	Panama	0.5
14	Japan	20.1	79	Moldova	0.5
15	Luxembourg	19.8	80	South Africa	0.3
16	Taiwan, China	19.8	81	Nicaragua	0.3
17	United States	19.3	82	Egypt	0.3
18	Australia	19.1	83	Guyana	0.3
19	Belgium	19.1	84	Paraguay	0.3
20	Singapore	18.2	85	Senegal	0.2
21	Austria	17.4	86	Guatemala	0.2
22	Estonia	17.2	87	Kazakhstan	0.2
23	Germany	17.0	88	India	0.2
24	Spain	15.3	89	Ecuador	0.2
25	Italy	14.9	90	Tunisia	0.2
26	New Zealand	14.2	91	Thailand	0.2
27	Portugal	13.8	92	Philippines	0.1
28	Slovenia	13.4	93	Sri Lanka	0.1
29	Ireland	12.3	94	Bolivia	0.1
30	Barbados	11.9	95	Libya	0.1
31	Lithuania	10.8	96	Botswana	0.1
32	Czech Republic	10.6	97	Zimbabwe	0.1
33	Malta	10.4	98	Mongolia	0.1
34	Hungary	9.7	99	Armenia	0.1
35	Romania	8.2	100	Indonesia	0.0
36	Poland	6.9	101	Kyrgyz Republic	0.0
37	Chile	5.9	102	Uzbekistan	0.0
38	Cyprus	5.9	103	Pakistan	0.0
39	Slovak Republic	5.9	104	Syria	0.0
40	Qatar	5.6	105	Azerbaijan	0.0
41	Croatia	5.5	106	Mauritania	0.0
42	Bahrain	5.2	107	Mali	0.0
43	United Arab Emirates	5.2	108	Zambia	0.0
44	Bulgaria	5.0	109	Burkina Faso	0.0
45	Latvia	4.8	110	Albania	0.0
46	Serbia	4.6	111	Cambodia	0.0
47	Greece	4.4	112	Gambia, The	0.0
48	Argentina	4.0	113	Uganda	0.0
49	China	3.8	114	Lesotho	0.0
50	Turkey	3.7	115	Benin	0.0
51	Malaysia	3.5	116	Cameroon	0.0
52	Mexico	3.4	117	Tajikistan	0.0
53	Uruguay	3.1	118	Nigeria	0.0
54	Puerto Rico	3.0	119	Ethiopia	0.0
55	Brazil	2.4	120	Bangladesh	0.0
56	Russian Federation	2.0	120	Burundi	0.0
57	Venezuela	2.0	120	Chad	0.0
58	Macedonia, FYR	1.8	120	Honduras	0.0
59	Mauritius	1.7	120	Kenya	0.0
60	Peru	1.7	120	Madagascar	0.0
61	Jamaica	1.7	120	Mozambique	0.0
62	Trinidad and Tobago	1.6	120	Namibia	0.0
63	Ukraine	1.4	120	Nepal	0.0
64	Colombia	1.4	120	Tanzania	0.0
65	Costa Rica	1.3	n/a	Montenegro	n/a

SOURCE: International Telecommunication Union, *World Telecommunication Indicators 2007*

## 9.05 Mobile telephone subscribers (hard data)

Mobile telephone subscribers per 100 population | 2006 or most recent year available

RANK	COUNTRY/ECONOMY	HARD DATA	RANK	COUNTRY/ECONOMY	HARD DATA
1	Luxembourg	151.6	66	Colombia	64.3
2	Lithuania	138.1	67	Ecuador	63.2
3	Hong Kong SAR	131.5	68	Thailand	63.0
4	Trinidad and Tobago	126.4	69	Algeria	63.0
5	Estonia	125.2	70	Mauritius	61.5
6	Italy	123.1	71	Botswana	55.7
7	Israel	122.7	72	Guatemala	55.6
8	Bahrain	121.7	73	El Salvador	55.0
9	Czech Republic	119.0	74	Montenegro	54.3
10	United Arab Emirates	118.5	75	Kazakhstan	52.9
11	United Kingdom	116.4	76	Mexico	52.6
12	Portugal	116.0	77	Canada	52.5
13	Austria	112.8	78	Panama	52.5
14	Ireland	111.4	79	Morocco	52.1
15	Iceland	110.6	80	Paraguay	51.3
16	Qatar	109.6	81	Dominican Republic	51.1
17	Singapore	109.3	82	Philippines	50.7
18	Norway	108.6	83	Albania	48.9
19	Finland	107.8	84	Bosnia and Herzegovina	48.3
20	Bulgaria	107.6	85	Brazil	46.2
21	Denmark	107.3	86	Azerbaijan	39.2
22	Ukraine	106.7	87	Georgia	38.4
23	Spain	106.4	88	Guyana	37.5
24	Sweden	105.9	89	China	34.8
25	Jamaica	105.8	90	Mauritania	33.6
26	Switzerland	102.1	91	Costa Rica	32.8
27	Taiwan, China	102.0	92	Nicaragua	32.7
28	Germany	101.9	93	Moldova	32.4
29	Greece	99.6	94	Honduras	30.4
30	Hungary	98.9	95	Peru	30.0
31	Croatia	98.1	96	Bolivia	28.8
32	Netherlands	97.1	97	Indonesia	28.3
33	Australia	97.0	98	Gambia, The	26.0
34	Poland	95.4	99	Sri Lanka	25.9
35	Latvia	95.1	100	Senegal	25.0
36	Slovenia	92.6	101	Namibia	24.4
37	Belgium	92.6	102	Nigeria	24.1
38	Cyprus	92.1	103	Syria	24.0
39	Slovak Republic	90.6	104	Egypt	23.9
40	Kuwait	88.6	105	Pakistan	22.0
41	New Zealand	87.6	106	Mongolia	21.1
42	Malta	86.0	107	Kenya	18.5
43	France	85.1	108	Vietnam	18.2
44	Korea, Rep.	83.8	109	India	14.8
45	Russian Federation	83.6	110	Tanzania	14.8
46	Argentina	80.5	111	Zambia	14.0
47	Romania	80.4	112	Lesotho	13.9
48	Japan	79.3	113	Cameroon	13.8
49	Saudi Arabia	78.0	114	Bangladesh	13.2
50	United States	77.4	115	Benin	12.1
51	Barbados	76.7	116	Mozambique	11.6
52	Chile	75.6	117	Mali	10.9
53	Malaysia	75.5	118	Armenia	10.5
54	Jordan	74.4	119	Kyrgyz Republic	10.3
55	Tunisia	71.9	120	Cambodia	7.9
56	South Africa	71.6	121	Burkina Faso	7.5
57	Turkey	71.0	122	Uganda	6.7
58	Suriname	70.8	123	Zimbabwe	6.4
59	Serbia	70.0	124	Madagascar	5.5
60	Oman	69.6	125	Chad	4.6
61	Macedonia, FYR	69.6	126	Tajikistan	4.1
62	Venezuela	69.0	127	Nepal	3.8
63	Puerto Rico	68.8	128	Uzbekistan	2.7
64	Uruguay	66.8	129	Burundi	2.0
65	Libya	65.8	130	Ethiopia	1.1

SOURCE: International Telecommunication Union, *World Telecommunication Indicators 2007*

10th pillar  
Price competitiveness  
in the T&T industry

## 10.01 Ticket taxes and airport charges (hard data)

Index of relative cost of access (ticket taxes and airport charges) to international air transport services (0 = highest cost, 100 = lowest cost) | 2007

RANK	COUNTRY/ECONOMY	HARD DATA	RANK	COUNTRY/ECONOMY	HARD DATA
1	Libya.....	100.0	66	Portugal.....	78.4
2	Luxembourg.....	97.0	67	Iceland.....	78.2
3	Lesotho.....	97.0	68	Honduras.....	78.2
4	Kuwait.....	96.9	69	Lithuania.....	77.9
5	Puerto Rico.....	96.5	70	Cambodia.....	77.6
6	United Arab Emirates.....	96.3	71	South Africa.....	77.4
7	Bahrain.....	96.3	72	Switzerland.....	77.1
8	India.....	95.2	73	Macedonia, FYR.....	77.0
9	Qatar.....	94.6	74	Austria.....	76.9
10	Oman.....	93.9	75	Tanzania.....	76.8
11	Malaysia.....	93.7	76	Morocco.....	76.3
12	Indonesia.....	93.4	77	New Zealand.....	76.3
13	Taiwan, China.....	92.7	78	Nigeria.....	75.8
14	Botswana.....	92.4	79	Czech Republic.....	75.6
15	Saudi Arabia.....	91.2	80	Uganda.....	75.4
16	Panama.....	89.6	81	Kyrgyz Republic.....	75.3
17	Philippines.....	89.2	82	Romania.....	74.7
18	Vietnam.....	89.1	83	Denmark.....	74.7
19	Bulgaria.....	88.5	84	Pakistan.....	74.7
20	China.....	88.0	85	Suriname.....	74.3
21	Turkey.....	87.7	86	Jamaica.....	73.1
22	Mozambique.....	87.7	87	Ukraine.....	73.0
23	Guyana.....	87.6	88	Madagascar.....	72.9
24	Spain.....	87.5	89	Peru.....	72.6
25	Norway.....	87.2	90	Bangladesh.....	72.3
26	Ethiopia.....	87.0	91	Namibia.....	72.0
27	Thailand.....	86.4	92	Brazil.....	71.9
28	Sweden.....	86.2	93	Bolivia.....	71.7
29	Italy.....	85.6	94	Albania.....	71.4
30	Mongolia.....	85.5	95	Slovenia.....	70.7
31	Korea, Rep.....	85.2	96	Netherlands.....	70.6
32	Egypt.....	85.2	97	Georgia.....	70.5
33	Singapore.....	84.8	98	Greece.....	70.0
34	Estonia.....	84.7	99	Cyprus.....	69.6
35	Uruguay.....	84.6	100	Slovak Republic.....	68.8
36	Zambia.....	84.5	101	Moldova.....	68.5
37	Nepal.....	84.3	102	Gambia, The.....	68.4
38	Ireland.....	84.2	103	France.....	68.4
39	Finland.....	84.1	104	United Kingdom.....	67.8
40	Hong Kong SAR.....	83.9	105	Bosnia and Herzegovina.....	67.8
41	Latvia.....	83.8	106	Malta.....	66.7
42	Syria.....	83.5	107	Benin.....	66.6
43	Uzbekistan.....	83.1	108	Tunisia.....	66.4
44	Hungary.....	82.8	109	Jordan.....	66.1
45	Guatemala.....	82.6	110	Mauritania.....	65.2
46	Barbados.....	82.3	111	El Salvador.....	65.1
47	Germany.....	81.7	112	Tajikistan.....	64.0
48	Belgium.....	81.7	113	Azerbaijan.....	63.8
49	Chile.....	81.5	114	Kenya.....	63.6
50	Burundi.....	81.4	115	Venezuela.....	61.6
51	Poland.....	81.1	116	Australia.....	61.1
52	Paraguay.....	80.5	117	Colombia.....	56.3
53	Armenia.....	80.5	118	Sri Lanka.....	55.0
54	Croatia.....	80.4	119	United States.....	54.1
55	Serbia.....	79.9	120	Burkina Faso.....	51.9
56	Trinidad and Tobago.....	79.5	121	Cameroon.....	51.8
57	Japan.....	79.4	122	Canada.....	50.7
58	Israel.....	79.3	123	Ecuador.....	50.7
59	Russian Federation.....	79.2	124	Mexico.....	49.0
60	Algeria.....	79.1	125	Dominican Republic.....	48.3
61	Mauritius.....	78.9	126	Mali.....	46.6
62	Costa Rica.....	78.8	127	Senegal.....	24.9
63	Nicaragua.....	78.6	128	Chad.....	0.0
64	Argentina.....	78.6	n/a	Kazakhstan.....	n/a
65	Zimbabwe.....	78.5	n/a	Montenegro.....	n/a

SOURCE: International Air Transport Association, SRS Analyser

## 10.02 Purchasing power parity (hard data)

Ratio of purchasing power parity (PPP) conversion factor to official exchange rate | 2006

RANK	COUNTRY/ECONOMY	HARD DATA	RANK	COUNTRY/ECONOMY	HARD DATA
1	Zimbabwe	0.1	66	Lithuania	0.5
2	Gambia, The	0.1	67	Kazakhstan	0.5
3	Cambodia	0.2	68	Latvia	0.5
4	Ethiopia	0.2	69	Russian Federation	0.6
5	Burundi	0.2	70	Romania	0.6
6	Nepal	0.2	71	Slovak Republic	0.6
7	Uganda	0.2	72	Hungary	0.6
8	Bangladesh	0.2	73	Guatemala	0.6
9	India	0.2	74	Turkey	0.6
10	Vietnam	0.2	75	Poland	0.6
11	Nicaragua	0.2	76	Czech Republic	0.6
12	Mozambique	0.2	77	Serbia	0.6
13	Guyana	0.2	78	Panama	0.6
14	Kyrgyz Republic	0.2	79	Ecuador	0.6
15	Philippines	0.2	80	Brazil	0.6
16	Sri Lanka	0.3	81	Nigeria	0.6
17	Uzbekistan	0.3	82	Barbados	0.6
18	China	0.3	83	Croatia	0.7
19	Tajikistan	0.3	84	Israel	0.7
20	Paraguay	0.3	85	Estonia	0.7
21	Lesotho	0.3	86	Chile	0.7
22	Ukraine	0.3	87	Libya	0.7
23	Madagascar	0.3	88	Mexico	0.7
24	Pakistan	0.3	89	Hong Kong SAR	0.7
25	Bosnia and Herzegovina	0.3	90	Oman	0.7
26	Egypt	0.3	91	Malta	0.7
27	Burkina Faso	0.3	92	Korea, Rep.	0.8
28	Tunisia	0.3	93	Slovenia	0.8
29	Moldova	0.3	94	Cyprus	0.8
30	Argentina	0.3	95	Portugal	0.8
31	Thailand	0.3	96	Zambia	0.8
32	Colombia	0.4	97	Trinidad and Tobago	0.9
33	Mali	0.4	98	Saudi Arabia	0.9
34	Mauritania	0.4	99	Jamaica	0.9
35	Namibia	0.4	100	Bahrain	0.9
36	Mauritius	0.4	101	Singapore	0.9
37	Azerbaijan	0.4	102	Venezuela	0.9
38	Indonesia	0.4	103	New Zealand	1.0
39	Morocco	0.4	104	Spain	1.0
40	Senegal	0.4	105	Puerto Rico	1.0
41	Bolivia	0.4	105	United States	1.0
42	Armenia	0.4	107	Italy	1.0
43	Suriname	0.4	108	Japan	1.0
44	Macedonia, FYR	0.4	109	Greece	1.0
45	Honduras	0.4	110	Belgium	1.1
46	Chad	0.4	111	Austria	1.1
47	Botswana	0.4	112	Luxembourg	1.1
48	Bulgaria	0.4	113	Canada	1.1
49	Dominican Republic	0.4	114	Australia	1.1
50	Tanzania	0.4	115	United Kingdom	1.1
51	South Africa	0.4	116	Germany	1.1
52	Costa Rica	0.4	117	United Arab Emirates	1.1
53	Algeria	0.4	118	France	1.1
54	Benin	0.4	119	Finland	1.1
55	Mongolia	0.4	120	Netherlands	1.1
56	Cameroon	0.4	121	Ireland	1.2
57	Jordan	0.5	122	Sweden	1.2
58	El Salvador	0.5	123	Iceland	1.3
59	Malaysia	0.5	124	Switzerland	1.4
60	Georgia	0.5	125	Denmark	1.4
61	Peru	0.5	126	Kuwait	1.5
62	Kenya	0.5	127	Norway	1.6
63	Albania	0.5	128	Syria	1.8
64	Taiwan, China	0.5	129	Qatar	1.9
65	Uruguay	0.5	n/a	Montenegro	n/a

SOURCE: International Monetary Fund, *World Economic Outlook* (April 2007), *International Financial Statistics Online*; World Bank, *World Development Indicators 2007*



## 10.03 Extent and effect of taxation

The level of taxes in your country (1 = significantly limits the incentives to work or invest, 7 = has little impact on the incentives to work or invest)



SOURCE: World Economic Forum, Executive Opinion Survey 2006, 2007

## 10.04 Fuel price levels (hard data)

Retail diesel fuel prices (US cents per liter) | 2005

RANK	COUNTRY/ECONOMY	HARD DATA
1	Venezuela	2.0
2	Saudi Arabia	7.0
3	Egypt	12.0
4	Bahrain	13.0
4	Libya	13.0
4	Syria	13.0
7	Algeria	19.0
7	Qatar	19.0
9	Kuwait	21.0
10	Trinidad and Tobago	24.0
11	Ecuador	39.0
11	Oman	39.0
13	Malaysia	40.0
14	Azerbaijan	41.0
15	Indonesia	44.0
16	Bangladesh	45.0
16	Jordan	45.0
16	Kazakhstan	45.0
19	Bolivia	47.0
20	Argentina	48.0
21	Mexico	52.0
22	United Arab Emirates	53.0
22	Vietnam	53.0
24	Kyrgyz Republic	54.0
24	Uzbekistan	54.0
26	Sri Lanka	55.0
27	Mauritius	56.0
28	Colombia	57.0
28	Tunisia	57.0
30	Nicaragua	58.0
31	Panama	60.0
32	China	61.0
32	Guyana	61.0
34	Ethiopia	62.0
35	Singapore	63.0
36	Guatemala	64.0
36	Pakistan	64.0
38	Thailand	65.0
38	Zimbabwe	65.0
40	Nigeria	66.0
40	Russian Federation	66.0
42	Costa Rica	67.0
42	Philippines	67.0
44	United States	69.0
45	New Zealand	70.0
46	Taiwan, China	71.0
47	Honduras	73.0
47	Nepal	73.0
49	Botswana	74.0
49	Tajikistan	74.0
51	Dominican Republic	75.0
51	India	75.0
51	Jamaica	75.0
54	Armenia	77.0
54	Paraguay	77.0
56	Cambodia	78.0
56	Canada	78.0
56	Puerto Rico	78.0
59	Barbados	79.0
60	El Salvador	80.0
61	Benin	81.0
62	Brazil	84.0
62	Mauritania	84.0
62	South Africa	84.0
65	Chile	86.0
65	Moldova	86.0
65	Peru	86.0
68	Mongolia	87.0
68	Morocco	87.0
68	Namibia	87.0
68	Ukraine	87.0
72	Lesotho	88.0
73	Georgia	89.0
74	Japan	90.0
75	Australia	94.0
75	Uruguay	94.0
77	Kenya	98.0
78	Tanzania	99.0
79	Madagascar	100.0
80	Gambia, The	101.0
80	Uganda	101.0
82	Mali	104.0
83	Hong Kong SAR	106.0
83	Mozambique	106.0
85	Cameroon	107.0
86	Bulgaria	108.0
87	Lithuania	109.0
87	Macedonia, FYR	109.0
87	Senegal	109.0
90	Portugal	110.0
90	Spain	110.0
92	Burkina Faso	112.0
93	Latvia	115.0
94	Greece	119.0
95	Chad	120.0
95	Cyprus	120.0
97	Slovenia	121.0
98	Burundi	122.0
98	Croatia	122.0
98	Estonia	122.0
98	Zambia	122.0
102	Bosnia and Herzegovina	124.0
102	Romania	124.0
104	Austria	126.0
104	Finland	126.0
104	Malta	126.0
107	Israel	127.0
107	Montenegro	127.0
109	Albania	129.0
109	Czech Republic	129.0
111	Poland	130.0
112	Hungary	131.0
113	Netherlands	132.0
114	France	133.0
114	Korea, Rep.	133.0
116	Belgium	134.0
117	Ireland	135.0
118	Luxembourg	136.0
118	Switzerland	136.0
120	Germany	138.0
121	Slovak Republic	143.0
122	Sweden	144.0
123	Denmark	145.0
124	Italy	149.0
125	Turkey	162.0
126	Norway	166.0
127	United Kingdom	173.0
128	Iceland	178.0
n/a	Serbia	n/a
n/a	Suriname	n/a

SOURCE: World Bank, *World Development Indicators 2007*

## 10.05 Hotel price index (hard data)

Average room rates calculated for first-class branded hotels for calendar year in US\$ | 2006

RANK	COUNTRY/ECONOMY	HARD DATA	RANK	COUNTRY/ECONOMY	HARD DATA
1	Gambia, The	30.0	66	Belgium	134.0
2	Nepal	44.4	67	Mexico	134.1
3	Malaysia	58.8	68	Estonia	135.2
4	Bolivia	60.0	69	Norway	138.5
5	Egypt	61.2	70	Iceland	139.8
6	Uruguay	66.6	71	Bulgaria	140.0
7	Uzbekistan	68.1	72	Canada	141.1
8	Indonesia	68.7	73	Luxembourg	141.6
9	Philippines	69.3	74	Croatia	142.1
10	Tunisia	70.8	75	Japan	142.2
11	Guatemala	71.5	76	Cameroon	144.2
12	Moldova	73.1	77	Denmark	146.4
13	El Salvador	75.5	78	Ireland	148.5
14	Sri Lanka	78.0	79	Sweden	149.4
15	Kenya	84.1	80	Saudi Arabia	149.9
16	Bangladesh	85.2	81	Morocco	150.3
17	Ecuador	85.8	82	United States	150.9
18	Syria	86.5	83	Romania	151.4
19	Peru	87.5	84	Taiwan, China	151.9
20	Hungary	88.5	85	Pakistan	154.0
21	Cambodia	88.5	86	Hong Kong SAR	154.1
22	Colombia	88.8	87	Czech Republic	156.3
23	Dominican Republic	91.0	88	India	156.9
24	Vietnam	91.1	89	Costa Rica	158.8
25	Panama	96.4	90	Greece	160.3
26	New Zealand	97.5	91	Bahrain	160.8
27	Madagascar	98.9	92	Netherlands	161.2
28	Slovenia	99.5	93	Oman	161.8
29	Zambia	100.2	94	Cyprus	162.9
30	Jordan	100.5	95	Slovak Republic	165.6
30	Thailand	100.5	96	Switzerland	172.1
32	Uganda	100.7	97	United Arab Emirates	172.6
33	Venezuela	102.0	98	Algeria	174.1
34	Honduras	102.7	99	United Kingdom	175.9
35	South Africa	104.0	100	Kazakhstan	177.8
36	Chile	104.1	101	Puerto Rico	181.4
37	Paraguay	105.0	102	Azerbaijan	182.8
38	Brazil	105.6	103	Kyrgyz Republic	187.1
39	Malta	108.5	104	Georgia	192.5
40	Mozambique	109.9	105	Nigeria	193.3
41	Nicaragua	110.1	106	Italy	194.0
42	Argentina	111.3	107	Korea, Rep.	197.3
43	Poland	111.5	108	Kuwait	203.0
44	Tanzania	111.9	109	Serbia	212.5
45	Trinidad and Tobago	112.5	110	France	230.3
46	Portugal	113.1	111	Qatar	254.0
47	China	113.8	112	Ukraine	266.6
48	Turkey	114.0	113	Libya	267.7
49	Lithuania	114.1	114	Russian Federation	283.2
50	Armenia	116.8	n/a	Barbados	n/a
51	Latvia	118.3	n/a	Benin	n/a
52	Albania	118.9	n/a	Bosnia and Herzegovina	n/a
53	Singapore	118.9	n/a	Botswana	n/a
54	Ethiopia	120.2	n/a	Burkina Faso	n/a
55	Spain	120.5	n/a	Burundi	n/a
56	Germany	124.2	n/a	Lesotho	n/a
57	Austria	124.5	n/a	Macedonia, FYR	n/a
58	Chad	125.0	n/a	Mali	n/a
59	Jamaica	125.3	n/a	Mauritania	n/a
60	Senegal	125.5	n/a	Mongolia	n/a
61	Guyana	126.5	n/a	Montenegro	n/a
62	Israel	129.3	n/a	Namibia	n/a
63	Finland	129.4	n/a	Suriname	n/a
64	Australia	131.5	n/a	Tajikistan	n/a
65	Mauritius	131.6	n/a	Zimbabwe	n/a

SOURCE: Deloitte

11th pillar  
Human resources

## 11.01 Primary education enrollment (hard data)

Net primary education enrollment rate | 2005 or most recent year available

RANK	COUNTRY/ECONOMY	HARD DATA	RANK	COUNTRY/ECONOMY	HARD DATA
1	Japan	99.8	66	Czech Republic	92.2
2	Canada	99.6	67	Russian Federation	92.2
3	Taiwan, China	99.5	68	United States	92.1
4	Korea, Rep.	99.4	69	Macedonia, FYR	91.8
5	Cyprus	99.3	70	Slovak Republic	91.7
6	Spain	99.3	71	Tanzania	91.4
7	New Zealand	99.2	72	Venezuela	91.3
8	Greece	98.9	73	Kazakhstan	91.2
9	Cambodia	98.9	74	Costa Rica	90.6
10	Argentina	98.8	75	Honduras	90.6
11	United Kingdom	98.8	76	Jamaica	89.9
12	Belgium	98.7	77	Trinidad and Tobago	89.7
13	Italy	98.6	78	Chile	89.7
14	France	98.6	79	Turkey	89.4
15	Iceland	98.6	80	Zambia	88.9
16	Netherlands	98.5	81	Jordan	88.9
17	Panama	98.5	82	Lithuania	88.9
18	Guyana	98.4	83	Hungary	88.8
19	Portugal	98.2	84	India	88.8
20	Slovenia	98.2	85	Latvia	87.8
21	Finland	98.2	86	Thailand	87.8
22	Norway	98.1	87	Vietnam	87.7
23	Mexico	98.0	88	Dominican Republic	87.7
24	Ecuador	97.7	89	Paraguay	87.5
25	Barbados	97.6	90	Croatia	87.3
26	Tajikistan	97.4	91	Nicaragua	87.2
27	Israel	97.4	92	South Africa	87.1
28	Sri Lanka	97.1	93	Libya	87.0
29	Bahrain	97.1	94	Colombia	86.9
30	Austria	96.9	95	Kyrgyz Republic	86.8
31	Tunisia	96.8	96	Lesotho	86.7
32	Algeria	96.6	97	Kuwait	86.5
33	Australia	96.6	98	Malta	86.3
34	Peru	96.5	99	Germany	86.3
35	Poland	96.4	100	Morocco	86.1
36	Singapore	96.4	101	Moldova	85.9
37	Ireland	96.3	102	Azerbaijan	84.5
38	Sweden	96.3	103	Botswana	84.5
39	Qatar	95.9	104	Mongolia	83.7
40	Serbia	95.8	105	Ukraine	83.3
41	Indonesia	95.5	106	Zimbabwe	81.9
42	Malaysia	95.4	107	Nepal	79.2
43	Denmark	95.4	108	Armenia	78.8
44	Brazil	95.3	109	Kenya	78.6
45	Estonia	95.1	110	Benin	78.2
46	Mauritius	95.1	111	Saudi Arabia	77.9
47	Luxembourg	95.0	112	Mozambique	77.2
48	Bolivia	95.0	113	Gambia, The	77.2
49	China	94.6	114	Oman	75.8
50	Syria	94.5	115	Mauritania	72.2
51	Suriname	94.2	116	Namibia	71.5
52	Bangladesh	94.1	117	United Arab Emirates	70.5
53	Guatemala	94.1	118	Senegal	68.5
54	Albania	94.0	119	Pakistan	68.1
55	Philippines	94.0	120	Nigeria	67.9
56	Egypt	93.7	121	Ethiopia	61.4
57	Bulgaria	93.1	122	Chad	61.0
58	Switzerland	93.0	123	Burundi	60.5
59	Georgia	92.8	124	Mali	50.9
60	Uruguay	92.7	125	Burkina Faso	45.2
61	El Salvador	92.7	n/a	Bosnia and Herzegovina	n/a
62	Hong Kong SAR	92.7	n/a	Cameroon	n/a
63	Romania	92.6	n/a	Puerto Rico	n/a
64	Madagascar	92.5	n/a	Uganda	n/a
65	Montenegro	92.3	n/a	Uzbekistan	n/a

SOURCE: UNESCO, Institute for Statistics

## 11.02 Secondary education enrollment (hard data)

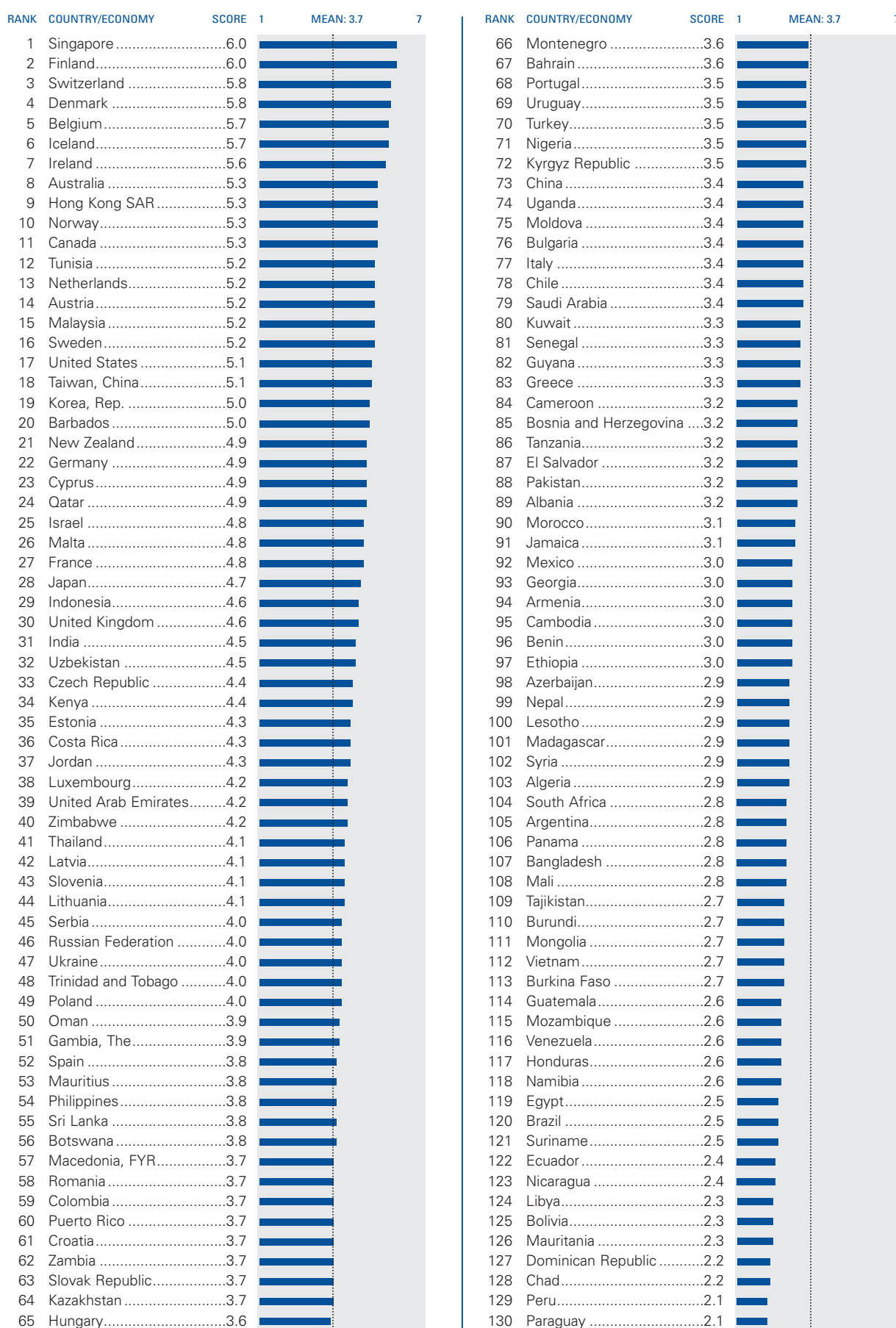
Gross secondary education enrollment rate | 2005 or most recent year available

RANK	COUNTRY/ECONOMY	HARD DATA	RANK	COUNTRY/ECONOMY	HARD DATA
1	Australia	148.6	66	Oman	87.1
2	Denmark	124.2	67	Argentina	86.4
3	Spain	119.1	68	Kyrgyz Republic	86.4
4	Netherlands	118.8	69	Philippines	85.9
5	New Zealand	117.8	70	Romania	85.1
6	Norway	115.6	71	Macedonia, FYR	84.1
7	Barbados	113.3	72	Azerbaijan	83.8
8	Ireland	111.6	73	Montenegro	83.7
9	France	110.6	74	Algeria	83.1
10	Finland	109.4	75	Sri Lanka	82.5
11	Belgium	108.9	76	Georgia	82.3
12	Canada	108.5	77	Tajikistan	81.8
13	Uruguay	108.0	78	Moldova	81.7
14	Iceland	107.9	79	Tunisia	81.3
15	Malta	105.3	80	Mexico	79.7
16	United Kingdom	104.5	81	Turkey	79.2
17	Libya	103.9	82	Costa Rica	79.2
18	Sweden	102.6	83	Colombia	78.6
19	Bulgaria	102.1	84	Albania	78.0
20	Lithuania	102.1	85	Serbia	76.4
21	Brazil	102.0	86	Malaysia	75.8
22	Japan	101.6	87	Vietnam	75.8
23	Austria	100.9	88	Botswana	75.1
24	Germany	100.3	89	Venezuela	74.5
25	Qatar	100.0	90	Thailand	73.2
26	Slovenia	99.8	91	China	72.5
27	Taiwan, China	99.2	92	Dominican Republic	70.7
28	Italy	99.1	93	Panama	70.2
29	Bahrain	98.6	94	Syria	67.6
30	Kazakhstan	98.6	95	Honduras	65.5
31	Estonia	98.1	96	Indonesia	64.1
32	Singapore	98.0	97	United Arab Emirates	63.8
33	Cyprus	97.7	98	Nicaragua	63.7
34	Poland	96.7	99	Paraguay	62.9
35	Portugal	96.7	100	El Salvador	62.8
36	Latvia	96.6	101	Ecuador	61.0
37	Hungary	96.5	102	Namibia	60.6
38	Greece	96.3	103	India	53.5
39	Czech Republic	95.7	104	Guatemala	51.3
40	Kuwait	94.9	105	Morocco	49.9
41	Luxembourg	94.9	106	Kenya	48.9
42	United States	94.7	107	Gambia, The	46.9
43	Uzbekistan	94.6	108	Nepal	45.7
44	Slovak Republic	94.2	109	Bangladesh	45.6
45	Mongolia	94.0	110	Bosnia and Herzegovina	45.0
46	Switzerland	93.4	111	Cameroon	44.3
47	Russian Federation	92.9	112	Lesotho	38.7
48	Korea, Rep.	92.9	113	Zimbabwe	36.4
49	Israel	92.7	114	Nigeria	34.2
50	Peru	91.6	115	Benin	32.5
51	South Africa	90.5	116	Ethiopia	30.9
52	Guyana	89.9	117	Cambodia	29.4
53	Chile	89.1	118	Zambia	28.3
54	Ukraine	88.7	119	Pakistan	26.9
55	Bolivia	88.5	120	Senegal	26.4
56	Mauritius	88.4	121	Mali	23.9
57	Croatia	88.2	122	Mauritania	20.5
58	Jamaica	88.1	123	Uganda	16.0
59	Armenia	88.0	124	Chad	15.5
60	Trinidad and Tobago	87.8	125	Madagascar	14.1
61	Saudi Arabia	87.6	126	Burkina Faso	14.0
62	Jordan	87.4	127	Mozambique	13.5
63	Hong Kong SAR	87.2	128	Burundi	13.5
64	Suriname	87.1	129	Tanzania	5.9
65	Egypt	87.1	n/a	Puerto Rico	n/a

SOURCE: UNESCO Institute for Statistics; The World Bank, *World Development Indicators 2007*; national sources

## 11.03 Quality of the educational system

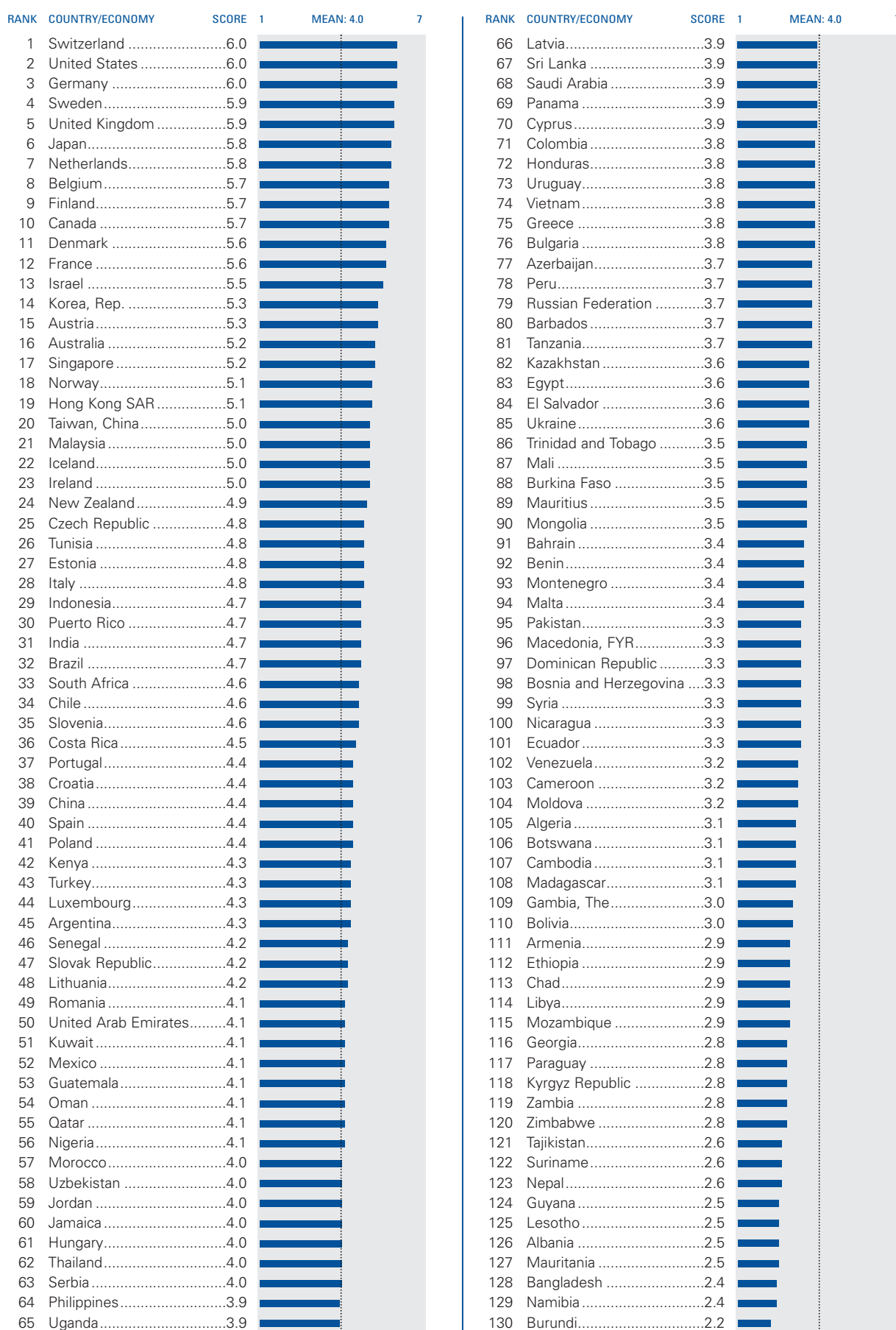
The educational system in your country (1 = does not meet the needs of a competitive economy, 7 = meets the needs of a competitive economy)



SOURCE: World Economic Forum, Executive Opinion Survey 2006, 2007

## 11.04 Local availability of specialized research and training services

In your country, specialized research and training services are (1 = not available, 7 = available from world-class local institutions)

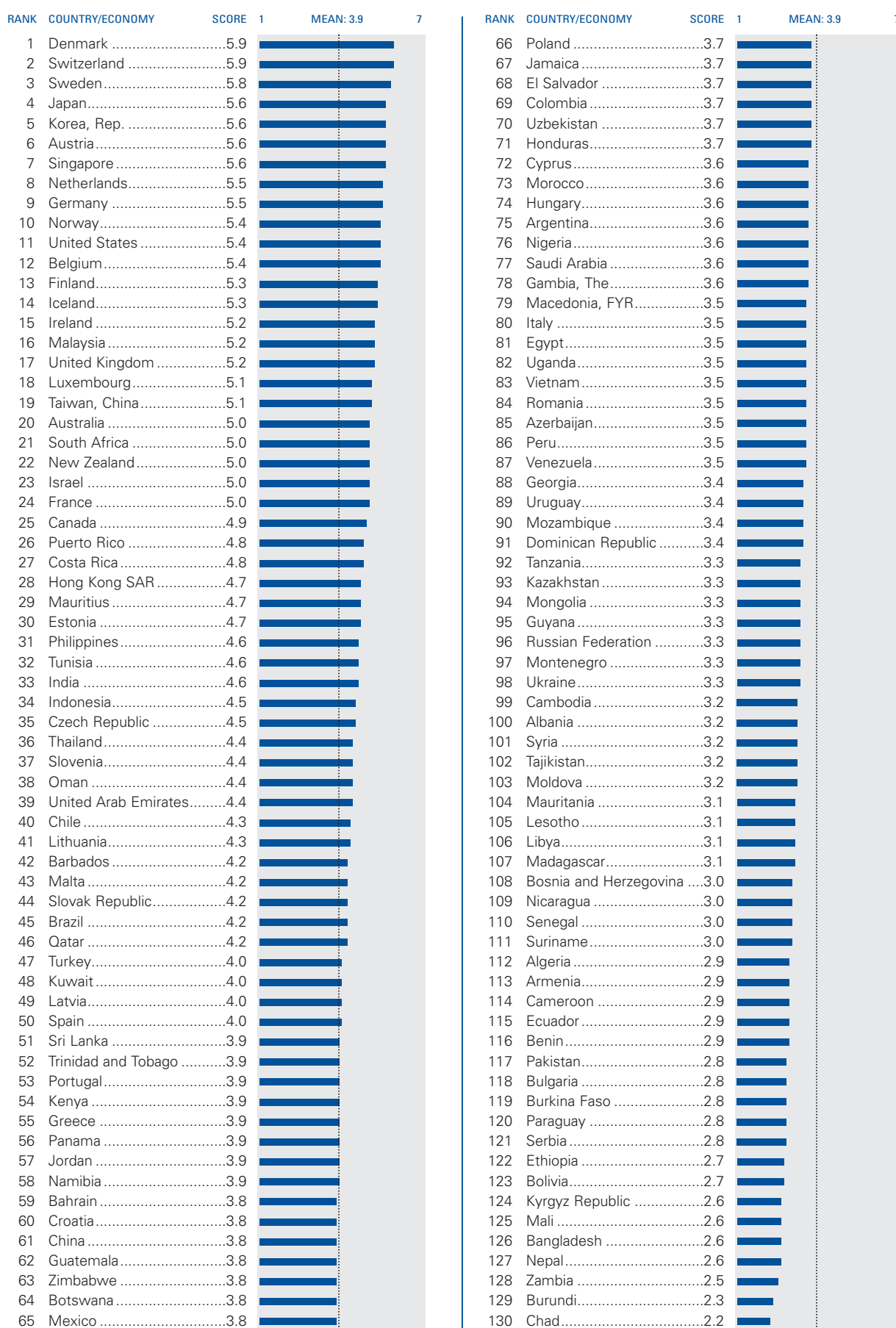


SOURCE: World Economic Forum, Executive Opinion Survey 2006, 2007



## 11.05 Extent of staff training

The general approach of companies in your country to human resources is (1 = to invest little in training and employee development, 7 = to invest heavily to attract, train and retain employees)



SOURCE: World Economic Forum, Executive Opinion Survey 2006, 2007

## 11.06 Hiring and firing practices

The hiring and firing of workers is (1 = impeded by regulations, 7 = flexibly determined by employers)



SOURCE: World Economic Forum, Executive Opinion Survey 2006, 2007

## 11.07 Ease of hiring foreign labor

Labor regulation in your country (1 = prevents your company from employing foreign labor, 7 = does not prevent your company from employing foreign labor)

RANK	COUNTRY/ECONOMY	SCORE	1	MEAN: 4.8	7	RANK	COUNTRY/ECONOMY	SCORE	1	MEAN: 4.8	7
1	Kuwait	6.2				66	Mexico	4.8			
2	Armenia	5.9				67	Vietnam	4.8			
3	Ireland	5.9				68	Cambodia	4.7			
4	Albania	5.9				69	Brazil	4.7			
5	Georgia	5.9				70	Netherlands	4.7			
6	Nicaragua	5.8				71	Sweden	4.6			
7	Singapore	5.8				72	Macedonia, FYR	4.6			
8	Dominican Republic	5.8				73	Burundi	4.6			
9	United Arab Emirates	5.8				74	Tunisia	4.6			
10	Iceland	5.7				75	Madagascar	4.6			
11	Portugal	5.7				76	Hungary	4.6			
12	Slovak Republic	5.7				77	Turkey	4.6			
13	Indonesia	5.7				78	Malta	4.6			
14	El Salvador	5.6				79	Bahrain	4.6			
15	Finland	5.6				80	Tanzania	4.6			
16	Qatar	5.6				81	Latvia	4.5			
17	United Kingdom	5.6				82	Australia	4.5			
18	Uganda	5.5				83	France	4.5			
19	Guyana	5.5				84	Bulgaria	4.5			
20	Luxembourg	5.5				85	Belgium	4.5			
21	Paraguay	5.4				86	India	4.5			
22	Uruguay	5.4				87	Kenya	4.5			
23	Switzerland	5.4				88	Trinidad and Tobago	4.5			
24	Argentina	5.3				89	Slovenia	4.5			
25	Nigeria	5.3				90	Saudi Arabia	4.4			
26	Hong Kong SAR	5.3				91	Taiwan, China	4.4			
27	Chile	5.3				92	Thailand	4.4			
28	Peru	5.3				93	Lithuania	4.4			
29	Italy	5.3				94	Jordan	4.4			
30	Mauritania	5.3				95	Croatia	4.4			
31	Norway	5.3				96	Romania	4.4			
32	Honduras	5.3				97	Canada	4.4			
33	Costa Rica	5.2				98	Ecuador	4.4			
34	Egypt	5.2				99	Ethiopia	4.4			
35	Benin	5.2				100	Mongolia	4.3			
36	United States	5.2				101	Cyprus	4.3			
37	Czech Republic	5.2				102	Bosnia and Herzegovina	4.3			
38	Spain	5.2				103	Japan	4.3			
39	Senegal	5.1				104	Puerto Rico	4.2			
40	Malaysia	5.1				105	Chad	4.2			
41	Colombia	5.1				106	Estonia	4.2			
42	Azerbaijan	5.1				107	Ukraine	4.2			
43	Gambia, The	5.1				108	Poland	4.2			
44	Zambia	5.1				109	Kyrgyz Republic	4.2			
45	Denmark	5.1				110	Sri Lanka	4.1			
46	Burkina Faso	5.1				111	Barbados	4.1			
47	Pakistan	5.1				112	Philippines	4.1			
48	Guatemala	5.1				113	Venezuela	4.1			
49	Mali	5.1				114	Oman	4.0			
50	Cameroon	5.0				115	Lesotho	4.0			
51	Serbia	5.0				116	Kazakhstan	4.0			
52	Suriname	5.0				117	Syria	4.0			
53	Jamaica	5.0				118	Panama	3.9			
54	Montenegro	5.0				119	Botswana	3.9			
55	Bolivia	4.9				120	Austria	3.9			
56	Morocco	4.9				121	Algeria	3.7			
57	Germany	4.9				122	Russian Federation	3.7			
58	Uzbekistan	4.9				123	Libya	3.7			
59	Tajikistan	4.9				124	Bangladesh	3.7			
60	China	4.9				125	Mozambique	3.5			
61	Korea, Rep.	4.9				126	Israel	3.5			
62	Mauritius	4.9				127	South Africa	3.5			
63	New Zealand	4.8				128	Nepal	3.0			
64	Greece	4.8				129	Zimbabwe	2.6			
65	Moldova	4.8				130	Namibia	2.5			

SOURCE: World Economic Forum, Executive Opinion Survey 2006, 2007

## 11.08 HIV prevalence (hard data)

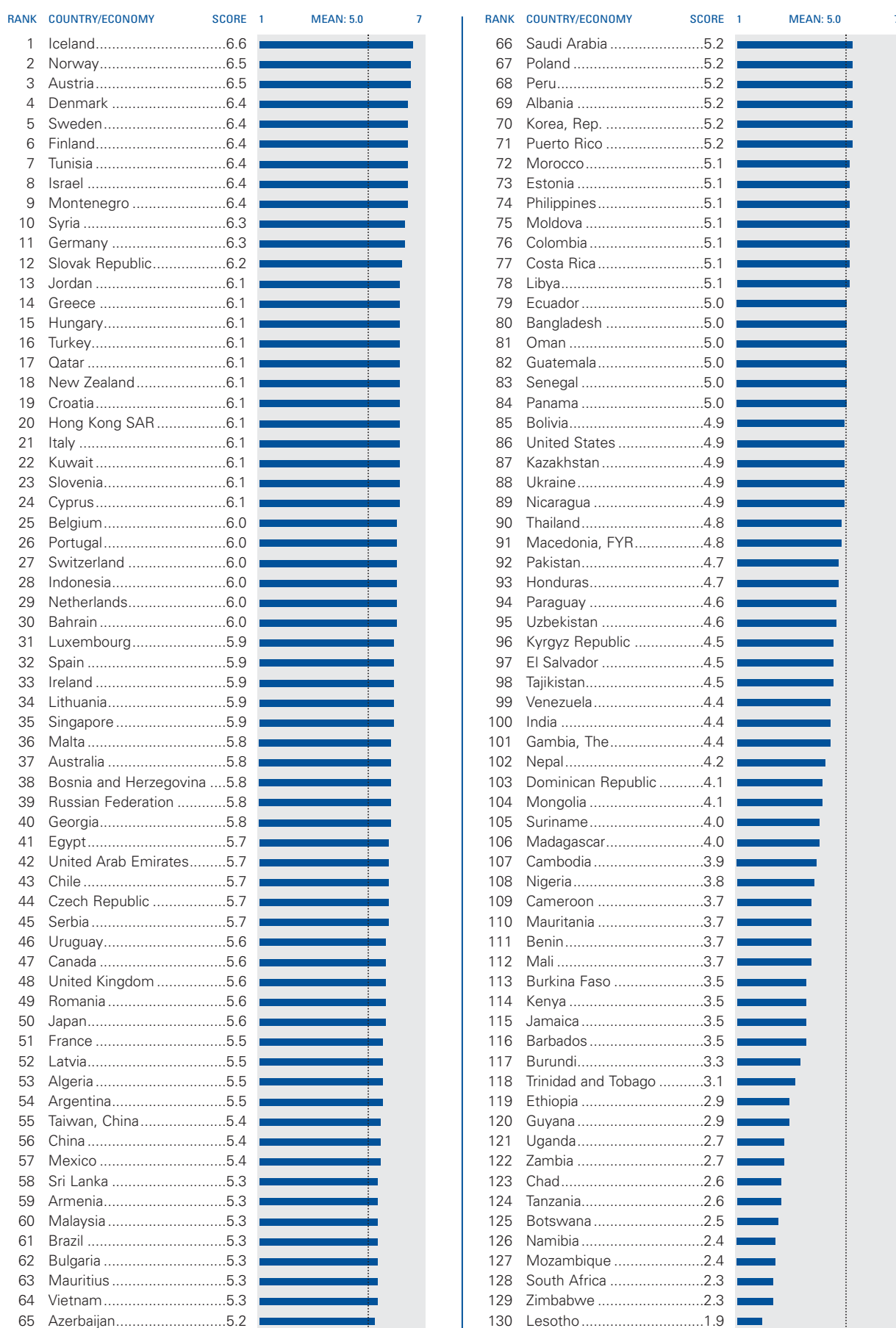
HIV prevalence as a percentage of adults aged 15–49 years | 2005 or most recent year available

RANK	COUNTRY/ECONOMY	HARD DATA	RANK	COUNTRY/ECONOMY	HARD DATA
1	Bangladesh	<0.1	63	Chile	0.3
1	Bosnia and Herzegovina	<0.1	63	Costa Rica	0.3
1	Bulgaria	<0.1	63	Ecuador	0.3
1	Croatia	<0.1	63	Libya	0.3
1	Egypt	<0.1	63	Mexico	0.3
1	Hong Kong SAR	<0.1	63	Singapore	0.3
1	Japan	<0.1	72	France	0.4
1	Jordan	<0.1	72	Paraguay	0.4
1	Korea, Rep.	<0.1	72	Portugal	0.4
1	Kuwait	<0.1	72	Switzerland	0.4
1	Macedonia, FYR	<0.1	76	Brazil	0.5
1	Mongolia	<0.1	76	Italy	0.5
1	Montenegro	<0.1	76	Madagascar	0.5
1	Philippines	<0.1	76	Malaysia	0.5
1	Qatar	<0.1	76	Nepal	0.5
1	Romania	<0.1	76	Uruguay	0.5
1	Saudi Arabia	<0.1	76	Vietnam	0.5
1	Serbia	<0.1	83	Argentina	0.6
1	Slovak Republic	<0.1	83	Colombia	0.6
1	Slovenia	<0.1	83	Mauritius	0.6
1	Sri Lanka	<0.1	83	Peru	0.6
1	Syria	<0.1	83	Spain	0.6
1	Turkey	<0.1	83	United States	0.6
24	Albania	0.1	89	Mauritania	0.7
24	Algeria	0.1	89	Venezuela	0.7
24	Armenia	0.1	91	Puerto Rico	0.8
24	Australia	0.1	92	Latvia	0.8
24	Azerbaijan	0.1	93	El Salvador	0.9
24	Bolivia	0.1	93	Guatemala	0.9
24	China	0.1	93	India	0.9
24	Czech Republic	0.1	93	Panama	0.9
24	Finland	0.1	93	Senegal	0.9
24	Germany	0.1	98	Ethiopia	1.0
24	Hungary	0.1	99	Dominican Republic	1.1
24	Indonesia	0.1	99	Moldova	1.1
24	Israel	0.1	99	Russian Federation	1.1
24	Kazakhstan	0.1	102	Estonia	1.3
24	Kyrgyz Republic	0.1	103	Thailand	1.4
24	Malta	0.1	103	Ukraine	1.4
24	Morocco	0.1	105	Barbados	1.5
24	New Zealand	0.1	105	Honduras	1.5
24	Norway	0.1	105	Jamaica	1.5
24	Oman	0.1	108	Cambodia	1.6
24	Pakistan	0.1	109	Mali	1.7
24	Poland	0.1	110	Benin	1.8
24	Tajikistan	0.1	111	Suriname	1.9
24	Tunisia	0.1	112	Burkina Faso	2.0
48	Taiwan, China	0.1	113	Gambia, The	2.4
49	Bahrain	0.2	113	Guyana	2.4
49	Denmark	0.2	115	Trinidad and Tobago	2.6
49	Georgia	0.2	116	Burundi	3.3
49	Greece	0.2	117	Chad	3.5
49	Iceland	0.2	118	Nigeria	3.9
49	Ireland	0.2	119	Cameroon	5.4
49	Lithuania	0.2	120	Kenya	6.1
49	Luxembourg	0.2	121	Tanzania	6.5
49	Netherlands	0.2	122	Uganda	6.7
49	Nicaragua	0.2	123	Mozambique	16.1
49	Sweden	0.2	124	Zambia	17.0
49	United Arab Emirates	0.2	125	South Africa	18.8
49	United Kingdom	0.2	126	Namibia	19.6
49	Uzbekistan	0.2	127	Zimbabwe	20.1
63	Austria	0.3	128	Lesotho	23.2
63	Belgium	0.3	129	Botswana	24.1
63	Canada	0.3	n/a	Cyprus	n/a

SOURCE: UNAIDS, 2006 Report on the Global AIDS Epidemic; UNDP, Human Development Report 2006; national sources

## 11.09 Business impact of HIV/AIDS

How serious do you consider the future impact of HIV/AIDS on your company in the next 5 years? (1 = extremely serious, 7 = not a problem)



SOURCE: World Economic Forum, Executive Opinion Survey 2006, 2007

## 11.10 Life expectancy (hard data)

Life expectancy at birth (years) | 2005

RANK	COUNTRY/ECONOMY	HARD DATA
1	Hong Kong SAR	82.0
1	Japan	82.0
3	Australia	81.0
3	Iceland	81.0
3	Spain	81.0
3	Sweden	81.0
3	Switzerland	81.0
8	Canada	80.0
8	France	80.0
8	Israel	80.0
8	Italy	80.0
8	Malta	80.0
8	New Zealand	80.0
8	Norway	80.0
8	Singapore	80.0
16	Austria	79.0
16	Belgium	79.0
16	Costa Rica	79.0
16	Cyprus	79.0
16	Finland	79.0
16	Germany	79.0
16	Greece	79.0
16	Ireland	79.0
16	Luxembourg	79.0
16	Netherlands	79.0
16	United Arab Emirates	79.0
16	United Kingdom	79.0
28	Chile	78.0
28	Denmark	78.0
28	Korea, Rep.	78.0
28	Kuwait	78.0
28	Portugal	78.0
28	Puerto Rico	78.0
28	Slovenia	78.0
28	United States	78.0
36	Taiwan, China	77.4
37	Croatia	76.0
37	Czech Republic	76.0
37	Uruguay	76.0
40	Albania	75.0
40	Argentina	75.0
40	Bahrain	75.0
40	Barbados	75.0
40	Ecuador	75.0
40	Mexico	75.0
40	Oman	75.0
40	Panama	75.0
40	Poland	75.0
40	Sri Lanka	75.0
50	Bosnia and Herzegovina	74.0
50	Libya	74.0
50	Macedonia, FYR	74.0
50	Malaysia	74.0
50	Qatar	74.0
50	Slovak Republic	74.0
50	Syria	74.0
50	Venezuela	74.0
58	Armenia	73.0
58	Bulgaria	73.0
58	Colombia	73.0
58	Estonia	73.0
58	Hungary	73.0
58	Mauritius	73.0
58	Montenegro	73.0
58	Saudi Arabia	73.0
58	Serbia	73.0
58	Tunisia	73.0
68	Algeria	72.0
68	Azerbaijan	72.0
68	China	72.0
68	Jordan	72.0
68	Romania	72.0
73	Brazil	71.0
73	Egypt	71.0
73	El Salvador	71.0
73	Georgia	71.0
73	Jamaica	71.0
73	Latvia	71.0
73	Lithuania	71.0
73	Paraguay	71.0
73	Peru	71.0
73	Philippines	71.0
73	Thailand	71.0
73	Turkey	71.0
73	Vietnam	71.0
86	Morocco	70.0
86	Nicaragua	70.0
86	Suriname	70.0
86	Trinidad and Tobago	70.0
90	Honduras	69.0
91	Dominican Republic	68.0
91	Guatemala	68.0
91	Indonesia	68.0
91	Kyrgyz Republic	68.0
91	Moldova	68.0
91	Ukraine	68.0
97	Mongolia	67.0
97	Uzbekistan	67.0
99	Kazakhstan	66.0
100	Bolivia	65.0
100	Pakistan	65.0
100	Russian Federation	65.0
103	Bangladesh	64.0
103	Guyana	64.0
103	India	64.0
103	Tajikistan	64.0
107	Nepal	63.0
108	Cambodia	57.0
108	Gambia, The	57.0
110	Madagascar	56.0
110	Senegal	56.0
112	Benin	55.0
113	Mauritania	54.0
114	Uganda	50.0
115	Kenya	49.0
115	Mali	49.0
117	Burkina Faso	48.0
117	South Africa	48.0
119	Namibia	47.0
120	Cameroon	46.0
120	Tanzania	46.0
122	Burundi	45.0
123	Chad	44.0
123	Nigeria	44.0
125	Ethiopia	43.0
126	Mozambique	42.0
127	Zambia	38.0
128	Zimbabwe	37.0
129	Botswana	35.0
129	Lesotho	35.0

SOURCE: World Health Organization, *World Health Statistics 2007*



12th pillar  
Affinity for Travel & Tourism



## 12.01 Tourism openness (hard data)

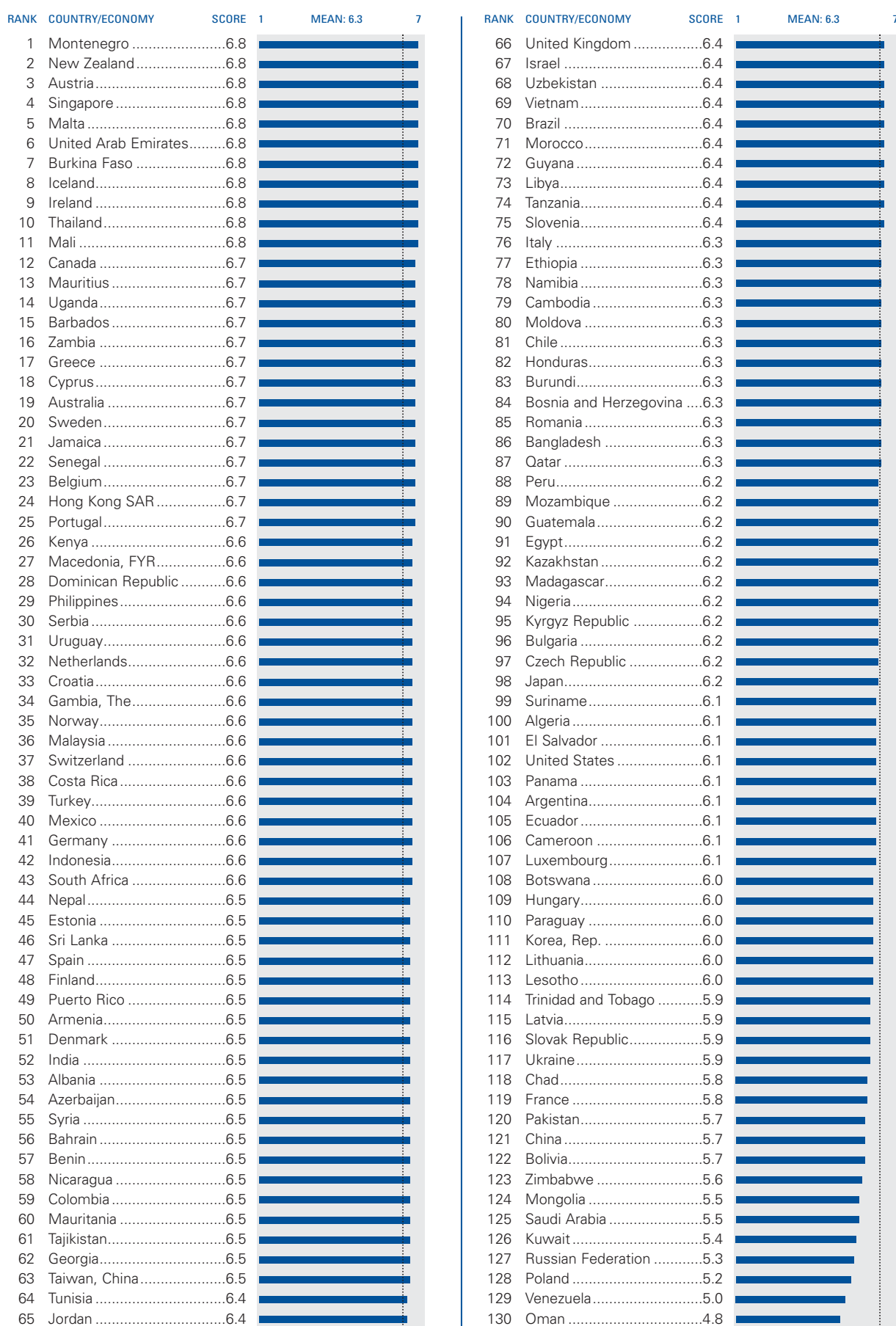
Tourism expenditure and receipts as a percentage of GDP | 2006

RANK	COUNTRY/ECONOMY	HARD DATA	RANK	COUNTRY/ECONOMY	HARD DATA
1	Barbados	32.1	66	Uruguay	4.8
2	Albania	23.6	67	Denmark	4.7
3	Jamaica	23.0	68	Mozambique	4.7
4	Croatia	22.2	69	South Africa	4.7
5	Mauritius	21.8	70	Kenya	4.5
6	Cyprus	19.9	71	Bolivia	4.5
7	Luxembourg	18.4	72	Netherlands	4.5
8	Malta	18.2	73	Israel	4.4
9	Jordan	18.0	74	United Kingdom	4.3
10	Cambodia	17.2	75	Poland	4.3
11	Burundi	15.8	76	Trinidad and Tobago	4.2
12	Singapore	14.9	77	Mali	4.2
13	Bulgaria	14.9	78	Australia	4.1
14	Gambia, The	14.6	79	Taiwan, China	4.0
15	Mongolia	14.4	80	Germany	3.8
16	Hong Kong SAR	14.4	81	Philippines	3.8
17	Dominican Republic	14.2	82	Nepal	3.8
18	Estonia	11.6	83	Oman	3.7
19	Tanzania	11.5	84	Argentina	3.6
20	Morocco	11.3	85	Zambia	3.5
21	Bahrain	11.2	86	France	3.5
22	Costa Rica	10.5	87	Suriname	3.5
23	Kyrgyz Republic	10.5	88	Macedonia, FYR	3.5
24	Egypt	10.4	89	Italy	3.5
25	Moldova	10.3	90	Russian Federation	3.4
26	Qatar	10.3	91	Sri Lanka	3.3
27	Malaysia	10.2	92	Lesotho	3.3
28	Thailand	9.7	93	Canada	3.1
29	Iceland	9.5	94	Korea, Rep.	3.0
30	Syria	9.4	95	Finland	3.0
31	Honduras	9.3	96	Benin	3.0
32	Guyana	9.2	97	Kazakhstan	2.9
33	Tunisia	9.0	98	Indonesia	2.8
34	Austria	8.5	99	Peru	2.7
35	Slovenia	8.4	100	Mexico	2.6
36	Namibia	8.3	101	Romania	2.6
37	Panama	8.0	102	China	2.6
38	Belgium	7.7	103	Ecuador	2.6
39	Botswana	7.7	104	Azerbaijan	2.4
40	Lithuania	7.6	105	Paraguay	2.4
41	Latvia	7.6	106	Colombia	2.3
42	Georgia	7.5	107	Ethiopia	2.3
43	Zimbabwe	7.4	108	Libya	2.2
44	Bosnia and Herzegovina	7.4	109	Saudi Arabia	2.1
45	Ukraine	7.3	110	India	2.1
46	Kuwait	6.8	111	Chile	2.1
47	Nicaragua	6.7	112	Madagascar	1.7
48	Guatemala	6.6	113	Pakistan	1.6
49	New Zealand	6.5	114	Venezuela	1.3
50	Hungary	6.5	115	United States	1.3
51	Portugal	6.3	116	Nigeria	1.1
52	Czech Republic	6.2	117	Brazil	1.1
53	Greece	6.1	118	Japan	0.8
54	Vietnam	6.0	119	Algeria	0.5
55	Ireland	6.0	120	Bangladesh	0.4
56	Spain	6.0	121	Tajikistan	0.3
57	Switzerland	5.9	122	Burkina Faso	0.0
58	Sweden	5.7	122	Cameroon	0.0
59	United Arab Emirates	5.7	122	Chad	0.0
60	Slovak Republic	5.4	122	Mauritania	0.0
61	Turkey	5.4	122	Senegal	0.0
62	Norway	5.3	122	Serbia	0.0
63	Uganda	5.3	122	Uzbekistan	0.0
64	Armenia	5.2	n/a	Montenegro	n/a
65	El Salvador	5.2	n/a	Puerto Rico	n/a

SOURCE: United Nations World Tourism Organization

## 12.02 Attitude of population toward foreign visitors

Are foreign travelers and in particular tourists welcome in your country? (1 = no, citizens in my country do not welcome foreign travelers and tourists, 7 = yes, my country's citizens are open and welcome foreign travelers and tourists)



SOURCE: World Economic Forum, Executive Opinion Survey 2006, 2007

## 12.03 Extension of business trips recommended

When a senior executive visits you in your country for business purposes, how likely are you to recommend extending their trip for leisure purposes? (1 = I would never recommend it, 7 = I would always recommend it)

RANK	COUNTRY/ECONOMY	SCORE	1	MEAN: 5.5	7	RANK	COUNTRY/ECONOMY	SCORE	1	MEAN: 5.5	7
1	Montenegro	6.6				66	Hong Kong SAR	5.5			
2	Uzbekistan	6.5				67	Tanzania	5.5			
3	Turkey	6.4				68	Chile	5.5			
4	Indonesia	6.3				69	Macedonia, FYR	5.5			
5	South Africa	6.2				70	Cambodia	5.5			
6	Austria	6.2				71	Mexico	5.5			
7	Namibia	6.2				72	Honduras	5.5			
8	Armenia	6.2				73	Nepal	5.4			
9	United Arab Emirates	6.2				74	Albania	5.4			
10	New Zealand	6.2				75	Ireland	5.4			
11	Switzerland	6.2				76	Burkina Faso	5.4			
12	France	6.1				77	Ecuador	5.4			
13	Thailand	6.1				78	Botswana	5.4			
14	Azerbaijan	6.1				79	United States	5.4			
15	Kyrgyz Republic	6.1				80	Singapore	5.4			
16	Estonia	6.1				81	Peru	5.4			
17	Malaysia	6.0				82	Latvia	5.4			
18	Syria	6.0				83	Belgium	5.3			
19	Sri Lanka	6.0				84	Madagascar	5.3			
20	Italy	6.0				85	Burundi	5.3			
21	Tajikistan	6.0				86	Zimbabwe	5.3			
22	Costa Rica	6.0				87	Romania	5.3			
23	Barbados	6.0				88	Luxembourg	5.3			
24	Jordan	6.0				89	Bahrain	5.3			
25	Greece	6.0				90	Mongolia	5.2			
26	Iceland	6.0				91	Netherlands	5.2			
27	Argentina	6.0				92	Slovenia	5.2			
28	Georgia	6.0				93	Algeria	5.2			
29	Kazakhstan	6.0				94	Croatia	5.1			
30	Tunisia	5.9				95	Libya	5.1			
31	Israel	5.9				96	Gambia, The	5.1			
32	Cyprus	5.9				97	Lesotho	5.1			
33	Malta	5.9				98	Korea, Rep.	5.1			
34	Guatemala	5.9				99	Cameroon	5.1			
35	Zambia	5.9				100	Guyana	5.1			
36	Uruguay	5.8				101	Uganda	5.1			
37	Morocco	5.8				102	Ethiopia	5.1			
38	Mauritania	5.8				103	Denmark	5.0			
39	Spain	5.8				104	United Kingdom	5.0			
40	Portugal	5.8				105	Mozambique	5.0			
41	Egypt	5.8				106	Suriname	5.0			
42	Philippines	5.8				107	Pakistan	5.0			
43	Moldova	5.8				108	Senegal	5.0			
44	Bulgaria	5.8				109	Finland	4.9			
45	Lithuania	5.7				110	Nicaragua	4.9			
46	Mali	5.7				111	Saudi Arabia	4.9			
47	Brazil	5.7				112	Oman	4.9			
48	Mauritius	5.7				113	Trinidad and Tobago	4.8			
49	Serbia	5.7				114	Qatar	4.8			
50	Puerto Rico	5.7				115	Nigeria	4.8			
51	Russian Federation	5.7				116	Poland	4.8			
52	Canada	5.7				117	Vietnam	4.7			
53	Kenya	5.7				118	El Salvador	4.7			
54	Czech Republic	5.6				119	Chad	4.7			
55	India	5.6				120	Sweden	4.7			
56	Slovak Republic	5.6				121	Bolivia	4.6			
57	Australia	5.6				122	Bangladesh	4.5			
58	Ukraine	5.6				123	China	4.4			
59	Jamaica	5.6				124	Norway	4.3			
60	Benin	5.6				125	Japan	4.2			
61	Panama	5.6				126	Bosnia and Herzegovina	4.2			
62	Germany	5.6				127	Paraguay	4.2			
63	Colombia	5.6				128	Hungary	4.2			
64	Dominican Republic	5.6				129	Venezuela	4.2			
65	Taiwan, China	5.5				130	Kuwait	3.9			

SOURCE: World Economic Forum, Executive Opinion Survey 2006, 2007

13th pillar  
Natural resources

## 13.01 Number of World Heritage natural sites (hard data)

Number of World Heritage natural sites in the country | August 2007

RANK	COUNTRY/ECONOMY	HARD DATA	RANK	COUNTRY/ECONOMY	HARD DATA
1	Australia	15.0	39	Tunisia	1.0
2	United States	12.0	39	Ukraine	1.0
3	China	10.0	39	Venezuela	1.0
4	Canada	8.0	39	Zambia	1.0
4	Russian Federation	8.0	70	Albania	0.0
6	Brazil	7.0	70	Armenia	0.0
7	India	5.0	70	Austria	0.0
7	Spain	5.0	70	Azerbaijan	0.0
7	United Kingdom	5.0	70	Bahrain	0.0
10	Argentina	4.0	70	Barbados	0.0
10	Indonesia	4.0	70	Belgium	0.0
10	Peru	4.0	70	Benin	0.0
10	South Africa	4.0	70	Bosnia and Herzegovina	0.0
10	Tanzania	4.0	70	Botswana	0.0
15	Costa Rica	3.0	70	Burkina Faso	0.0
15	Japan	3.0	70	Burundi	0.0
15	Mexico	3.0	70	Cambodia	0.0
15	New Zealand	3.0	70	Chad	0.0
15	Panama	3.0	70	Chile	0.0
15	Sweden	3.0	70	Cyprus	0.0
21	Bulgaria	2.0	70	Czech Republic	0.0
21	Colombia	2.0	70	Dominican Republic	0.0
21	Ecuador	2.0	70	El Salvador	0.0
21	France	2.0	70	Estonia	0.0
21	Greece	2.0	70	Gambia, The	0.0
21	Kenya	2.0	70	Georgia	0.0
21	Madagascar	2.0	70	Guyana	0.0
21	Malaysia	2.0	70	Hong Kong SAR	0.0
21	Nepal	2.0	70	Iceland	0.0
21	Philippines	2.0	70	Ireland	0.0
21	Senegal	2.0	70	Israel	0.0
21	Slovak Republic	2.0	70	Jamaica	0.0
21	Switzerland	2.0	70	Jordan	0.0
21	Thailand	2.0	70	Kazakhstan	0.0
21	Turkey	2.0	70	Kuwait	0.0
21	Uganda	2.0	70	Kyrgyz Republic	0.0
21	Vietnam	2.0	70	Latvia	0.0
21	Zimbabwe	2.0	70	Lesotho	0.0
39	Algeria	1.0	70	Libya	0.0
39	Bangladesh	1.0	70	Lithuania	0.0
39	Bolivia	1.0	70	Luxembourg	0.0
39	Cameroon	1.0	70	Malta	0.0
39	Croatia	1.0	70	Mauritius	0.0
39	Denmark	1.0	70	Moldova	0.0
39	Egypt	1.0	70	Morocco	0.0
39	Ethiopia	1.0	70	Mozambique	0.0
39	Finland	1.0	70	Namibia	0.0
39	Germany	1.0	70	Netherlands	0.0
39	Guatemala	1.0	70	Nicaragua	0.0
39	Honduras	1.0	70	Nigeria	0.0
39	Hungary	1.0	70	Oman	0.0
39	Italy	1.0	70	Pakistan	0.0
39	Korea, Rep.	1.0	70	Paraguay	0.0
39	Macedonia, FYR	1.0	70	Puerto Rico	0.0
39	Mali	1.0	70	Qatar	0.0
39	Mauritania	1.0	70	Saudi Arabia	0.0
39	Mongolia	1.0	70	Serbia	0.0
39	Montenegro	1.0	70	Singapore	0.0
39	Norway	1.0	70	Syria	0.0
39	Poland	1.0	70	Taiwan, China	0.0
39	Portugal	1.0	70	Tajikistan	0.0
39	Romania	1.0	70	Trinidad and Tobago	0.0
39	Slovenia	1.0	70	United Arab Emirates	0.0
39	Sri Lanka	1.0	70	Uruguay	0.0
39	Suriname	1.0	70	Uzbekistan	0.0

SOURCE: UNESCO, World Heritage Centre

## 13.02 Protected areas (hard data)

Protected areas as a percentage of total land area | 2005

RANK	COUNTRY/ECONOMY	HARD DATA
1	Venezuela	63.0
2	Hong Kong SAR	51.5
3	Zambia	41.5
4	Tanzania	38.4
5	Saudi Arabia	37.1
6	Dominican Republic	32.6
7	Colombia	31.6
8	Estonia	31.0
9	Guatemala	30.8
10	Botswana	30.2
11	Germany	30.0
12	Switzerland	28.7
13	Austria	28.0
14	Poland	27.1
15	Uganda	26.3
16	Slovak Republic	25.2
17	Panama	24.6
18	Costa Rica	23.3
19	United States	23.2
20	Benin	23.0
21	Cambodia	21.6
22	Chile	20.8
23	Honduras	20.0
24	Bolivia	19.8
25	New Zealand	19.6
26	Ecuador	19.4
27	Thailand	19.0
28	Brazil	18.7
29	Nicaragua	18.2
29	Tajikistan	18.2
31	Malaysia	17.3
32	Sri Lanka	17.2
33	Luxembourg	17.1
34	Ethiopia	16.9
35	Australia	16.7
36	Nepal	16.3
37	Israel	16.2
38	Czech Republic	15.8
39	Burkina Faso	15.4
40	China	14.8
41	Zimbabwe	14.7
42	Namibia	14.6
43	Netherlands	14.3
44	Mongolia	13.9
45	Latvia	13.9
46	Jamaica	13.5
47	Peru	13.3
48	Egypt	13.3
49	Kenya	12.7
50	Italy	12.5
51	United Kingdom	12.5
52	France	11.7
53	Suriname	11.5
54	Oman	11.3
55	Jordan	10.9
56	Senegal	10.8
57	Lithuania	10.6
58	Armenia	10.0
59	Bulgaria	9.5
60	Chad	9.3
61	Sweden	9.2
62	Indonesia	9.1
63	Pakistan	9.1
64	Cameroon	8.9
65	Hungary	8.9
66	Russian Federation	8.8
67	Mexico	8.7
68	Mozambique	8.6
69	Japan	8.6
70	Finland	7.8
71	Spain	7.7
72	Slovenia	7.3
73	Azerbaijan	7.3
74	Macedonia, FYR	7.1
75	Denmark	7.1
76	Canada	6.8
77	Philippines	6.5
78	Croatia	6.5
79	Argentina	6.2
80	South Africa	6.1
81	Nigeria	6.1
82	Taiwan, China	6.0
83	Paraguay	5.8
84	Iceland	5.6
85	Burundi	5.6
86	India	5.4
87	Romania	5.1
88	Portugal	5.0
89	Algeria	5.0
90	Norway	4.8
91	Uzbekistan	4.6
92	Gambia, The	4.2
93	Cyprus	4.0
93	Georgia	4.0
95	United Arab Emirates	4.0
96	Turkey	3.9
97	Korea, Rep.	3.9
98	Vietnam	3.6
99	Kyrgyz Republic	3.6
100	Ukraine	3.4
101	Belgium	3.3
102	Albania	2.9
103	Kazakhstan	2.9
104	Greece	2.8
105	Madagascar	2.6
106	Kuwait	2.6
107	Puerto Rico	2.5
108	Singapore	2.2
109	Guyana	2.2
110	Mali	2.1
111	Syria	1.9
112	Trinidad and Tobago	1.8
113	Mauritania	1.7
114	Moldova	1.4
115	Malta	1.4
116	Bangladesh	1.3
117	Tunisia	1.3
118	Bahrain	1.3
119	Morocco	1.2
120	El Salvador	0.9
121	Mauritius	0.9
122	Ireland	0.7
123	Qatar	0.6
124	Bosnia and Herzegovina	0.5
125	Uruguay	0.4
126	Lesotho	0.2
127	Libya	0.1
128	Barbados	0.1
n/a	Montenegro	n/a
n/a	Serbia	n/a

SOURCE: The International Union for Conservation of Nature (IUCN) and UNEP World Conservation Monitoring Centre *World Database on Protected Areas*

## 13.03 Quality of the natural environment

The natural environment in your country is: (1 = among the most polluted in the world, 7 = as clean as the least polluted countries in the world)

RANK	COUNTRY/ECONOMY	SCORE	1	MEAN: 4.6	7	RANK	COUNTRY/ECONOMY	SCORE	1	MEAN: 4.6	7
1	Finland.....	6.3				66	Macedonia, FYR.....	4.6			
2	New Zealand.....	6.3				67	Saudi Arabia.....	4.6			
3	Namibia.....	6.3				68	Bahrain.....	4.5			
4	Austria.....	6.3				69	Ethiopia.....	4.5			
5	Sweden.....	6.3				70	United States.....	4.5			
6	Uruguay.....	6.2				71	Brazil.....	4.5			
7	Iceland.....	6.2				72	Spain.....	4.5			
8	Norway.....	6.1				73	Uzbekistan.....	4.5			
9	Denmark.....	5.9				74	Moldova.....	4.4			
10	Switzerland.....	5.9				75	Slovak Republic.....	4.4			
11	Kyrgyz Republic.....	5.9				76	Italy.....	4.4			
12	Singapore.....	5.8				77	Mauritania.....	4.4			
13	Australia.....	5.8				78	Pakistan.....	4.4			
14	Croatia.....	5.8				79	Jamaica.....	4.4			
15	Canada.....	5.6				80	Ecuador.....	4.3			
16	Germany.....	5.6				81	Netherlands.....	4.3			
17	Qatar.....	5.5				82	Burkina Faso.....	4.3			
18	Estonia.....	5.4				83	Mozambique.....	4.3			
19	Ireland.....	5.3				84	Bulgaria.....	4.2			
20	Luxembourg.....	5.3				85	Peru.....	4.2			
21	Slovenia.....	5.3				86	Cameroon.....	4.2			
22	Tajikistan.....	5.3				87	Dominican Republic.....	4.2			
23	Bolivia.....	5.3				88	Czech Republic.....	4.2			
24	Latvia.....	5.3				89	Belgium.....	4.2			
25	Costa Rica.....	5.3				90	Thailand.....	4.2			
26	Barbados.....	5.2				91	Romania.....	4.1			
27	Malaysia.....	5.2				92	Kenya.....	4.1			
28	Botswana.....	5.2				93	Kuwait.....	4.1			
29	United Arab Emirates.....	5.2				94	Poland.....	4.1			
30	Tunisia.....	5.2				95	Madagascar.....	4.1			
31	Portugal.....	5.2				96	Morocco.....	4.1			
32	Korea, Rep.....	5.2				97	Georgia.....	4.1			
33	Suriname.....	5.1				98	Algeria.....	4.1			
34	Honduras.....	5.1				99	Syria.....	4.1			
35	Jordan.....	5.1				100	Lesotho.....	4.0			
36	Montenegro.....	5.1				101	Cambodia.....	4.0			
37	France.....	5.1				102	Taiwan, China.....	4.0			
38	Oman.....	5.1				103	Trinidad and Tobago.....	3.9			
39	Argentina.....	5.1				104	Russian Federation.....	3.9			
40	Lithuania.....	5.0				105	Uganda.....	3.9			
41	Cyprus.....	5.0				106	Turkey.....	3.9			
42	Japan.....	5.0				107	Hungary.....	3.9			
43	Puerto Rico.....	4.9				108	Mongolia.....	3.9			
44	Paraguay.....	4.9				109	Azerbaijan.....	3.9			
45	Gambia, The.....	4.9				110	Malta.....	3.8			
46	Libya.....	4.9				111	Nepal.....	3.8			
47	Panama.....	4.9				112	Serbia.....	3.8			
48	United Kingdom.....	4.9				113	Chad.....	3.7			
49	Zimbabwe.....	4.9				114	Senegal.....	3.7			
50	Mauritius.....	4.9				115	India.....	3.7			
51	Nicaragua.....	4.8				116	Hong Kong SAR.....	3.7			
52	Zambia.....	4.8				117	Vietnam.....	3.6			
53	South Africa.....	4.8				118	Kazakhstan.....	3.5			
54	Tanzania.....	4.7				119	Benin.....	3.4			
55	Greece.....	4.7				120	Armenia.....	3.4			
56	Mali.....	4.7				121	Ukraine.....	3.4			
57	Bosnia and Herzegovina.....	4.7				122	Mexico.....	3.4			
58	Guyana.....	4.7				123	Bangladesh.....	3.3			
59	Sri Lanka.....	4.7				124	Nigeria.....	3.2			
60	Israel.....	4.7				125	Philippines.....	3.1			
61	Burundi.....	4.7				126	China.....	3.1			
62	Venezuela.....	4.7				127	El Salvador.....	2.9			
63	Colombia.....	4.6				128	Egypt.....	2.9			
64	Chile.....	4.6				129	Albania.....	2.9			
65	Guatemala.....	4.6				130	Indonesia.....	2.1			

SOURCE: World Economic Forum, Executive Opinion Survey 2006, 2007

## 13.04 Total known species (hard data)

Total known species (mammals, birds, amphibians) in the country | 2007

RANK	COUNTRY/ECONOMY	HARD DATA	RANK	COUNTRY/ECONOMY	HARD DATA
1	Brazil	2,993.0	66	Israel	485.0
2	Colombia	2,887.0	67	Korea, Rep.	472.0
3	Peru	2,606.0	68	Mongolia	469.0
4	Indonesia	2,513.0	69	Morocco	465.0
5	Ecuador	2,358.0	70	Saudi Arabia	458.0
6	China	2,034.0	71	Greece	455.0
7	Venezuela	1,977.0	72	Bulgaria	439.0
8	Mexico	1,956.0	73	Algeria	438.0
9	Bolivia	1,938.0	73	Romania	438.0
10	India	1,803.0	75	Singapore	425.0
11	United States	1,587.0	76	Germany	423.0
12	Tanzania	1,571.0	77	Ukraine	419.0
13	Kenya	1,518.0	78	Portugal	412.0
14	Argentina	1,492.0	79	Slovak Republic	403.0
15	Cameroon	1,383.0	80	Tunisia	402.0
16	Uganda	1,382.0	81	Macedonia, FYR	398.0
17	Panama	1,349.0	82	Oman	397.0
18	Thailand	1,312.0	83	Austria	396.0
19	Costa Rica	1,258.0	84	Poland	393.0
20	Nigeria	1,231.0	84	Uzbekistan	393.0
21	Australia	1,222.0	86	Czech Republic	391.0
22	Malaysia	1,218.0	87	Hungary	382.0
23	Vietnam	1,194.0	87	Slovenia	382.0
24	South Africa	1,184.0	89	Croatia	380.0
25	Ethiopia	1,135.0	90	Switzerland	377.0
26	Guyana	1,105.0	91	Albania	370.0
27	Zambia	1,057.0	91	Serbia	370.0
28	Guatemala	1,039.0	91	Tajikistan	370.0
29	Nepal	1,035.0	94	Libya	363.0
30	Honduras	1,026.0	95	Sweden	361.0
31	Suriname	988.0	95	United Kingdom	361.0
32	Mozambique	966.0	97	Armenia	359.0
33	Russian Federation	959.0	98	Georgia	356.0
34	Paraguay	923.0	98	Netherlands	356.0
35	Nicaragua	916.0	100	Montenegro	355.0
36	Zimbabwe	892.0	101	Syria	354.0
37	Canada	842.0	102	Bosnia and Herzegovina	349.0
38	Philippines	837.0	103	Jordan	348.0
39	Namibia	833.0	104	Belgium	346.0
40	Pakistan	807.0	105	Azerbaijan	344.0
41	Senegal	752.0	106	Denmark	343.0
42	Burundi	747.0	107	Norway	341.0
43	Bangladesh	744.0	108	Latvia	338.0
44	Botswana	733.0	109	Finland	332.0
44	Mali	733.0	110	Puerto Rico	331.0
46	Cambodia	675.0	111	Lesotho	320.0
47	El Salvador	669.0	112	Dominican Republic	316.0
48	Japan	667.0	113	Estonia	304.0
49	Benin	659.0	114	Lithuania	296.0
49	Chad	659.0	115	Cyprus	295.0
51	Chile	646.0	116	Kuwait	273.0
52	Madagascar	608.0	117	Moldova	270.0
53	Burkina Faso	593.0	118	Barbados	262.0
54	Gambia, The	579.0	119	Ireland	257.0
55	Trinidad and Tobago	574.0	120	New Zealand	253.0
56	Kazakhstan	568.0	121	Hong Kong SAR	252.0
57	Mauritania	565.0	122	Kyrgyz Republic	249.0
58	Sri Lanka	560.0	123	Luxembourg	240.0
59	Uruguay	559.0	124	Jamaica	235.0
60	Turkey	543.0	125	Malta	226.0
61	Spain	536.0	126	United Arab Emirates	221.0
62	France	510.0	127	Bahrain	156.0
63	Taiwan, China	506.0	128	Iceland	137.0
64	Italy	497.0	129	Qatar	135.0
65	Egypt	494.0	130	Mauritius	66.0

SOURCE: The International Union for Conservation of Nature (IUCN), Red List of Threatened Species 2007





14th pillar  
Cultural resources

## 14.01 Number of World Heritage cultural sites (hard data)

Number of World Heritage cultural sites in the country | August 2007

RANK	COUNTRY/ECONOMY	HARD DATA	RANK	COUNTRY/ECONOMY	HARD DATA
1	Italy	40.0	54	Ukraine	3.0
2	Spain	37.0	54	Vietnam	3.0
3	Germany	31.0	54	Zimbabwe	3.0
4	France	30.0	69	Albania	2.0
5	China	29.0	69	Azerbaijan	2.0
6	Mexico	24.0	69	Bangladesh	2.0
7	United Kingdom	23.0	69	Bosnia and Herzegovina	2.0
8	India	22.0	69	Ecuador	2.0
9	Greece	17.0	69	Estonia	2.0
10	Russian Federation	15.0	69	Gambia, The	2.0
11	Sweden	14.0	69	Ireland	2.0
12	Czech Republic	12.0	69	Kazakhstan	2.0
12	Poland	12.0	69	Latvia	2.0
12	Portugal	12.0	69	Nepal	2.0
15	Japan	11.0	69	Nigeria	2.0
16	Brazil	10.0	69	Panama	2.0
17	Belgium	9.0	69	Venezuela	2.0
17	Turkey	9.0	83	Bahrain	1.0
19	Austria	8.0	83	Benin	1.0
19	Morocco	8.0	83	Botswana	1.0
19	Peru	8.0	83	Cambodia	1.0
19	United States	8.0	83	Dominican Republic	1.0
23	Algeria	7.0	83	El Salvador	1.0
23	Bulgaria	7.0	83	Honduras	1.0
23	Ethiopia	7.0	83	Iceland	1.0
23	Hungary	7.0	83	Kenya	1.0
23	Korea, Rep.	7.0	83	Luxembourg	1.0
23	Netherlands	7.0	83	Macedonia, FYR	1.0
23	Tunisia	7.0	83	Madagascar	1.0
30	Australia	6.0	83	Mauritania	1.0
30	Canada	6.0	83	Mauritius	1.0
30	Egypt	6.0	83	Moldova	1.0
30	Finland	6.0	83	Mongolia	1.0
30	Norway	6.0	83	Montenegro	1.0
30	Pakistan	6.0	83	Mozambique	1.0
30	Romania	6.0	83	Namibia	1.0
30	Sri Lanka	6.0	83	New Zealand	1.0
38	Bolivia	5.0	83	Nicaragua	1.0
38	Chile	5.0	83	Paraguay	1.0
38	Croatia	5.0	83	Suriname	1.0
38	Israel	5.0	83	Uganda	1.0
38	Libya	5.0	83	Uruguay	1.0
38	South Africa	5.0	108	Barbados	0.0
38	Switzerland	5.0	108	Burkina Faso	0.0
38	Syria	5.0	108	Burundi	0.0
46	Argentina	4.0	108	Cameroon	0.0
46	Colombia	4.0	108	Chad	0.0
46	Lithuania	4.0	108	Costa Rica	0.0
46	Mali	4.0	108	Guyana	0.0
46	Oman	4.0	108	Hong Kong SAR	0.0
46	Serbia	4.0	108	Jamaica	0.0
46	Slovak Republic	4.0	108	Kuwait	0.0
46	Uzbekistan	4.0	108	Kyrgyz Republic	0.0
54	Armenia	3.0	108	Lesotho	0.0
54	Cyprus	3.0	108	Malaysia	0.0
54	Denmark	3.0	108	Puerto Rico	0.0
54	Georgia	3.0	108	Qatar	0.0
54	Guatemala	3.0	108	Saudi Arabia	0.0
54	Indonesia	3.0	108	Singapore	0.0
54	Jordan	3.0	108	Slovenia	0.0
54	Malta	3.0	108	Taiwan, China	0.0
54	Philippines	3.0	108	Tajikistan	0.0
54	Senegal	3.0	108	Trinidad and Tobago	0.0
54	Tanzania	3.0	108	United Arab Emirates	0.0
54	Thailand	3.0	108	Zambia	0.0

SOURCE: UNESCO, World Heritage Centre

## 14.02 Sports stadiums (hard data)

Sports stadium capacity per million population | 2005

RANK	COUNTRY/ECONOMY	HARD DATA
1	Ireland	259,508.1
2	Qatar	238,888.9
3	Bahrain	205,114.3
4	Iceland	186,220.0
5	Malta	158,750.0
6	Barbados	156,666.7
7	Uruguay	154,031.1
8	Australia	147,494.1
9	Norway	144,888.3
10	New Zealand	144,611.5
11	Luxembourg	143,404.0
12	Finland	134,678.9
13	Portugal	133,747.9
14	Cyprus	129,213.8
15	Spain	126,342.9
16	Switzerland	123,453.4
17	Sweden	100,730.0
18	Bulgaria	98,297.1
19	Macedonia, FYR	91,037.0
20	United Kingdom	90,168.9
21	Denmark	89,154.4
22	Trinidad and Tobago	87,692.3
23	United States	86,411.3
24	Montenegro	85,616.7
25	Slovenia	82,281.0
26	Belgium	79,420.0
27	Suriname	73,000.0
28	Germany	71,597.4
29	Austria	69,642.6
30	Bosnia and Herzegovina	66,923.1
31	Croatia	66,697.4
32	Hungary	66,216.7
33	Greece	65,778.4
34	Korea, Rep.	64,473.9
35	Argentina	57,924.2
36	Czech Republic	57,616.1
37	Italy	57,265.8
38	Serbia	56,711.4
39	Ecuador	55,932.7
40	Netherlands	54,239.6
41	Albania	54,062.5
42	Canada	54,010.8
43	Kuwait	53,750.0
44	Georgia	53,675.7
45	Slovak Republic	49,355.2
46	Romania	48,309.8
47	France	47,687.3
48	Oman	46,666.7
49	Costa Rica	46,100.2
50	United Arab Emirates	45,104.2
51	Chile	43,467.3
52	Libya	43,409.8
53	Jamaica	43,333.3
54	Puerto Rico	43,191.0
55	Poland	41,901.8
56	Brazil	41,519.2
57	Estonia	39,000.0
58	Latvia	36,655.2
59	Armenia	35,756.0
60	Paraguay	35,312.5
61	Honduras	33,254.7
62	Malaysia	33,242.7
63	Lithuania	32,392.9
64	Guyana	31,428.6
65	Israel	30,912.1
66	South Africa	30,317.9
67	Venezuela	30,273.5
68	Tunisia	29,708.7
69	Taiwan, China	28,964.8
70	Bolivia	28,842.1
71	Japan	27,706.7
72	Singapore	27,650.9
73	Peru	27,364.4
74	Mauritius	26,307.7
75	Hong Kong SAR	25,638.9
76	Guatemala	25,178.5
77	Colombia	21,871.1
78	Mexico	21,238.8
79	Panama	21,212.1
80	Turkey	21,149.5
81	Namibia	19,666.7
82	Nicaragua	19,368.4
83	Dominican Republic	19,041.4
84	Azerbaijan	18,807.1
85	Ukraine	18,772.6
86	Zambia	18,595.0
87	Algeria	17,846.6
88	Moldova	17,262.1
89	El Salvador	17,183.1
90	Morocco	17,083.3
91	Senegal	16,598.4
92	Kazakhstan	15,875.5
93	Cameroon	13,668.6
94	Zimbabwe	13,068.2
95	Jordan	13,000.0
96	Botswana	12,500.0
96	Mauritania	12,500.0
98	Benin	12,166.7
99	Mali	11,678.3
100	Syria	11,425.0
101	Saudi Arabia	11,298.4
102	Lesotho	11,111.1
103	Kyrgyz Republic	10,185.2
104	Burkina Faso	9,857.1
105	Gambia, The	9,375.0
106	Russian Federation	9,100.0
107	Sri Lanka	8,910.0
108	Egypt	8,003.1
109	Uzbekistan	7,978.1
110	Tanzania	7,682.6
111	Kenya	7,561.1
112	Mongolia	7,407.4
113	Thailand	6,283.6
114	Indonesia	6,236.3
115	Mozambique	5,951.2
116	Nigeria	5,306.1
117	Pakistan	3,994.0
118	Cambodia	3,424.7
119	Vietnam	2,997.7
120	Burundi	2,716.0
121	Philippines	2,558.5
122	Nepal	2,127.7
123	Chad	1,941.7
124	China	1,817.7
125	Bangladesh	1,753.9
126	Ethiopia	1,699.5
127	Tajikistan	1,492.5
128	India	1,382.0
129	Uganda	1,294.5
130	Madagascar	1,122.4

SOURCE: Booz Allen Hamilton Inc.

## 14.03 Number of international fairs and exhibitions (hard data)

Number of international fairs and exhibitions held in the country annually | 2004 to 2006 average

RANK	COUNTRY/ECONOMY	HARD DATA	RANK	COUNTRY/ECONOMY	HARD DATA
1	United States	481.0	66	Sri Lanka	9.3
2	Germany	346.7	66	Venezuela	9.3
3	Spain	307.7	68	Guatemala	8.7
4	United Kingdom	291.3	68	Puerto Rico	8.7
5	France	291.0	70	Tunisia	7.0
6	Italy	240.7	70	Ukraine	7.0
7	Netherlands	207.0	72	Kenya	5.3
8	Australia	180.7	73	Israel	5.0
9	Austria	178.3	73	Senegal	5.0
10	China	167.7	75	Paraguay	4.7
11	Japan	163.7	76	Jamaica	4.0
12	Brazil	162.0	77	Bolivia	3.7
13	Canada	158.3	77	El Salvador	3.7
13	Switzerland	158.3	79	Uganda	3.3
15	Sweden	144.7	80	Jordan	3.0
16	Korea, Rep.	122.0	80	Nigeria	3.0
17	Portugal	121.0	80	Qatar	3.0
18	Singapore	120.3	83	Bangladesh	2.7
19	Belgium	108.7	83	Pakistan	2.7
20	Greece	108.3	85	Cameroon	2.0
21	Finland	108.0	85	Ethiopia	2.0
22	Hungary	105.7	85	Macedonia, FYR	2.0
23	Denmark	95.0	85	Mauritius	2.0
24	Czech Republic	86.7	89	Cambodia	1.7
24	Thailand	86.7	89	Trinidad and Tobago	1.7
26	Mexico	85.7	91	Bahrain	1.3
27	Poland	85.0	91	Barbados	1.3
28	Hong Kong SAR	79.7	91	Bosnia and Herzegovina	1.3
29	Norway	78.7	91	Honduras	1.3
30	Malaysia	78.0	91	Nepal	1.3
31	Turkey	74.7	91	Oman	1.3
32	South Africa	66.0	91	Tanzania	1.3
33	Ireland	65.7	91	Zambia	1.3
34	Taiwan, China	55.0	99	Burkina Faso	1.0
35	India	54.3	99	Gambia, The	1.0
36	Chile	52.0	99	Kazakhstan	1.0
37	Argentina	50.3	99	Mali	1.0
38	Slovenia	36.7	99	Mongolia	1.0
39	Russian Federation	34.3	99	Nicaragua	1.0
40	Indonesia	30.7	105	Albania	0.7
41	Croatia	30.3	105	Armenia	0.7
42	New Zealand	29.0	105	Azerbaijan	0.7
43	Philippines	27.0	105	Benin	0.7
44	Uruguay	26.3	105	Kuwait	0.7
45	Iceland	22.0	105	Montenegro	0.7
46	Colombia	20.7	105	Mozambique	0.7
47	Malta	19.3	105	Saudi Arabia	0.7
48	Latvia	19.0	113	Algeria	0.3
49	Romania	18.3	113	Botswana	0.3
50	Peru	18.0	113	Libya	0.3
51	Estonia	17.7	113	Madagascar	0.3
52	Vietnam	17.3	113	Syria	0.3
53	Cyprus	16.7	113	Zimbabwe	0.3
54	Egypt	16.3	119	Burundi	0.0
55	Bulgaria	15.7	119	Georgia	0.0
56	Lithuania	14.3	119	Guyana	0.0
56	Slovak Republic	14.3	119	Mauritania	0.0
58	Ecuador	13.7	119	Moldova	0.0
59	United Arab Emirates	13.3	119	Namibia	0.0
60	Panama	11.7	119	Uzbekistan	0.0
61	Costa Rica	11.3	n/a	Chad	n/a
62	Luxembourg	10.7	n/a	Kyrgyz Republic	n/a
63	Dominican Republic	10.3	n/a	Lesotho	n/a
64	Morocco	10.0	n/a	Suriname	n/a
64	Serbia	10.0	n/a	Tajikistan	n/a

SOURCE: International Congress and Convention Association

# Technical Notes and Sources

The data used in this *Report* represent the best available estimates from various national authorities, international agencies, and private sources at the time the *Report* was prepared. It is possible that some data will have been revised or updated by national resources after publication. Throughout the statistical tables in this publication, “n/a” denotes that the value is not available, or that available data are unreasonably outdated or do not come from a reliable source.

The following notes provide sources for the hard data—that is, the indicators listed in the Data Tables that do not come from the Executive Opinion Survey.

## Pillar 1: Policy rules and regulations

### 1.04 Visa requirements

**Number of countries requiring visas to enter the country for tourism and/or business trips as a percentage of UN countries, 2007**

This variable is based on visitor visa requirements of all UN countries. The score refers to the percentage of UN countries whose citizens require a visa to enter each country.

Source: United Nations World Tourism Organization

### 1.05 Openness of bilateral Air Service Agreements

**Index of openness of bilateral Air Service Agreements, 2005**

This index measures the average openness of all bilateral Air Service Agreements (ASAs) concluded by International Civil Aviation Organization (ICAO) signatories as registered in ICAO's World's Air Services Agreements (WASA) database (2005 update), weighted by bilateral scheduled passenger traffic taking place under each ASA. Regulatory data come from ICAO's WASA database (2005) and traffic data were obtained from IATA.

Source: World Trade Organization

### 1.07 Time required to start a business

**Number of days required to start a business, 2007**

According to the World Bank, this variable measures the median duration that incorporation lawyers indicate is necessary to complete a procedure with minimum follow up with government agencies and no extra payments.

Source: World Bank, *Doing Business 2008*

### 1.08 Cost to start a business

**Cost to start a business as percentage of GNI per capita, 2007**

According to the World Bank, this variable measures all official fees and fees for legal or professional services if such services are required by law.

Source: World Bank, *Doing Business 2008*

## Pillar 2: Environmental sustainability

### 2.04 Carbon dioxide emissions

**Carbon dioxide emissions per capita in metric tons, 2003**

According to the World Bank, carbon dioxide emissions are those emanating from the burning of fossil fuels and the manufacture of cement. They include carbon dioxide produced during consumption of solid, liquid, and gas fuels and gas flaring.

Source: World Bank, *World Development Indicators 2007*

### 2.05 Particulate matter concentration

**Urban-population-weighted PM10 micrograms per cubic meter, 2004**

According to the World Bank, *particulate matter concentrations* refer to fine suspended particulates less than 10 microns in diameter (PM10) that are able to penetrate deep into the respiratory tract and cause significant health damage. Data for countries are urban population-weighted PM10 levels in residential areas of cities with more than 100,000 residents. The estimates represent the average annual exposure level of the average urban resident to outdoor particulate matter.

Source: World Bank, *World Development Indicators 2007*

### 2.06 Threatened species

**Threatened species as a percentage of total species (mammals, birds, amphibians), 2007**

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

Source: The International Union for Conservation of Nature (IUCN), Red List of Threatened Species 2007

### 2.07 Environmental treaty ratification

**Total number of ratified environmental treaties, 2007**

This variable measures the total number of international treaties from a set of 25 for which a state is a participant. A state becomes a “participant” by Ratification, Formal confirmation, Accession, Acceptance, Definitive signature, Approval, Simplified procedure, Consent to be bound, Succession, and Provisional application (which are here grouped under the term ratification, for reasons of convenience). The treaties included are: International Convention for the Regulation of Whaling, 1948 Washington; International Convention for the Prevention of Pollution of the Sea by Oil, 1954, as amended in 1962 and 1969, 1954 London; Convention on Wetlands of International Importance especially as Waterfowl Habitat, 1971 Ramsar; Convention concerning the Protection of the World Cultural and Natural Heritage, 1972 Paris; Convention on the Prevention of Marine Pollution by Dumping of Wastes and Other Matter, 1972 London, Mexico City, Moscow, Washington; Convention on International Trade in Endangered Species of Wild Fauna and Flora, 1973 Washington; International Convention for the Prevention of Pollution from Ships (MARPOL) as modified by the Protocol of 1978, 1978 London; Convention on the Conservation of Migratory Species of Wild Animals, 1979 Bonn; United Nations Convention on the Law of the Sea, 1982 Montego Bay; Convention on the Protection of the Ozone Layer, 1985 Vienna; Protocol on Substances that Deplete the Ozone Layer, 1987 Montreal; Convention on the Control of Transboundary Movements of Hazardous Wastes and their Disposal, 1989 Basel; International Convention on Oil Pollution Preparedness, Response and Co-operation, 1990 London; United Nations Framework Convention on Climate Change, 1992 New York; Convention on Biological Diversity, 1992 Rio de

Janeiro; International Convention to Combat Desertification in those countries Experiencing Serious Drought and/or Desertification, particularly Africa, 1994 Paris; Agreement relating to the Implementation of Part XI of the United Nations Convention on the Law of the Sea of 10 December 1982, 1994 New York; Agreement relating to the Provisions of the United Nations Convention on the Law of the Sea relating to the Conservation and Management of Straddling Fish Stocks and Highly Migratory Fish Stocks, 1995 New York; Kyoto Protocol to the United Nations Framework Convention on the Climate Change, Kyoto 1997; Rotterdam Convention on the Prior Informed Consent Procedure for Certain Hazardous Chemicals and Pesticides in International Trade, 1998 Rotterdam; Cartagena Protocol of Biosafety to the Convention on Biological Diversity, 2000 Montreal; Protocol on Preparedness, Response and Cooperation to Pollution Incidents by Hazardous and Noxious Substances, 2000 London; Stockholm Convention on Persistent Organic Pollutants, 2001 Stockholm; International Treaty on Plant Genetic Resources for Food and Agriculture, 2001 Rome; International Tropical Timber Agreement 206, 2001 Geneva.

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

### Pillar 3: Safety and security

#### 3.04 Road traffic accidents

**Estimated deaths per 100,000 population due to road traffic accidents, 2002**

Source: World Health Organization, *World Health Statistics 2007*

### Pillar 4: Health and hygiene

#### 4.01 Physician density

**Physician density per 1,000 people, 2004 or most recent year available**

This variable measures the number of physicians per 1,000 people in the country. The World Bank defines *physicians* as graduates of any faculty of medicine who are working in the country in any medical field (practice, teaching, research).

Source: World Health Organization, *World Health Statistics 2007*, national sources

#### 4.02 Access to improved sanitation

**Access to adequate sanitation as a percentage of total population, 2004**

This variable refers to the percentage of the population with at least adequate access to excreta disposal facilities that can effectively prevent human, animal, and insect contact with excreta. Improved facilities range from simple but protected pit latrines to flush toilets with a sewerage connection. To be effective, facilities must be correctly constructed and properly maintained.

Source: World Health Organization/UNICEF Joint Monitoring Programme

#### 4.03 Access to improved drinking water

**Access to safe drinking water as a percentage of total population, 2004**

This variable refers to the percentage of the population with reasonable access to an adequate amount of water from an improved source, such as a household connection, public stand-pipe, borehole, protected well or spring, or rainwater collection. Unimproved sources include vendors, tanker trucks, and unprotected wells and springs. Reasonable access is defined as the availability of at least 20 liters per person per day from a source within 1 kilometer of the dwelling.

Source: World Health Organization/UNICEF Joint Monitoring Programme

#### 4.04 Hospital beds

**Hospital beds per 10,000 population, 2005 or most recent year available**

Source: World Health Organization, *World Health Statistics 2007*

### Pillar 5: Prioritization of Travel & Tourism

#### 5.02 T&T government expenditure

**T&T government expenditure as percentage of total budget, 2007**

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

Source: World Travel & Tourism Council, Tourism Satellite Accounting Research 2007

#### 5.04 T&T fair attendance

**Index of country presence at 12 major T&T fairs, 2006–2007**

This index was constructed as follows: a country was given a 1 for each time it was represented at one of the 13 travel and tourism fairs below that took place during the period August 2006–July 2007. The score is the sum of all fairs at which the country was represented. The fairs included were: ITB Berlin, Salon Mondial du Tourisme (France), World Travel Market (London), Holiday World Prague, International Trade Fair for Tourism (Russia), Arabian Travel Market (Dubai), PATA Travel Mart (Pacific Asia Travel Association), China International Travel Mart, Japan Association of Travel Agents (JATA) World Travel Fair, Travel and Tourism Fair (India), American Society of Travel Agents' Trade Show, Travel Mart Latin America, and the International Tourism Fair of Latin America.

Source: Booz Allen Hamilton Inc.

### Pillar 6: Air transport infrastructure

#### 6.02 Available seat kilometers

**Scheduled available seat kilometers per week originating in country (in millions), January 2007 and July 2007 average**

This variable measures an airline's passenger-carrying capacity; it is composed of the number of seats available on each flight multiplied by the flight distance in kilometers. The resulting variable is an average of the total for all scheduled flights in a week during January (winter schedule) and July (winter schedule) 2007.

Source: International Air Transport Association, SRS Analyser; national sources

#### 6.03 Departures per 1,000 population

**Number of departures per 1,000 population, 2006**

*Aircraft departures* are the number of domestic and international takeoffs of air carriers registered in the country.

Source: Booz Allen Hamilton Inc.

#### 6.04 Airport density

**Number of airports per million population, 2006**

This variable provides the number of airports with at least one scheduled flight in 2006 per million population.

Source: International Air Transport Association, SRS Analyser; national sources

#### 6.05 Number of operating airlines

**Number of airlines with scheduled flights originating in country, January 2007 and July 2007 average**

Source: International Air Transport Association, SRS Analyser; national sources

## Pillar 7: Ground transport infrastructure

### 7.05 Road density

#### Kilometers of road per 100 square kilometers of land, 2004

According to the World Bank, this variable refers to the ratio of the length of the country's total road network to the country's land area. The road network includes all roads in the country: motorways, highways, main or national roads, secondary or regional roads, and other urban and rural roads.

Source: World Bank, *World Development Indicators 2007*

## Pillar 8: Tourism infrastructure

### 8.01 Hotel rooms

#### Number of hotel rooms per 100 population, 2006 or most recent year available

Source: United Nations World Tourism Organization

### 8.02 Presence of major car rental companies

#### Index of presence of major car rental companies, 2007

This variable measures the presence of seven major car rental companies: Avis, Budget, Europcar, Hertz, National Car Rental, Sixt, and Thrifty.

Source: Individual rental car company websites

### 8.03 ATMs accepting Visa cards

#### Number of automated teller machines (ATMs) accepting Visa credit cards per million population, 2007

Source: Visa International

## Pillar 9: ICT infrastructure

### 9.02 Internet users

#### Internet users per 100 population, 2006 or most recent year available

*Internet users* are people with access to the worldwide network.

Source: International Telecommunication Union, *World Telecommunication Indicators 2007*

### 9.03 Telephone lines

#### Telephone lines per 100 inhabitants, 2006 or most recent year available

A *main telephone line* is a telephone line connecting the subscriber's terminal equipment to the public switched telephone network and that has a dedicated port in the telephone exchange equipment.

Source: International Telecommunication Union, *World Telecommunication Indicators 2007*

### 9.04 Broadband Internet subscribers

#### Broadband Internet subscribers per 100 population, 2006 or most recent year available

The International Telecommunication Union considers *broadband* to be any dedicated connection to the Internet of 256 kilobits per second or faster, in both directions. *Broadband subscribers* refers to the sum of DSL, cable modem, and other broadband (for example, fiber optic, fixed wireless, apartment LANs, satellite connections) subscribers.

Source: International Telecommunication Union, *World Telecommunication Indicators 2007*

### 9.05 Mobile telephone subscribers

#### Mobile telephone subscribers per 100 population, 2006 or most recent year available

The term *subscribers* refers to users of mobile telephones subscribing to an automatic public mobile telephone service that provides access to the public switched telephone network using cellular technology. This can include analogue and digital cellular systems but should not include non-cellular systems. Subscribers to fixed wireless, public mobile data services, or radio paging services are not included.

Source: International Telecommunication Union, *World Telecommunication Indicators 2007*

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

### 10.01 Ticket taxes and airport charges

#### Index of relative cost of access (ticket taxes and airport charges) to international air transport services | (0 = highest cost, 100 = lowest cost), 2007

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

Source: International Air Transport Association, SRS Analyser

### 10.02 Purchasing power parity

#### Ratio of purchasing power parity (PPP) conversion factor to official exchange rate, 2006

The purchasing power parity (PPP) conversion factors for 2006 were obtained from the International Monetary Fund (IMF)'s *World Economic Outlook* (April 2007). The official exchange rates for 2006 were obtained from IMF's *International Financial Statistics Online* and from the World Bank's *World Development Indicators 2007*. The World Bank defines the *purchasing power parity conversion factor* as the number of units of a country's currency required to buy the same amount of goods and services in the domestic market as a US dollar would buy in the United States. *Official exchange rate* refers to the exchange rate determined by national authorities or to the rate determined in the legally sanctioned exchange market. It is calculated as an annual average based on monthly averages (local currency units relative to the US dollar). The variable shown is the result obtained by dividing the PPP conversion factor by the official exchange rate.

Source: International Monetary Fund, *World Economic Outlook* (April 2007), *International Financial Statistics Online*; World Bank, *World Development Indicators 2007*

### 10.04 Fuel price levels

#### Retail diesel fuel prices (US cents per liter), 2005

According to the World Bank, this variable refers to the pump prices of the most widely sold grade of diesel fuel. Prices are converted from the local currency to the US dollar.

Source: World Bank, *World Development Indicators 2007*



**10.05 Hotel price index****Average room rates calculated for first-class branded hotels for calendar year 2006 in US\$**

This index measures the average price, in US dollars, for first-class hotel accommodation in each country. The index is calculated by using the average room rate achieved by first-class hotels in each country over a 12-month period from January through December 2006, to mitigate the impact of any seasonality fluctuations.

Source: Deloitte

**Pillar 11: Human resources****11.01 Primary education enrollment****Net primary education enrollment rate, 2005 or most recent year available**

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

Source: UNESCO, Institute for Statistics

**11.02 Secondary education enrollment****Gross secondary education enrollment rate, 2005 or most recent year available**

According to the World Bank, the *gross secondary enrollment rate* is the ratio of total enrollment, regardless of age, to the population of the age group that officially corresponds to the secondary education level. Secondary education completes the provision of basic education that began at the primary level, and aims at laying the foundations for lifelong learning and human development, by offering more subject- and skill-oriented instruction using more specialized teachers.

Source: UNESCO Institute for Statistics; The World Bank, *World Development Indicators 2007*; national resources

**11.08 HIV prevalence****HIV prevalence as a percentage of adults aged 15–49 years, 2005 or most recent year available**

Source: UNAIDS, *2006 Report on the Global AIDS Epidemic*; UNDP, *Human Development Report 2006*; national sources

**11.10 Life expectancy****Life expectancy at birth (years), 2005**

Source: World Health Organization, *World Health Statistics 2007*

**Pillar 12: Affinity for Travel & Tourism****12.01 Tourism openness****Tourism expenditure and receipts as a percentage of GDP, 2006**

This variable is the ratio of the sum of international tourism expenditures and receipts to GDP. *International tourism expenditures* are expenditures of international outbound visitors in other countries, including payments to foreign carriers for international transport. *International tourism receipts* are expenditures of international inbound visitors in other countries, including payments to foreign carriers for international transport.

Source: United Nations World Tourism Organization

**Pillar 13: Natural resources****13.01 Number of World Heritage natural sites****Number of World Heritage natural sites in the country, August 2007**

Source: UNESCO, World Heritage Centre

**13.02 Protected areas****Protected areas as a percentage of total land area, 2005**

According to the IUCN, a *protected area* is an area of land and/or sea especially dedicated to the protection and maintenance of biological diversity, and of natural and associated cultural resources, and managed through legal or other effective means.

Source: The International Union for Conservation of Nature (IUCN) and UNEP World Conservation Monitoring Centre *World Database on Protected Areas*

**13.04 Total known species****Total known species (mammals, birds, amphibians) in the country, 2007**

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

Source: The International Union for Conservation of Nature (IUCN), Red List of Threatened Species 2007

**Pillar 14: Cultural resources****14.01 Number of World Heritage cultural sites****Number of World Heritage cultural sites in the country, August 2007**

Source: UNESCO, World Heritage Centre

**14.02 Sports stadiums****Sports stadium capacity per million population, 2005**

This variable is calculated as the ratio of total seats for all major sports stadiums in the country to the total population (in millions).

Source: Booz Allen Hamilton Inc.

**14.03 Number of international fairs and exhibitions****Number of international fairs and exhibitions held in the country annually, 2004 to 2006 average**

This variable measures the average number of international fairs and exhibitions held annually in each country between 2004 and 2006. Data on international fairs and exhibitions was obtained from the International Congress and Convention Association (ICCA), which includes meetings organized by international associations attended by at least 50 participants that take place on a regular basis (one-time events are not included) and rotate between a minimum of three countries.

Source: International Congress and Convention Association

## About the Authors

### Jennifer Blanke

Jennifer Blanke is Director and Senior Economist with the Global Competitiveness Network at the World Economic Forum. Since joining the team in 2002, she has written and lectured extensively on issues related to national competitiveness and has served as lead editor on a number of regional and topical competitiveness reports. From 1998 to 2002, she was Senior Programme Manager responsible for developing the business, management, and technology section of the World Economic Forum's Annual Meeting in Davos. Before joining the Forum, Dr Blanke worked for a number of years as a management consultant for Eurogroup, Mazars Group in Paris, France, where she specialized in banking and financial market organization. Dr Blanke obtained a Master of International Affairs from Columbia University and an MA and a PhD in International Economics from the Graduate Institute of International Studies (Geneva).

### Thea Chiesa

Thea Chiesa is Associate Director and Head of Aviation, Travel and Tourism at the World Economic Forum. She has a background in business development and strategic planning in the Aerospace/Telecom industry, having spent nine years working with Telespazio both as part of Telecom Italia and Finmeccanica. At the Forum she has developed an expertise in the Travel & Tourism industry, having headed the community for five years. Coupled with her background in advanced communications systems, Ms Chiesa has developed a passion for the Travel & Tourism industry, and she is currently working with key government and industry leaders in developing strategies and implementing innovative projects in the field of T&T competitiveness and traveler information-sharing as well as rebranding campaigns. Ms Chiesa has a BSc in Management from Boston College and a Master's in International Relations from Boston University. She is currently a World Economic Forum Global Leadership Fellow.

### Nigel Couzens

Nigel Couzens is Marketing Manager for Travelport GDS, working across global markets and responsible for effectively communicating Travelport GDS' brand, products, and services to both agency and supplier customers. Mr Couzens is also responsible for leading Travelport GDS' carbon emissions reporting initiatives. This new reporting tool will provide corporations with accurate and timely information that will enable businesses to make more informed decisions when considering the environmental impact of their travel programs. Mr Couzens has over 15 years senior marketing and commercial experience, holding senior roles in blue chip travel, telecommunications, and consumer electronics companies. He holds a degree in Accountancy and Finance and speaks fluent German as well as his native Welsh.

### Julia Felton

Julia Felton is a Director in Deloitte's Tourism, Hospitality & Leisure Industry program with specific responsibility for developing benchmarking solutions for the Travel & Tourism industry. She was responsible for the launch and development of the Deloitte HotelBenchmark Survey, which is now regarded as the most definitive and authoritative source of hotel performance data outside the United States. She launched [www.HotelBenchmark.com](http://www.HotelBenchmark.com) to support the survey, a website that is designed to be the place to go for hospitality research and incorporates for the first time hotel performance data online. In 2005, she expanded Deloitte's benchmarking expertise into the Health and Fitness sector with the launch of [www.HealthClubBenchmark.com](http://www.HealthClubBenchmark.com). Ms Felton's expertise is in developing innovative web-based solutions to enable clients to interpret performance benchmarks and use the data to improve business performance. She speaks regularly at conferences and is often cited in the press.

### Richard Fly

Richard Fly is a Writer and Strategic Communications Consultant to executives and companies in multiple industries. He has written for such CEOs as Jeff Clarke of Travelport, Carly Fiorina of HP, Michael Capellas of Compaq, Alan Mullaly of Ford, and Bob Palmer of Digital. Before starting his own business, Mr Fly was Vice President of Executive Communications and Industry Analyst Relations at HP and Vice President, Communications Services, at Compaq. He has more than 30 years of experience in communications. He spent 15 years as a journalist, including four years as White House and national political correspondent for *Business Week* magazine. He holds a Journalism degree from the University of Texas at Austin.

### Amir Girgis

Amir Girgis is an Economist at the World Travel & Tourism Council (WTTC). In close partnership with Oxford Economics, Mr. Girgis is involved in the production of the WTTC's Tourism Satellite Accounting (TSA) reports, and is presently involved in updating the model used by the TSA Research Program. He obtained a Bachelor of Science degree in Economics from the University of Southampton and a Master's degree in Economics from Warwick University.

**Stephan Gross**

Stephan Gross is a Senior Associate in Booz Allen Hamilton's Munich office. Since joining the firm in 1999, he has been particularly active in top management consulting for clients in the aviation and logistics industry around the globe, especially on strategic assignments such as re-organization, operational improvement, and turnaround projects. Dr Gross has worked particularly with clients in Europe and the Middle East on regulatory issues related to strategic transformation and privatization projects to support the competitiveness of state-owned incumbents in liberalized markets. Prior to joining Booz Allen Hamilton, he worked for a New Zealand-based merchant bank as an analyst in the corporate finance division with a focus on the Australasian infrastructure and utility sector. There he was responsible for evaluating publicly traded shares and was involved in due diligence work as a basis for bids on Australian airport privatizations. Dr Gross holds a BSc (Honors) from Northeastern University in Boston, an MBA from the University of Reutlingen in Germany, and a PhD from the University of Leipzig, Germany, where he focused on the impact of vertical and horizontal integration of publicly listed corporations.

**Ufi Ibrahim**

Ufi Ibrahim is Chief Operating Officer of the World Travel & Tourism Council (WTTC)—a global forum for Chief Executives of the world's foremost 100 Travel & Tourism organizations. Working closely with governments and industry across the world, Ms Ibrahim advises on policy-making and the development of planning frameworks for the long-term success of Travel & Tourism. As a champion of public and private sector partnerships to drive social and economic development, she is responsible for the Global Travel & Tourism Summit—the annual meeting of world leaders to discuss and agree key priorities for Travel & Tourism. Prior to joining WTTC, Ms Ibrahim worked with the American Express Company, where she took charge of immigration services for the company's extensive portfolio of corporate clients.

**John Kester**

John Kester is Chief of the Market Intelligence & Promotion Department at the World Tourism Organization (UNWTO), where he has worked since 1999. He is involved in the preparation of the yearly *Tourism Market Trends* series of regional reports, and has contributed to several occasional documents such as the report *Tourism Generating Markets: Overview and Country Profiles* and various reports prepared by UNWTO in the framework of the Tourism Recovery Committee. He has also been in charge of the final editing of the various volumes of the UNWTO's long-term forecast study *Tourism 2020 Vision*. Since its inception in 2003, he has been involved in the development of the UNWTO *World Tourism Barometer*, a publication aimed at monitoring the short-term evolution of tourism, issued three times a year. He also regularly collaborates on the preparation of news releases, as well as on the Facts & Figures section of the UNWTO website. Previously, Mr Kester worked in the UNWTO at the Statistics, Economic Analysis and Market Research section. Before joining the UNWTO he worked for seven years at Statistics Netherlands as a researcher in the field of socio-cultural statistics. Mr Kester graduated in Social Science with a specialization in research methodology and data analysis from the University of Leiden (the Netherlands).

**Alex Kyriakidis**

Alex Kyriakidis is Global Managing Partner of Tourism, Hospitality & Leisure at Deloitte. He has 33 years of experience providing strategic, attest, financial, and integration services to travel, hospitality, and leisure companies. As the partner in charge of the Global Tourism, Hospitality & Leisure Industry program at Deloitte, Mr Kyriakidis' strengths include an in-depth understanding of the industry trends that impact the performance of the industry. He has advised many of the most prominent travel and hospitality companies on strategy, M&A transactions, and risk management. In addition, Mr Kyriakidis has also served as the Lead Client Service partner for a number of major Hospitality & Leisure companies in Europe and worldwide, including InterContinental Hotels Group, Marriott International, and Global Hyatt. He has represented the firm in its partnership with the World Economic Forum on Travel & Tourism and has direct responsibility for the development of the Board of Governors day at Davos on Travel & Tourism. Mr Kyriakidis has also led global teams on major M&A transactions including the sale of InterContinental and Le Meridien, and the sale/manage-back of the InterContinental Hotels Group UK asset portfolio of 75 hotels.

**Geoffrey Lipman**

Geoffrey Lipman is Assistant Secretary-General of the World Tourism Organization (UNWTO). He is Chair of Green Globe 21, the responsible/sustainable tourism group, and of Green Global Village (GGV), its consultancy arm. He is President of the International Council of Tourism Partners (ICTP)—a platform connecting socially responsible tourism organizations and people, a Board Member of the Armstrong Hospitality Group (Canada), and Senior Tourism Research Fellow at George Washington University in the United States. Professor Lipman was the first president of the World Travel & Tourism Council (WTTC), the global business leaders' forum. Between 1990 and 1999, he shaped the WTTC's agenda during its growth from 10 to 100 members and the positioning of Travel & Tourism as the world's largest industry, as well as its Millennium Vision for open markets, elimination of barriers, and sustainable development. Prior to this he spent 20 years with the International Air Transport Association (IATA) as Executive Director and Head of Government Affairs. Professor Lipman has written and lectured around the world on tourism strategy, sustainability, and airline liberalization; has co-authored books on opening up European aviation; and has established a Think Tank on Free Trade in the Air. He has been a member of two European Union High Level Commissions—on Airline Liberalization and on Tourism Employment—as well as a member of the UK Roundtable on Sustainable Development.

### Julia Marton-Lefèvre

Julia Marton-Lefèvre is Director General of IUCN (International Union for Conservation of Nature) the world's largest conservation/environment membership organization, which brings together states, government agencies, nongovernmental organizations, scientists, and experts in a unique worldwide partnership. IUCN's mission is to influence, encourage, and assist societies throughout the world to conserve the integrity and diversity of nature and to ensure that any use of natural resources is equitable and ecologically sustainable. Prior to this, Ms Marton-Lefèvre was Rector of the University for Peace (UPEACE), a graduate-level international university mandated by the United Nations, providing education, training, and research on issues related to peace and conflict. Earlier offices held by Ms Marton-Lefèvre include Executive Director of LEAD (Leadership for Environment and Development) International, a program established by the Rockefeller Foundation to bring together and train mid-career leaders from all parts of the world in improving their leadership skills around the issues of sustainable development, and Executive Director of the International Council for Science (ICSU), an important and respected global organization bringing together scientific academies and unions to promote scientific activities for the benefit of humanity. Ms Marton-Lefèvre is a member of a number of boards, councils, and committees for organizations such as the China Council for International Cooperation on Environment and Development (CCICED), an advisory body to the Chinese Government; UPEACE; LEAD International; the Bibliotheca Alexandria; the Geneva-based Graduate Institute of International and Development Studies; Oxford University's James Martin 21st Century School; and the Clinton Global Initiative's Energy and Climate Change Working Group.

### Stephen McCool

Stephen McCool is a Consultant working with various governments and nongovernmental organizations on protected area management and planning issues. From 1977 to 2007, he served on the faculty of the University of Montana (USA) as a professor of wildland recreation management, specializing in social science aspects of protected area planning and management. He currently is Professor Emeritus with the Department of Society and Conservation there. For many years, he has taught and lectured on these issues around the United States and the world, most recently serving as a visiting scholar at the Tsinghua University in Beijing and the University of KwaZulu-Natal in South Africa, and is author of numerous research and applied articles on managing tourism and visitors in protected areas. He works closely with IUCN, the World Commission on Protected Areas, and the UNESCO World Heritage Center. In 2004, he received the USDA Forest Service Chief's award recognizing outstanding research in Wilderness Management. Dr McCool holds a BS degree from the University of Idaho and MSc and PhD degrees from the University of Minnesota.

### Marilyn Carlson Nelson

Marilyn Carlson Nelson is Chairman and Chief Executive Officer of Carlson. *Forbes* magazine has regularly selected Ms Nelson as one of "The World's 100 Most Powerful Women." She is on the World Economic Forum's International Business Council, and in 2004 she cochaired the Forum's Annual Meeting in Davos, Switzerland. She recently completed a presidential appointment as Chair of the National Women's Business Council, an advisory council to the President and Congress of the United States, and is currently Vice Chair of the U.S. Travel and Tourism Advisory Board. She recently received the National Business Travel Association's highest honor—the Icon Award—for a career of leadership in the business travel industry. In October 2006, H.E. Jean-David Levitte, French Ambassador to the United States, presented Ms Nelson with a French national honor created by Napoleon Bonaparte: Chevalier (Knight) in the French Légion d'Honneur. Ms Nelson was also named one of "America's Best Leaders" by *U.S. News and World Report*. She is a past national chair of the Travel Industry Association of America, has served as a delegate to the White House Conference on Tourism, and was on the board of the U.S. National Tourism Organization. She is currently on the Singapore Tourism Board. Outside her industry Ms Nelson serves on the boards of Exxon Mobil Corporation, the Mayo Clinic Foundation, and the Committee to Encourage Corporate Philanthropy. She was the first major player in the United States travel industry to take a stand in the fight against child sexual tourism by co-founding the World Childhood Foundation, established by the Queen of Sweden. In addition, she signed Carlson to ECPAT—an international code of conduct aimed at ending child prostitution, child pornography and the trafficking of children for sexual purposes—in 2004.

### Brian Pearce

Brian Pearce is Chief Economist of International Air Transport Association (IATA). An economist with over 20 years of international experience in several industries, he was formerly Head of Global Economic Research at UBS Warburg and Chief Economist at Ernst & Young. Prior to joining IATA, Mr Pearce was involved in the UK Air Transport White Paper and in the discussion and design of policies to influence aviation's impact on the environment. He also advised on the financial sector's role in promoting good corporate governance and responsibility, and directed the initiative launched by the UK Prime Minister at the World Summit on Sustainable Development. Before that he was Head of Global Economic Research at the investment bank SBC Warburg (now UBS), in Tokyo and then London. During this time he published extensively on international financial and economic issues and advised private and public sector clients in over 20 countries. As Chief Economist at Ernst & Young's economic forecasting consultancy, the ITEM Club, he worked with the UK Treasury's and other econometric models to analyze public policy and forecast global economic prospects. He was frequently called on by television, radio, and the press to comment on government economic policy.

**Jürgen Ringbeck**

Jürgen Ringbeck is a Senior Partner and Senior Vice President of Booz Allen Hamilton based in Düsseldorf. He consults primarily companies in transportation industries, such as airlines, tourism operators, postal and logistics companies, and railways. Before becoming Partner of Booz Allen Hamilton, Dr Ringbeck was Partner of McKinsey & Company, where he was Co-leader of the Transportation Group. In total he has more than 18 years in top-level management consulting. Dr Ringbeck holds a Diploma in Mathematics from the University of Münster and a PhD in Economics from the University of Osnabrück. Before starting his career as a Management Consultant, he worked as a University Assistant and Guest Professor at the University of Toronto. Dr Ringbeck is author of several business books (including the US business bestseller *Do IT Smart*) and numerous publications in business strategy and IT management. He has received several awards for his work from major institutions, including the Marketing Science Institute (Cambridge USA).

**Gordon Wilson**

Gordon Wilson is President and CEO of Travelport GDS, responsible for its global activities across approximately 145 countries. Headquartered in Langley, UK, Travelport GDS is comprised of the Galileo and Worldspan businesses; Shepherd Systems, an expert in the field of providing business and marketing intelligence to the travel industry; AiRES, the next-generation server-based internal airline IT product suite; and THOR, a provider of distribution and marketing services to travel-related companies. Before taking on global responsibility for its GDS division, Wilson was President and CEO of Travelport Business Group, responsible for all of its B2B businesses across Europe, the Middle East and Africa, and Asia and the Pacific, including companies such as GTA, TRUST, and WizCom as well as Galileo. Previous roles have included Vice President, Global Customer Service Delivery, based in Denver, Colorado; Managing Director of Galileo Southern Africa, based in Johannesburg, South Africa; Managing Director of Galileo Portugal and Espana, based in Lisbon; and General Manager, Airline Sales and Marketing, for Galileo International. Before joining Galileo International in 1991, Wilson held a number of positions in the UK airline and chemical industries. Wilson holds a Master's degree in Law from the University of Cambridge, UK, and a Postgraduate Diploma in Air and Space Law from University College, London. He also sits on the Board of SITA, a provider of IT solutions and communications services to the air transport industry.

**The World Economic Forum would like to thank the following organizations for their invaluable support of this Report.**

## Abercrombie & Kent

Born as a safari outfitter in 1962, Abercrombie & Kent's unparalleled travel services extend around the globe to more than one hundred countries on all seven continents. The company built its award-winning reputation by being the first to bring unexpected comforts and amenities to remote destinations. Small group or private travel with A&K offers the convenience, service and security of a network of over 50 on-site offices to ensure "by invitation only" access to inspiring experiences in a personalized, low-profile and intelligent style.

Among the names in the Abercrombie & Kent family of brands and services are: Abercrombie & Kent, Akorn, Sanctuary Retreats, Sanctuary Lodges & Camps, Sanctuary Villas & Apartments, Sanctuary Cruising (Sun Boats on the Nile, Yangtze Explorer). Abercrombie & Kent employs over 2,500 people worldwide.

Visit our website at [www.abercrombiekent.com](http://www.abercrombiekent.com).

## BOMBARDIER

Bombardier shares with the World Economic Forum the belief that the world's key challenges can only be overcome through joint efforts. Bombardier contributes to such efforts by providing transportation solutions that support social development and economic growth worldwide. The company's commitment is firmly grounded in sustainable development principles, which define the way it conducts business.

Bombardier works diligently to offer state-of-the-art planes, trains and related services that respond to today's mobility challenges—cultivating environmental sustainability in all aspects of its activities, be it product design, management systems or operations. The company communicates openly in its workplace as well as with its customers, shareholders and other stakeholders. Moreover, Bombardier supports—through philanthropy and partnerships—the communities in which it operates. They are at the core of Bombardier's success and deserve its recognition.

Entrepreneurs well understand the value of partnerships. Just like in business, social development is a matter of teamwork. Bombardier commends the Forum for bringing people together to work towards a common and laudable goal.

## Booz | Allen | Hamilton

Booz Allen Hamilton has been at the forefront of management consulting for businesses and governments for more than 90 years. Integrating the full range of consulting capabilities, Booz Allen is the one firm that helps clients solve their toughest problems, working by their side to help them achieve their missions.

With 19,000 employees on six continents, the firm generates annual sales of \$4 billion. Booz Allen, a global strategy and technology consulting firm, is committed to delivering results that endure. To learn more about the firm, visit the Booz Allen Web site at [www.boozallen.com](http://www.boozallen.com).



British Airways is a leading global airline and its main base is London Heathrow Airport. It will move into the brand new Terminal 5 at the end of March 2008, offering passengers a world-class experience. British Airways also operates from 8 other airports in the UK and flies over 35 million passengers each year to over 140 destinations in 72 countries. BA employs more than 43,000 people and offers passengers a wide choice of cabins in which to travel: First, Club World, World Traveller Plus and World Traveller on longhaul routes and Club Europe or Euro Traveller on European routes.

The airlines currently has a fleet of 245 aircraft and, in September 2007, placed an order for 12 Airbus A380 aircraft and 24 Boeing 787 aircraft with options for a further seven Airbus A380s and 18 Boeing 787s as part of a longhaul fleet replacement programme.

British Airways is a member of the oneworld alliance.

For flights, fares and other information about British Airways, please log on to our website [www.ba.com](http://www.ba.com).



Carlson is a global leader in the hotel, restaurant, business and leisure travel, and marketing industries.

Among the names in the Carlson family of brands and services are: Regent International Hotels®, Radisson Hotels & Resorts®, Park Plaza® Hotels & Resorts, Country Inn & Suites By Carlson, Park Inn® hotels, T.G.I. Friday's® and Pick Up Stix® restaurants, Carlson Wagonlit Travel, CW Government Travel, Carlson Marketing®, Peppers & Rogers Group®, and Gold Points Reward Network®.

Based in Minneapolis, Carlson's brands and services employ about 190,000 people in more than 150 countries.

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## Deloitte.

Deloitte is one of the world's leading professional services organisations with more than 120,000 people worldwide in over 140 countries. Our member firms serve over one-half of the world's largest companies, as well as large national enterprises, public institutions, and successful, fast-growing global growth companies.

We have assembled a dedicated team of serve the Tourism, Hospitality and Leisure sector across the globe, providing a range of integrated services including Audit, Tax, Consulting and Corporate Finance. Deloitte is the leading provider of professional services to the international hotel and resort industry acting for owners, operators, developers and investors.



Emirates Airline & Group operates 114 wide-bodied aircraft (including 11 freighters) to 99 international destinations in six continents. The fleet will expand to over 150 aircraft by 2012, and will include 58 Airbus A380s—the largest order for this aircraft placed by any airline. Although owned by the government of Dubai, Emirates receives no subsidy of any kind and no protection against competition in its home market.

As well as Emirates and Dnata, the Group includes the tour operator Emirates Holidays; the Dubai destination management company Arabian Adventures; the conservation-based Emirates Al Maha Desert Resort; and Mercator, an air transport and travel software business. Dnata's original airport handling and travel agency businesses continue to flourish.

Dnata is the largest and most influential non-airline travel business in the Middle East and West Asia region. Its airport services division provides all ramp, cargo and passenger handling at Dubai International Airport as well as ground handling operations in 16 other cities in Australia, China, Pakistan, Philippines, Singapore and Switzerland. Dnata's travel agency division supplies corporate and retail travel products and travel-related services in the UAE, and has also expanded its business into Kuwait and Saudi Arabia.



The Hertz Corporation, the world's largest general use car rental brand, operates from approximately 7,900 locations in 145 countries worldwide.

Hertz is the number one airport car rental brand in the U.S. and at 69 major airports in Europe. The Company operates corporate and licensee locations throughout North America, Europe, Latin America, Australia and New Zealand and has licensee locations throughout Africa, Asia, and the Mid-East.

Hertz also operates one of the world's largest equipment rental businesses, Hertz Equipment Rental Corporation, from more than 360 branches in the United States, Canada, France and Spain with a growing presence in Asia and India.

Based in Park Ridge, NJ Hertz's brands and services employ approximately 28,000 people worldwide.

Visit Hertz on the web at [www.hertz.com](http://www.hertz.com).



The International Air Transport Association (IATA), founded in April 1945, is the prime vehicle for inter-airline cooperation in promoting safe, reliable, secure, and economical air services. Today IATA represents 250 airlines comprising 94 percent of international scheduled air traffic.



Founded in 1948 as the International Union for Conservation of Nature and Natural Resources, IUCN brings together States, government agencies and a diverse range of non-governmental organizations in a unique world partnership: over 1000 members in all, spread across some 140 countries.

As a Union, IUCN seeks to influence, encourage and assist societies throughout the world to conserve the integrity and diversity of nature and to ensure that any use of natural resources is equitable and ecologically sustainable. A central Secretariat coordinates the IUCN Programme and serves the Union membership, representing their views on the world stage and providing them with the strategies, services, scientific knowledge and technical support they need to achieve their goals. Through its six Commissions, IUCN draws together over 10,000 expert volunteers in project teams and action groups, focusing in particular on species and biodiversity conservation and the management of habitats and natural resources. The Union has helped many countries to prepare National Conservation Strategies, and demonstrates the application of its knowledge through the field projects it supervises. Operations are increasingly decentralized and are carried forward by an expanding network of regional and country offices, located principally in developing countries.

IUCN builds on the strengths of its members, networks and partners to enhance their capacity and to support global alliances to safeguard natural resources at local, regional and global levels.



Silversea is a cruise company reflecting generations of maritime and travel experience. In the early 1990s, the Lefebvre family of Rome, former owners of Sitmar Cruises, conceived and organized a unique cruise company pledging to build and operate the highest-quality ships in the ultra-luxury segment.

Silversea launched its first ship, Silver Cloud, in 1994, followed by Silver Wind in 1995, Silver Shadow in 2000, and the newest ship, Silver Whisper in 2001. The fleet was purpose-built for the ultra-luxury market, establishing a new class of smaller, intimate vessels that could slip into more exotic ports off the beaten path. These elite vessels were specifically designed for fewer guests, more space, and the highest levels of personalized service, delivered by Italian officers and European staff.

Taking the company into the future is Albert Peter, Silversea's Chief Executive Officer. Since taking the leadership reins in June 2001, Mr. Peter has steered the company to a steady course of high customer satisfaction, financial stability, and new product innovation.



SWISS is Switzerland's national airline, serving 71 destinations around the world from its Zurich hub and from Basel and Geneva international airports. Operating a fleet of 72 aircraft, SWISS is a key player within the Lufthansa Group and the global Star Alliance. SWISS remains true to its mission of providing quality air services that link Switzerland with Europe and the world.

People who fly with SWISS should always feel at home. With its core values of personal care, Swiss hospitality and quality down to the finest detail, SWISS will continue to maintain its high market profile as Switzerland's national airline, committed at all times to providing first-class service on board and on the ground.



Travelport is one of the world's largest travel conglomerates. The company operates three primary businesses: a global distribution system business, which comprises the Galileo and Worldspan brands; a supplier services and data analysis business, Shepherd Systems; and a group travel and wholesale hotel business through its brand GTA. Travelport also owns a significant interest in Orbitz Worldwide (NYSE: OWW), a leading global online travel company. With 2006 revenues (including Worldspan) of approximately US\$ 3.4 billion, Travelport operates in 145 countries and has approximately 7,500 employees. Travelport is a private company owned by the Blackstone Group and One Equity Partners of New York and Technology Crossover Ventures of Palo Alto, California.





The World Tourism Organization (UNWTO) is the specialized agency of the United Nations in the field of tourism and the leading international organization for the sector. The UNWTO serves as a global forum for tourism policy issues and practical source of tourism know-how.

In the year 2006, UNWTO celebrated a twofold anniversary: 60 years of international work in favor of tourism, travel, and development, and its 30th anniversary in Spain. The organization plays a central role within the UN System in promoting the development of responsible, sustainable, and universally accessible tourism within the framework of the Millennium Development Goals. The UNWTO encourages the implementation of the Global Code of Ethics for Tourism, with a view to ensuring that member countries, tourist destinations, and businesses maximize the positive economic, social, and cultural effects of tourism and fully reap its benefits, while minimizing its negative social and environmental impacts.

In 2007, the UNWTO's membership is comprised of 150 countries, 7 territories, and more than 300 Affiliate Members representing the private sector, educational institutions, tourism associations, local tourism authorities, and civil society.



The World Travel & Tourism Council (WTTC) is the global business leaders' forum for Travel & Tourism. Its Members are the Chairmen and Chief Executives of 100 of the world's foremost organizations, representing all regions of the world and all sectors of the industry.

Travel & Tourism is one of the world's largest industries, employing approximately 230 million people and generating over 10 percent of world GDP. As the voice of the global private sector, WTTC works together with governments to raise awareness of the economic and social importance of our industry across the world. WTTC's extensive economic research—Tourism Satellite Accounting—provides public and private sector decision makers with estimates and forecasts for the direct and indirect impacts of Travel & Tourism activity. The research identifies Travel & Tourism's contribution to capital investment, exports, gross domestic product, and jobs for more than 174 countries across the world.