

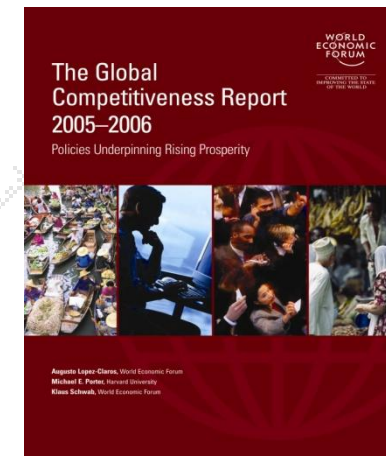
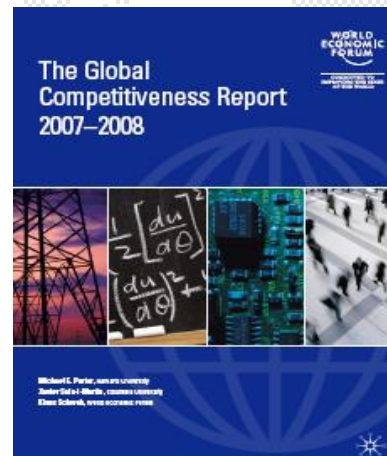
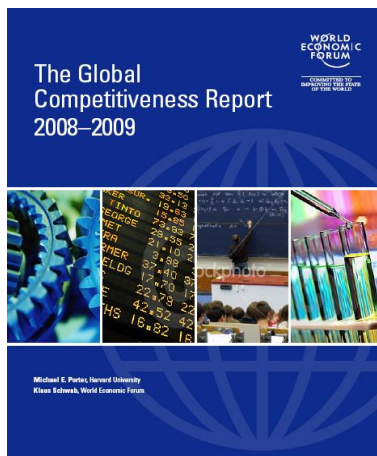
The Travel & Tourism Competitiveness Report 2009

Tourism & Creative Industries

Outline

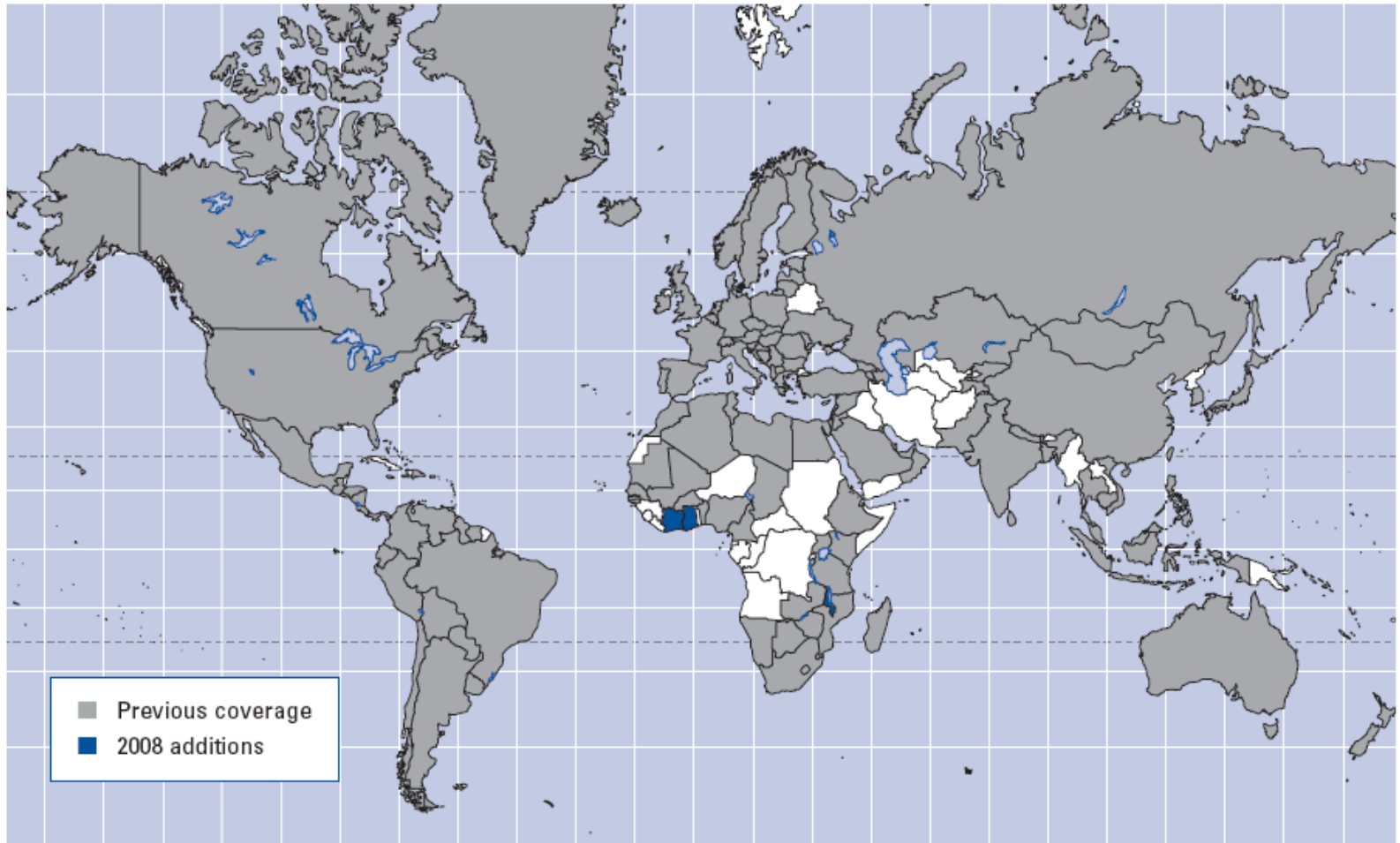
- The Global Competitiveness Network and the Travel & Tourism Competitiveness Report 2009
- The Travel & Tourism Competitiveness Index (TTCI)
- Culture and creative industries as a driver of national T&T competitiveness: the T&T performance of selected OECD countries, as assessed by the TTCI

Global Competitiveness Network



- ▶ Flagship product: Global Competitiveness Report
- ▶ Launched in 1979 covering **16 countries**
- ▶ The Report has since expanded its coverage to **134 countries**.
- ▶ 2008 marked our **29th anniversary of measuring competitiveness**

Global Competitiveness Network Geographical coverage



Global Competitiveness Network

Other regional and special topic reports recently released:

- Global Gender Gap Report 2008
- Arab World Competitiveness Report 2007
- Africa Competitiveness Report 2007
- Global Information Technology Report 2008-2009
- Global Enabling Trade Report 2008

The T&T Competitiveness Report

Motivations

- **Travel and tourism** is in many countries a **critical sector** impacting **national prosperity** and **economic growth**.
- A cross-country analysis of the drivers of T&T competitiveness provides **useful comparative information** for **making business decisions**
- The analysis provides an **opportunity** for the **T&T industry** to **highlight** to **national policymakers** the **obstacles** to **T&T competitiveness** for **policy attention**. It is a **platform for dialogue** between **industry and policymakers** to **address** the **obstacles** to **T&T competitiveness**

The T&T Competitiveness Report Partners

- The Report was developed in **collaboration** with a number of key partners:
 - **Data partners:**
UN-WTO, WTTC, IATA, IUCN, Booz Allen, and Deloitte.
 - **Industry partners**
Abercrombie & Kent, Airbus, Bombardier, British Airways, Carlson, Emirates, Etihad Airways, Herz, Jet Airways, Rolls Royce, Silversea, Swiss International Airlines, and Netjets.

The T&T Competitiveness Report Definition

The T&T Competitiveness Index measures:

**“The factors and policies
that make it attractive
to develop the T&T sector
in different countries.”**

The T&T Competitiveness Index

What data do we use?

A) Executive Opinion Survey :

- It records the perspectives of **business leaders** around the world; Survey data is indispensable, particularly for variables where no reliable hard data sources exist
- Respondents compare their own operating environments with global standards on a wide range of dimensions

B) Hard data available from international sources

(IATA, UNWTO, WTTC, IUCN, WB etc.)

The T&T Competitiveness Index

The framework

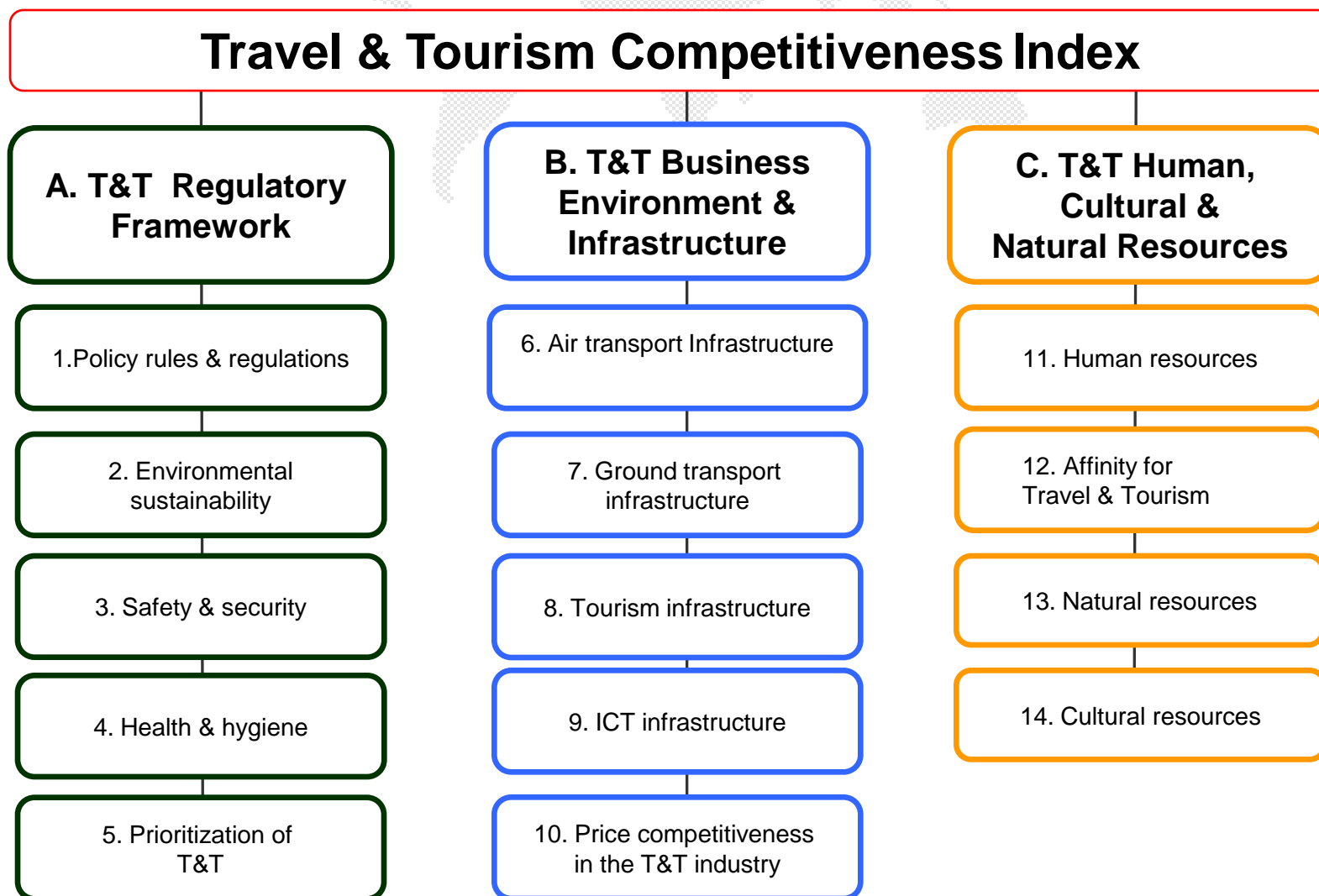
Travel & Tourism Competitiveness Index

**A. T&T Regulatory
Framework**

**B. T&T Business
Environment &
Infrastructure**

**C. Human, Cultural &
Natural Resources**

The T&T Competitiveness Index Structure



The T&T Competitiveness Index

T&T Regulatory framework

A. T&T Regulatory Framework

1. Policy rules and regulations

2. Environmental sustainability

3. Safety and Security

4. Health and Hygiene

5. Prioritization of T&T

- Examples of variables
 - Foreign ownership restrictions
 - Openness of air service agreements
 - Visitor visa requirements
 - Sustainable development of the T&T industry
 - Costs of crime and violence
 - Access to improved sanitation
 - Effectiveness of marketing and branding to attract inbound tourists
 - Prioritization by government of the T&T industry

The T&T Competitiveness Index

The T&T business environment and infrastructure

B. T&T Business Environment and Infrastructure

6. Air transport infrastructure

7. Ground transport infrastructure

8. Tourism infrastructure

9. ICT infrastructure

10. Price Competitiveness

- Examples of variables
 - Quality of air transport infrastructure
 - Quality of airline connections to overseas markets
 - Quality of roads, railroads, ports, etc.
 - Hotel concentration
 - Presence of major car rental companies in a country
 - Internet use for business transactions in country
 - Airport taxes and ticket charges
 - Hotel price index

The T&T Competitiveness Index

The T&T human, cultural and natural resources

C. T&T Human, Cultural & Natural Resources

11. Human resources

12. Affinity for T&T

13. Natural resources

14. Cultural resources

Examples of variables

- Educational attainment rates, Extent of staff training
- Attitude towards tourists, Extension of business trips
- Nationally protected land areas. Quality of the natural environment. Total known species
- Number of World Heritage sites, Number of international fairs and exhibitions. **CREATIVE INDUSTRIES EXPORT(selected UNCTAD data)**

The T&T Competitiveness Index

Rankings of the 2009 Index – Top 20 vs Creative Industries export ranking

Country/Economy	2009		2008
	Rank/133	Score	Rank/130
Switzerland	1	5.68	1
Austria	2	5.46	2
Germany	3	5.41	3
France	4	5.34	10
Canada	5	5.32	9
Spain	6	5.29	5
Sweden	7	5.28	8
United States	8	5.28	7
Australia	9	5.24	4
Singapore	10	5.24	16
United Kingdom	11	5.22	6
Hong Kong SAR	12	5.18	14
Netherlands	13	5.09	18
Denmark	14	5.08	13
Finland	15	5.07	12
Iceland	16	5.07	11
Portugal	17	5.01	15
Ireland	18	4.99	21
Norway	19	4.97	17
New Zealand	20	4.94	19

Creative Industries Export Ranking

1. China
2. Italy
3. USA
4. Hong Kong SAR
5. **Germany**
6. United Kingdom
7. **France**
8. Canada
9. **Switzerland**
10. India
11. Spain
12. Belgium
13. Netherlands
14. **Austria**
15. Thailand
16. Japan
17. Mexico
18. Sweden
19. Singapore
20. Korea, Rep

The T&T Competitiveness Index

Creative Industries are a driver of Competitiveness

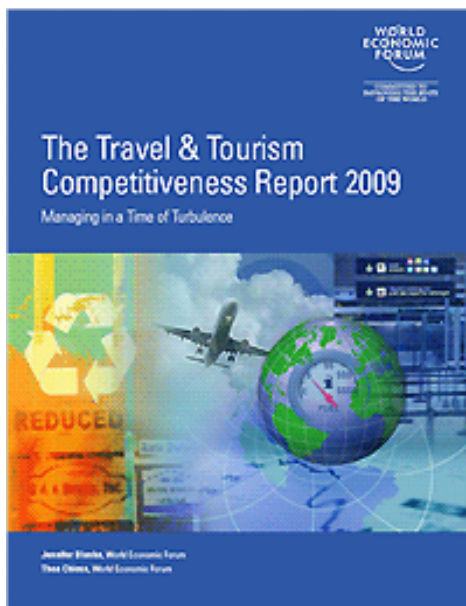
- Top 4 countries overall ranking, rank in the 20 rankings for creative industries export demonstrates that:
 - Cultural is important driver of destination attractiveness
 - Cultural exports drive “awareness” of a destination for potential tourism --- knowing a country before deciding to go there
- As a result, it is important for destinations to ensure:
 - Protect and manage cultural assets
 - Export national cultural assets through participation in exhibitions, fairs and cultural events
- Many travellers pick destinations for their cultural offering therefore the implementation of innovative strategies which tap into a nations cultural resources will ensure that destinations are able to enhance their competitiveness

Creative Industries Export Ranking

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The Travel and Tourism Competitiveness Report 2009

How to obtain more information



Visit our website for further information and to download most sections of the Report:

www.weforum.org