

MENA

Average score Difference from global avg. of 3.8

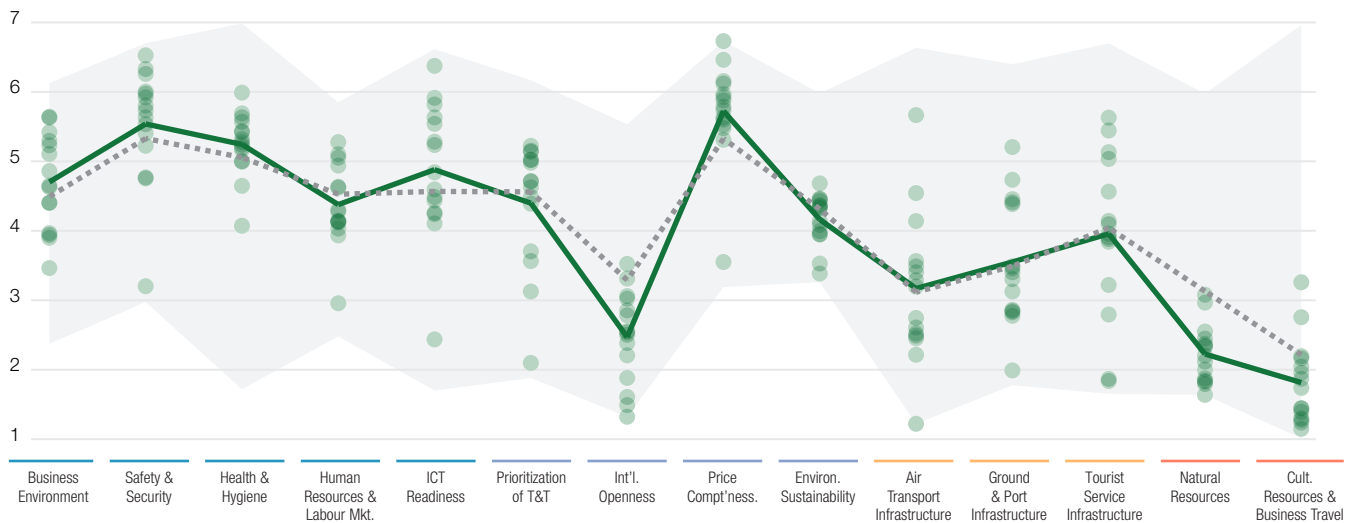
3.7 **-4.4%**

Travel & Tourism Competitiveness Index 2019

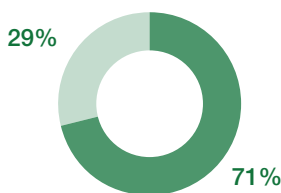
Key Indicators

International tourist arrivals (thousands)	84,658.4	Domestic spending (share of internal T&T spending)	42.0%
International tourism inbound receipts (US\$ millions)	84,323.5	Visitor spending (share of internal T&T spending).....	58.0%
Average receipts per arrival (US\$).....	996.0	T&T industry employment (thousands).....	4,655.5
T&T industry GDP (US\$ millions).....	119,434.4	% of total	4.0%
% of total	3.9%		

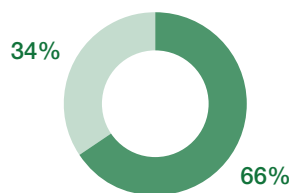
Middle East and North Africa Pillar Performance Overview, 2019



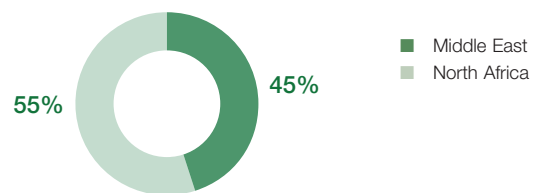
T&T GDP subregion share



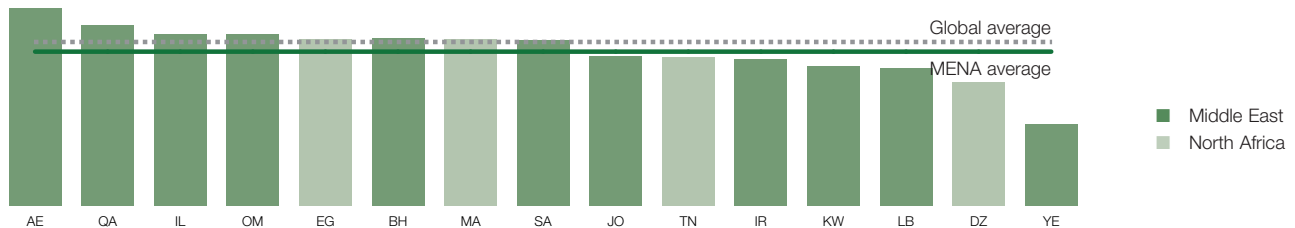
International tourist arrivals subregion share



T&T employment subregion share



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



Regional Highlights

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

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

MENA Pillar Snapshot

<p>Regional average</p> <p>4.7 ↓</p> <p>Difference from global avg. of 4.5</p> <p>4.7%</p>	<p>Business Environment</p> <p> Top scorer: Qatar Most improved: Morocco</p> <p>Qatar ranks 8th globally due to low tax rates (3rd) that have a low impact on work and investment (4th) and an efficient legal system and administration.</p>	<p>Regional average</p> <p>5.7 ▲</p> <p>Difference from global avg. of 5.3</p> <p>7.5%</p>	<p>Price Competitiveness</p> <p> Top scorer: Iran, Islamic Rep. Most improved: Israel</p> <p>Iran ranks 1st globally thanks to low ticket taxes and airport charges (7th), fuel prices (5th) and high purchasing power (5th).</p>
<p>Regional average</p> <p>5.5 ▲</p> <p>Difference from global avg. of 5.3</p> <p>3.9%</p>	<p>Safety and Security</p> <p> Top scorer: Oman Most improved: Egypt</p> <p>Oman ranks 3rd due to lower homicides rates (19th) a reliable police force (5th) and low costs of terrorism (7th) and crime (3rd).</p>	<p>Regional average</p> <p>4.2 ▲</p> <p>Difference from global avg. of 4.3</p> <p>-3.5%</p>	<p>Environmental Sustainability</p> <p> Top scorer: Egypt Most improved: Kuwait</p> <p>Egypt ranks 31st globally thanks to low levels of deforestation (13th) and below regional average air pollution (62nd), T&T industry sustainability (53rd) and water stress (61st).</p>
<p>Regional average</p> <p>5.2 ↓</p> <p>Difference from global avg. of 5.1</p> <p>3.7%</p>	<p>Health and Hygiene</p> <p> Top scorer: Israel Most improved: Algeria</p> <p>Israel ranks 46th globally due to comprehensive water and sanitation services coverage (1st), low to non-existent HIV (1st) and malaria (1st) rates, and high physician density (29th).</p>	<p>Regional average</p> <p>3.2 ▲</p> <p>Difference from global avg. of 3.1</p> <p>1.7%</p>	<p>Air Transport Infrastructure</p> <p> Top scorer: United Arab Emirates Most improved: Morocco</p> <p>United Arab Emirates ranks 4th globally thanks to its quality of air transport infrastructure (7th), high airline route capacity (5th) and numerous operating carriers (20th).</p>
<p>Regional average</p> <p>4.4 ▲</p> <p>Difference from global avg. of 4.5</p> <p>-3.3%</p>	<p>Human Resources and Labour Market</p> <p> Top scorer: Israel Most improved: Oman</p> <p>Israel ranks 21st globally thanks to its qualified labour force (32nd), including ease of finding skilled labour (2nd), and a good overall labour market (18th).</p>	<p>Regional average</p> <p>3.6 ▲</p> <p>Difference from global avg. of 3.5</p> <p>1.7%</p>	<p>Ground and Port Infrastructure</p> <p> Top scorer: Bahrain Most improved: Egypt</p> <p>Bahrain ranks 14th globally thanks to total and paved road density.</p>
<p>Regional average</p> <p>4.9 ▲</p> <p>Difference from global avg. of 4.6</p> <p>6.9%</p>	<p>ICT Readiness</p> <p> Top scorer: United Arab Emirates Most improved: Iran, Islamic Rep.</p> <p>United Arab Emirates ranks 4th globally thanks to a high density of mobile (2nd) and mobile internet subscriptions (1st) and network coverage (1st).</p>	<p>Regional average</p> <p>4.0 ↓</p> <p>Difference from global avg. of 4.0</p> <p>-2.1%</p>	<p>Tourist Service Infrastructure</p> <p> Top scorer: United Arab Emirates Most improved: Saudi Arabia</p> <p>United Arab Emirates ranks 22nd globally thanks to good hotel density and high perception of its tourism infrastructure quality (7th).</p>
<p>Regional average</p> <p>4.4 ▲</p> <p>Difference from global avg. of 4.6</p> <p>-3.6%</p>	<p>Prioritization of Travel & Tourism</p> <p> Top scorer: Morocco Most improved: Algeria</p> <p>Morocco ranks 26th globally thanks to government prioritization of T&T (30th), availability of data (16th) and above regional average effectiveness in tourism marketing (41st).</p>	<p>Regional average</p> <p>2.2 ↓</p> <p>Difference from global avg. of 3.1</p> <p>-28.9%</p>	<p>Natural Resources</p> <p> Top scorer: Morocco Most improved: Egypt</p> <p>Morocco ranks 63rd globally thanks to the degree to which natural assets are a reason for tourist arrivals (52nd) and digital demand (27th).</p>
<p>Regional average</p> <p>2.5 ▲</p> <p>Difference from global avg. of 3.3</p> <p>-24.9%</p>	<p>International Openness</p> <p> Top scorer: Qatar Most improved: Qatar</p> <p>Qatar ranks 64th globally thanks to a momentous reduction in visa requirements (119th to 3rd).</p>	<p>Regional average</p> <p>1.8 ↓</p> <p>Difference from global avg. of 2.2</p> <p>-18.0%</p>	<p>Cultural Resources and Business Travel</p> <p> Top scorer: Egypt Most improved: Jordan</p> <p>Egypt ranks 22nd globally thanks to its numerous sport stadiums (29th) and cultural and entertainment digital demand (4th).</p>

Middle East and North Africa

TTCI 2019 Scores

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

Source: World Economic Forum, 2019.

Middle East and North Africa

TTCI 2019 Scores

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

Bottom 20% Top 20%

Middle East and North Africa (MENA)

Regional Analysis

Overview

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

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

More positively, stability, safety and security have started to recover throughout the region, slightly reducing travel fears and underlying one of the key reasons for the recent pickup in arrivals. Furthermore, it seems that there has

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

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

Subregion Analysis

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

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

North Africa scores lower than the Middle East, but demonstrates far greater improvement in overall competitiveness. The subregion outcores the Middle East on five pillars and bests the global average on four. North Africa is the most price competitive subregion in the world, with three out of its four members among the 12 least-expensive economies covered in the report. North Africa's greatest advantage relative to the Middle East is its natural and cultural resources—although it still underperforms the world on both the Natural Resources and Cultural and Business Travel pillars. The subregion also bests the MENA average in prioritization of T&T and environmental

sustainability, areas where it has improved since 2017. On the other hand, North Africa has underdeveloped infrastructure and T&T enabling environment, contrasting some of the high performers in the Middle East subregion. In particular, North Africa trails when it comes to tourist service infrastructure and ICT readiness. The subregion's strong rate of improvement is due to enhanced safety and security, overall T&T policy and enabling conditions and air transport and ground infrastructure.

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

Selected Country/Economy Analysis

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

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

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

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

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

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

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

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

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

How to Read the Regional Profiles

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

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

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

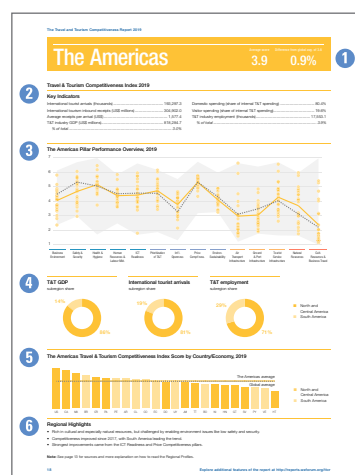
Each regional profile consists of: 1) Regional Dashboard, 2) Pillar Snapshot, 3) TTCI regional rankings table, 4) TTC regional scores heatmap, and 5) written analysis.

Please note:

- Any mention of country/economy grouping averages (i.e. global or regional averages) in TTCI or component growth since the 2017 index is based on the average (arithmetic) of countries covered in both the 2017 and 2019 report. As a result, performance may be over- or understated.
- Unless otherwise noted, figures in parenthesis represent an economy's global ranking (out of 140) for the mentioned metric.
- Differences between pillars and growth rates might not be reflected in the scores provided due to the rounding of scores to the tenth decimal point.
- All mentions of T&T GDP, domestic and visitor share of internal spending and employment figures comes

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

Regional Dashboard



1 Average score and global average comparison

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

2 Key Indicators

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

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

3 Regional pillar performance overview

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

4 Subregion share pie charts

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

5 Regional TTCI score by country

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

6 Regional highlights

Provides brief high-level takeaways about the region.

Pillar Snapshot



Presents regional performance for each TTCI pillar, including:

- Regional average (arithmetic) score, with arrow representing direction of change since the 2017 TTCI. Please note that performance since 2017 is always based on economies covered in both the 2017 and 2019 editions of the TTCI. As a result, performance may be over- or understated.
- Difference from global avg. (%)—the percentage difference between the average (arithmetic) pillar score for the 140 economies covered by the 2019 report and the regional average (arithmetic) score.
- Names of the region's highest-scoring economy on the pillar and the economy that had the highest score increase (by percentage) since the 2017 report.
- Short overview of the highest-scoring economy in the region for the pillar, including its global pillar ranking and key metrics that explain its position.

TTCI 2019 Rankings

The Americas TTCI 2019 Rankings

Country/Economy	2019	DIFFERENCE FROM 2017		SCORE DIFF. FROM BENCHMARK AVG.	
		Rank	Score	Percentage	Score
1. U.S.	1.1	1.5	1.6	0.1	0.1
2. Canada	0.1	0.3	1.4	0.1	0.3
3. Mexico	0.7	0.5	1.4	0.2	0.8
4. Brazil	0.4	1.0	0.4	1.0	1.0
5. Chile	0.7	0.9	0.2	0.9	0.9
6. Peru	0.2	0.3	0.1	0.3	0.3
7. Argentina	0.2	1.0	0.8	0.9	0.9
8. Costa Rica	0.1	0.0	0.0	0.0	0.0
9. Colombia	0.0	0.0	0.0	0.0	0.0
10. Ecuador	0.0	0.0	0.0	0.0	0.0
11. Dominican Republic	0.0	0.0	0.0	0.0	0.0
12. Uruguay	0.0	0.0	0.0	0.0	0.0
13. Panama	0.0	0.0	0.0	0.0	0.0
14. Venezuela	0.0	0.0	0.0	0.0	0.0
15. Cuba	0.0	0.0	0.0	0.0	0.0
16. Haiti	0.0	0.0	0.0	0.0	0.0
17. Guatemala	0.0	0.0	0.0	0.0	0.0
18. Honduras	0.0	0.0	0.0	0.0	0.0
19. Nicaragua	0.0	0.0	0.0	0.0	0.0
20. Belize	0.0	0.0	0.0	0.0	0.0
21. Paraguay	0.0	0.0	0.0	0.0	0.0
22. Bolivia	0.0	0.0	0.0	0.0	0.0
23. El Salvador	0.0	0.0	0.0	0.0	0.0
24. Cuba	0.0	0.0	0.0	0.0	0.0
25. Mexico	0.0	0.0	0.0	0.0	0.0
26. Argentina	0.0	0.0	0.0	0.0	0.0
27. Brazil	0.0	0.0	0.0	0.0	0.0
28. Chile	0.0	0.0	0.0	0.0	0.0
29. Peru	0.0	0.0	0.0	0.0	0.0
30. Colombia	0.0	0.0	0.0	0.0	0.0
31. Ecuador	0.0	0.0	0.0	0.0	0.0
32. Dominican Republic	0.0	0.0	0.0	0.0	0.0
33. Uruguay	0.0	0.0	0.0	0.0	0.0
34. Panama	0.0	0.0	0.0	0.0	0.0
35. Venezuela	0.0	0.0	0.0	0.0	0.0
36. Cuba	0.0	0.0	0.0	0.0	0.0
37. Haiti	0.0	0.0	0.0	0.0	0.0
38. Guatemala	0.0	0.0	0.0	0.0	0.0
39. Honduras	0.0	0.0	0.0	0.0	0.0
40. Nicaragua	0.0	0.0	0.0	0.0	0.0
41. Belize	0.0	0.0	0.0	0.0	0.0
42. Paraguay	0.0	0.0	0.0	0.0	0.0
43. Bolivia	0.0	0.0	0.0	0.0	0.0
44. El Salvador	0.0	0.0	0.0	0.0	0.0
45. Cuba	0.0	0.0	0.0	0.0	0.0
46. Haiti	0.0	0.0	0.0	0.0	0.0
47. Guatemala	0.0	0.0	0.0	0.0	0.0
48. Honduras	0.0	0.0	0.0	0.0	0.0
49. Nicaragua	0.0	0.0	0.0	0.0	0.0
50. Belize	0.0	0.0	0.0	0.0	0.0
51. Paraguay	0.0	0.0	0.0	0.0	0.0
52. Bolivia	0.0	0.0	0.0	0.0	0.0
53. El Salvador	0.0	0.0	0.0	0.0	0.0
54. Cuba	0.0	0.0	0.0	0.0	0.0
55. Haiti	0.0	0.0	0.0	0.0	0.0
56. Guatemala	0.0	0.0	0.0	0.0	0.0
57. Honduras	0.0	0.0	0.0	0.0	0.0
58. Nicaragua	0.0	0.0	0.0	0.0	0.0
59. Belize	0.0	0.0	0.0	0.0	0.0
60. Paraguay	0.0	0.0	0.0	0.0	0.0
61. Bolivia	0.0	0.0	0.0	0.0	0.0
62. El Salvador	0.0	0.0	0.0	0.0	0.0
63. Cuba	0.0	0.0	0.0	0.0	0.0
64. Haiti	0.0	0.0	0.0	0.0	0.0
65. Guatemala	0.0	0.0	0.0	0.0	0.0
66. Honduras	0.0	0.0	0.0	0.0	0.0
67. Nicaragua	0.0	0.0	0.0	0.0	0.0
68. Belize	0.0	0.0	0.0	0.0	0.0
69. Paraguay	0.0	0.0	0.0	0.0	0.0
70. Bolivia	0.0	0.0	0.0	0.0	0.0
71. El Salvador	0.0	0.0	0.0	0.0	0.0
72. Cuba	0.0	0.0	0.0	0.0	0.0
73. Haiti	0.0	0.0	0.0	0.0	0.0
74. Guatemala	0.0	0.0	0.0	0.0	0.0
75. Honduras	0.0	0.0	0.0	0.0	0.0
76. Nicaragua	0.0	0.0	0.0	0.0	0.0
77. Belize	0.0	0.0	0.0	0.0	0.0
78. Paraguay	0.0	0.0	0.0	0.0	0.0
79. Bolivia	0.0	0.0	0.0	0.0	0.0
80. El Salvador	0.0	0.0	0.0	0.0	0.0
81. Cuba	0.0	0.0	0.0	0.0	0.0
82. Haiti	0.0	0.0	0.0	0.0	0.0
83. Guatemala	0.0	0.0	0.0	0.0	0.0
84. Honduras	0.0	0.0	0.0	0.0	0.0
85. Nicaragua	0.0	0.0	0.0	0.0	0.0
86. Belize	0.0	0.0	0.0	0.0	0.0
87. Paraguay	0.0	0.0	0.0	0.0	0.0
88. Bolivia	0.0	0.0	0.0	0.0	0.0
89. El Salvador	0.0	0.0	0.0	0.0	0.0
90. Cuba	0.0	0.0	0.0	0.0	0.0
91. Haiti	0.0	0.0	0.0	0.0	0.0
92. Guatemala	0.0	0.0	0.0	0.0	0.0
93. Honduras	0.0	0.0	0.0	0.0	0.0
94. Nicaragua	0.0	0.0	0.0	0.0	0.0
95. Belize	0.0	0.0	0.0	0.0	0.0
96. Paraguay	0.0	0.0	0.0	0.0	0.0
97. Bolivia	0.0	0.0	0.0	0.0	0.0
98. El Salvador	0.0	0.0	0.0	0.0	0.0
99. Cuba	0.0	0.0	0.0	0.0	0.0
100. Haiti	0.0	0.0	0.0	0.0	0.0

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

TTCI 2019 Scores

The Americas TTCI 2019 Scores

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

Written analysis

The Americas Regional Analysis

Overview

The Americas region improved its T&T competitiveness performance since the last edition of the report in 2017 and remains more competitive than the global average – an encouraging development for the region. The Americas' T&T industry is more competitive than the global average, especially in terms of infrastructure, human resources, and safety and security. Higher taxes and higher inflation are the main challenges to the region's T&T industry. The region's T&T industry is more competitive than the global average, especially in terms of infrastructure, human resources, and safety and security. Higher taxes and higher inflation are the main challenges to the region's T&T industry. The region's T&T industry is more competitive than the global average, especially in terms of infrastructure, human resources, and safety and security. Higher taxes and higher inflation are the main challenges to the region's T&T industry.

Subregion Analysis

Through the North and Central America subregion is more competitive than the South America subregion. The region's T&T industry is more competitive than the global average, especially in terms of infrastructure, human resources, and safety and security. Higher taxes and higher inflation are the main challenges to the region's T&T industry.

Presents the following detailed insights:

- General overview of T&T competitiveness in the region.
- Subregional analysis, including overarching trends and a short discussion of each subregion's largest T&T economy (by T&T direct GDP), top and bottom TTCI scorers and most-improved T&T economy measured by percentage change in TTCI score since the 2017 index.
- Analysis of three countries/economies in the region: 1) top-scoring economy, 2) largest T&T economy (by T&T direct GDP) and 3) most-improved economy measured by percentage change in TTCI score since the 2017 index. Note that when an economy meets more than one of these criteria, selection for a third country comes from a subregion level (see The Americas region).

ISO-2 Code Lookup Table

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

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

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

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

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

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

