In collaboration with
Zurich Insurance Group

WORLD ECONOMIC FORUM

Travel & Tourism Development Index 2026

INSIGHT REPORT

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Foreword



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Recent geopolitical conflict, heatwaves and wildfires around the world are stark reminders of how exposed travel and tourism (T&T) remains to forces beyond the sector's control. Disruptions in the Middle East and North Africa (MENA) region closed a critical aviation corridor linking Europe, Asia, Australia and Africa, disrupting schedules, capacity, fares and traveller confidence, while climate-driven disruption across Europe and North America exposed mounting operational strain.

But disruption is only part of the story. Travel activity and visitor spending have reached record highs, with an estimated 1.52 billion international tourists travelling globally in 2025, according to data from the UN Tourism World Tourism Barometer.[1] In 2025, travel and tourism's total contribution to the global economy reached $11.6 trillion, while domestic visitor spending reached $5.63 trillion and international visitor spending totalled $2.02 trillion.[2] The travel and tourism sector also supported a record 366 million jobs worldwide in 2025, representing about one in every nine jobs globally.[3]

Travel and tourism's value extends well beyond visitor spending. It supports jobs and local businesses, connects people and places, and helps communities share their culture, heritage and identity with the world. But sustaining this contribution depends on ensuring that growth translates into broader socioeconomic benefits for the places that host T&T – through quality employment, stronger local supply chains, higher public revenue and investment that improves local infrastructure and services.

As visitor numbers rise, that task is becoming more difficult. Pressure on infrastructure, housing, natural assets and public services is increasing, while accommodation, transport and operating costs are eroding affordability. At the same time, investment in infrastructure has not kept pace. Without stronger investment and destination management, there is a risk that tourism growth will place greater strain on the very communities and assets on which its long-term success depends.

Growth is no longer the challenge. Managing it – without weakening the systems, communities and assets on which long-term tourism success depends – is the opportunity.

The *Travel & Tourism Development Index* (TTDI) 2026 highlights this shift from rebuilding to managing growth. Increasingly, the destinations performing best are those able to convert visitor activity into lasting value. Japan's rise to the top of this year's rankings reflects more than visitor appeal. It demonstrates how strong foundations and effective destination management can turn travel and tourism activity into long-term advantage.

The choices made by governments, industry and investors will determine whether the next phase of tourism growth is better balanced and better managed than the last. Five priorities stand out: diversifying to reduce concentration risk; protecting access, visibility and operational continuity; competing on value rather than price alone; managing growth to maintain social licence; and strengthening the workforce and delivery systems that allow tourism to function.

This edition of the TTDI reflects a collective effort. We are grateful to the members of the Beyond Tourism Insights Council, whose expertise helped shape the 2026 framework and findings: American Express Global Business Travel, the Asian Development Bank, Bloom Consulting, Cinnamon Hotels, Destinations International, the European Travel Commission, the Global Sustainable Tourism Council, Hong Kong Polytechnic University, the International Air Transport Association, the Inter-American Development Bank Group, the JLL Global Tourism and Destination Development Group, Kearney, Mastercard, Microsoft, MMGY TCI Research, New York University, the Pacific Asia Travel Association, Sommet Education, Technogym, Trip.com Group, UN Tourism, the University of Surrey, Visa, the World Bank Group, the World Travel & Tourism Council and Zurich Cover-More.

The TTDI helps public- and private-sector decision-makers to understand what underpins sustainable and resilient tourism development, identify strengths and gaps, and benchmark progress over time. We hope this report supports a more informed debate about the future of the sector and the choices needed to ensure that tourism continues to create benefits for people, businesses and communities.

Executive summary

The growth outlook for the T&T sector is strong. There is opportunity and risk in managing this growth while strengthening the systems, communities and assets on which long-term tourism success depends.

The *Travel & Tourism Development Index* (TTDI) 2026 points to a sector that has largely moved beyond recovery, with a record 1.5 billion international tourist arrivals in 2025. Tourism assets, connectivity and visitor capacity continue to strengthen across much of the world. But the conditions for success are changing. Affordability pressures, investment gaps, workforce constraints and sustainability challenges are increasingly shaping the sector's future.

Tourism development conditions are at their strongest since the pandemic: Between 2024 and 2026, 92% of the 110 ranked economies improved their TTDI score, and average scores rose by 2.1%, the fastest pace of improvement since 2019. The strongest gains were in cultural attractions, tourism infrastructure and services, and air connectivity, reflecting stronger assets and systems that underpin tourism growth.

Advanced economies continue to set the pace: Japan leads the TTDI rankings, while advanced economies account for nine of the top 10 positions, with China the sole exception. European economies hold six places in the top 10, underlining Europe and Eurasia's position as the highest-performing region overall. The top 10 are Japan, the United States, Spain, Australia, France, Germany, the United Kingdom, China, Switzerland and Italy.

Asia-Pacific and emerging tourism economies are gaining ground: The largest emerging tourism economies have improved their TTDI scores more than twice as fast as the top 20 since 2019, benefiting from competitive prices, rich natural assets and more sustainable tourism patterns. Asia-Pacific is driving much of this momentum, accounting for seven of the 10 fastest-improving performers, while Albania was the most improved economy overall between 2024 and 2026.

Affordability is one of tourism's biggest constraints, while investment and workforce gaps persist: Travel and tourism-related prices have risen faster than inflation in many economies, contributing to a decline in price competitiveness in three-quarters of TTDI-ranked economies between 2024 and 2026. Despite improvement, tourism investment has lagged behind activity since 2022, while workforce shortages and skills gaps risk constraining service quality and adaptation to digital and AI-driven change.

Tourism growth is not automatically translating into broader benefits: While travel activity and visitor spending continue to grow, the economic and social value generated by tourism weakened between 2024 and 2026, with pressures linked to crowding and visitor concentration remaining above pre-pandemic levels. As a result, managing growth is equally as important as generating it, requiring destinations to share tourism's benefits more widely while limiting pressure on communities, infrastructure and natural assets.

Resilience is becoming a competitive advantage: Climate, economic and geopolitical risks are increasing the importance of resilience. Recent events, including disruptions to international aviation networks following the escalation of the conflict in the Middle East and the heatwaves and wildfires in Europe and North America, illustrate how quickly tourism systems can come under pressure. What singles out successful destinations is not only the strength of their tourism assets, but their ability to adapt and continue functioning during times of uncertainty.

1

About the Travel & Tourism Development Index 2026

The TTDI 2026 helps governments, businesses and destination leaders understand what drives tourism success, identify opportunities for improvement and benchmark performance against peers.

↓ Albania was the most improved economy overall between 2024 and 2026.



The *Travel & Tourism Development Index* (TTDI) builds on nearly two decades of the World Economic Forum's work on travel and tourism (T&T) benchmarking. It has evolved from the *Travel & Tourism Competitiveness Index* (TTCI), published biennially from 2007 to 2019. Relaunched in 2022 in its current form, it reflects a broader focus on sustainable and resilient development, beyond competitiveness alone.

The TTDI measures the factors and policies that enable the sustainable and resilient development of the T&T sector, which in turn contributes to economic and social development. It does not measure tourism performance – such as arrivals, spending or revenue – directly, but the conditions that determine how well a destination can attract, support and sustain T&T in ways that generate benefits for economies and societies. By enabling cross-country comparison and tracking these conditions across successive editions, the index informs policy, investment and operational decisions, identifies strengths and gaps, and supports dialogue among governments, industry, communities and international partners.

The 2026 edition was produced in collaboration with Zurich Insurance Group, drawing on Zurich's role as one of the world's largest travel insurers and a leading provider of protection and resilience advice to the sector.

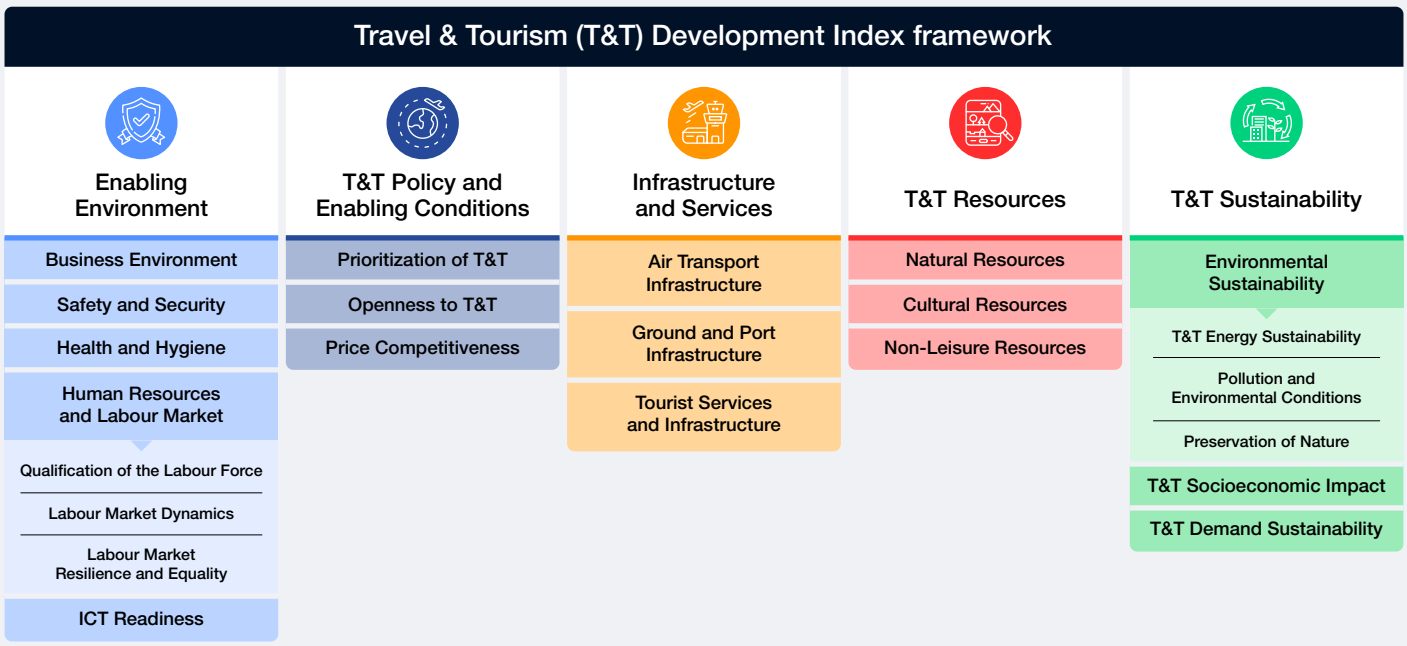
The index is also informed by the Beyond Tourism Insights Council, whose members include American Express Global Business Travel, the Asian Development Bank, Bloom Consulting, Cinnamon Hotels, Destinations International, the European Travel Commission, the Global Sustainable Tourism Council, Hong Kong Polytechnic University, the International Air Transport Association, the Inter-American Development Bank Group, the JLL Global Tourism and Destination Development Group, Kearney, Mastercard, Microsoft, MMGY TCI Research, New York University, the Pacific Asia Travel Association, Sommet Education, Technogym, Trip.com Group, UN Tourism, the University of Surrey, Visa, the World Bank Group, the World Travel & Tourism Council and Zurich Cover-More.

Additional information on methodology, country and income group classifications, indicator definitions and interactive data visualizations is available on the index website and in the Technical notes and methodology section of this report.

1.1 Index overview

The TTDI framework is organized around five dimensions, 17 pillars and 102 individual indicators. The five dimensions provide a high-level structure for organizing and presenting the index but are not used in calculating the overall scores.

FIGURE 1 **TTDI framework**



Source: World Economic Forum



The **Enabling Environment dimension** captures the general conditions necessary for operating and investing in a country and consists of five pillars:

- **Business Environment:** This pillar captures the extent to which a country's policy environment is conducive to companies doing business and investing.
- **Safety and Security:** This pillar measures the extent to which a country exposes locals, tourists and businesses to security risks.
- **Health and Hygiene:** This pillar measures healthcare infrastructure and accessibility and health security.
- **Human Resources and Labour Market:** This pillar measures the availability of quality employees and the dynamism, resilience and equality of the labour market, as well as the level of protection for workers. It consists of three subpillars: Qualification of the Labour Force, Labour Market Dynamics and Labour Market Resilience and Equality.
- **ICT Readiness:** This pillar measures the availability and use of information and communication technology (ICT) infrastructure and digital services.



The **T&T Policy and Enabling Conditions dimension** captures specific policies or strategic aspects that affect the T&T sector more directly and consists of three pillars:

- **Prioritization of T&T:** This pillar measures the extent to which the government actively promotes, tracks and invests in the development of the T&T sector.
- **Openness to T&T:** This pillar measures how open a country is to visitors and facilitating cross-border travel.
- **Price Competitiveness:** This pillar measures how costly it is to visit, travel within and operate in a country.



The **Infrastructure and Services dimension** captures the availability and quality of physical infrastructure and tourism services and consists of three pillars:

- **Air Transport Infrastructure:** This pillar measures the extent to which a country's infrastructure offers sufficient air connectivity and access for travellers domestically and internationally.
- **Ground and Port Infrastructure:** This pillar measures the availability of efficient and accessible ground and port transportation services and infrastructure.
- **Tourist Services and Infrastructure:** This pillar measures investment in, and the availability and productivity of, tourist services and infrastructure.



The **T&T Resources dimension** captures the principal "reasons to travel" to a destination and consists of three pillars:

- **Natural Resources:** This pillar measures the available natural capital as well as the development of outdoor tourism activities. Natural capital is defined in terms of landscape, natural parks and the richness of the fauna. To an extent, this pillar captures how natural resources are promoted rather than the actual existing natural heritage of a country.
- **Cultural Resources:** This pillar measures the availability of cultural resources such as archaeological sites and entertainment facilities. To an extent, this pillar captures how cultural resources are promoted and developed rather than the actual existing cultural heritage of a country.
- **Non-Leisure Resources:** This pillar measures the extent and attractiveness of factors that drive business and other non-leisure travel, including the presence of global cities, major corporations and leading universities.



The **T&T Sustainability dimension** captures the current or potential sustainability challenges and risks facing T&T and consists of three pillars:

- **Environmental Sustainability:** This pillar measures the T&T sector's energy sustainability and the general sustainability of an economy's natural environment and the protection of natural resources. It consists of three subpillars: T&T Energy Sustainability, Pollution and Environmental Conditions, and Preservation of Nature.
- **T&T Socioeconomic Impact:** This pillar measures the economic and social impact of T&T, including induced economic contribution, the provision of high-wage jobs and workforce gender equality.
- **T&T Demand Sustainability:** This pillar measures factors that may indicate the existence of, or risks related to, excess demand for tourism or inadequate demand, demand volatility and other potentially unsustainable demand trends.

Pillar definitions and the full list of indicators are set out in the Technical notes and methodology section of this report.

1.2 Data and methodology

Most TTDI indicators are quantitative measures sourced from international organizations, public datasets and private-sector data providers. The remainder come from the World Economic Forum's annual Executive Opinion Survey, used where comparable statistical data is limited.

Data sources include AirDNA, Arton Capital, Bloom Consulting, the CIA World Factbook, CoStar, Euromonitor International, GlobalPetrolPrices.com, the International Air Transport Association, the International Civil Aviation Organization, the International Labour Organization, the International Telecommunication Union, the International Union for Conservation of Nature, MMGY TCI Research, Tripadvisor, the United Nations Educational, Scientific and Cultural Organization (UNESCO), the UN Statistics Division, UN Tourism, the World Bank, the World Database on Protected Areas, the World Health Organization, the World Trade Organization and the World Travel & Tourism Council.

Overall TTDI scores are calculated through successive aggregations, beginning at the indicator level and progressing through pillars using a simple arithmetic mean. Indicator values are normalized to a common scale of 1 (worst outcome) to 7 (best outcome), ensuring consistency across data sources. Where data is missing, established imputation methods are used; full details are set out in the Technical Notes and Methodology section of this report.

Data revisions, changes in economy coverage, and minor indicator adjustments limit comparability with previous editions of the TTDI. The 2026 edition includes recalculated figures for 2019, 2021 and 2024, using new adjustments, reflecting the latest available data at the time of collection (May 2026).

1.3 Economy coverage

The TTDI covers 110 economies. Economies included in 2024 but not covered in the 2026 edition are Barbados, Cambodia, Iran, Lebanon, Moldova, Montenegro, Tajikistan, Trinidad and Tobago, and Venezuela. No new economies were added in the 2026 edition. Criteria for economy inclusion and exclusion are set out in the Technical notes and methodology section of this report.

1.4 How to read this report

To properly interpret the TTDI findings please keep the following in mind:

- The index measures the factors and policies that enable sustainable and resilient development of the T&T sector. It does not measure tourism performance – such as arrivals, spending or revenue – directly.
- As noted above, data revisions, changes in economy coverage and minor indicator adjustments significantly reduce comparability with previously published TTDI editions. Users should compare historical results only using the recalculated figures published with this edition of the index.
- Unless otherwise stated, references to regional, pillar and overall TTDI scores reflect the mean value for that grouping.
- The TTDI results reflect the latest available data at the time of collection (May 2026). For some indicators, the latest available figures may be several years old and vary between economies. As a result, more recent policy changes and economic, social or environmental developments may not always be reflected in the results.
- While global rankings provide a useful basis for comparing economies, they should be interpreted alongside the regional context, strategic priorities and national circumstances. Two economies may have similar scores and rankings but differ significantly in areas such as the business environment, price competitiveness, infrastructure, natural and cultural resources, and sustainability. The importance of these factors will vary depending on regional competitors and national goals for T&T.

2

Global context

Global travel demand has remained remarkably resilient despite higher costs and a more volatile geopolitical and economic environment.

↓ International tourist arrivals reached a record 1.5 billion in 2025.



FIGURE 2 | **Global tourism reaches new highs**

International tourist arrivals

2025

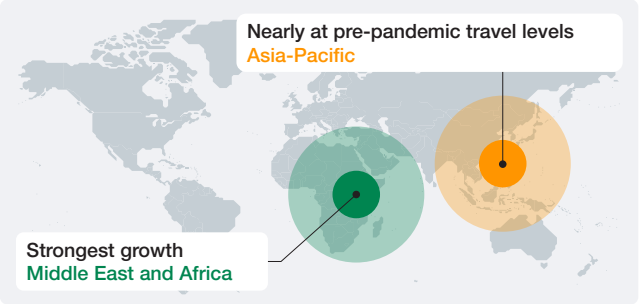
1.5 billion

2024

▲+5%

2019

▲+4.4%



Total economic contribution of travel and tourism
(including direct, indirect and induced effects)

2025

$11.6 trillion

2024

▲+4.1%

2019

▲+8.7%

Worldwide jobs supported (2025)

366 million



One in every nine jobs globally

Sources: UN Tourism and World Travel & Tourism Council (WTTC)

The resilience of international arrivals and traveller spending during 2025 is notable given inflation and geopolitical uncertainty.

International tourist arrivals reached a record 1.5 billion in 2025, up 5% on 2024 and 4.4% above 2019 levels. Growth was strongest in the Middle East and Africa, while Asia-Pacific continued to close the gap with pre-pandemic travel levels.[4]

The total economic contribution of travel and tourism (T&T), including direct, indirect and induced effects, reached a record $11.6 trillion in 2025, up 4.1% on 2024 and 8.7% compared with 2019. This was equivalent to nearly 10% of global GDP. This output has supported 366 million jobs worldwide, representing around one in every nine jobs globally.[5]

Sector economic growth was supported by growing leisure and business travel spending. Accounting for more than 80% of traveller spending, leisure spending increased by 3.5% to $6.1 trillion in 2025. Supported by the return of in-person meetings, conferences and events, business travel spending climbed 4%, reaching $1.5 trillion worldwide over this period.[6]

Domestic travel remained the largest source of demand in 2025, accounting for 73.6% of total traveller spending and valued at $5.6 trillion, up 3.7% on 2024. This was slightly faster than growth in international visitor spending, which increased by 3.2% to $2 trillion.[7] In many economies, this domestic base has helped sustain tourism businesses and infrastructure, providing a buffer against volatility in international demand.

The resilience of international arrivals and traveller spending during 2025 is notable given inflation in tourism services and a backdrop of economic and geopolitical uncertainty.[8]

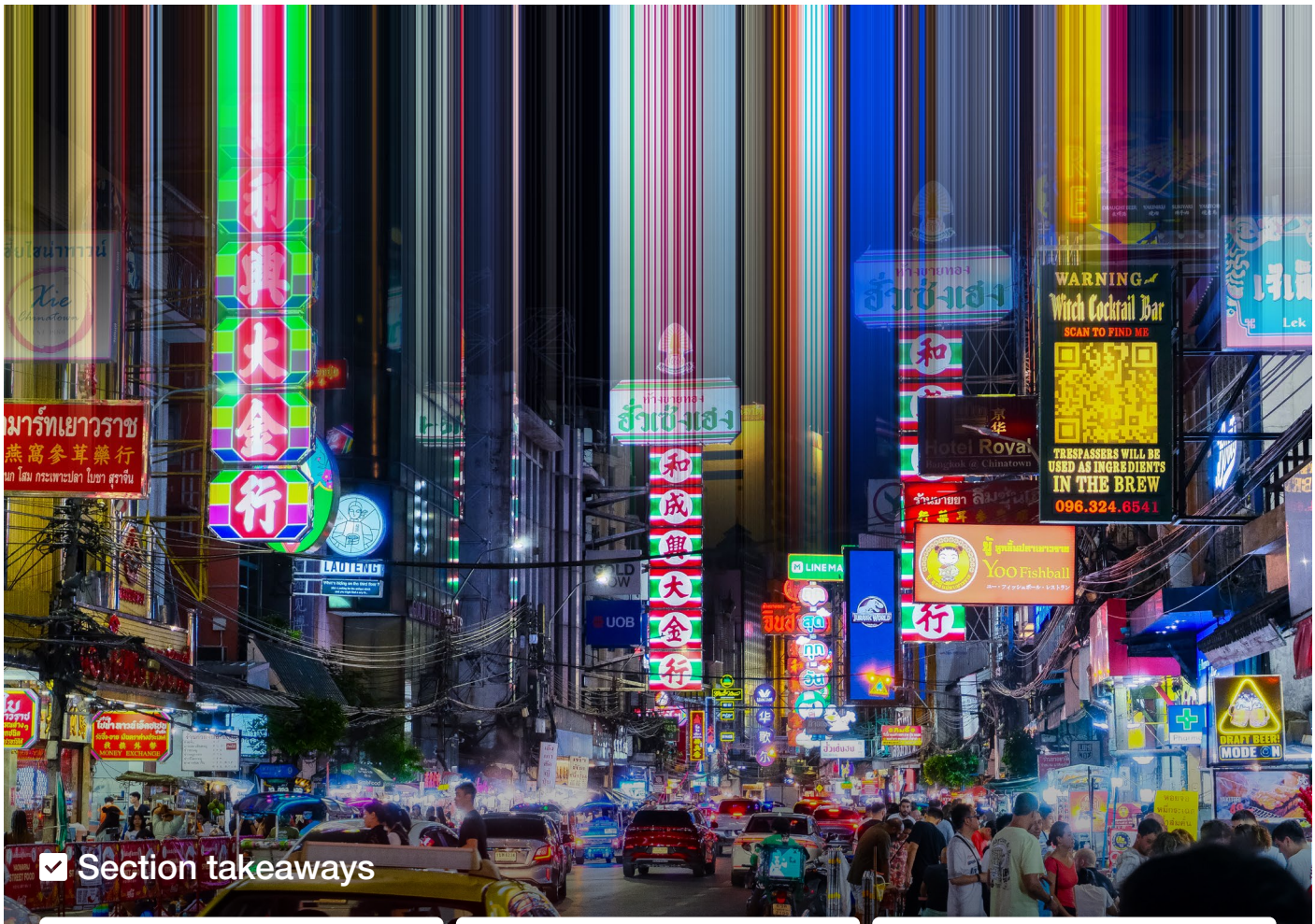
These pressures intensified from late February 2026, when the conflict in the Middle East escalated, affecting global travel networks. Airspace closures, security concerns and restrictions across parts of the Middle East disrupted a critical aviation corridor linking Europe, Asia, Australia and Africa, with knock-on effects on flight times, fuel costs, airfares, schedules and traveller confidence. In April 2026, traffic (revenue passenger kilometres) carried by Middle Eastern carriers contracted by 46.6% year on year, dragging global air traffic down by 3.4% – the first contraction since the post-pandemic recovery.[9]

The Middle East conflict illustrates how quickly geopolitical disruptions can affect T&T through interconnected transport networks. Localized shocks can have wider operational and commercial consequences, particularly when they affect major aviation corridors. Climate-related disruptions have also become increasingly visible. During the summer of 2026, severe heatwaves and wildfires affected parts of southern Europe, including Spain and France.[10] Despite these disruptions, travel demand continued to recover. International tourist arrivals increased by 2% in the first quarter of 2026, with growth in every region except the Middle East. This underlines the sector's underlying resilience.[11]

3 Global performance trends

The foundations of T&T growth are stronger than ever, yet rising costs, economic and geopolitical uncertainty, and mounting sustainability pressures threaten future progress.

↓ South-East Asia recorded the world's strongest gains in cultural resources (+26.5%) since 2024.



Section takeaways

Global travel and tourism development conditions are at their strongest since the pandemic: Between 2024 and 2026, 14 of 17 pillars improved and average TTDI scores rose by 2%, the fastest pace of improvement since 2019. Strong gains in cultural attractions, tourism infrastructure and services, and air connectivity reinforced the foundations that support tourism growth.

Destinations are becoming easier to access and more digitally enabled: ICT Readiness was one of the most improved pillars, with 91% of economies recording higher scores. Greater travel openness is expanding opportunities for travellers, while AI is reshaping how destinations compete, raising the importance of digital infrastructure, workforce skills and data capabilities.

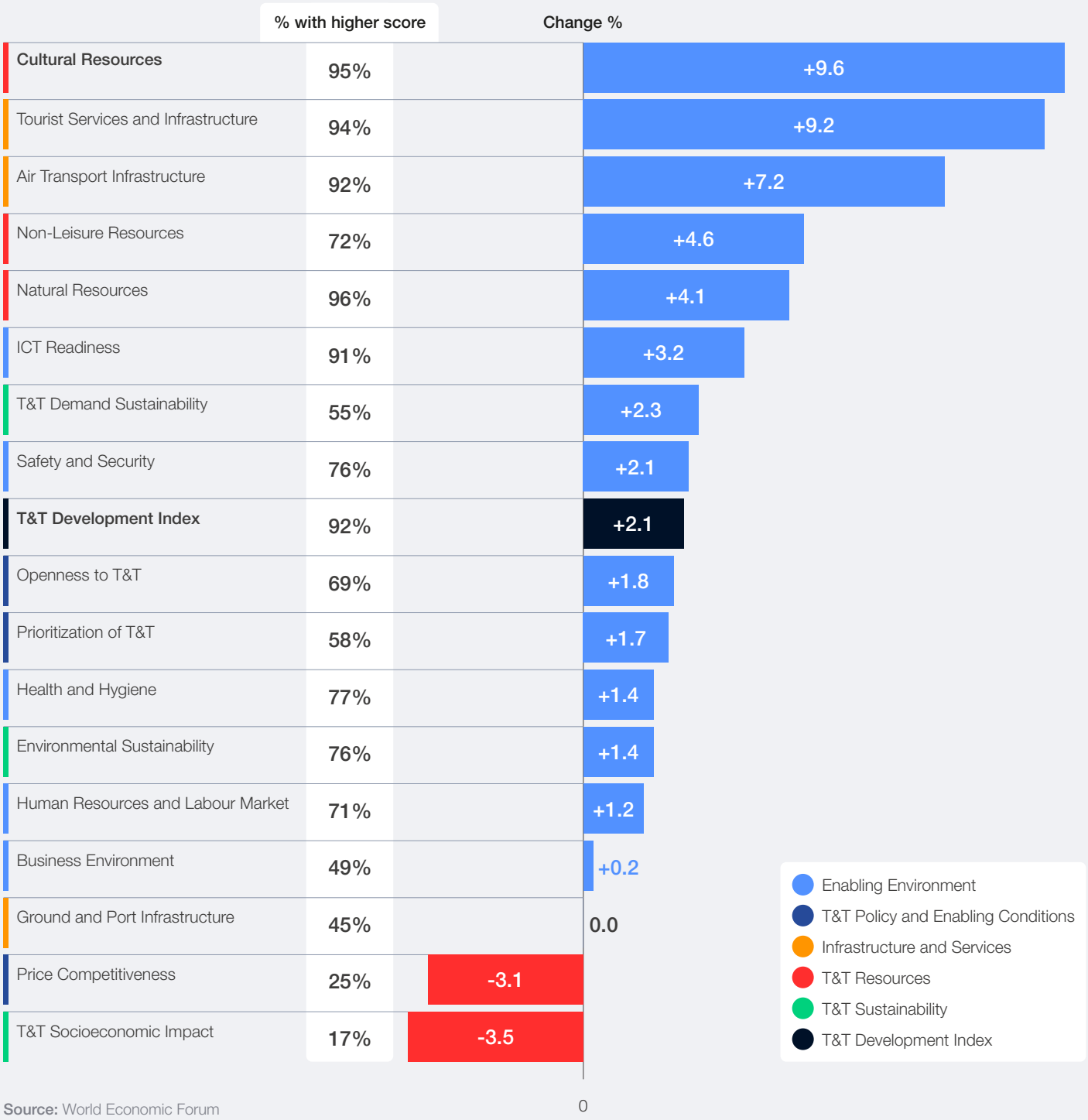
Affordability pressures are intensifying as investment and workforce gaps persist: Price Competitiveness declined in three-quarters of TTDI-ranked economies between 2024 and 2026 as travel costs outpaced inflation. In the meantime, despite improvement, tourism investment has lagged behind demand since 2022, while workforce shortages and skills gaps risk limiting service quality and the sector's ability to grow and adapt.

The TTDI measures the factors and policies that enable the sustainable and resilient development of the sector rather than tourism outcomes such as visitor volumes or traveller spending. The 2026 results point to broad-based strengthening of enabling conditions for T&T growth. Between the 2024 and 2026 editions, 92% of ranked economies improved their overall TTDI score, compared with around 54% between 2021 and 2024, while average performance increased by around 2.1%, up from 0.2% in the previous reporting cycle. These results represent the strongest improvement since the pandemic, indicating that T&T development conditions are strengthening across much of the world.

Despite global economic and geopolitical concerns, the past two years have seen rising demand and the development of cultural, natural and non-leisure resources, greater air capacity and connectivity, and continued expansion in tourism infrastructure. Some of the strongest gains were recorded in Asia-Pacific as the region continued to recover from its delayed post-pandemic reopening.

Nonetheless, the results also point to mounting pressure from rising prices, economic and investment uncertainty, and sustainability challenges, creating headwinds for the continued development of the T&T sector.

FIGURE 3 **Change in TTDI pillar scores (%), 2024–2026**



Source: World Economic Forum

3.1 Travel and tourism development conditions are strengthening

Cultural Resources was the most improved pillar in the TTDI, with over 95% of economies recording higher scores.

Travel opportunities and attractions are expanding

Among the strongest and most widespread improvements were those seen in the Cultural, Natural and Non-Leisure Resources pillars (see Figure 3), indicating continued development and expansion of attractions and travel opportunities across leisure, business, educational and institutional travel.

Cultural Resources was the most improved pillar in the TTDI. Average scores increased by 9.6% between the 2024 and 2026 index editions, with over 95% of economies recording higher scores. The largest gains were recorded in South-East Asia (+26.5%), North Africa (+18.0%) and the Balkans and Eastern Europe (+12.8%).

This partly reflects a global effort to safeguard cultural heritage. UNESCO's World Heritage List contains some of the world's most internationally recognized tourism assets, with the number of cultural sites increasing from 869 in 2019 to 991 in 2026.[12] However, the fastest growth has occurred in UNESCO's Intangible Cultural Heritage register, which expanded from 549 recognized elements in 2019 to 849 in 2026 across 157 countries.[13] The register recognizes living traditions such as festivals, performing arts, craftsmanship and food culture, rather than physical places.

The rise in cultural resources is occurring alongside growing interest in experience-based travel. Online demand for cultural and entertainment attractions, measured through a TTDI indicator that tracks search activity related to gastronomy, heritage sites, museums, festivals, local traditions and performing arts, increased by around 15% between 2024 and 2026. For instance, more than half of travellers now prioritize food when planning trips, which helped grow the global gastronomy tourism market to $16.1 billion in 2025, up from $8.5 billion in 2021.[14]

Natural Resources also strengthened significantly between the 2024 and 2026 TTDI editions, increasing by 4.1%, with 96% of economies improving their scores – the broadest improvement of any pillar. The largest subregional increases were recorded in South-East Asia (+9.1%), the Balkans and Eastern Europe (+5.6%) and South Asia (+5.1%). This trend is also occurring alongside growing interest in outdoor recreation, wellness tourism and nature-based travel, creating opportunities for destinations to diversify beyond traditional cultural and urban attractions and expand tourism into more rural areas. For example, global wellness tourism expenditure reached an estimated $894 billion in 2024,[15] reflecting growing demand for travel experiences linked to health, well-being and nature.

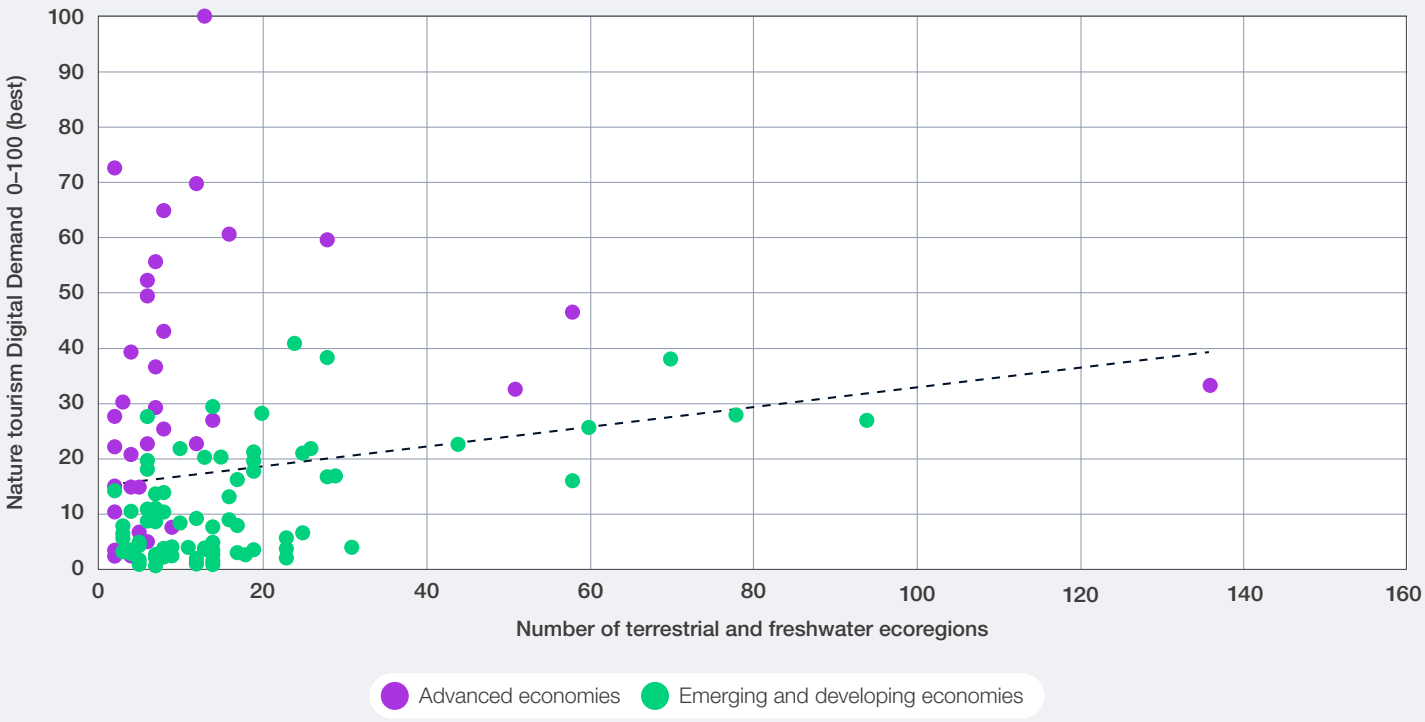
These trends create a strong opportunity for emerging and developing economies. Unlike major cultural monuments and iconic attractions, many living traditions can be developed into visitor experiences without the same level of capital-intensive infrastructure. At the same time, natural assets, from forests and coastlines to wildlife and protected areas, represent some of the sector's strongest comparative advantages.[16] Among the 30 highest-scoring economies for natural resources, 18 are emerging or developing economies, mostly located in Latin America and Asia-Pacific.

However, the possession of natural and cultural assets alone does not guarantee visitor interest. Figure 4 shows that Digital Demand for nature tourism does not always reflect a country's natural-resource endowment. Many advanced economies dominate nature-related searches despite having fewer ecoregions (a proxy for nature diversity) than many emerging and developing economies. Converting natural and cultural assets into tourism value requires effective promotion, strong connectivity, visitor services, infrastructure and digital readiness.

↓ The global gastronomy tourism market rose from $8.5 billion in 2021 to $16.1 billion in 2025.



FIGURE 4 | **Nature tourism Digital Demand vs. number of terrestrial and freshwater ecoregions**



Source: Bloom Consulting, D2 Digital Demand, One Earth, Freshwater Ecoregions of the World (FEOW)

Despite recent disruptions, progress in Air Transport Infrastructure has been underpinned by greater air route capacity and improved connectivity since 2024.

Non-Leisure Resources recorded a more moderate improvement (+4.6%) but remain an important part of the overall picture, with 72% of economies improving their score. The pillar captures factors that support business, conference, educational and institutional travel, including the presence of major cities, global firms, universities and research institutions.

The results coincide with a continued recovery in business travel. According to the World Travel & Tourism Council (WTTC), global T&T business spending is estimated to have reached $1.5 trillion in 2025, 4% higher than in 2024.[17]

Recent industry forecasts suggest that business travel demand remains resilient despite higher costs and geopolitical uncertainty, supported by continued spending on meetings, events, client engagement and other travel linked to commercial activity.[18] This continued demand helps support airlines, accommodation providers and urban visitor economies in many destinations.

Taken together, these findings indicate that destinations are broadening the reasons people travel. Cultural and natural assets remain at the heart of tourism development, while the recovery of business, educational and institutional travel is strengthening other sources of demand. The strongest improvements are occurring not simply because destinations possess resources, but because they are investing more effort in protecting, promoting and connecting those resources to potential visitors.

Capacity and connectivity are improving

Another major source of improvement in the TTDI is the infrastructure that allows people to reach destinations and supports their stay once they arrive. The Tourist Services and Infrastructure and Air Transport Infrastructure pillars recorded the second- and third-largest gains of any pillar between 2024 and 2026, increasing by 9.2% and 7.2% respectively. Progress was also broadly shared, with over 90% of economies improving their scores on both pillars.

Tourist Services and Infrastructure scores were bolstered by increases in accommodation supply, sector labour productivity and investment. About 70% of economies covered by the index recorded higher T&T capital investment intensity scores (investment per employee) than in the previous TTDI edition, while global sector capital investment is estimated to have increased by 8.5% in 2025, reaching $1.1 trillion.[19]

Meanwhile, despite recent disruptions, progress in Air Transport Infrastructure has been underpinned by greater air route capacity and improved connectivity since 2024. This is reflected in strong growth in available domestic and international seat kilometres (+18.7%), which measures an airline's passenger-carrying capacity, and the airport connectivity score (+8.5%), which uses the IATA Air Connectivity Index[20] to measure how well an economy is integrated into the global air transport



↑ ICT Readiness rose by 3.2% globally between 2024 and 2026, with 91% of economies improving.

network. The biggest subregional increases were in South-East Asia (up 14.7%) and Eastern Asia-Pacific (up 13.2%), as these regions fully recovered from pandemic-era travel restrictions.

While recent gains in capacity and investment have increased the supply and capacity of T&T, it does not mean capacity constraints have disappeared. As discussed later in this section, investment in tourism-related infrastructure continues to face pressure from higher financing costs, fiscal constraints and wider economic uncertainty. Nevertheless, the latest TTDI results suggest that many destinations are making progress in expanding the infrastructure and connectivity that underpin the sector's growth.

ICT Readiness is increasing opportunities, but digital and human capital gaps remain

ICT Readiness was one of the most improved areas between 2024 and 2026. The ICT Readiness pillar increased by 3.2%, with 91% of economies recording higher scores. Emerging and developing countries continue to close their ICT Readiness gap, increasing by 4.9% vs. 1.6% for advanced economies.

The pillar measures the foundations of a connected economy, including internet usage, broadband subscriptions, mobile network coverage, digital payments, the use of online platforms and the reliability of electricity supply. These factors shape how travellers discover destinations, book trips, pay for services and share experiences.

As highlighted in previous TTDI editions,[21] digitalization shapes every stage of the travel journey, from trip planning and booking to payments and post-trip engagement. Improving ICT Readiness can help tourism businesses reach customers more effectively, while digital payments and online platforms can reduce barriers for travellers and smaller enterprises.

Advances in artificial intelligence (AI) are reinforcing these trends. Surveys suggest that many US travellers plan to use AI to research destinations, plan activities and book trips.[22]

Meanwhile, businesses are looking to integrate AI capabilities into everything from workflow automation and insight generation to marketing and adaptive customer journeys. The share of the world's largest travel companies mentioning AI in their annual reports increased from just 4% in 2022 to 35% in 2024. Moreover, the share of travel-industry venture capital funding going to AI-enabled offerings climbed from 10% in 2023 to 45% in the first half of 2025.[23]

Not all economies and tourism businesses are equally positioned to benefit from digitalization and AI. On average, emerging and developing economies score about 24% below advanced economies for ICT Readiness. Many emerging economies and small and medium-sized tourism enterprises (SMEs) continue to face barriers to digital adoption, including limited infrastructure, resources, technical expertise and digital capacity. As a result, destinations and businesses may struggle to reach travellers, access online marketplaces and adopt new technologies. Moreover, SMEs may also require support in assessing the business case for digital investment and identifying the technologies best suited to their needs. Helping smaller businesses adopt and benefit from digital tools will remain an important challenge for the sector.[24]

> The TTDI results suggest that many of the conditions that enable people to travel internationally remain resilient.

ICT Readiness is not only a question of infrastructure and connectivity, but also access to skilled workers. More than 70% of economies improved their Human Resources and Labour Market score, with strong gains in areas such as the share of labour force with advanced education (+3.6%) and perceptions of the ease of finding skilled employees (+2.1%). This suggests that access to skills is improving in many economies. However, the sector continues to face significant workforce challenges, especially in attracting and retaining workers. Many potential employees, particularly younger people, do not see the sector as an appealing long-term career. Key barriers include intense, long and unpredictable working hours, limited flexibility compared with other sectors, and perceptions of weak career progression and job security, alongside increased expectations for work–life balance and remote or hybrid work. As a result, by 2035 the T&T sector could face a shortfall of 43 million workers, 16% below required levels.[25]

In the World Economic Forum's *Future of Jobs Report 2025*,[26] most accommodation, food and leisure industry businesses identified skills gaps and difficulties attracting talent as major barriers to business transformation. The challenge is particularly acute for the T&T sector, with 55% of respondents citing difficulty attracting talent, compared with 37% across all industries.

Despite global tensions, the world remains open to visitors

The past few years have been marked by geopolitical tensions, growing concern over tourism's impact on local communities and renewed debate about migration and border controls. Yet the TTDI results suggest that many of the conditions that enable people to travel internationally remain resilient. The Openness to T&T pillar improved by 1.8% between the 2024 and 2026 TTDI editions, reflecting gains across several measures of international mobility and visitor access.

One of the strongest improvements came from the reputation for hospitality indicator, which increased by 7.2%. Based on the TRAVELSAT Competitive Index,[27] this measures how welcoming destinations are perceived to be by analysing online discussions relating to local hospitality, visitor experiences and destination quality. Unlike traditional measures of tourism performance, it focuses on the quality of the visitor experience and how local communities are perceived by visitors. The results suggest that, despite growing public debate about overtourism in some destinations, most countries remain welcoming to visitors.

However, progress on visa policies has been more uneven. Based on the latest available data included in the TTDI, only around one-third of TTDI-ranked economies reduced visa requirements between 2024 and 2026, with much of the improvement concentrated in Asia-Pacific and the Middle East and North Africa. European and North American economies continue to maintain some of the highest visa requirements on average, indicating that some of the most advanced T&T economies retain higher formal barriers to visitors outside their region.

The Safety and Security (+2.1%) and Health and Hygiene (1.4%) pillars also improved over the period. This suggests that many destinations continue to strengthen the conditions that support safe and reliable travel.

Government roles are evolving

Index results also point to an evolving role for government in tourism development. While average scores for the Prioritization of T&T pillar improved by 1.7% between 2024 and 2026, they remain below 2019 levels. However, the picture is more nuanced than the headline suggests. Government spending on tourism as a share of total public spending has risen by 7.6% since 2019, reflecting increased public-sector support for the sector in many economies.

Much of the pillar's long-term decline is driven by the Country Brand Strategy indicator, which remains below 2019 levels despite improving by 1% since 2024. The indicator measures how closely national tourism promotion aligns with traveller search behaviour. According to Bloom Consulting, recent changes partly reflect a broader shift in how destinations are discovered online, including the growing role of AI-driven search and recommendation systems. Rather than signalling weaker tourism promotion, the results may indicate a period of adaptation as tourism organizations adjust their content and branding strategies to a rapidly evolving digital environment.

3.2 Conditions are stronger, but constraints are growing

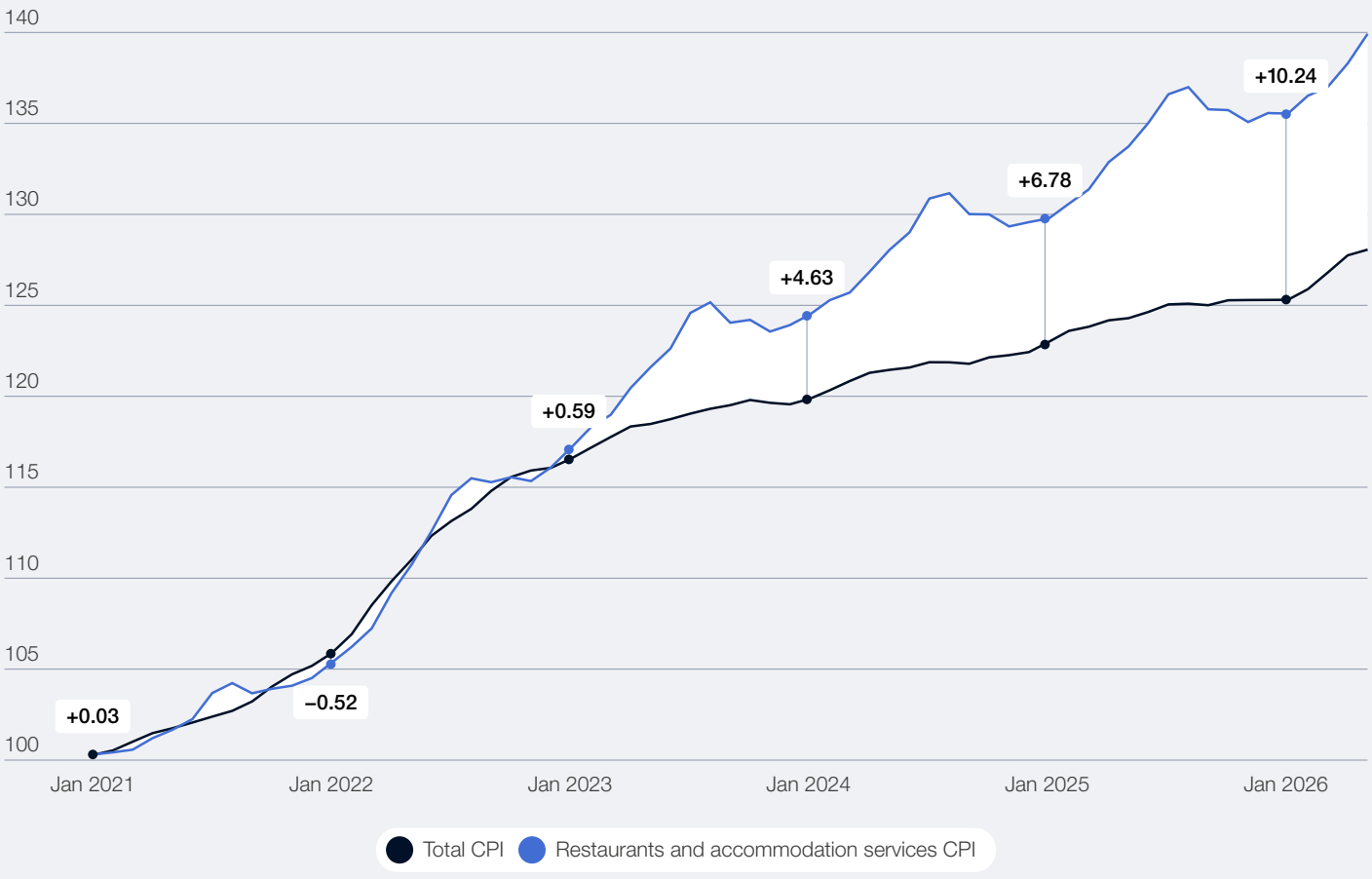
While TTDI results point to a strengthening of the conditions supporting tourism development, they also highlight growing constraints. As visitor demand has continued to grow, affordability pressures have intensified, investment has struggled to keep pace with demand, and sustainability challenges have become more complex.

Pricing and economic uncertainty pressures continue to build

In general, the cost of travelling to, staying in and operating within many destinations has continued to rise. Price Competitiveness was one of the lowest-performing pillars in the TTDI between 2024 and 2026, with 75% of ranked economies recording lower scores, leading to the global average declining by 3.1%.

In many countries, T&T-related prices have outpaced overall inflation (see Figure 5). While the drivers vary across economies, higher labour, food and energy costs probably contributed to this divergence, with the sector being particularly exposed to volatile fuel and transportation prices. Since 2024, prices for gasoline (petrol) have increased in about 65% of ranked economies, with recent price shocks linked to the ongoing conflict in the Middle East likely to cause further pressure. Strong travel demand in recent years, combined with capacity constraints in some destinations, has also allowed businesses to pass a greater share of these cost increases to consumers. For instance, mid-class and above hotel room prices increased by an average of 6% among ranked economies.

FIGURE 5 **Restaurants and accommodation vs. total consumer price index (CPI), select countries average**



Notes: CPI index data is based on mean month-over-month growth rates for Belgium, Bulgaria, Canada, Costa Rica, Croatia, Czechia, Denmark, Estonia, Finland, France, Greece, Hungary, Italy, Japan, Latvia, Lithuania, Luxemburg, Mexico, Netherlands, Norway, Portugal, Saudi Arabia, Slovenia, South Africa, Spain, Sweden and Switzerland. Selection based on countries with data for relevant categories.

Source: Organisation for Economic Co-operation and Development, *Consumer price indices (CPIs, HICPs), COICOP 2018*



↑ Price Competitiveness declined by 3.1% globally between 2024 and 2026 as fuel, labour, accommodation and food costs outpaced inflation in many destinations.

These pressures are changing how value is understood. Lower prices still matter, but travellers are weighing cost against accessibility, quality, reliability and the overall experience. For higher-cost destinations, this increases the pressure to justify prices through stronger infrastructure, service quality and destination management. For lower-cost destinations, it can create an opening if affordability is matched by improving tourism development conditions.

This opportunity can be particularly strong for destinations located close to more expensive tourism markets. According to the TTDI, the Balkans and Eastern Europe are significantly more price competitive than Western, Southern and Northern Europe. Combined with dense intra-European transport networks, this cost advantage can help attract travellers seeking more affordable alternatives within the region.

The TTDI also points to pressure on investment. The Business Environment pillar has remained largely stagnant since 2024, with fewer than half of ranked economies improving their scores. Across many economies, indicators related to policy stability, access to finance and the investment climate have remained stagnant or have deteriorated. According to the World Economic Forum's *Global Risks Report* 2026,[28] geoeconomic confrontation (sanctions, tariffs, investment screening), state-based armed conflict and economic downturn are among the top 10 risks facing the world. Against this backdrop, T&T capital investment has increased in recent years but remains below 2019 levels.

WTTC analysis of G20 economies finds that T&T capital investment has lagged behind demand since 2022. This investment gap is expected to persist until 2033.[29] This matters because tourism depends on long-lived, capital-intensive assets. Hotels, airports, attractions and transport infrastructures require high upfront investment and long planning horizons. Higher interest rates, fiscal pressures, trade tensions and geopolitical uncertainty can slow the investment needed to expand capacity, improve productivity and maintain quality. If investment fails to keep pace with demand, capacity pressures, costs and localized overcrowding can intensify.

The effects are visible in other parts of the TTDI. Ground and Port Infrastructure pillar scores have remained stagnant, suggesting that funding for capital-intensive assets such as roads and railways has struggled to keep pace with rising tourism demand.

The findings highlight a growing tension. Rising prices reflect strong demand and higher operating costs, but they also make travel less affordable and increase pressure on businesses and destinations. Economic uncertainty also makes it harder to invest in the assets needed to expand capacity and ease those pressures. Destinations must not only manage higher costs but also ensure that investment, infrastructure and service quality keep pace with the expectations of travellers and communities.

Sustainability pressures are becoming more complex

The TTDI highlights the complexity of the sustainability challenges facing the sector. As travel demand continues to grow, destinations face

> The challenge will increasingly be to ensure that visitor activity supports local quality of life while sustaining economic benefits.

growing pressure to manage visitor flows, reduce environmental impacts, strengthen the sustainability of tourism supply chains and ensure that tourism creates lasting benefits for local communities. Progress is evident in some areas, but balancing these objectives is becoming more complex.

Benefiting from the energy transition, but sustainability challenges remain

Despite continued growth in T&T, energy sustainability improved between the 2024 and 2026 editions. Most ranked economies reduced their T&T-related greenhouse gas (GHG) emissions and energy intensity, while the TTDI found that the share of low-carbon energy increased from 5.7% on average in 2018 to nearly 7.0% in 2024. Many of these gains reflect broader progress in the global energy transition. The World Economic Forum's *Energy Transition Index 2026*[30] highlights continued advances in energy system efficiency, electrification and renewable energy deployment, including a record $2.3 trillion invested in clean energy worldwide. These developments are benefitting the T&T sector, especially segments that rely heavily on electricity, such as hotels and other accommodation providers.

These gains are encouraging, but they should not be mistaken for a broader sustainability breakthrough. Continued growth in T&T, particularly in less energy-sustainable emerging economies and Asia-Pacific, is likely to increase energy demand and emissions unless improvements in energy efficiency and clean energy deployment accelerate. Moreover, the growth of hard-to-abate sectors such as aviation and other transport services will make decarbonization more difficult.

In addition, air quality, water stress, biodiversity loss and resource pressures continue to challenge many destinations. Tourism demand is also growing at a time when climate risks are becoming more visible, increasing the importance of adaptation and resilience measures across the sector. According to the World Economic Forum's *Global Risks Report 2026*,[31] environmental risks such as extreme weather events, biodiversity loss and pollution account for half of the world's top 10 risks over the next decade. Extreme weather events can affect tourism both directly – through road and airport closures, infrastructure damage, shutdown of outdoor attractions or cancellation of festivals and events – and indirectly, by harming the reputation of destinations and deterring future visitors. In Canada, for example, unprecedented wildfires near Jasper, Alberta, during the peak 2024 tourist season caused an estimated CAN$4.5 million ($3.25 million) in lost tourism revenue per day, while critical infrastructure damage curtailed accommodation capacity by roughly 25% even a year later.[32]

Sustaining recent progress will also require continued investment in energy systems, transport infrastructure, resource efficiency and environmental management. The energy transition is creating opportunities for the sector to reduce its environmental footprint, but current progress is unlikely to be sufficient without faster advances in decarbonization, adaptation and resource management.

Managing growth and visitor pressure

T&T Demand Sustainability improved modestly between 2024 and 2026. High scores show countries managing a steady inflow while managing growth effectively. However, scores remain below 2019 levels, highlighting the difficulty of managing crowding, seasonality and visitor flows as tourism activity expands. Managing growth remains one of the most important enablers to unlocking the potential of the sector.

Many destinations naturally perform better on measures of crowding and seasonality when visitor numbers are low. As demand recovers, pressures associated with concentrated visitor flows, overcrowding and infrastructure strain often re-emerge. In that sense, lower T&T Demand Sustainability scores do not necessarily indicate policy failure. Rather, they reflect the challenge of maintaining balanced tourism growth as visitor volumes increase.

Europe recorded the lowest T&T Demand Sustainability scores of any region, underperforming the global pillar average by nearly 12%. Anti-tourism protests in Barcelona and the Balearic and Canary Islands in Spain in 2024 and 2025[33] illustrate the growing debate about how tourism growth should be managed in high-demand destinations.

Recent OECD analysis[34] highlights growing efforts to better manage visitor flows and diversify tourism activity to improve outcomes for communities and the environment. These efforts focus on spreading tourism demand more evenly across destinations and throughout the year, helping to ease pressure on overcrowded locations while supporting a more balanced distribution of tourism benefits.

Success also depends on investment in housing, transport, utilities and public services, alongside stronger coordination among governments, businesses and local communities. As tourism continues to grow, the challenge will increasingly be to ensure that visitor activity supports local quality of life while sustaining economic benefits. This places growing importance on measuring tourism's economic, social and environmental impacts in a more integrated way, including through frameworks such as the UN Statistical Framework for Measuring the Sustainability of Tourism.[35]

Turning visitor growth into wider benefits

The weakest sustainability-related result comes from the T&T Socioeconomic Impact pillar, which declined by 3.5% between the 2024 and 2026 TTDI editions and improved in only around 17% of economies.

The results highlight an important reality: higher visitor numbers do not automatically translate into stronger socioeconomic outcomes. While tourism activity has continued to recover in many destinations, improvements in indicators such as employment and GDP multipliers, and the availability of higher-wage tourism jobs have generally been more modest.

Part of the challenge is that tourism's wider contribution depends on how effectively tourism activity is connected to the local economy. Destinations differ in the extent to which visitor spending supports local businesses and supporting industries, in how successfully tourism generates quality employment, and in the extent to which tourism generates tax revenues that can support public services and wider community development. While the pillar does not directly measure factors such as local sourcing or the retention of tourism spending within a destination, these can influence how widely tourism benefits are distributed across businesses, workers and communities.

↓ While T&T Socioeconomic Impact was the weakest sustainability pillar, 17% of economies have improved since 2024.

Where tourism employment is highly seasonal or concentrated in lower-value activities, increases in visitor numbers may not translate into improvements in livelihoods or job quality. At the same time, destinations with stronger workforce capabilities and deeper connections between tourism and other sectors may be better positioned to translate tourism growth into wider economic benefits.

Growing visitor numbers remains important, but creating greater value from those visitors – and ensuring that this value is more widely shared – will increasingly define successful tourism development. As tourism recovers and expands, many destinations are increasingly focusing on how benefits are distributed among people, businesses and communities, rather than relying solely on visitor growth and spending as indicators of success. This places greater emphasis on destination management, local business participation, workforce development and policies that strengthen tourism's wider contribution. It also highlights the importance of shared measures of success that reflect community, economic and social outcomes rather than visitor volumes alone.[36]

The findings suggest that destinations face a question of quality rather than quantity.



FIGURE 6 | **TTDI pillar performance (score out of 7), leaders and recent improvement, 2026**

Enabling Environment

Business Environment

Global average score 2026

4.4 ▲ +0.2%

Trend 2019–2026: 4.2, 4.3, 4.4, 4.4

Improvements are relatively uneven, indicating that business conditions remain harder to shift in the short term.

Top-ranked subregion: Western Europe

Economy

Top-ranked: Singapore

Most improved 2024–2026: Argentina ▲ +12%

% of economies with higher score 2024–2026: **49%**

Enabling Environment

Safety and Security

Global average score 2026

5.7 ▲ +2.1%

Trend 2019–2026: 5.5, 5.5, 5.6, 5.7

High global scores and broad gains show safety remains a core but unevenly distributed advantage.

Top-ranked subregion: Northern Europe

Economy

Top-ranked: Singapore

Most improved 2024–2026: El Salvador ▲ +18%

% of economies with higher score 2024–2026: **76%**

Enabling Environment

Health and Hygiene

Global average score 2026

4.8 ▲ +1.4%

Trend 2019–2026: 4.6, 4.6, 4.7, 4.8

Scores remain comparatively high, with most economies improving from an already solid baseline.

Top-ranked subregion: Western Europe

Economy

Top-ranked: Austria

Most improved 2024–2026: Honduras ▲ +16%

% of economies with higher score 2024–2026: **77%**

Enabling Environment

Human Resources and Labour Market

Global average score 2026

4.3 ▲ +1.2%

Trend 2019–2026: 4.2, 4.2, 4.3, 4.3

Moderate but widespread gains point to improving labour conditions, though workforce constraints still persist.

Top-ranked subregion: Northern Europe

Economy

Top-ranked: Denmark

Most improved 2024–2026: Malaysia ▲ +9%

% of economies with higher score 2024–2026: **71%**

Enabling Environment

ICT Readiness

Global average score 2026

5.2 ▲ +3.2%

Trend 2019–2026: 4.7, 4.9, 5.1, 5.2

Digital capability is rising in most economies, reinforcing its role as a core enabler of tourism competitiveness.

Top-ranked subregion: Western Europe

Economy

Top-ranked: Korea, Rep.

Most improved 2024–2026: Nepal ▲ +21%

% of economies with higher score 2024–2026: **91%**

T&T Policy and Enabling Conditions

Prioritization of T&T

Global average score 2026

4.5 ▲ +1.7%

Trend 2019–2026: 4.6, 4.3, 4.4, 4.5

Scores are up in many economies, but uneven progress shows differences in policy prioritization.

Top-ranked subregion: Southern Europe

Economy

Top-ranked: Indonesia

Most improved 2024–2026: Côte d'Ivoire ▲ +35%

% of economies with higher score 2024–2026: **58%**

T&T Policy and Enabling Conditions

Openness to T&T

Global average score 2026

4.1 ▲ +1.8%

Trend 2019–2026: 4.0, 4.0, 4.0, 4.1

Gains remain moderate, suggesting openness is advancing incrementally rather than transforming sharply.

Top-ranked subregion: Western Europe

Economy

Top-ranked: Singapore

Most improved 2024–2026: Qatar ▲ +12%

% of economies with higher score 2024–2026: **69%**

T&T Policy and Enabling Conditions

Price Competitiveness

Global average score 2026

4.5 ▼ -3.1%

Trend 2019–2026: 4.8, 5.0, 4.6, 4.5

T&T-related prices have broadly climbed due to higher labour, food and energy costs.

Top-ranked subregion: South Asia

Economy

Top-ranked: Egypt

Most improved 2024–2026: Qatar ▲ +49%

% of economies with higher score 2024–2026: **25%**

Infrastructure and Services

Air Transport Infrastructure

Global average score 2026

4.1 ▲ +7.2%

Trend 2019–2026: 3.9, 3.6, 3.8, 4.1

Air access has recovered broadly, but leadership remains concentrated in established connectivity hubs.

Top-ranked subregion: Southern Europe

Economy

Top-ranked: United Arab Emirates

Most improved 2024–2026: Lao PDR ▲ +31%

% of economies with higher score 2024–2026: **92%**

Infrastructure and Services

Ground and Port Infrastructure

Global average score 2026

3.7 – 0.0%

Trend 2019–2026: 3.6, 3.7, 3.7, 3.7

Progress is less widespread as surface connectivity remains a slower-moving structural constraint.

Top-ranked subregion: Western Europe

Economy

Top-ranked: Singapore

Most improved 2024–2026: Kyrgyz Republic ▲ +24%

% of economies with higher score 2024–2026: **45%**

Source: World Economic Forum

FIGURE 6 | **TTDI pillar performance (score out of 7), leaders and recent improvement, 2026** (continued)

Infrastructure and Services

Tourist Services and Infrastructure

Global average score 2026

3.0 ▲ +9.2%

Trend 2019–2026: 2.9, 2.9, 2.8, 3.0

A key area of improvement, reflecting renewed accommodation and tourism service capacity across destinations.

Top-ranked subregion: Southern Europe

Economy

Top-ranked: Iceland

Most improved 2024–2026: Albania ▲+44%

% of economies with higher score 2024–2026: **94%**

T&T Resources

Natural Resources

Global average score 2026

3.0 ▲ +4.1%

Trend 2019–2026: 2.8, 2.9, 2.9, 3.0

Score remains relatively low, but gains are evident among economies with strong nature-based tourism offers.

Top-ranked subregion: Eastern Asia-Pacific

Economy

Top-ranked: United States

Most improved 2024–2026: Singapore ▲+21%

% of economies with higher score 2024–2026: **96%**

T&T Resources

Cultural Resources

Global average score 2026

2.5 ▲ +9.6%

Trend 2019–2026: 2.2, 2.2, 2.3, 2.5

Improvements reflect renewed interest in culture-led tourism and stronger destination appeal.

Top-ranked subregion: Eastern Asia-Pacific

Economy

Top-ranked: Japan

Most improved 2024–2026: Thailand ▲+42%

% of economies with higher score 2024–2026: **95%**

T&T Resources

Non-Leisure Resources

Global average score 2026

2.7 ▲ +4.6%

Trend 2019–2026: 2.7, 2.6, 2.6, 2.7

Score is low, just back to pre-pandemic levels. Gains reflect demand recovery, not capacity growth.

Top-ranked subregion: Eastern Asia-Pacific

Economy

Top-ranked: Japan

Most improved 2024–2026: Croatia ▲+30%

% of economies with higher score 2024–2026: **72%**

T&T Sustainability

Environmental Sustainability

Global average score 2026

4.5 ▲ +1.4%

Trend 2019–2026: 4.4, 4.4, 4.5, 4.5

Broad but moderate gains point to gradual progress, with performance uneven across economies.

Top-ranked subregion: Western Europe

Economy

Top-ranked: Luxembourg

Most improved 2024–2026: Lao PDR ▲+14%

% of economies with higher score 2024–2026: **76%**

T&T Sustainability

T&T Socioeconomic Impact

Global average score 2026

4.2 ▼ -3.5%

Trend 2019–2026: 4.2, 4.3, 4.4, 4.2

The weakest area of recent improvement, showing growth is not translating evenly into benefits.

Top-ranked subregion: Southern Africa

Economy

Top-ranked: Paraguay

Most improved 2024–2026: United States ▲+9%

% of economies with higher score 2024–2026: **17%**

T&T Sustainability

T&T Demand Sustainability

Global average score 2026

3.9 ▲ +2.3%

Trend 2019–2026: 4.0, 4.1, 3.8, 3.9

Recent gains are mixed, reflecting the difficulty of managing crowding and seasonality as travel returns.

Top-ranked subregion: South Asia

Economy

Top-ranked: Cameroon

Most improved 2024–2026: Uruguay ▲+44%

% of economies with higher score 2024–2026: **55%**

Source: World Economic Forum

4

Economy and regional performance

↓ Asia-Pacific was 2026's most-improved region, up 3.6%, with Japan, Australia and China all improving faster than the overall index average.

T&T development improved in most economies in the TTDI results, but progress remains uneven.



Section takeaways

Tourism development conditions improved in almost every economy: Between 2024 and 2026, 92% of economies improved their TTDI score, reflecting broad-based progress in both advanced and developing tourism markets. Gains were recorded across every region and income group.

Advanced economies continue to set the pace: High-income economies account for 19 of the top 20 TTDI performers, combining world-class tourism infrastructure, strong connectivity, major commercial centres and favourable enabling conditions. Japan leads the rankings, while European economies hold six of the top 10 positions.

Asia-Pacific and emerging tourism economies are gaining ground: The 10 largest emerging tourism economies have improved their TTDI scores more than twice as fast as the top 20 since 2019. Asia-Pacific is driving much of this momentum, accounting for seven of the 10 fastest-improving performers, while Albania was the most improved economy overall between 2024 and 2026.

Many destinations are strengthening their tourism assets and connectivity, but those with deeper infrastructure, services and supporting systems continue to hold an advantage.

FIGURE 7 **Travel & Tourism Development Index 2026 overall rankings**

Rank[1]	Economy	Score[2]	Change since 2024 Rank	Change since 2024 Score	Change since 2019[3] Rank	Change since 2019[3] Score
1	Japan	5.27	2 ▲	2.6%	3 ▲	4.0%
2	United States	5.23	0 —	1.4%	-1 ▼	-0.8%
3	Spain	5.22	-2 ▼	1.0%	-1 ▼	2.8%
4	Australia	5.18	2 ▲	3.5%	3 ▲	3.8%
5	France	5.17	-1 ▼	1.9%	1 ▲	3.5%
6	Germany	5.09	-1 ▼	1.6%	-1 ▼	1.0%
7	United Kingdom	5.08	0 —	1.6%	-4 ▼	0.0%
8	China	5.00	0 —	2.1%	2 ▲	2.8%
9	Switzerland	4.97	1 ▲	2.8%	0 —	1.4%
10	Italy	4.93	-1 ▼	1.3%	3 ▲	3.6%
11	Portugal	4.91	1 ▲	3.1%	1 ▲	3.1%
12	Korea, Rep.	4.90	1 ▲	3.2%	2 ▲	4.2%
13	Singapore	4.89	1 ▲	3.4%	-5 ▼	-0.6%
14	Canada	4.85	-3 ▼	1.3%	-3 ▼	0.3%
15	Austria	4.72	0 —	0.7%	0 —	1.5%
16	Denmark	4.70	0 —	1.5%	1 ▲	1.5%
17	Netherlands	4.69	0 —	1.1%	-1 ▼	0.9%
18	Sweden	4.68	0 —	1.8%	1 ▲	3.0%
19	Finland	4.60	1 ▲	1.5%	-1 ▼	0.9%
20	Ireland	4.57	3 ▲	2.6%	0 —	2.1%
21	Greece	4.57	0 —	2.5%	4 ▲	3.6%
22	United Arab Emirates	4.56	-3 ▼	0.5%	4 ▲	4.6%
23	Indonesia	4.56	-1 ▼	2.2%	12 ▲	7.5%
24	Belgium	4.53	0 —	2.8%	-2 ▼	2.2%
25	New Zealand	4.51	3 ▲	3.6%	-4 ▼	0.6%
26	Malaysia	4.50	13 ▲	5.8%	2 ▲	4.4%
27	Luxembourg	4.46	-2 ▼	1.5%	-3 ▼	1.2%
28	Poland	4.46	-2 ▼	2.0%	4 ▲	4.1%
29	Saudi Arabia	4.45	3 ▲	3.4%	17 ▲	7.8%
30	Cyprus	4.43	1 ▲	2.8%	0 —	2.7%
31	India	4.42	9 ▲	4.3%	-4 ▼	1.4%
32	Brazil	4.41	-5 ▼	1.0%	-1 ▼	2.8%
33	Malta	4.41	-3 ▼	1.8%	-4 ▼	2.3%
34	Iceland	4.40	-5 ▼	1.6%	-11 ▼	-0.5%
35	Chile	4.39	3 ▲	2.9%	1 ▲	3.8%
36	Türkiye	4.37	1 ▲	2.5%	11 ▲	6.1%
37	Czechia	4.35	-4 ▼	1.5%	-4 ▼	2.1%
38	Thailand	4.35	10 ▲	5.6%	1 ▲	3.9%
39	Bulgaria	4.34	3 ▲	2.7%	-1 ▼	3.4%
40	Georgia	4.32	1 ▲	2.0%	8 ▲	4.8%
41	Mexico	4.31	-6 ▼	0.9%	-7 ▼	1.5%
42	Hungary	4.31	-6 ▼	1.0%	-1 ▼	3.5%
43	Romania	4.31	0 —	2.3%	-1 ▼	3.7%
44	Estonia	4.30	-10 ▼	0.6%	-7 ▼	1.9%
45	Slovenia	4.26	-1 ▼	1.6%	-5 ▼	1.9%
46	Croatia	4.25	-1 ▼	1.6%	-3 ▼	2.5%
47	Qatar	4.23	10 ▲	6.0%	3 ▲	3.5%
48	Argentina	4.22	2 ▲	2.8%	-3 ▼	1.9%
49	Lithuania	4.18	-3 ▼	0.6%	0 —	2.1%
50	Israel	4.18	-3 ▼	1.5%	-6 ▼	0.8%
51	Costa Rica	4.16	-2 ▼	1.4%	4 ▲	4.8%
52	Viet Nam	4.15	7 ▲	6.3%	10 ▲	8.4%
53	Albania	4.14	10 ▲	7.0%	20 ▲	12.8%
54	Colombia	4.13	-3 ▼	0.9%	4 ▲	4.8%
55	Bahrain	4.11	-2 ▼	2.4%	2 ▲	3.7%
56	Kazakhstan	4.09	-4 ▼	1.6%	-5 ▼	2.4%
57	Philippines	4.08	8 ▲	5.5%	12 ▲	9.6%
58	Azerbaijan	4.07	-3 ▼	1.7%	-6 ▼	2.5%
59	Mauritius	4.07	-3 ▼	2.0%	-6 ▼	2.5%
60	Slovak Republic	4.04	-6 ▼	0.8%	-6 ▼	1.6%
61	South Africa	3.99	-3 ▼	0.5%	0 —	3.1%
62	Oman	3.98	2 ▲	2.9%	-2 ▼	2.6%
63	Egypt	3.97	-2 ▼	2.1%	7 ▲	7.1%
64	Peru	3.96	-4 ▼	1.8%	2 ▲	5.8%
65	Panama	3.96	-3 ▼	2.1%	-6 ▼	0.6%
66	Dominican Republic	3.93	0 —	1.8%	-3 ▼	4.3%
67	Latvia	3.89	1 ▲	1.2%	-11 ▼	-1.8%
68	Serbia	3.89	-1 ▼	0.8%	0 —	4.2%
69	Sri Lanka	3.85	4 ▲	4.3%	-4 ▼	2.7%
70	Morocco	3.84	7 ▲	5.5%	1 ▲	3.9%
71	Uruguay	3.82	-1 ▼	2.4%	-4 ▼	2.4%
72	Armenia	3.81	-1 ▼	2.0%	-8 ▼	1.3%
73	Jordan	3.80	-4 ▼	0.5%	-1 ▼	3.4%
74	Tanzania	3.70	2 ▲	1.3%	7 ▲	4.5%
75	Lao PDR	3.69	10 ▲	6.1%	13 ▲	9.1%
76	Uzbekistan	3.69	-4 ▼	-1.1%	7 ▲	4.8%
77	Kenya	3.67	2 ▲	1.2%	-1 ▼	1.3%
78	Jamaica	3.65	4 ▲	2.3%	2 ▲	2.9%
79	Mongolia	3.64	1 ▲	1.5%	-4 ▼	0.1%
80	Ecuador	3.64	-6 ▼	-1.0%	-6 ▼	-0.5%
81	North Macedonia	3.64	0 —	1.9%	-3 ▼	2.0%
82	Tunisia	3.62	-4 ▼	-0.2%	-5 ▼	1.1%
83	Bosnia and Herzegovina	3.58	1 ▲	2.8%	2 ▲	3.8%
84	Botswana	3.57	-9 ▼	-2.0%	-5 ▼	0.4%
85	Paraguay	3.56	2 ▲	2.8%	1 ▲	3.6%
86	Nepal	3.55	8 ▲	5.1%	7 ▲	6.7%
87	El Salvador	3.53	2 ▲	3.0%	5 ▲	5.8%
88	Kuwait	3.53	-2 ▼	1.8%	-6 ▼	-0.2%
89	Algeria	3.52	4 ▲	3.6%	5 ▲	6.1%
90	Namibia	3.50	-7 ▼	-0.2%	-6 ▼	0.1%
91	Rwanda	3.47	-1 ▼	1.3%	-2 ▼	2.8%
92	Bolivia	3.44	-1 ▼	0.4%	-2 ▼	2.1%
93	Kyrgyz Republic	3.44	2 ▲	2.2%	5 ▲	5.9%
94	Guatemala	3.43	-2 ▼	0.3%	-7 ▼	0.5%
95	Pakistan	3.42	-7 ▼	-0.7%	-4 ▼	1.5%
96	Zambia	3.37	1 ▲	2.1%	-1 ▼	2.4%
97	Ghana	3.35	-1 ▼	-0.4%	-1 ▼	1.7%
98	Bangladesh	3.34	0 —	1.6%	2 ▲	4.3%
99	Senegal	3.29	0 —	2.0%	3 ▲	3.1%
100	Nicaragua	3.28	0 —	1.8%	-1 ▼	1.5%
101	Zimbabwe	3.27	0 —	2.0%	0 —	2.4%
102	Côte d'Ivoire	3.26	1 ▲	2.7%	4 ▲	7.5%
103	Honduras	3.22	-1 ▼	1.1%	-6 ▼	-1.4%
104	Nigeria	3.20	3 ▲	4.0%	1 ▲	5.4%
105	Angola	3.18	0 —	1.7%	-2 ▼	1.0%
106	Benin	3.13	-2 ▼	-0.2%	-2 ▼	1.6%
107	Malawi	3.08	1 ▲	1.3%	0 —	2.0%
108	Cameroon	3.05	-2 ▼	-1.1%	0 —	2.3%
109	Sierra Leone	2.91	0 —	2.3%	0 —	3.1%
110	Mali	2.75	0 —	1.8%	0 —	0.1%

Notes: Data revisions and minor indicator adjustments to the TTDI limit its comparability to previous editions. The 2026 edition of the TTDI includes recalculated figures for 2019, 2021 and 2024, using new adjustments. This reflects the latest available data at the time of collection (May 2026).

1. Index results represent the latest data available at the time of collection (May 2026) .
2. Overall scores range from 1 to 7 where 1 = worst and 7 = best.
3. Change since 2019 refers to 2019 results using new index framework and methodology.

Source: World Economic Forum

The Americas · Asia-Pacific · Middle East and North Africa · Europe and Eurasia · Sub-Saharan Africa

4.1 Rankings overview

The 2026 TTDI results show that performance has strengthened across almost all economies in the index, but that the pace of improvement varies considerably.

Across all 110 economies, 101 – or 92% – improved their score between 2024 and 2026, while every economy in the top 75 recorded gains. The same 10 economies occupy the top 10 positions as in 2024, although their ranking order has changed. They are Japan, the United States, Spain, Australia, France, Germany, the United Kingdom, China, Switzerland and Italy. With the exception of Australia and Switzerland, all are also among the world's 10 largest travel and tourism economies.[37] Japan and Australia also improved at a slightly faster rate than the overall index. This partly reflects stronger demand and greater capacity in Asia-Pacific as the region continued to recover from its delayed post-pandemic reopening. As a result, Asia-Pacific was the most improved region, with its average TTDI score increasing by 3.6% between 2024 and 2026.

The region's developing economies have particularly benefitted from this growth, with seven out of the 10 most improved economies coming from developing countries in South-East and South Asia, including Lao PDR (+6.1%), Malaysia (+5.8%) and Thailand (+5.6%). However, Albania stands out as the strongest overall improver between 2024 and 2026, increasing its score by 7.0%. Its gains were driven by improvements in tourist services and infrastructure, air transport, and ground and port infrastructure – the foundations of access and service capacity that help destinations convert growing visitor demand into tourism growth.

More broadly, while the high-income economies continue to dominate the top of the index, some of the strongest momentum is occurring among a group of large emerging tourism economies that are steadily closing the gap with the leaders. The following sections explore what distinguishes the highest-ranked economies, where this momentum is concentrated and what still separates the fastest-rising destinations from the world's leading tourism economies.

↓ Japan held its position among the TTDI's top 10 in 2026, taking the top spot and improving faster than the overall index average as Asia-Pacific's recovery continued.



4.2 Top 20 performance

The top 20 economies combine large business hubs, internationally recognized attractions and the infrastructure to support high visitor volumes.

The highest-ranked economies in the TTDI continue to be distinguished by the depth and scale of the assets that support T&T. Most are advanced economies with long-established tourism sectors, extensive visitor infrastructure and strong international connectivity, although the group also includes major emerging tourism powers such as China.

Compared with the other economies in the index, the top 20's largest advantages are concentrated in Non-Leisure and Cultural Resources, Ground and Port Infrastructure, Air Transport Infrastructure and Tourism Services and Infrastructure (see Figure 8). These economies tend to combine large business hubs, internationally recognized attractions, extensive transport networks and the accommodation and visitor services needed to support high volumes of leisure and business travel. They also benefit from stronger Health and Hygiene, Safety and Security, ICT Readiness and Business Environment conditions.

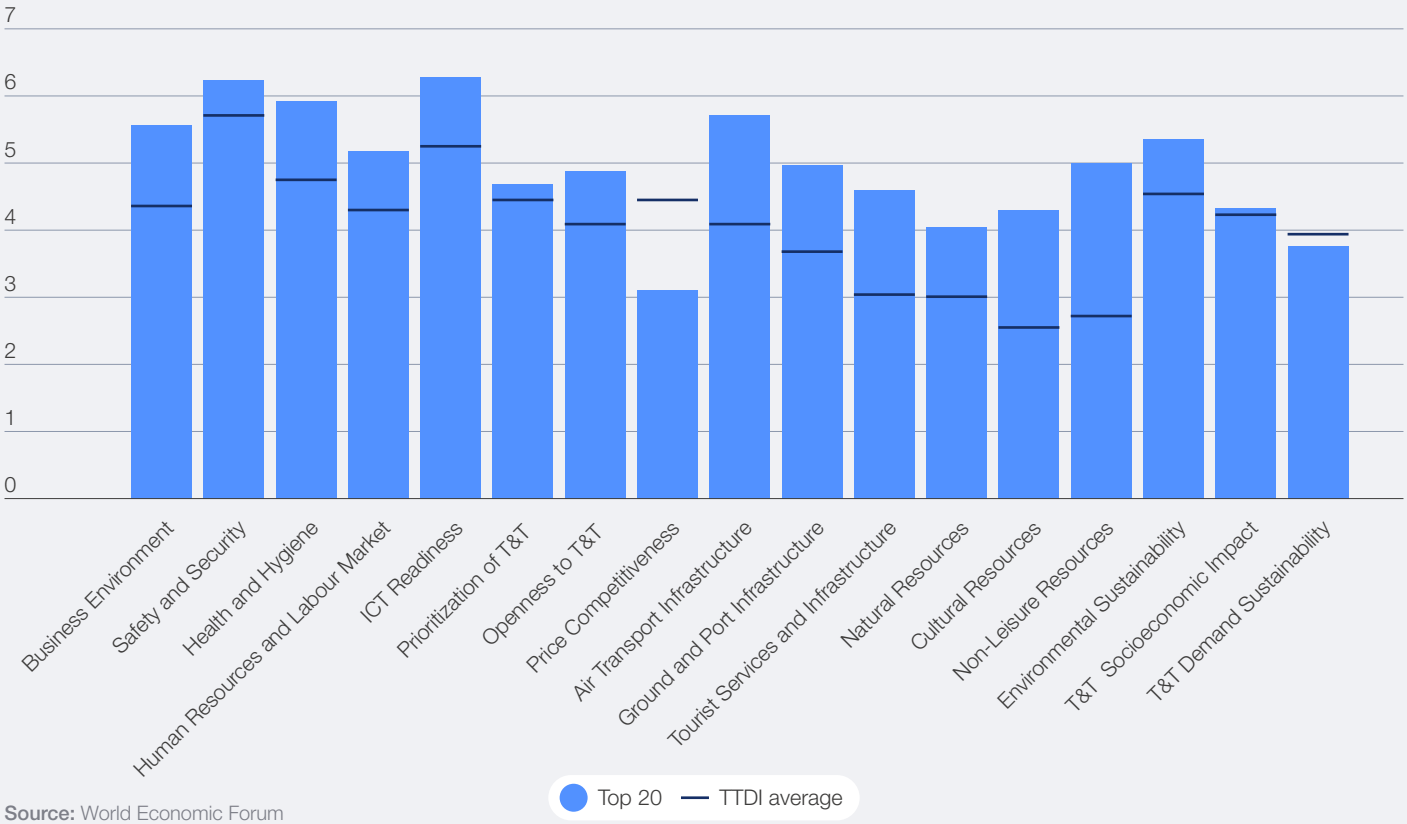
Domestic and regional travel flows help reinforce these advantages. Domestic tourism accounted for almost three-quarters of total T&T spending in 2025.[38] Countries with large domestic markets, such as the United States, benefit from a stable source of demand that helps sustain tourism infrastructure and services even when international arrivals fluctuate.

Domestic travel also enhances resilience by reducing reliance on international source markets, smoothing seasonal demand and supporting tourism activity beyond major visitor hotspots. In Europe, dense networks of short-haul travel provide a similar source of stability, helping sustain visitor volumes, connectivity and accommodation capacity.

Non-leisure travel can provide a similar stabilizing effect. Business travel, meetings and events often generate year-round demand, support higher visitor spending and help sustain tourism activity outside peak leisure seasons.

The leaders do not dominate every pillar. The top 20 perform significantly worse than the rest of the world on Price Competitiveness and slightly below average on T&T Demand Sustainability. This reflects a common pattern among mature tourism economies: success often brings higher costs and greater pressure on popular destinations. Many of the European economies also score lower for T&T Socioeconomic Impact, reflecting tourism intensity and the pressures associated with high visitor volumes. At the same time, they tend to lead the world on Environmental Sustainability, suggesting a greater capacity to manage environmental pressures, protect the assets on which tourism depends and strengthen their appeal to environmentally conscious travellers.

FIGURE 8 **Top 20 TTDI scorers versus the index average by TTDI pillar, 2026**



Source: World Economic Forum

4.3 Major emerging economies are gaining ground

While advanced economies continue to dominate the top of the index, some of the strongest momentum is occurring elsewhere. This section examines China, India, Indonesia, Malaysia, Thailand, Viet Nam, the Philippines, Türkiye, Mexico and Brazil – the 10 largest non-high-income T&T economies by direct T&T GDP.

Together, these economies account for more than 28% of global direct travel and tourism GDP, with their share projected to rise to 35% by 2035.[39]

They therefore represent one of the most important sources of future tourism growth.

Their recent progress has also outpaced the wider index (see Figure 9). Looking back to 2019, these economies increased their average TTDI score by 4.7%, compared with 2.9% and 1.9% for the overall index and the top 20, respectively. Between 2024 and 2026 alone, these economies improved at a faster rate than the remaining 100 economies on 15 of the 17 TTDI pillars.

FIGURE 9 **TTDI score: 10 major emerging tourism economies, top 20 TTDI scorers and all economies, 2019–2026**



Note: Major emerging economies are defined as the 10 largest non-high-income economies by direct T&T GDP. These are China, India, Indonesia, Malaysia, Thailand, Viet Nam, the Philippines, Türkiye, Mexico and Brazil.

Source: World Economic Forum

The improvement of major emerging tourism economies has been widespread. The more important question now is what continues to separate them from the world's tourism leaders.

As a group, the 10 major emerging tourism economies outperform the top 20 on Price Competitiveness, Natural Resources, T&T Demand Sustainability and Cultural Resources (Figure 10). Their tourism appeal is underpinned by a strong combination of natural assets, cultural heritage and competitive pricing. For instance, Brazil, China, India and Mexico account for over 17% of UNESCO World Heritage natural sites among TTDI-ranked economies, while China, India and Mexico also rank among the top 10 for the number of World Heritage cultural sites.

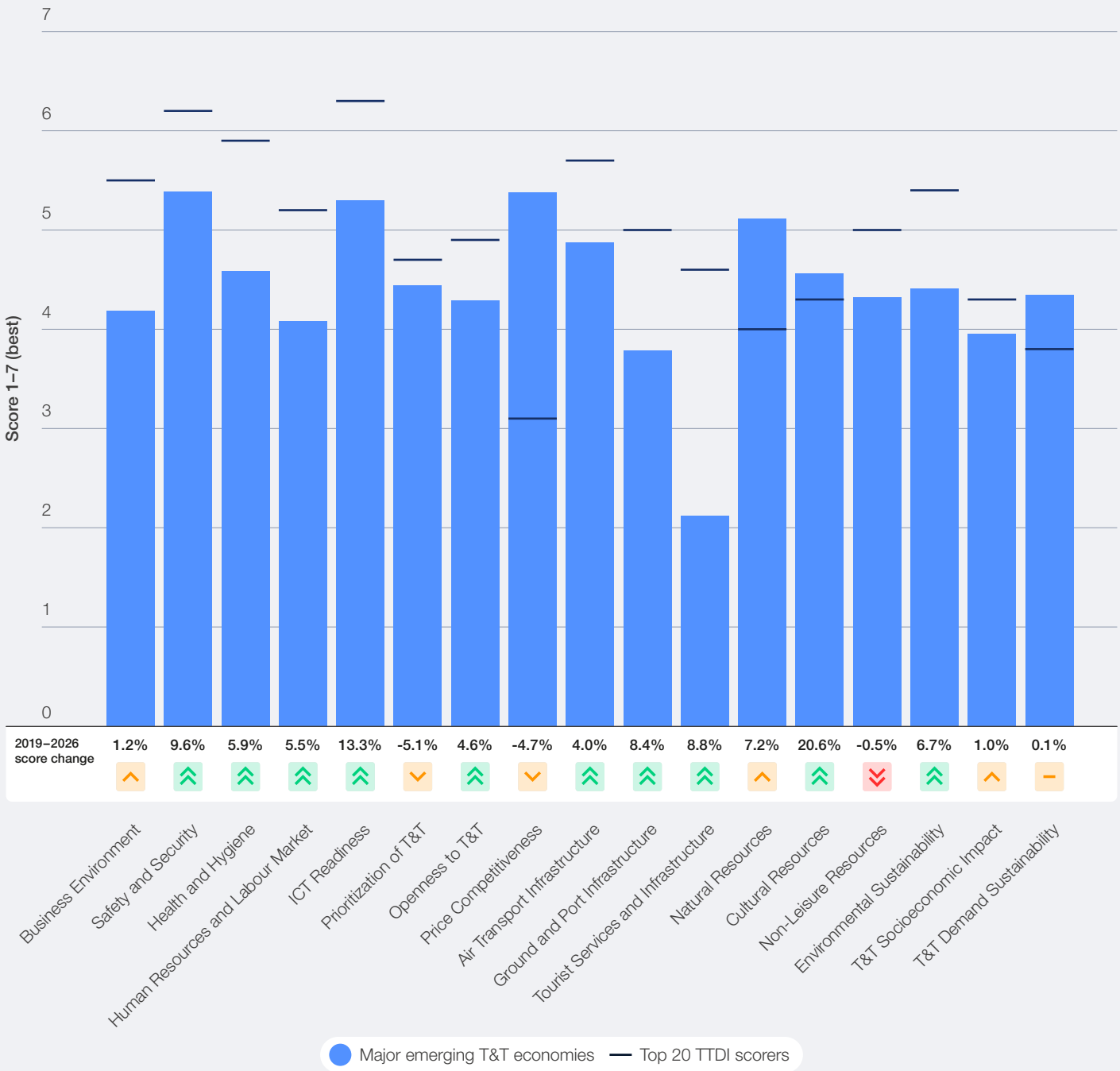
Since 2019, they have also outperformed the top 20 on 12 pillars, expanding their lead in Cultural Resources while closing gaps in ICT Readiness, Safety and Security and Air Transport Infrastructure.

Nonetheless, important gaps remain. Tourist Services and Infrastructure represents by far the largest difference between these economies and the top 20, underscoring the need for greater

investment in accommodation, visitor services and supporting infrastructure. Below-average scores for the Business Environment and Human Resources and Labour Market pillars reflect common challenges, including limited access to finance, regulatory barriers and gaps in workforce capabilities. Environmental Sustainability remains another challenge, underlying a growing risk to these economies' rich tourism-generating natural resources.

Overall, these findings suggest that the next stage of convergence will depend less on attracting visitors and more on supporting them and travel and tourism businesses. Many major emerging tourism economies already possess the assets associated with tourism success. What separates them from the leaders is the depth of the infrastructure, services and enabling conditions needed to support tourism.

FIGURE 10 **Gap between the 10 largest emerging and the top 20 average by TTDI pillar, 2026**



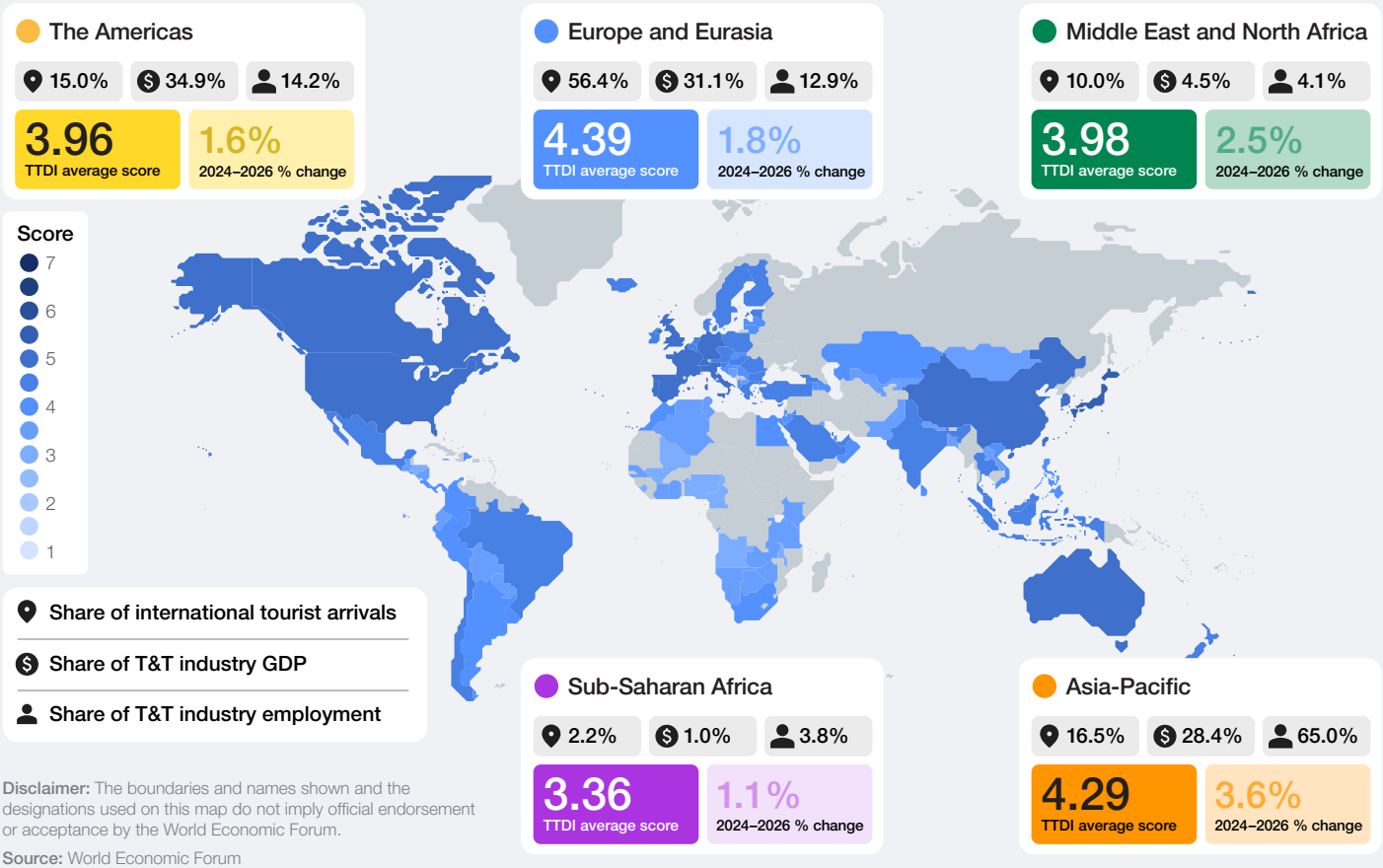
Note: China is included in both the TTDI top 20 and the group of the top 10 largest emerging tourism economies. Arrows indicate the relative 2019–2026 score change between major emerging T&T economies and the top 20 TTDI scorers. Double green arrow = above top 20 growth rate; single yellow arrow = below top 20 growth rate; yellow line = stagnant growth; single left arrow = decline, but less than top 20 TTDI; double red arrow = decline is greater than top 20.

Source: World Economic Forum

4.4 Regional performance

Overall T&T development conditions improved across every region between 2024 and 2026, but the pace of progress varied considerably (see Figure 11). Asia-Pacific and the Middle East and North Africa (MENA) recorded the strongest gains, with average scores increasing by 3.6% and 2.5% respectively. Growth was more modest in Europe and Eurasia (+1.8%) and the Americas (+1.6%), while sub-Saharan Africa recorded the slowest improvement at 1.1%.

FIGURE 11 **Regional TTDI performance, 2026**



Disclaimer: The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the World Economic Forum.

Source: World Economic Forum

> While many destinations continue to strengthen their tourism offer and connectivity, rising costs are making it more difficult to convert these gains into stronger overall performance.

Looking beyond the latest cycle, the results point to a widening development gap. Between 2019 and 2024, average regional scores changed relatively little. Since then, Asia-Pacific and MENA have accelerated, narrowing the gap with Europe and Eurasia, while sub-Saharan Africa has made more limited progress.

In Asia-Pacific, gains were driven by improvements in Cultural Resources, Air Transport Infrastructure and Non-Leisure Resources, reflecting stronger connectivity and growing business and visitor capacity. MENA followed a similar pattern, with particularly strong gains in Cultural Resources, Tourist Services and Infrastructure, and T&T Demand Sustainability.

Europe and Eurasia remain the highest-performing region overall. Recent gains were concentrated in Tourist Services and Infrastructure, Cultural Resources and Air Transport Infrastructure. However, these improvements were partly offset by declining price competitiveness as travel, accommodation and operating costs continued to rise.

While the Americas recorded solid improvements in Cultural Resources, Tourist Services and Infrastructure, and Air Transport Infrastructure, overall regional progress was held back by a decline in Price Competitiveness. This suggests that although many destinations continue to strengthen their tourism offer and connectivity, rising costs are making it more difficult to convert these gains into stronger overall performance.

Sub-Saharan Africa followed a different trajectory. Progress was concentrated in ICT Readiness, Prioritization of T&T and Cultural Resources. However, weaker performance on T&T Demand Sustainability and T&T Socioeconomic Impact limited overall gains. As a result, the gap between sub-Saharan Africa and all other regions has continued to widen.

4.5 Subregional performance

Regional averages mask significant variation within regions. At the subregional level, clear differences emerge in how destinations perform across the TTDI pillars (see Figure 12). The results show that T&T performance is shaped not only by geography but also by the mix of resources, infrastructure and enabling conditions that underpin development.

FIGURE 12 **Comparative subregional profiles across TTDI pillars, 2026**

		Enabling Environment					T&T Policy and Enabling Conditions			Infrastructure and Services			T&T Resources			T&T Sustainability		
Region/subregion	TTDI Index	Business Environment	Safety and Security	Health and Hygiene	Human Resources and Labour Market	ICT Readiness	Prioritization of T&T	Openness to T&T	Price Competitiveness	Air Transport Infrastructure	Ground and Port Infrastructure	Tourist Services and Infrastructure	Natural Resources	Cultural Resources	Non-Leisure Resources	Environmental Sustainability	T&T Socioeconomic Impact	T&T Demand Sustainability
Asia-Pacific	**4.29**	**4.35**	**5.88**	**4.82**	**4.23**	**5.24**	**4.48**	**4.16**	**5.04**	**4.58**	**4.04**	**2.38**	**3.87**	**3.29**	**3.64**	**4.38**	**4.26**	**4.34**
Eastern Asia-Pacific	4.75	4.94	6.08	6.01	4.87	6.11	4.32	4.39	4.29	5.10	4.28	3.28	4.53	4.40	4.60	4.84	4.73	3.98
South Asia	3.71	3.24	5.53	4.01	3.19	4.13	4.30	3.36	5.73	3.56	3.44	1.43	3.22	2.54	2.77	3.85	4.32	4.52
South-East Asia	4.32	4.64	5.97	4.38	4.42	5.29	4.75	4.54	5.20	4.87	4.25	2.28	3.77	2.88	3.43	4.38	3.81	4.51
Europe and Eurasia	**4.39**	**4.87**	**6.12**	**5.92**	**4.84**	**5.91**	**4.66**	**4.60**	**3.87**	**4.47**	**4.23**	**4.19**	**2.63**	**2.77**	**2.92**	**5.07**	**4.03**	**3.47**
Balkans and Eastern Europe	4.10	4.38	6.07	5.94	4.46	5.61	4.48	4.58	4.57	3.51	3.75	3.52	2.22	2.08	2.04	5.07	4.11	3.22
Eurasia	3.90	4.20	5.87	5.47	4.51	5.39	4.14	3.74	5.63	3.58	3.39	2.46	2.20	1.94	1.55	3.85	4.35	4.07
Northern Europe	4.39	5.37	6.38	5.87	5.42	6.27	4.60	4.61	3.52	4.16	4.29	4.73	2.24	1.89	2.54	5.45	4.25	3.11
Southern Europe	4.63	4.69	6.05	5.97	4.55	5.91	5.30	4.77	3.31	5.47	4.01	5.49	3.36	3.88	3.65	4.94	3.97	3.46
Western Europe	4.76	5.56	6.20	6.15	5.23	6.28	4.67	4.99	2.83	5.38	5.35	4.47	2.97	3.69	4.29	5.63	3.65	3.64
Middle East and North Africa	**3.98**	**4.55**	**6.09**	**4.73**	**4.04**	**5.33**	**4.47**	**3.94**	**4.81**	**4.62**	**3.77**	**2.92**	**2.03**	**2.25**	**2.72**	**3.83**	**3.45**	**4.14**
Middle East	4.10	5.03	6.20	5.01	4.39	5.75	4.29	4.13	4.41	5.02	4.09	3.08	1.83	2.00	2.86	3.83	3.58	4.28
North Africa	3.74	3.59	5.87	4.18	3.35	4.47	4.82	3.55	5.60	3.83	3.13	2.62	2.42	2.76	2.43	3.85	3.19	3.85
Sub-Saharan Africa	**3.36**	**3.56**	**5.22**	**2.44**	**3.81**	**4.08**	**3.64**	**3.37**	**4.85**	**2.83**	**2.82**	**1.70**	**2.79**	**1.52**	**1.52**	**4.02**	**4.75**	**4.20**
Eastern Africa	3.60	3.93	5.85	2.88	4.01	4.21	4.66	4.06	4.55	3.22	3.22	1.73	2.75	1.44	1.46	4.07	4.62	4.50
Southern Africa	3.48	3.62	5.16	2.69	3.89	4.26	3.71	3.29	5.19	2.77	2.59	2.01	3.24	1.60	1.71	4.28	5.18	3.99
Western Africa	3.12	3.27	4.86	1.97	3.62	3.87	2.95	2.99	4.77	2.63	2.75	1.45	2.48	1.51	1.41	3.78	4.51	4.17
The Americas	**3.96**	**3.99**	**4.94**	**4.52**	**4.01**	**4.94**	**4.78**	**3.85**	**4.56**	**3.76**	**2.97**	**2.63**	**3.81**	**2.57**	**2.63**	**4.53**	**4.61**	**4.15**
North and Central America	3.96	4.21	5.07	4.26	4.00	4.84	4.98	3.80	4.07	4.10	3.15	2.77	3.68	2.37	2.65	4.52	4.56	4.28
South America	3.95	3.72	4.79	4.83	4.02	5.06	4.54	3.91	5.15	3.35	2.76	2.47	3.97	2.82	2.59	4.55	4.67	4.00

Source: World Economic Forum

Note: Cell colours indicate the score level on a scale of 1–7, with green representing higher scores and red lower scores.

Western Europe, Eastern Asia-Pacific and Southern Europe remain the highest-performing subregions. All three score highly on Cultural Resources and Air Transport Infrastructure, although their profiles are not identical. Western and Southern Europe stand out for Tourist Services and Infrastructure, while Eastern Asia-Pacific is the strongest-performing subregion in Natural Resources. Across all three, Price Competitiveness remains a relative weakness.

The chart shows that strong tourism performance can be achieved through different combinations of strengths. The Middle East performs particularly well on Air Transport Infrastructure and ICT Readiness, while North and Central America and South America benefit from rich natural assets.

Western Africa, Eastern Africa and Southern Africa face challenges across several pillars, most notably on Health and Hygiene, Tourist Services and Infrastructure, Air Transport Infrastructure and Non-Leisure Resources. Yet they score relatively highly on T&T Socioeconomic Impact, highlighting tourism's importance to local economies despite structural constraints.

5

Special focus: Five priorities for T&T in a more uncertain world

With disruption now the norm, destinations must manage tourism activity, create value, protect access, use digital innovation and be adaptable in order to remain competitive and sustainable.

↓ Disruption is now a common occurrence for travel and tourism.



In the 2020s, disruption has become a constant rather than an exception. For T&T, geopolitical conflict, economic volatility, climate stress, digital disruption and workforce constraints are now testing destinations more frequently. The destinations that do best will be those that can keep functioning, maintain trust and adapt as circumstances become more complex – not those that simply grow the fastest. Five priorities stand out for governments, national and regional tourism authorities, airlines, accommodation providers, platforms and investors.



5.1 Diversify demand and reduce concentration risk

↑ Year-round demand can be strengthened by diversifying travel experiences, markets and visitor segments.

One of the clearest lessons from recent years is that destinations benefit from having multiple sources of demand. While the TTDI shows improvement in tourism development conditions, recovery and performance have varied considerably across economies and regions, highlighting the value for businesses and destinations of a diverse mix of markets, visitor segments and travel seasons.

Diversification became particularly evident during and after the pandemic, when recovery patterns varied significantly by market and region. Destinations with strong domestic and regional travel activity were often better positioned to sustain tourism activity while international travel remained constrained. More broadly, excessive dependence on any single source market, visitor segment or travel season can leave destinations exposed to economic shocks, geopolitical tensions, changing traveller preferences or disruptions to transport networks.

Diversification is therefore about reducing concentration risk by broadening the sources, purposes and timing of travel demand. This means:

- Diversifying across domestic, regional and international markets, with a balance of short-haul and long-haul access
- Broadening the mix of leisure and non-leisure travel, including business events, meetings and other higher-value segments
- Expanding source markets across different traveller groups, budgets and motivations
- Developing year-round demand through a wider mix of experiences and products

Balanced tourism activity creates a more stable base for growth. It makes destinations less exposed when a major source market weakens, an air corridor closes, business travel slows, travellers become more price-sensitive during times of economic stress or climate pressures affect seasons. It also supports more consistent investment in tourism infrastructure, services and workforce development.

For governments and national and regional tourism authorities, this means aligning marketing, connectivity and product development strategies around a broader mix of markets and visitor segments. For airlines, tour operators and platforms, it means creating routes, products and experiences that attract different types of traveller throughout the year. Diversification can also help destinations capture demand redirected from more constrained or disrupted competitors.

“ Balanced tourism activity creates a more stable base for growth. It makes destinations less exposed when a major source market weakens.

CASE STUDY: JAPAN

Diversifying demand and reducing concentration risk.

TTDI context: Japan's travel and tourism strengths have traditionally rested on its world-class transport connectivity and rich cultural and non-leisure resources. Since 2024, however, the key drivers of its rise to the top of the TTDI rankings have been strong gains in demand sustainability and openness. Japan was the second-highest improver globally in the T&T Demand Sustainability pillar and the fourth-highest improver in Openness to T&T, helping the country attract a broader mix of visitors and strengthen resilience to changing travel patterns.

The pressure: Heavy reliance on a small number of source markets can expose destinations to geopolitical tensions, economic shocks and shifting traveller preferences. At the same time, the concentration of visitors in major tourism hubs can create crowding and infrastructure pressures, while limiting the benefits that tourism brings to other regions.

The response: Japan has pursued a strategy to diversify both its visitor markets and its destinations. Alongside efforts to attract travellers from a wider range of countries, the Japan National Tourism Organization (JNTO) has promoted regional destinations and encouraged travel beyond Japan's major urban gateways.[40] Initiatives have included targeted marketing campaigns in new markets and programmes designed to increase visits to smaller cities and regional areas.

The outcome: Japan welcomed a record 42.7 million international visitors in 2025, despite a sharp decline in Chinese arrivals at the end of the year.[41] Over the longer term, the composition of T&T activity has become more diverse: the share of visitors from mainland China, Korea, Rep., Taiwan, Province of China and Hong Kong SAR, China fell from 70% in 2019 to 65% in 2025, while the share from the United States, Europe, Australia and the Middle East increased from 14% to 18%. At the same time, international visitor nights in regional areas grew by 14.1% year on year in October 2025, compared with a 0.8% decline in Japan's three major urban areas.[42]

Why it matters: Japan demonstrates that diversification is about resilience as much as growth. By extending its visitor base and encouraging more travel beyond major tourism centres, the country has reduced concentration risk while continuing to achieve record tourism performance. For destinations facing similar challenges, the lesson is that openness, connectivity and destination development can help build a more balanced and adaptable tourism system.

↓ Takayama, Japan. Tourism has diversified beyond the major cities – regional visitor nights grew 14.1% year on year even as its three biggest urban areas declined.



5.2 Protect access, visibility and operating continuity

If diversification shapes where demand comes from, access, visibility and operating continuity determine whether that demand can be realized.

Air Transport Infrastructure is one of the largest advantages enjoyed by the top 20 economies in the TTDI, with average scores more than 50% higher than those of the rest of the index. The ability to move people efficiently and reliably remains a defining feature of the top-performing destinations.

However, physical connectivity alone is not enough. Openness, visa policy and border management play an important role in translating transport access into tourism flows. Destinations must also be visible, trusted and easy to find across the digital channels and AI-powered tools that travellers use to plan and book trips. For many destinations, the challenge is not a lack of information but coordinating it across multiple organizations and ensuring it is accurate and machine-readable. TTDI results suggest that many destinations are still adapting to these changes. As AI-powered search and recommendation tools play a greater role in travel planning, ensuring destination content is visible and accessible may become as important as traditional tourism promotion.

At the same time, destinations need to remain operational when disruption occurs. As highlighted by the World Bank, resilient tourism systems depend not only on physical infrastructure but also on risk planning, preparedness, coordination and recovery capabilities that enable destinations to adapt to disruption and restore visitor confidence.[43] This includes:

- Maintaining reliable connectivity – including interregional links across air, rail, road and maritime transport – with route resilience and coordinated border management
- Ensuring digital continuity across booking, payment and visitor information systems
- Sustaining clear, trusted destination visibility on all digital and AI-mediated discovery channels
- Aligning infrastructure, border management and visa regulations with geopolitical, climate and operational risks

Preserving access is about more than new infrastructure or restored routes. It is also about ensuring destinations remain easy to find, navigate and access when disruption occurs – so that interest still translates into travel.

For governments and regulators, this means treating transport connectivity, visa and border policy, digital infrastructure, early-warning systems and crisis communication as part of the same resilience agenda. For airlines, platforms and large operators, it means having back-up systems and clear traveller communication so that disruption can be managed quickly and travellers can re-book or re-route when problems occur.

↓ Physical connectivity alone isn't enough – destinations must also coordinate information across multiple organizations and ensure it is accurate and machine-readable.



CASE STUDY: GERMANY'S NATIONAL TOURISM DATA PLATFORM

Making destinations visible, consistent and trusted in an AI-mediated discovery system.

TTDI context: Ranking sixth globally, Germany is a leader in tourism Digital Demand and destination branding. The country ranks third for cultural tourism Digital Demand, first for non-leisure tourism Digital Demand and 10th for Country Brand Strategy. These strengths highlight Germany's ability to generate global interest in everything from local gastronomy and historical sites to business travel, entrepreneurship and exchange programmes.

The pressure: Travel discovery is now shaped by digital platforms, search engines and, more recently, generative-AI assistants. When tourism data is fragmented across hundreds of tourism boards, transport providers, attractions and other stakeholders, maintaining consistent up-to-date information becomes difficult. Inconsistent formats, standards and governance can make it harder for digital platforms, search engines and AI platforms to provide accurate, up-to-date content.

The response: The German National Tourist Board (GNTB) launched the Knowledge Graph in 2023,[44] creating a single, machine-readable source of tourism information for Germany. Data on attractions, events, accommodation and services from regional and city tourism boards and other providers is harmonized and made available to search engines, platforms and AI platforms. The GNTB works with tourism organizations across all 16 federal states, creating a shared database of around 500,000 tourism records. The data is openly accessible, allowing tour operators, start-ups and other third parties to develop new digital services. One example is Emma, an AI-powered travel assistant that uses the data to provide personalized travel recommendations and information.[45]

Why it matters: As travel discovery shifts towards AI-mediated channels, destination data is becoming critical digital infrastructure rather than simply a marketing asset. Maintaining accurate, structured and shareable information requires coordination across multiple tourism stakeholders, but it can also support innovation, visibility and operating continuity. Germany's approach demonstrates how destinations can improve their discoverability and credibility across rapidly evolving digital channels while enabling new tourism services and applications.

5.3 Compete on value, not price

> What matters is not whether a destination is expensive or affordable, but whether travellers feel the experience and service justify the cost.

Price Competitiveness was one of the weakest-performing pillars in the TTDI between 2024 and 2026, reflecting rising costs across many tourism economies. At the same time, many destinations continued to attract visitors despite higher prices, suggesting that competitiveness increasingly depends on factors beyond affordability alone.

Affordability remains a powerful advantage for many destinations. Countries such as Albania have benefitted from offering visitors a more affordable alternative to neighbouring destinations while still providing a compelling tourism experience. However, preserving competitiveness is becoming more challenging as inflation, rising labour costs and more expensive transport place pressure on prices across the sector. As a result, destinations need to strengthen other sources of competitive advantage alongside affordability.

Competing on value therefore requires a shift in approach. Rather than relying solely on volume growth or discounting, destinations need to focus on:

- Maintaining consistent service quality across the visitor journey
- Supporting higher-value segments, including business, events and year-round travel
- Adapting offers to tighter budgets without eroding trust or quality
- Protecting long-term positioning by investing in reputation, brand and the environmental, cultural and social assets that underpin visitor appeal, rather than chasing short-term volume

Different destinations can succeed in different ways. With tighter budgets, both premium destinations that justify their price and lower-cost destinations that offer credible value can gain ground. What matters is not whether a destination is expensive or affordable, but whether travellers feel the experience and service justify the cost.

For destination managers and businesses, this means making value visible and credible through service reliability, design and communication. Reputation and brand remain central to this effort. However, value is shaped not only by the visitor experience itself but also by confidence that destinations can maintain the environmental, cultural and social qualities that make them

attractive over time. In some market segments, sustainability is also becoming a more important factor in destination choice.

Affordability will continue to influence traveller choices and create opportunities for destinations that offer strong value for money. But long-term performance depends on combining affordability, quality, trust and destination stewardship in ways that reinforce a destination's lasting appeal.

CASE STUDY: COSTA RICA

Competing on value through sustainability and destination quality.

TTDI context: Costa Rica is one of the least price-competitive destinations in the Americas, ranking 86th globally on the Price Competitiveness pillar. Despite this, it ranks among the world's leading performers on tourism sustainability, placing fourth on the T&T Sustainability dimension and sixth on the T&T Demand Sustainability pillar. It also ranks third for Prioritization of T&T, reflecting a long-standing focus on public-sector support, destination stewardship, sustainability and value-based branding.

The pressure: Rising travel costs and inflation make it harder for destinations to compete on affordability alone. For relatively expensive destinations, competitiveness increasingly depends on demonstrating that the visitor experience justifies the cost. At the same time, Costa Rica faces the challenge of protecting the natural and cultural assets that underpin its tourism appeal while continuing to generate economic returns from the sector.

↓ Costa Rica ranks 86th on the Price Competitiveness pillar but 4th on the Sustainability dimension; however, average visitor spending still rose by 15% to $1,848 per trip.

The response: Costa Rica has pursued a tourism model centred on sustainability, destination quality and visitor value rather than mass-market growth. It established its Certification for Sustainable Tourism (CST) programme to encourage tourism businesses to strengthen environmental and social performance, improve resource management and engage local communities. The CST standard has since been recognized by the Global Sustainable Tourism Council (GSTC), reinforcing Costa Rica's international reputation as a sustainability-focused destination.[46] While international arrivals grew by only around 1% in 2025, average visitor spending increased from approximately $1,602 to $1,848 per trip,[47] a rise of around 15%, demonstrating how a value-oriented tourism model can increase visitor spending without relying on significant growth in arrivals.

Why it matters: Costa Rica demonstrates that destinations do not need to compete primarily on price to remain attractive. By investing in sustainability, destination quality and differentiated visitor experiences, it has built a tourism model that supports strong visitor spending despite relatively low price competitiveness. As travel costs rise globally and affordability becomes harder to maintain, the lesson for destinations is that long-term competitiveness depends on the value delivered to visitors rather than affordability alone.



5.4 Create and communicate prosperity for local communities

Managing growth is not only about protecting destinations from overcrowding. It is about ensuring that tourism growth creates local value.

Growth has exposed another challenge. As tourism expands, destinations face growing pressure to deliver and showcase community impacts and manage local resources. TTDI results show that T&T Demand Sustainability, measuring the extent to which tourism demand is distributed across locations and seasons and the pressures associated with visitor concentration, remains below pre-pandemic levels, while T&T Socioeconomic Impact has weakened. Maintaining tourism's social licence to operate depends on ensuring growth remains compatible with local quality of life and continues to create economic and social value for residents, businesses and communities.

Managing growth is not only about protecting destinations from overcrowding. It is about ensuring that tourism growth creates local value, supports quality jobs, strengthens communities and maintains the environmental, cultural and social assets on which tourism depends. When tourism growth outpaces local capacity to capture and retain its benefits, the result can be rising living costs, congestion, pressure on public services and declining public support for tourism.

Tourism competes alongside residents and other sectors for housing, labour, public services, water and energy. Anti-tourism protests in Barcelona and the Balearic and Canary Islands in Spain in 2024 and 2025 illustrate how concerns about tourism's impact on housing, congestion and local quality of life can translate into public opposition, even in commercially successful destinations.[48] Addressing this issue requires:

- Planning tourism growth in line with the capacity of local infrastructure, housing, workforce, water and energy systems
- Strengthening tourism's contribution to local economies by supporting SMEs, local supply chains and quality jobs
- Assessing success by measuring local economic impact, resident sentiment, quality of employment, environmental outcomes and visitor distribution, rather than visitor numbers alone
- Communicating clearly and transparently how tourism benefits local communities while demonstrating how these benefits are reinvested locally

For governments and local authorities, this means using planning, regulation and investment to match tourism growth with local capacity and to maximize local economic benefit. For businesses and platforms, it means designing products, visitor experiences and marketing strategies that support local businesses, spread tourism activity appropriately and avoid overloading the same locations at the same times.

At the local level, technology can support these efforts. In the San Vigilio Dolomites in Italy, the "Giggo" virtual holiday assistant helps visitors plan trips that match real-time conditions, including weather, crowding and accessibility, encouraging dispersal across the valley and reducing pressure on the most popular trails and viewpoints.[49]

Growth in visitor numbers is no longer a sufficient indicator of success. Many destinations are evaluating tourism through measures such as resident sentiment, visitor yield, environmental performance and the distribution of tourism across places and seasons. This approach is increasingly reflected in tourism policy, including the European Union's 2026 strategic guidelines for a sustainable and competitive tourism sector, which emphasize resilience, sustainability and community well-being alongside economic growth.[50]

Finally, effective communication with local communities is critical to maintaining tourism's social licence to operate. The benefits generated by tourism are often dispersed across jobs, local supply chains, tax revenues, public services and infrastructure, making them less visible to residents than the pressures associated with visitor growth. Governments, destinations and businesses therefore need to communicate more clearly and transparently about how tourism creates value locally, where revenues are generated and reinvested, and how communities can benefit over time. For example, New York City has highlighted that visitor spending generated almost $7 billion in tax revenue in 2024, equivalent to approximately $2,000 in avoided taxes per household, helping make tourism's contribution to public finances more tangible for residents.[51] This communication is most credible when it is supported by measurable evidence and accompanied by meaningful community engagement, rather than relying on promotional messaging alone.

CASE STUDY: TÜRKIYE

Managing growth through sustainability standards.

TTDI context: Türkiye faces significant tourism growth and concentration pressures. While the country continues to score lower for the T&T Demand Sustainability, T&T Socioeconomic Impact and Environmental Sustainability pillars, all three scores have improved since 2024. The strongest gains have been in the T&T Socioeconomic Impact pillar, which improved by 8.3%, the second-largest improvement globally. The T&T Demand Sustainability pillar improved by 5.1%, while the Environmental Sustainability pillar also recorded modest gains. Together, these trends suggest that efforts to better manage tourism growth and strengthen local benefits are beginning to gain traction.

The pressure: Rapid tourism growth can place severe strain on natural resources, infrastructure, communities and cultural assets, particularly when visitor flows are concentrated in a limited number of destinations. For countries such as Türkiye, maintaining public support for tourism increasingly depends on ensuring that growth is managed in ways that protect destination quality, strengthen local benefits and reduce pressure on communities and ecosystems.

The response: In 2022, Türkiye launched a national sustainable tourism programme in partnership with the Global Sustainable Tourism Council (GSTC), creating a common framework for accommodation providers to adopt internationally recognized sustainability standards. More than 2,000 accommodation facilities have achieved GSTC certification, with certification set to become mandatory nationwide by 2030. The programme is built around GSTC standards that include effective sustainability planning, reducing environmental impacts, protecting cultural heritage and, importantly, maximizing social and economic benefits for local communities. Through this programme, Türkiye is seeking to ensure tourism growth contributes more directly to local economies and destination well-being while reducing pressure on the assets and communities that support tourism.[52]

Why it matters: Türkiye demonstrates that managing growth is not only about limiting visitor numbers. It is about ensuring that tourism continues to create positive outcomes for destinations and the communities that host it. Facing growing visitor pressure, Türkiye has sought to embed common sustainability standards across its tourism sector, including requirements related to local community benefits, cultural heritage and environmental management. For destinations facing similar growth pressures, the lesson is that social licence depends not only on growth itself but on ensuring that tourism growth strengthens local economic, social and environmental outcomes.

↓ Cappadocia, Türkiye. The country's national sustainability programme has certified over 2,000 accommodation facilities, with certification set to become mandatory nationwide by 2030.



5.5 Strengthen workforce capacity and the systems that support delivery

By 2035, demand for workers in T&T is projected to exceed supply by more than 43 million people – a 16% shortfall.

The TTDI shows that across the highest-performing destinations, success depends not only on attracting visitors but also on having the people, institutions and systems needed to deliver tourism consistently and at scale.

Workforce constraints are at the centre of this challenge. As one of the world's largest employers, T&T's ability to grow depends on attracting, developing and retaining the people needed to deliver visitor experiences. By 2035, demand for workers in T&T is projected to exceed supply by more than 43 million people – a 16% shortfall.[53] This will place increasing pressure on tourism businesses' ability to meet demand and maintain service quality.

The challenge is becoming more complex than a simple shortage of workers. Many tourism businesses continue to report difficulties recruiting staff with the skills and experience required by the sector. Ageing populations and barriers to labour mobility are making recruitment and retention more difficult.[54] At the same time, AI and digital tools may help improve productivity, but they are viewed as tools to support workers rather than replace the human-centred experiences at the heart of T&T.[55]

Strengthening delivery capacity therefore requires a focused response. It calls for:

- Investing in workforce skills, retention, leadership development and career pathways
- Improving job quality and reducing excessive seasonality to improve retention
- Supporting workforce productivity through skills development, digital tools and AI-enabled augmentation
- Strengthening the tourism support ecosystem through SME development, improving digital capabilities and closer coordination between governments, education providers and industry

Workforce capacity is the clearest immediate constraint, but it is not the only one. Tourism also depends on the businesses, institutions and coordination mechanisms that support service delivery. Many tourism economies depend on SMEs for diversity, local value and capacity. Fragmented responses across government, transport, destination management and industry can weaken the system as a whole, even where individual organizations perform well.

This requires governments, businesses and industry associations to align education, labour, tourism and SME policies – and to invest jointly in training, career pathways and collaborative responses to disruption. Destinations that can attract, retain and continually develop their workforce, support their service providers and coordinate action under strain will be better placed to maintain service quality, adapt to disruption and sustain long-term competitiveness.

CASE STUDY: SAUDI ARABIA

Building a tourism workforce as the sector grows.

TTDI context: Saudi Arabia has recorded the second-largest improvement in the Human Resources and Labour Market pillar globally since 2019, reflecting substantial progress in workforce development, education and labour market conditions. At the same time, the country has become one of the world's fastest-growing tourism markets, supported by major investment in destinations, infrastructure and connectivity.

The pressure: As part of Vision 2030, Saudi Arabia has committed to expanding tourism rapidly.[56] Sustaining that growth requires a workforce with the skills, experience and leadership capabilities needed to deliver sophisticated tourism products and services. Without coordinated action, labour shortages, skills gaps and weak career pathways could become a major constraint on growth.

The response: The Ministry of Tourism's Human Capability Development Program sets out a coordinated workforce strategy. This includes scholarship and training programmes for Saudi nationals, professional certification and leadership tracks, secondments and apprenticeships with international hospitality institutions, and targeted programmes to support tourism workers at every stage of their careers.[57] Tourism employment reached nearly 1.03 million jobs in 2025, while Saudi women accounted for approximately 47% of Saudi employees in tourism roles, up from 5% in 2018.[58]

Why it matters: Saudi Arabia's large-scale investment in tourism talent development, coupled with strong gains in workforce participation and employment, highlights the role that coordinated workforce strategies can play in supporting rapid tourism growth. For destinations facing similar workforce pressures, the lesson is that long-term competitiveness depends on fostering the people and capabilities needed to deliver growth.

Conclusion

Travel and tourism (T&T) has moved beyond recovery. International arrivals and visitor spending are now above pre-pandemic levels. Between the 2024 and 2026 editions, 92% of economies improved their TTDI score, reflecting broad-based progress in the conditions that support the sector.

However, the TTDI also points to a shift in the sector's challenges. As activity has recovered and tourism development conditions have improved, new constraints are emerging. Three pressures stand out. Affordability is weakening. Investment is struggling to keep pace with demand. Sustainability pressures are becoming more complex, from crowding and environmental stress to how widely tourism's benefits are shared.

From recovery to managed growth

In 2026, the challenge is no longer recovering pre-pandemic activity. The opportunity is managing growth. Air transport, accommodation, tourist services and natural, cultural and business-linked assets are all stronger than they were in 2024 and in 2019, reflecting how rapidly the sector's operating base has been rebuilt.

The question is no longer whether destinations can attract visitors. It is whether they can convert demand into sustainable and resilient tourism development that creates lasting value for businesses, communities and destinations. This means keeping travel affordable, ensuring infrastructure and services keep pace with growth, managing pressure on communities and natural assets, and creating more local benefits from visitor spending.

At the same time, destinations have less room to absorb disruption. Geopolitical conflict, economic uncertainty, climate pressures and technological change are reshaping the environment in which tourism operates. What separates successful destinations is not only the strength of their tourism assets but also their ability to adapt and continue functioning when circumstances become unstable. This reinforces the need for T&T to have a stronger voice in policy discussions on infrastructure, workforce development, climate adaptation and economic resilience.

The strategic shift

For governments, industry and investors, the task has shifted from supporting recovery to strengthening the conditions that underpin long-term tourism performance. The challenge is no longer simply generating demand, but ensuring that infrastructure, services, investment and destination management keep pace with growth while maintaining resilience to disruption. Increasingly, this will depend on smarter infrastructure, stronger regional connectivity and tourism systems that can adapt to changing patterns of visitor behaviour, mobility and risk.

Section 5 sets out five practical responses: diversify activity and reduce concentration risk; protect access, visibility and operating continuity; compete on value, not price; manage growth to maintain social licence; and strengthen workforce capacity and the systems that support delivery.

None of these works in isolation. A destination cannot compete on value without people to deliver it, manage growth without the trust of residents or protect access without coordination among airlines, hotels, regulators and destination managers.

The destinations that do best in the years ahead will be those whose tourism systems continue to function, adapt and create positive outcomes for visitors, businesses and communities. Achieving this will require greater collaboration across governments, destinations, businesses and international tourism organizations on the issues that matter most for the sector's future: resilience, sustainability, connectivity, workforce development and inclusive growth.

Technical notes and methodology

Appendix A

Travel & Tourism Development Index methodology

This section provides details about the methodology of the 2026 edition of the *Travel & Tourism Development Index* (TTDI). It comprises the following parts:

- Composition and calculation
- Indicator and country selection
- Indicator list and details
- Index changes and comparability

Composition and calculation

The TTDI structure (see Figure A1) is composed of 17 pillars organized into five dimensions:

A. Enabling Environment (five pillars): 1. Business Environment; 2. Safety and Security; 3. Health and Hygiene; 4. Human Resources and Labour Market; 5. ICT Readiness

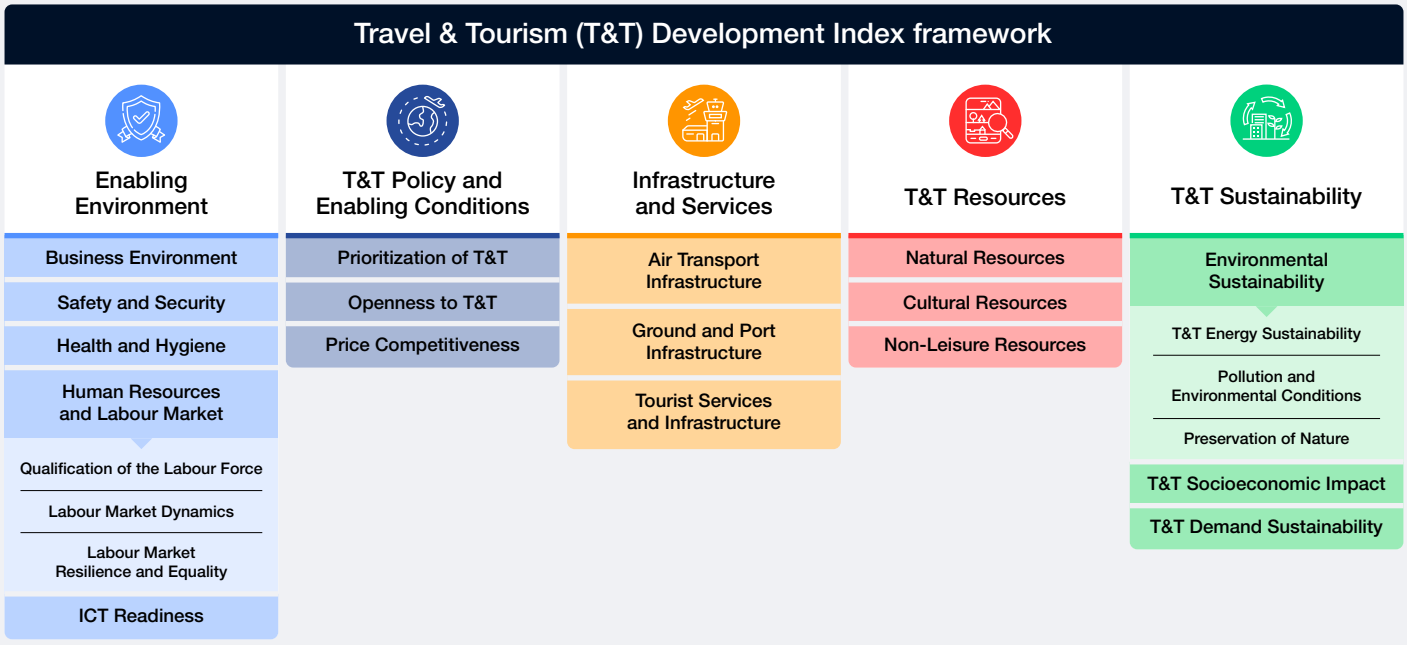
B. T&T Policy and Enabling Conditions (three pillars): 6. Prioritization of T&T; 7. Openness to T&T; 8. Price Competitiveness

C. Infrastructure and Services (three pillars): 9. Air Transport Infrastructure; 10. Ground and Port Infrastructure; 11. Tourist Services and Infrastructure

D. T&T Resources (three pillars): 12. Natural Resources; 13. Cultural Resources; 14. Non-Leisure Resources

E. T&T Sustainability (three pillars): 15. Environmental Sustainability; 16. T&T Socioeconomic Impact; 17. T&T Demand Sustainability

FIGURE A1 **Framework**



Source: World Economic Forum

These 17 pillars comprise 102 indicators that are calculated based on data derived from the Executive Opinion Survey (the survey) as well as quantitative data from other sources. The survey data is derived from responses to the World Economic Forum's Executive Opinion Survey and ranges in value from 1 (worst) to 7 (best). TTDI 2026 results reflect the latest available data at the time of collection (May 2026).

Hard data (non-survey data) was collected from various sources, which are described in Appendix B. Data used in the calculation of the TTDI can be found by visiting the online version of the *Travel & Tourism Development Index* (TTDI) 2026.

The TTDI is calculated as an average (arithmetic mean) of the 17 component pillar averages (arithmetic means). While figures for the five dimensions are provided, they are used for categorization and presentation purposes only. Each of the pillars is calculated as an unweighted average of the individual component variables. Note that the Human Resources and Labour Market pillar is the unweighted average of its three subpillars: Qualification of the Labour Force, Labour Market Dynamics and Labour Market Resilience and Equality. Likewise, the Environmental Sustainability pillar is the unweighted average of its three subpillars: T&T Energy Sustainability, Pollution and Environmental Conditions and Preservation of Nature.

Hard data indicators used in the TTDI are normalized to a 1-to-7 scale in order to align them with the Executive Opinion Survey's results. The standard formula for converting each hard data indicator to the 1-to-7 scale is:

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

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

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

However, in many cases, adjustments are made to figures used for sample minimum and sample maximum to account for issues such as outliers. See Table A1 for further details.

Indicator and country selection

To be selected for the TTDI, indicators need to meet the following criteria:

- **Relevance:** The indicator must be an acceptable metric for the concept that is being covered.
- **Country coverage:** Timely indicator data must be available for the majority of economies covered by the TTDI. In most cases, this means coverage exceeds 100 economies.
- **Comparability:** The indicator data must be comparable among the various economies covered and throughout its time series.
- **Update frequency:** The indicator must be regularly updated for the foreseeable future.
- **Source quality and objectivity:** The indicator must come from a reputable and objective source. In this regard, common sources include international organizations such as the World Bank and UN Tourism. To help with comparability, attempts are made to retrieve as much data as possible for a particular indicator from one source.

For data that is missing or is more than 10 years old, the following steps are taken:

- First, research is conducted to find an alternative non-government source.
- If no non-government source is found, publicly available government data is collected. However, the respective government is never informed of this action to avoid creating an unfair advantage or increase bias.
- In the case that no data is found using the above two steps, the data is imputed. Please see a list of imputed data in Table A2.

For an economy to be included in the TTDI, it needs to:

- Be included in at least one of the latest three Executive Opinion Surveys as this survey accounts for a large share of indicators
- Not have missing data for 10% or more of total indicators or 20–33% of indicators within any particular pillar (share depends on the pillar)
- Not be partaking in a conflict that generates enough material damage to make the indicators outdated

TABLE A1 **Indicator list and details**

The indicators that make up each pillar – and subpillar – are described below.

Dimension A: Enabling Environment
Pillar 1: Business Environment
1.01 Rule of law
1.02 Burden of government regulation
1.03 Government ensuring policy stability
1.04 Country credit rating
1.05 De-jure financial globalization
1.06 De-jure trade globalization
1.07 SME access to finance
Pillar 2: Safety and Security
2.01 Confidence in local police
2.02 Safety walking alone at night
2.03 Homicide rate
2.04 Global Terrorism Index
2.05 Organized violence, deaths
Pillar 3: Health and Hygiene
3.01 Physician density
3.02 Use of basic sanitation[1]
3.03 Use of basic drinking water[1]
3.04 Hospital beds density
3.05 Communicable disease incidence
Pillar 4: Human Resources and Labour Market
Qualification of the labour force
4.01 Labour force with intermediate education
4.02 Labour force with advanced education
4.03 Quality of secondary education
4.04 Quality of tertiary education
Labour Market Dynamics
4.05 Hiring and firing practices
4.06 Ease of finding skilled employees in local labour market
4.07 Flexible working arrangements
4.08 Labour force participation
Labour Market Resilience and Equality
4.09 Equal workforce opportunities
4.10 Workers' rights
4.11 Female labour force participation
4.12 Social protection basic coverage[1]
4.13 Social protection spending[1]
Pillar 5: ICT Readiness
5.01 Individuals using the internet
5.02 Broadband internet subscribers
5.03 Mobile broadband subscribers
5.04 3G mobile network coverage
5.05 Use of digital payments
5.06 Use of digital platforms for providing transportation and shipping
5.07 Use of digital platform for providing hotels, restaurants and leisure activity services
5.08 Power losses

Dimension B: T&T Policy and Enabling Conditions
Pillar 6: Prioritization of T&T
6.01 T&T government expenditure
6.02 Comprehensiveness of T&T data[1]
6.03 Timeliness of T&T data[1]
6.04 Country Brand Strategy rating
Pillar 7: Openness to T&T
7.01 Visa requirements
7.02 Number of air service agreements
7.03 TRAVELSAT Hospitality Reputation Index
7.04 Passport mobility score
Pillar 8: Price Competitiveness
8.01 Hotel price index
8.02 Purchasing power parity
8.03 Fuel price levels
8.04 Short-term rental price

Dimension C: Infrastructure and Services
Pillar 9: Air Transport Infrastructure
9.01 Efficiency of air transport services
9.02 Available seat kilometres
9.03 Number of operating airlines
9.04 Airport connectivity
Pillar 10: Ground and Port Infrastructure
10.01 Quality of roads
10.02 Road density
10.03 Efficiency of train services
10.04 Railroad density
10.05 Efficiency of public transport services
10.06 Efficiency of seaport services[2]
Pillar 11: Tourist Services and Infrastructure
11.01 Hotel rooms density
11.02 Short-term rental listing density
11.03 Labour productivity in hotels and restaurants
11.04 T&T capital investment intensity

Dimension D: T&T Resources
Pillar 12: Natural Resources
12.01 Number of World Heritage natural sites
12.02 Total known species
12.03 Total protected areas
12.04 Natural tourism Digital Demand
12.05 Number of terrestrial and freshwater ecoregions
Pillar 13: Cultural Resources
13.01 Number of World Heritage cultural sites[1]
13.02 Oral and intangible cultural heritage[1]
13.03 Number of large sports stadiums
13.04 Cultural and entertainment tourism Digital Demand
13.05 Number of UNESCO Creative Cities
Pillar 14: Non-Leisure Resources
14.01 Presence of Forbes Global 2000 HQ locations
14.02 Presence of global cities
14.03 Number of top universities
14.04 Non-leisure tourism Digital Demand

Dimension E: T&T Sustainability
Pillar 15: Environmental Sustainability
T&T Energy Sustainability
15.01 T&T GHG intensity
15.02 T&T energy intensity
15.03 T&T use of low-carbon energy
15.04 Renewable energy regulation[1]
15.05 Energy efficiency regulation[1]
Pollution and Environmental Conditions
15.06 Particulate matter (2.5) concentration
15.07 Level of water stress
15.08 Red List Index
15.09 Forest cover loss[2]
15.10 Proportion of safely treated domestic wastewater flows
15.11 Clean ocean water[2]
Preservation of Nature
15.12 Number of environmental treaty ratifications
15.13 Adequate protection for nature
15.14 Total protected areas coverage[1]
15.15 Average proportion of all key biodiversity areas covered by protected areas[1]
Pillar 16: T&T Socioeconomic Impact
16.01 T&T GDP multiplier
16.02 T&T employment multiplier
16.03 T&T high-wage jobs
16.04 T&T labour gender parity
Pillar 17: T&T Demand Sustainability
17.01 Inbound length of stay
17.02 Seasonality of international tourist arrivals
17.03 Concentration of interest in cultural attractions[1]
17.04 Concentration of interest in nature attractions[1]
17.05 Geographically dispersed tourism

Notes: 1. These indicators are combined by applying a simple average aggregation to form one single indicator. Consequently, they are implicitly weighted by a factor of 0.5.

2. These indicators are subject to exclusion filters. Landlocked economies will have an n/a value for indicator 10.06 Efficiency of seaport services and 15.11 Clean ocean water. Economies with minimal to no forest will have an n/a value for indicator 15.09 Forest cover loss.

TABLE A2 | **Table of normalization**

Indicator index number	Indicator title and units	Min/max used for normalization	Guiding principle
1.01	Rule of law, 0–100 (best)	0/100	Range of possible values
1.04	Country credit rating, 0–100 (best)	0/100	Range of possible values
1.05	De-jure financial globalization, 0–100 (best)	0/100	Range of possible values
1.06	De-jure trade globalization, 0–100 (best)	0/100	Range of possible values
2.01	Confidence in local police, 0–100 (best)	0/100	Range of possible values
2.02	Safety walking alone at night, 0–100 (best)	0/100	Range of possible values
2.03	Homicide cases per 100,000 pop	0/29	Winsorization
2.04	Global Terrorism Index, 0–10 (worst)	0/10	Range of possible values
2.05	Organized violence, deaths per 100,000 pop	0/4	Arbitrary min max
3.01	Number of physicians per 10,000 pop	0/50	Winsorization
3.02	Use of basic sanitation, % of pop	21/100	Winsorization
3.03	Use of basic drinking water, % of pop	50/100	Arbitrary min natural max
3.04	Hospital beds density per 1,000 pop	0/7.2	Winsorization
3.05	Communicable disease incidence per 100,000 pop	9,058/55,285	Winsorization
4.01	Labour force with intermediate education, % of total	0/1	Range of possible values
4.02	Labour force with advanced education, % of total	0/0.5	Winsorization
4.08	Labour force participation, % of adult pop	40/85	Winsorization
4.10	Workers' rights, 1–5+ (worst)	1/6 (value of 5+ is converted into 6)	Range of possible values
4.11	Female labour force participation, %	21/95	Winsorization
4.12	Social protection basic coverage, % of pop	0/100	Range of possible values
4.13	Social protection spending, % of GDP	0.05/24.5	Winsorization
5.01	Individuals using internet, % of pop	0/100	Range of possible values
5.02	Broadband internet subscribers per 100 pop	0/50	Natural min Social Mobility Index 2020 max
5.03	Active mobile broadband internet subscriptions per 100 pop	0/120	Natural min 120 is the value above which mobile broadband technology is considered sufficiently widespread not to constitute a constraint for the average user
5.04	3G mobile network coverage rate, % of pop	40/100	Arbitrary min natural max
5.05	Use of digital payments, % pop 15+	0/1	Range of possible values
5.08	Power losses, % of domestic supply	0/30	Arbitrary min max
6.01	T&T government expenditure, % gov't budget	0/10.7	Winsorization
6.02	Comprehensiveness of annual T&T data, 0–120 (best)	0/120	Range of possible values
6.03	Timeliness of providing monthly/quarterly T&T data, 0–22.5 (best)	0/22.5	Range of possible values
6.04	Country Brand Strategy rating, 0–100 (best)	0/100	Range of possible values

Indicator index number	Indicator title and units	Min/max used for normalization	Guiding principle
7.01	Visa requirements	0/49.9	Winsorization
7.02	Number of air service agreements	0/80	Arbitrary min max
7.03	Reputation for hospitality	0/88	Winsorization
7.04	Passport mobility score	0/227	Range of possible values
8.01	Hotel price index, US$	61/182	Winsorization
8.02	Purchasing power parity, PPP$	0.23/1.14	Winsorization
8.03	Fuel price levels, US$/litre	0.34/2.3	Winsorization
8.04	Short-term rental price, US$	32/280	Winsorization
9.02	Available seat kilometres per week, millions per pop	Unavailable due to data-sharing agreement	Winsorization
9.03	Number of operating airlines	Unavailable due to data-sharing agreement	Arbitrary min max
9.04	Airport connectivity score	0/200 (cubic power of logarithm)	The Global Competitiveness Index 4.0 Methodology
10.02	Road density, km/surface area	0/200	Arbitrary min max
10.04	Railroad density, km/100 square km surface area	0/10.4	Winsorization
11.01	Hotel rooms, per 100 pop	0/2.3	Winsorization
11.02	Number of short-term rental listing, per 10,000 pop	0/98	Winsorization
11.03	Labour productivity in hotels and restaurants, US$ per emp	0/102,400	Winsorization
11.04	T&T capital investment intensity, US$ per emp	0/38,337	Winsorization
12.01	Number of World Heritage natural sites	0/7.5	Winsorization
12.02	Total known species	899/11,514	Winsorization
12.03	Total protected areas, km^2	3.4/6.2 (logarithmic)	Winsorization
12.04	Natural tourism Digital Demand, 0–100 (best)	0/52	Winsorization
12.05	Number of terrestrial and freshwater ecoregions	0/40	Arbitrary min max
13.01	Number of World Heritage cultural sites	0/30	Arbitrary min max
13.02	Number of oral and intangible cultural expressions	0/17	Winsorization
13.03	Number of large sports stadiums	0/37	Winsorization
13.04	Cultural and entertainment tourism Digital Demand, 0–100 (best)	0/58	Winsorization
13.05	Number of UNESCO Creative Cities	0/10	Winsorization
14.01	Presence of Forbes Global 2000 HQ locations	0/1.9	Winsorization
14.02	Presence of global cities	0/0.5 (logarithmic (log[1+x]))	Arbitrary min max
14.03	Number of top universities	0/2.1 (logarithmic (log[1+x]))	Winsorization
14.04	Non-leisure tourism Digital Demand, 0–100 (best)	0/33	Winsorization
15.01	T&T GHG intensity, kg of CO_2e per US$ 2 of T&T GDP	0/2.5	Natural min arbitrary max
15.02	T&T energy intensity, MJ of energy, per real US$ of T&T GDP	0/29.5	Winsorization
15.03	T&T use of low-carbon energy, % of total	0/19	Winsorization

Indicator index number	Indicator title and units	Min/max used for normalization	Guiding principle
15.04	Renewable energy regulation, 0–100 (best)	0/100	Range of possible values
15.05	Energy efficiency regulation, 0–100 (best)	0/100	Range of possible values
15.06	Particulate matter (2.5) concentration (μg/m^3)	5/35	WHO guidelines
15.07	Level of water stress	0/100	Natural min arbitrary max
15.08	Red List Index, 0–1 (best)	0.5/1	Arbitrary min. natural max
15.09	Forest cover loss, average % of baseline	0/2	Arbitrary min max
15.10	Proportion of safely treated domestic wastewater flows, %	0/100	Range of possible values
15.11	Clean ocean water, 0–100 (best)	0/100	Range of possible values
15.12	Environmental treaty ratification, 0–29 (best)	0/29	Range of possible values
15.14	Total protected areas, % total area	0/41	Winsorization
15.15	Average proportion of all key biodiversity areas covered by protected areas, %	0/100	Range of possible values
16.01	T&T GDP multiplier	0.5/3	Winsorization
16.02	T&T employment multiplier	0.5/2.9	Winsorization
16.03	T&T high-wage jobs, % of emp in high-wage sectors	0/61	Winsorization
16.04	T&T labour gender parity, absolute dif male to female % of emp	0/100	Range of possible values
17.01	Inbound length of stay, days	0/13.4	Winsorization
17.02	Seasonality of international tourist arrivals, peak season % of total	27/64.5	Winsorization
17.03	Concentration of interest in cultural attractions, % of views	10/89	Winsorization
17.04	Concentration of interest in nature attractions, % of views	10/79	Winsorization

Note: This table presents the minimum and maximum used for the normalization of hard data into a 1–7 scale score. Indicators that come from the World Economic Forum's Executive Opinion Survey are not included as they are already using this scale.

TABLE A3 | **Table of imputation**

Indicator	Imputation method	Economy	Imputed value
1.06 De-jure trade globalization	Peer group mean. "Group" is defined as the combination of the World Bank income group and TTDI subregional groups	Uzbekistan	62.09
2.04 Global Terrorism Index	Peer group mean. "Group" is defined as countries with a 0 value for indicator "organized violence deaths/100,000 pop"	Luxembourg	0.662
		Malta	0.662
3.04 Hospital beds density	Peer group mean. "Group" is defined as the combination of the World Bank income group and TTDI subregional groups	Côte d'Ivoire	0.43
		Malawi	0.75
		Namibia	0.75
		Nigeria	0.43
		Sierra Leone	0.25
		South Africa	2.36
		Uzbekistan	3.73
		Zambia	0.75
		Zimbabwe	0.75
4.01 Labour force with intermediate education	Peer group mean. "Group" is defined as the combination of the World Bank income group and GCC member states	Kuwait	0.514
	Peer group mean. "Group" is defined as the combination of the World Bank income group and TTDI regional groups	Azerbaijan	0.746
		Cameroon	0.003
		Kyrgyz Republic	0.989
4.02 Labour force with advanced education	Peer group mean. "Group" is defined as the combination of the World Bank income group and TTDI regional groups	Azerbaijan	0.312
		Cameroon	0.001
		Kyrgyz Republic	0.212
4.10 Workers' rights	Rounded peer group mean. "Group" is defined as the combination of the World Bank income group and TTDI regional groups	Azerbaijan	3.6
		Cyprus	2.192
		Luxembourg	2.192
		Malta	2.192
		Mongolia	5
		Nicaragua	4
		Slovenia	2.192
		Uzbekistan	5
5.05 Use of digital payments	Peer group mean. "Group" is defined as the combination of the World Bank income group and TTDI subregional groups	Angola	0.618
		Qatar	0.804
5.08 Power losses	Peer group mean. "Group" is defined as countries whose quality of electricity supply (World Bank) value in 2015 is within ±5% of the target country's 2015 quality of electricity supply value. The same peer group is used to compute the mean of power losses across subsequent years	Malawi	12.222
		Mali	17.242
8.01 Hotel price index	Peer group mean. "Group" is defined as the combination of the World Bank income group and TTDI regional groups	Albania	115.715
		Angola	132.938
		Benin	132.938
		Bolivia	123.045
		Bosnia and Herzegovina	115.715

Indicator	Imputation method	Economy	Imputed value
		Cameroon	132.938
		Cyprus	145.431
		Kyrgyz Republic	115.49
		Malawi	156.93
		Mali	156.93
		Mongolia	75.963
		Sierra Leone	156.93
		Zimbabwe	132.938
11.03 Labour productivity in hotels and restaurants	Peer group mean. "Group" is defined as the combination of the World Bank income group and TTDI regional groups	Benin	24150
		Côte d'Ivoire	24150
		Malawi	14123
		Sierra Leone	14123
		Trinidad and Tobago	54536
		Uzbekistan	10145
		Zimbabwe	24150
15.07 Level of water stress	Peer group mean. "Group" is defined as the combination of the World Bank regional group and the World Resources Institute Aqueduct 4.0 category for baseline water stress	Montenegro	23.891
15.10 Proportion of safely treated domestic wastewater flows	Peer group mean. "Group" is defined as the combination of the World Bank income group and TTDI regional groups	Angola	22.637
		Botswana	24.25
		Cameroon	22.637
		Guatemala	36.55
		Honduras	29.3
		Indonesia	60.375
		Jamaica	36.55
		Namibia	22.637
		Oman	90.4
		Panama	63.42
		Rwanda	9.7
		Sri Lanka	32.3
		Uruguay	63.42
		Zambia	22.637
17.02 Seasonality of international tourist arrivals	Peer group mean. "Group" is defined as TTDI subregional groups	Bangladesh	32.08
		Cameroon	31.687
		Côte d'Ivoire	31.687
		Kyrgyz Republic	34.015
		Nigeria	31.687
		Pakistan	32.08
		Senegal	31.687

Note: This table presents the 2026 imputation method and the imputed values by indicator. In the regional profiles, ranking tables and other parts of the report that present raw indicator data, imputed values are not shown.

Index changes and comparability

Each new TTDI edition regularly includes: economy coverage changes; underlying indicator data revisions and methodology changes by sources; methodology adjustment such as normalization threshold changes; the addition and removal of indicators; and framework improvements.

Please note that the underlying data revisions and methodology changes make this edition of the index incompatible with the previously released version. Therefore, this release of the index includes recalculated 2019, 2021 and 2024 figures based on adjustments to ensure comparability. Consequently, TTDI results from 2019, 2021, 2024 and 2026 provided in this report are based on the latest TTDI methodology.

Most 2026 edition changes are due to underlying data revisions and threshold changes, with no changes being made to the framework. Table A3 provides a summary of the only indicator to have a methodology change introduced by the Forum.

TABLE A4 **Details of adjustments made to the TTDI**

Adjustment 01	Reasoning
The data source for the *Visa requirements* indicator (7.01) was changed from UN Tourism to Passport Index (Arton Capital), combined with World Bank population data. The original scale and equal-weighting-by-population methodology were retained, with one change: electronic travel authorizations (ETAs) are now scored at the electronic visa weight (0.5), whereas the previous methodology did not specify their treatment.	– World Tourism Organization (UN Tourism) is no longer available. – The Passport Index offers one of the most complete public bilateral visa matrices (~199 passports and destinations), updated as policies change. – Keeping the original scale and weighting preserves comparability with previously published scores and rankings.

Appendix B Data definitions and sources

This section complements the data tables by providing full descriptions and sources of all the indicators used for the calculations in the *Travel & Tourism Development Index* (TTDI) 2026.

The data used in this publication includes data derived from the World Economic Forum's Executive Opinion Survey as well as statistical data from other organizations. In the case of indicators derived from the Executive Opinion Survey (the survey), the full question and associated answers are provided. For more details on survey indicators, please email partner.institutes@weforum.org. Moreover, you can find information on Partner Institutes that carried out the survey in Appendix D.

For indicators sourced from other organizations or national sources, because of space limitations it is not possible to reproduce in this publication all of the additional information associated with specific data points. The data used in the computation of the TTDI 2026 represents the most recent and/or best data available at the time when it was collected. It is possible that data has subsequently been updated or revised.

Pillar 1: Business Environment

1.01 Rule of law

Score for index assessing rule of law conditions based on property rights, judicial effectiveness and government integrity | 2026

The rule of law dimension of the Index of Economic Freedom is a mean of the property rights, judicial effectiveness and government integrity components. The property rights component is derived by averaging scores for equally weighted subfactors: risk of expropriation, respect for intellectual property rights, and quality of contract enforcement, property rights and law enforcement. The score for the judicial effectiveness component is derived by averaging scores for equally weighted subfactors: judicial independence; quality of the judicial process; and perceptions of the quality of public services and the independence of the civil service. The score for the government integrity component is derived by averaging scores for

equally weighted subfactors: perception of corruption, bribery risk, and control of corruption, including "capture" of the state by elites and private interests. For information on the methodology of the Index of Economic Freedom, please visit: https://economicfreedom.heritage.org/pages/about#indexMethodology.

Source: The Heritage Foundation, 2026 Index of Economic Freedom

1.02 Burden of government regulation

Response to the survey question: "In your country, how easy is it for companies to comply with government regulation and administrative requirements (e.g. permits, reporting, legislation)?" [1 = Overly complex; 7 = Extremely easy] | 2024–2025 weighted average

Source: World Economic Forum, Executive Opinion Survey

1.03 Government ensuring political stability

Response to the survey question: "In your country, to what extent does the government ensure a stable policy environment for doing business?" [1 = Not at all; 7 = To a great extent] | 2024–2025 weighted average

Source: World Economic Forum, Executive Opinion Survey

1.04 Country credit rating

Average of scores across the rating of the three top rating agencies (S&P, Moody's and DBRS) | 2026

Scoring the creditworthiness of a country between 100 (riskless) and 0 (likely to default), assigned according to Trading Economics' methodology and based on Standard and Poor (S&P), Moody's and DBRS sovereign debt credit rating. For information on the methodology, please visit: https://tradingeconomics.com/country-list/rating.

Source: Trading Economics

1.05 De-jure financial globalization

Composite index that measures "de-jure" financial globalization by considering investment restriction, capital accounts openness and international investment agreements | 2023

The index is part of the KOF Globalisation Index and consists of: 1) investment restriction as measured by the prevalence of foreign ownership and regulations to international capital flow; 2) capital account openness as measured by the Chinn–Ito Index of capital account openness; and 3) international investment agreements as measured by the number of bilateral investment agreements (BITs) and treaties with investment provisions. For information on the methodology, please visit: https://kof.ethz.ch/en/forecasts-and-indicators/indicators/kof-globalisation-index.html.

Source: KOF Swiss Economic Institute, KOF Globalisation Index 2025

1.06 De-jure trade globalization

Composite index that measures "de-jure" trade globalization by considering trade regulations, trade taxes, tariffs and trade agreements | 2023

The index is part of the KOF Globalisation Index and consists of: 1) trade regulations as measured by the average of two subcomponents: prevalence of non-tariff trade barriers and compliance costs of importing and exporting; 2) trade taxes as measured by income from taxes on international trade as percentage of revenue (inverted); 3) tariffs as measured by the unweighted mean of tariff rates; and 4) trade agreements as measured by the number of bilateral and multilateral free trade agreements. For information on the methodology, please visit: https://kof.ethz.ch/en/forecasts-andindicators/indicators/kof-globalisation-index.html.

Source: KOF Swiss Economic Institute, KOF Globalisation Index 2025

1.07 SME access to finance

Response to the survey question: "In your country, to what extent can small and medium-sized enterprises (SMEs) access the finance they need for their business operations through the financial sector?" [1 = Not at all; 7 = To a great extent] | 2024–2025 weighted average

Source: World Economic Forum, Executive Opinion Survey

Pillar 2: Safety and Security

2.01 Confidence in local police

Legatum Prosperity Index score based on percentage of people who responded "Yes" to the Gallup question: "Do you have confidence in the local police force?" | 2023

Source: 2025 Legatum Prosperity Index

2.02 Safety walking alone at night

Legatum Prosperity Index score based on percentage of people who responded "Yes" to the Gallup question: Do you feel safe walking alone at night in the city or area where you live? | 2024

Source: 2025 Legatum Prosperity Index

2.03 Homicide rate

Number of homicide cases per 100,000 population | 2023

The United Nations Office on Drugs and Crime (UNODC) collects statistics on homicide occurrences worldwide, pooling information from national sources, including criminal justice and public health systems, supplemented by international datasets and partnerships with organizations such as Eurostat, the Organization of American States (OAS) and the World Health Organization (WHO).

Source: United Nations Office on Drugs and Crime (UNODC)

2.04 Global Terrorism Index

A composite measure of the impact of terrorism, on a scale of 0–10 | 2025

The Global Terrorism Index (GTI) scores each country on a scale of 0–10, where 0 represents no impact from terrorism and 10 represents the highest measurable impact of terrorism. The factors used are the total number of terrorist incidents in a given year, total number of fatalities caused by terrorists in a given year, total number of injuries caused by terrorists in a given year and the total number of hostages caused by terrorists in a given year. Each of the factors is weighted between 0 and 3, and a five-year weighted average is applied in a bid to reflect the latent psychological effect of terrorist acts over time. A five-year weighted average is applied. For more information, please visit: https://www.visionofhumanity.org/ maps/global-terrorism-index/#/.

Source: Institute for Economics & Peace, Global Terrorism Index 2026: Measuring the Impact of Terrorism

2.05 Organized violence, deaths

Number of organized violent incidents, deaths per 100,000 population | 2020–2024 moving average

A measure of deaths from state-based armed conflict, non-state conflict and one-sided violence. The categories are mutually exclusive and can be aggregated as “organized violence”. They also share the same intensity cut-off for inclusion – 25 fatalities in a calendar year. For more information, please see https://ucdp.uu.se/encyclopedia. The final figure is a World Economic Forum calculation of non-state deaths divided by total population.

Source: Uppsala Conflict Data Program; The World Bank, World Development Indicators

Pillar 3: Health and Hygiene

3.01 Physician density

Physician density per 10,000 population | 2024

This indicator measures the number of physicians in the country per 10,000 population. Physicians include generalists, specialist medical practitioners and medical doctors not further defined.

Source: World Health Organization, Global Health Observatory

3.02 Use of basic sanitation

People using at least basic sanitation services as a percentage of total population | 2024

The percentage of people using at least basic sanitation services – that is, improved sanitation facilities that are not shared with other households. This indicator encompasses both people using basic sanitation services and those using safely managed sanitation services. Improved sanitation facilities include flush/pour flush to piped sewer systems, septic tanks or pit latrines and ventilated improved pit latrines, composting toilets or pit latrines with slabs.

Source: WHO/UNICEF Joint Monitoring Programme

3.03 Use of basic drinking water

People using at least basic drinking water services as a percentage of total population | 2024

The percentage of people using at least basic water services. This indicator encompasses both people using basic water services and those using safely managed water services. Basic drinking water services are defined as drinking water from an improved source, provided collection time is not more than 30 minutes for a round trip. Improved water sources include piped water, boreholes or tubewells, protected dug wells, protected springs and packaged or delivered water.

Source: WHO/UNICEF Joint Monitoring Programme

3.04 Hospital beds density

Number of hospital beds per 1,000 population | 2023

Hospital beds include inpatient beds available in public, private, general and specialized hospitals and rehabilitation centres. In most cases, beds for both acute and chronic care are included.

Source: World Bank, World Development Indicators

3.05 Communicable disease incidence

Select communicable disease incidence rate per 100,000 population | 2023

The incidence rate represents the number of people with a condition within a given period – the affected population – in relation to the total population within which these cases have arisen (in the same period) – the target population. Communicable diseases covered by this indicator include HIV/AIDS and other sexually transmitted infections, lower respiratory infections and tuberculosis, neglected tropical diseases, malaria and other infectious diseases. Enteric infections, COVID-19 and upper respiratory infections are excluded.

Source: Institute for Health Metrics and Evaluation, Global Burden of Disease (GBD) Results Tool, 2024

Pillar 4: Human Resources and Labour Market

Qualification of the Labour Force subpillar

4.01 Labour force with at least intermediate education

Share of labour force that has at least an intermediate education | 2025

Intermediate education comprises upper secondary or post-secondary non-tertiary education according to the International Standard Classification of Education 2011 (ISCED 2011).

Source: International Labour Organization

4.02 Labour force with advanced education

Share of labour force that has an advanced education | 2025

Advanced education comprises short-cycle tertiary education, a bachelor's degree or equivalent education level, a master's degree or equivalent education level, or doctoral degree or equivalent education level according to the International Standard Classification of Education 2011 (ISCED 2011).

Source: International Labour Organization

4.03 Quality of secondary education

Response to the survey question: "In your country, how well does secondary non-vocational education meet the needs of a competitive economy?" [1 = Not at all; 7 = To a great extent] | 2024–2025 weighted average

Source: World Economic Forum, Executive Opinion Survey

4.04 Quality of tertiary education

Response to the survey question: "In your country, how well does tertiary education meet the needs of a competitive economy?" [1 = Not at all; 7 = To a great extent] | 2024–2025 weighted average

Source: World Economic Forum, Executive Opinion Survey

Labour Market Dynamics subpillar

4.05 Hiring and firing practices

Response to the survey question: "In your country, to what extent do regulations allow flexible hiring and firing of workers?" [1 = Not at all; 7 = To a great extent] | 2024–2025 weighted average

Source: World Economic Forum, Executive Opinion Survey

4.06 Ease of finding skilled employees in local labour market

Response to the survey question: "In your country, to what extent can companies find people with the skills required to fill their vacancies in the local labour market?" [1 = Not at all; 7 = To a great extent] | 2024–2025 weighted average

Source: World Economic Forum, Executive Opinion Survey

4.07 Flexible working arrangements

Response to the survey question: "In your country, to what extent do companies offer flexible working arrangements such as remote, hybrid and part-time work?" [1 = Not at all; 7 = To a great extent] | 2024–2025 weighted average

Source: World Economic Forum, Executive Opinion Survey

4.08 Labour force participation

Proportion of the population aged 15 and older that is economically active | 2025

Labour force participation rate is the proportion of the population aged 15 and older that is economically active: that is, all people who supply labour for the production of goods and services during a specified period.

Source: World Bank, World Development Indicators

Labour Market Resilience and Equality subpillar

4.09 Equal workforce opportunities

Average score across the four components of the following Executive Opinion Survey question: "In your country, to what extent do companies give equal workforce opportunities to: a. Women; b. All ethnic or racial backgrounds; c. Those with disabilities; d. Those who identify as LGBTQI+?" [1 = Not at all; 7 = To a great extent] | 2024–2025 weighted average

Source: World Economic Forum, Executive Opinion Survey

4.10 Workers' rights

The ITUC Global Rights Index measures countries on a scale from 1–5+ based on the degree of respect for workers' rights, with 1 being the best rating and 5+ the worst rating | 2025

Each country is analysed against a list of 97 indicators derived from ILO conventions and jurisprudence and represents violations of workers' rights in law and practice. Values correspond to the following conditions: 5+ means no guarantee of rights due to the breakdown of the rule of law, 5 means no guarantee of rights, 4 means systematic violations of rights, 3 means regular violations of rights, 2 means repeated violations of rights and 1 means sporadic violations of rights. For more information on the methodology, please visit: https://www.ituc-csi.org/the-global-rights-index-explained.

Source: International Trade Union Confederation, 2026 ITUC Global Rights Index

4.11 Female labour force participation

Ratio of female to male labour force participation rate | 2025

Labour force participation rate is the proportion of the population aged 15 and older that is economically active: it covers all people who supply labour for the production of goods and services during a specified period. The ratio of female to male labour force participation rate is calculated by dividing the female labour force participation rate by the male labour force participation rate and multiplying by 100.

Source: World Bank, World Development Indicators

4.12 Social protection basic coverage

Proportion of population covered by at least one social protection benefit | 2025

This indicator conveys the share of the population effectively covered by a social protection system, including social protection floors. It also provides the coverage rates of the main functions of social protection: child and maternity benefits, support for people without a job, people with disabilities, workers in case of work injury, older persons, and poor and vulnerable people. For more information, please visit: https://ilostat.ilo.org/methods/concepts-and-definitions/description-sustainable-development-labour-market-indicators/.

Source: International Labour Organization, International Labour Organization Database on International Labour Statistics (ILOSTAT) database

4.13 Social protection spending

Government expenditure on social security and welfare as a percentage of GDP | 2025

This indicator refers to all non-repayable payments by general government, whether capital or current, requited or not. General government expenditure on social security and welfare includes: sickness and disability, old age, survivors, family and children, unemployment, housing, social exclusion, R&D on social protection, social protection n.e.c.

Source: Euromonitor International

Pillar 5: ICT Readiness

5.01 Individuals using internet

Percentage of individuals using the internet | 2025

Internet users refers to people using the internet from any device (including mobile phones) in the past three months. Data is based on surveys generally carried out by national statistical offices or estimated based on the number of internet subscriptions.

Source: International Telecommunication Union, World Telecommunication Indicators

5.02 Broadband internet subscribers

Fixed broadband internet subscriptions per 100 population | 2024

This refers to total fixed (wired) broadband internet subscriptions (that is, subscriptions to high-speed access to the public internet – a TCP/IP connection – at downstream speeds equal to or greater than 256 kb/s).

Source: International Telecommunication Union, World Telecommunication Indicators

5.03 Mobile broadband subscribers

Mobile broadband subscriptions per 100 population | 2024

Active mobile-broadband subscriptions per 100 inhabitants.

Source: International Telecommunication Union, World Telecommunication Indicators

5.04 3G mobile network coverage

Percentage of total population covered by at least a 3G mobile network signal | 2024

Percentage of the population covered by at least a 3G mobile network refers to the percentage of inhabitants who are within range of at least a 3G mobile-cellular signal, irrespective of whether or not they are subscribers. This is calculated by dividing the number of inhabitants that are covered by at least a 3G mobile-cellular signal by the total population and multiplying by 100.

Source: International Telecommunication Union, World Telecommunication Indicators

5.05 Use of digital payments

Share of population 15 or older who made or received a digital payment | 2024

Digital payment includes the use of mobile money, a debit or credit card, or a mobile phone to make a payment from an account, or the use of the internet to pay bills or to buy something online or in a store, or to pay bills or send or receive remittances directly from or into a financial institution account or through a mobile money account in the past year. It also includes receiving payments for agricultural products, government transfers, wages or a public-sector pension into a financial institution account or through a mobile money account in the past year.

Source: The World Bank, Findex

5.06 Use of digital platforms for providing transportation and shipping

Response to the survey question: "In your country, to what extent are digital platforms* used to provide the following service: Transportation and shipping?" [1 = Not at all; 7 = To a great extent] *Digital platforms refer to services and labour markets available through a digital interface, often focused on short-term contracts and task-based work. | 2024–2025 weighted average

Source: World Economic Forum, Executive Opinion Survey

5.07 Use of digital platform for providing hotels, restaurants and leisure activities services

Response to the survey question: "In your country, to what extent are digital platforms* used to provide the following service: Hotels, restaurants and leisure activities services?" [1 = Not at all; 7 = To a great extent] *Digital platforms refer to services and labour markets available through a digital interface, often focused on short-term contracts and task-based work. | 2024–2025 weighted average

Source: World Economic Forum, Executive Opinion Survey

5.08 Power losses

Electric power transmission and distribution losses as a percentage of domestic supply | 2023

"Electric power transmission and distribution losses" are losses in transmission between sources of supply and points of distribution and in the distribution to consumers, including pilferage.

Source: International Energy Agency, Energy Data Center

Pillar 6: Prioritization of T&T

6.01 T&T government expenditure

Travel and tourism government spending as a percentage of total government consumption | 2025

This indicator includes spending (transfers or subsidies) made by government agencies to provide T&T services such as cultural (e.g. art museums), recreational (e.g. national parks), clearance (e.g. immigration/customs) and so on to visitors.

Source: World Travel & Tourism Council, Travel & Tourism Economic Impact Research 2026: https://researchhub.wttc.org/

6.02 Comprehensiveness of T&T data

Number of data available (0 = no data, 120 = all selected indicators are available) | 2018–2021

This indicator shows how much of the yearly data provided by national administrations on 30 different concepts from the UNWTO Compendium of Tourism Statistics is available. It covers 2018 through to 2021. The scores range from a minimum of 0 to a maximum of 120, where 120 can be obtained by a country providing data for all 30 concepts in all of the four years taken into consideration.

Source: United Nations World Tourism Organization (UN Tourism)

6.03 Timeliness of T&T data

Number of latest data available (0 = no data, 22.5 = data reported for all the periods considered) | 2024–2025

This indicator shows the availability of two key T&T indicators (international tourist arrivals and tourism receipts) on a monthly or quarterly basis, covering the period from October 2024 to December 2025. UN Tourism has calculated the score for each country based on the data included in the latest available UN Tourism World Tourism Barometer by adding the number of months for which data on international tourist arrivals is available to the number of months for which data on international tourism receipts is available. Half weight has been applied to the lower of the two scores, so the scores range from a minimum of 0 to a maximum of 22.5 (the maximum number of period counts a country can get is 14 for one measure and 7 for the other).

Source: United Nations World Tourism Organization (UN Tourism)

6.04 Country Brand Strategy rating © (CBS)

This indicator evaluates the accuracy of a National Tourism Organization (NTO)'s Country Brand Strategy | 2024-2025 moving average

The Country Brand Strategy © (CBS) rating measures how closely an NTO's official tourism website aligns with current traveller search demand. It compares the tourism-related brandtags most frequently searched for in a country with those most heavily promoted on its official tourism website. A higher rating shows stronger alignment between the website's content and the brandtags with the highest demand. A lower rating may indicate limited focus on high-demand brandtags or greater promotion of less popular ones. Data on the brandtags most promoted on an NTO's official tourism website is collected at a specific point during the year. Results may vary over time due to changes in website content or structure, traveller search patterns and the tools used to interpret evolving search behaviour, including AI-driven discovery.

Note: Exceptions may apply when a country introduces a new Country Brand Strategy to promote lesser-known brandtags and develop new markets. A lower rating may mean that the impact of the strategy is not yet reflected in traveller search demand. Exceptions may also apply when an NTO's website is being updated to adapt to new search and AI trends. In this case, the rating may not yet reflect the impact of those updates.

Source: Bloom Consulting and D2 Digital Demand © data, based on search demand from market-leading search engines worldwide (mobile and desktop)

Pillar 7: Openness to T&T

7.01 Visa requirements

Visa requirements for entry in the destination country for a tourism visit of a limited duration from worldwide source markets | 2025

This indicator measures to what extent a destination country is facilitating inbound tourism through its visa policy, distinguishing whether the country can be visited without a visa, a visa can be obtained on arrival or an electronic visa (including electronic travel authorizations) is available. It is calculated as a percentage of the world population that is exempt from a visa or is eligible for a visa on arrival or an electronic visa when visiting the destination country, where each source market is weighted equally by its share of world population, and: 1) the population of source markets that can visit the destination country without a visa is fully counted (i.e. weight 1); 2) the population of source markets that can obtain a visa on arrival when entering the destination

country is weighted by 0.7; and 3) the population of source markets that can use an electronic visa – including electronic travel authorizations (e.g. ESTA, eTA, NZeTA), which the source groups together with electronic visas – is weighted by 0.5. Source markets for which entry is not admitted are scored 0.

Source: Arton Capital, Passport Index (passportindex.org); The World Bank, World Development Indicators

7.02 Number of air service agreements

Number of air service agreements weighted by level of liberalization | 2023

This indicator measures the number of air service agreements (ASAs) to which an economy is party, weighted by level of liberalization. Traditional agreements receive a weight of 0.5, transitional agreements receive 0.75 and fully liberalized agreements receive 1.0. Please note that all European Union member states are treated as if they have a fully liberalized agreement with fellow members, with bilateral agreements between European Union member states not counted. The same methodology goes for economies covered by the European Common Aviation Area, the Euro–Mediterranean Aviation Agreement, the EU–US Open Skies Agreement, the EU–Canada Comprehensive Air Transport Agreement and the ASEAN Open Sky Agreement. Data and classification come from ICAO's WASA database, which can be accessed at: https://www.icao.int/sustainability/Pages/WASA.aspx.

Source: International Civil Aviation Organization (ICAO), WASA Database

7.03 Reputation for hospitality

TRAVELSAT Hospitality Reputation Index | March 2025 to March 2026

The TRAVELSAT Reputation Index for locals' hospitality quantifies the sentiment polarity in online discussions about the friendliness and hospitality of local residents towards visitors, across various platforms such as media, blogs and social networks. It generates a score reflecting the overall positivity or negativity in these conversations, influenced by a wide range of factors including sustainability, economic, environmental and sociopolitical issues that can affect the perceived hospitality of a destination's community.

Source: TRAVELSAT, MMGY TCI Research

7.04 Passport mobility score

Score for visa-free access for a country's passport to travel destinations as measured by the Henley Passport Index | 2026

For each travel destination, if no visa is required for passport holders from a country or territory, then a score with value = 1 is created for that passport. A score with value = 1 is also applied if passport holders can obtain a visa on arrival, a visitor's permit or an electronic travel authorization (ETA) when entering the destination. These types of visa require no pre-departure government approval because of the specific visa-waiver programmes in place. Where a visa is required, or where a passport holder has to obtain a government-approved electronic visa (eVisa) before departure, a score with value = 0 is assigned. A score with value = 0 is also assigned if passport holders need pre-departure government approval for a visa on arrival, a scenario that is not considered "visa-free". The total score for each passport is equal to the number of destinations for which no visa is required (value = 1), under the conditions defined above.

Source: Henley & Partners Holdings

Pillar 8: Price Competitiveness

8.01 Hotel price index

Average room rates calculated for midscale to upper-upscale hotels (US$) | 12-month average through to July 2025

This index measures the average price, in US dollars, of midscale to upper-upscale hotel accommodation in each country. The index is calculated by using the average room rate achieved by midscale to upper-upscale hotels in each country over a 12-month period from July 2024 through July 2025, to mitigate the impact of any seasonality fluctuations.

Source: CoStar

8.02 Purchasing power parity

Ratio of purchasing power parity (PPP) conversion factor to the official exchange rate | 2024

The World Bank defines the purchasing power parity (PPP) 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 PPP conversion factor to market exchange rate ratio as reported by the World Bank's World Development Indicator database.

Source: The World Bank, World Development Indicators

8.03 Fuel price levels

Retail gasoline (petrol) prices expressed as US dollars per litre | 2026

This indicator refers to the annual average of pump prices of octane-95 gasoline (petrol).

Source: Globalpertrolprices.com

8.04 Short-term rental price

Average daily rate for active properties on Airbnb and similar platforms | 12-month average 2025

Source: AirDNA

Pillar 9: Air Transport Infrastructure

9.01 Efficiency of air transport services

Response to the survey question: "In your country, how efficient (in terms of frequency, punctuality, speed and price) are the following transport services: Air transport services?" [1 = Extremely inefficient – among the worst in the world; 7 = Extremely efficient – among the best in the world] | 2024–2025 weighted average

Source: World Economic Forum, Executive Opinion Survey

9.02 Available seat kilometres

Domestic and international seat kilometres originating in country per week (year average) per population | 2024

This indicator 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 kilometres. The final value represents the weekly average for the year (Jan–Dec), taking into account flights scheduled beforehand by airline companies divided by country population.

Source: International Air Transport Association (IATA), OAG data; World Bank, World Development Indicators

9.03 Number of operating airlines

Number of airlines with scheduled passenger flights originating in the country | 2025

Source: International Air Transport Association (IATA), OAG data

9.04 Airport connectivity

This represents the IATA airport connectivity indicator, which measures the degree of integration of a country within the global air transport network | 2025

Source: International Air Transport Association (IATA), OAG data

Pillar 10: Ground and Port Infrastructure

10.01 Quality of roads

Response to the survey question: "In your country, what is the quality and extent of road infrastructure?" [1 = Extremely poor – among the worst in the world; 7 = Extremely good – among the best in the world] | 2024–2025 weighted average

Source: World Economic Forum, Executive Opinion Survey

10.02 Road density

Kilometres of road per 100 square kilometres of land | 2025

Road density is the ratio of the length of the country's total road network to the country's land area. The road network includes all motorways, highways and main or national roads, secondary or regional roads, and all other roads.

Source: Euromonitor International

10.03 Efficiency of train services

Response to the survey question: "In your country, how efficient (in terms of frequency, punctuality, speed, price) are train services (if applicable)?" [1 = Extremely inefficient – among the worst in the world; 7 = Extremely efficient – among the best in the world] | 2024–2025 weighted average

Source: World Economic Forum, Executive Opinion Survey

10.04 Railroad density

Kilometres of railroad per 100 square kilometres of land | 2025

Railroad density is the ratio of the length of the country's total railroad network to the country's land area. Rail lines are the length of railway route available for train service, irrespective of the number of parallel tracks.

Source: Euromonitor International

10.05 Efficiency of public transport services

Response to the survey question: “In your country, how efficient (in terms of frequency, punctuality, speed, price) are the following transport services: Public transport services (e.g. buses, trains, subways, electric bikes and taxis)?” [1 = Extremely inefficient – among the worst in the world; 7 = Extremely efficient – among the best in the world] | 2024–2025 weighted average

Source: World Economic Forum, Executive Opinion Survey

10.06 Efficiency of seaport services

Response to the survey question: “In your country, how efficient (in terms of frequency, punctuality, speed, price) are the following transport services: Seaport services (ferries, boats)?” [1 = Extremely inefficient – among the worst in the world; 7 = Extremely efficient – among the best in the world] | 2024–2025 weighted average

Source: World Economic Forum, Executive Opinion Survey

Pillar 11: Tourist Services and Infrastructure

11.01 Hotel rooms density

Number of hotel rooms per 100 population | 2024

Source: United Nations World Tourism Organization (UN Tourism); The World Bank, World Development Indicators

11.02 Short-term rental listing density

Number of active properties on Airbnb and similar platforms per 10,000 people | 12-month average ending in June 2025

Source: AirDNA; The World Bank, World Development Indicators

11.03 Labour productivity in hotels and restaurants

Sector output (gross value added) divided by employed population in constant 2020 PPP $ | 2023, 2024, 2025 moving average

This indicator category corresponds to division H of the International Standard Classification of all Economic Activities (ISIC Rev 3.1) and includes: hotels and restaurants.

Source: Euromonitor International

11.04 T&T capital investment intensity

Travel and tourism capital investment per sector employee | 2024, 2025 average

This indicator includes government-sector investment expenditure (e.g. equipment, land, buildings, infrastructure) and private-sector investment expenditures (e.g. hotels, convention centres, airports, taxis).

Source: World Travel & Tourism Council, Travel & Tourism Economic Impact Research 2026: https://researchhub.wttc.org/

Pillar 12: Natural Resources

12.01 Number of World Heritage natural sites

Number of World Heritage natural sites in the country | 2025

World Heritage natural sites are those properties that the World Heritage Committee considers to have outstanding universal value.

Source: UNESCO World Heritage Centre

12.02 Total known species

Number of animal, plant, fungus and chromista species in the country | 2025

This indicator measures the total number of species assessed and included on the IUCN Red List of Threatened Species, covering animals, plants, fungi and other taxonomic groups.

Source: International Union for Conservation of Nature and Natural Resources (IUCN), Red List

12.03 Total protected areas

Total square kilometres of terrestrial and marine areas under protection | 2026

Based on the IUCN’s definition, a protected area is a clearly defined geographical space, recognized, dedicated and managed, through legal or other effective means, to achieve the long-term conservation of nature with associated ecosystem services and cultural values. Protected areas include nature reserves, wilderness areas, national parks, natural monuments, habitat/species management, protected landscape/seascape and managed resource protected area. The data undergoes a logarithmic transformation before being scaled from 1 to 7. For more information on

protected areas and the associated methodology, please see: https://www.protectedplanet.net/en/thematic-areas/wdpa?tab=Methodology.

Source: United Nations Environment Programme–World Conservation Monitoring Centre (UNEP–WCMC), World Database of Protected Areas

12.04 Natural tourism Digital Demand

This indicator measures the total online search volume related to the following nature-related brandtags: Beach Accommodation, Beaches, Gardens, Natural Wonders, Parks and Reserves, Camping, Golf Accommodation, Rural Accommodation, Ski Accommodation, Diving, Golf, Water Sports, Winter Sports, Adventure and Outdoor, Animal Watching, Boating, Fishing, Hunting and Hiking | 2023, 2024, 2025 moving average

The calculation is based on the proprietary D2 Digital Demand © tool, which assesses the attractiveness of each country by analysing online tourism-related search data across the relevant brandtags, each comprising destination-specific keywords correlated to tourist activities and attractions. A total of 15,721,000 keywords were analysed across 199 countries and territories, in 21 languages: Arabic, Chinese (Mandarin), Danish, Dutch, English, Estonian, Finnish, French, German, Italian, Japanese, Korean, Lithuanian, Norwegian, Polish, Portuguese, Russian, Spanish, Swedish, Turkish and Vietnamese.

Source: Bloom Consulting and D2 Digital Demand © data, market leader search engines across the world (mobile and desktop)

12.05 Number of terrestrial and freshwater ecoregions

Number of terrestrial and freshwater ecoregions | 2021

The World Wide Fund for Nature (WWF) defines an ecoregion as a "large unit of land or water containing a geographically distinct assemblage of species, natural communities, and environmental conditions". This includes terrestrial, marine and freshwater ecoregions.

Source: One Earth; Freshwater Ecoregions of the World (FEOW)

Pillar 13: Cultural Resources

13.01 Number of World Heritage cultural sites

Number of World Heritage cultural sites in the country | 2025

World Heritage cultural sites are those properties that the World Heritage Committee considers as having outstanding universal value.

Source: UNESCO World Heritage Centre

13.02 Oral and intangible cultural heritage

Number of oral and intangible heritage practices and expressions | 2025

Intangible cultural heritage practices are those practices, representations, expressions, knowledge and skills – as well as the instruments, objects, artefacts and cultural spaces associated therewith – that communities, groups and, in some cases, individuals recognize as part of their cultural heritage. This intangible cultural heritage, transmitted from generation to generation, is constantly recreated by communities and groups in response to their environment and their interaction with nature and their history, and provides them with a sense of identity and continuity, thus promoting respect for cultural diversity and human creativity. The Intergovernmental Committee for the Safeguarding of the Intangible Cultural Heritage evaluates nominations proposed by States Parties to the Convention for the Safeguarding of the Intangible Cultural Heritage annually and decides whether or not to inscribe those cultural practices and expressions of intangible heritage on the Convention's Lists.

Source: UNESCO Intangible Cultural Heritage

13.03 Number of large sports stadiums

Total number of sports stadiums in a country with a capacity greater than 20,000 seats | 2025

The count of stadiums with a capacity greater than 20,000 seats is a proxy for the ability of a country to host significant sports or entertainment events (e.g. concerts, shows).

Source: Worldofstadiums.com

13.04 Cultural and entertainment tourism Digital Demand

This indicator measures the total online search volume related to the following culture and entertainment-related brandtags: Gastro Activities, Restaurants, Local Gastronomy, Historical Sites, Museums, UNESCO, History, Local Dances, Local People and Tribes, Local Traditions, Traditional Markets, Religious Sites and Pilgrimage, Performing Arts, Urban Landmarks, Aquariums, Entertainment Parks, Gambling, Nightlife, Shopping, Special Events and Zoos | 2023, 2024, 2025 moving average

The calculation is based on the proprietary D2 Digital Demand © tool, which assesses the attractiveness of each country by analysing online tourism-related search data across the relevant brandtags, each comprising destination-specific keywords correlated to tourist activities and attractions. A total of 18,308,000 keywords were analysed across 199 countries and territories, in 21 languages: Arabic, Chinese (Mandarin), Danish, Dutch, English, Estonian, Finnish, French, German, Italian, Japanese, Korean, Lithuanian, Norwegian, Polish, Portuguese, Russian, Spanish, Swedish, Turkish and Vietnamese.

Source: Bloom Consulting and D2 Digital Demand ˝ data, market leader search engines across the world (mobile and desktop)

13.05 Number of UNESCO Creative Cities

Number of cities that are members of UNESCO's Creative Cities Network | 2025

The UNESCO Creative Cities Network (UCCN) was created in 2004 to promote cooperation with and among cities that have identified creativity as a strategic factor for sustainable urban development. Cities that currently make up this network work together towards a common objective: placing creativity and cultural industries at the heart of their development plans at the local level and cooperating actively at the international level.

Source: UNESCO Creative Cities Network

Pillar 14: Non-Leisure Resources

14.01 Presence of Forbes Global 2000 HQ locations

Ratio of the share of Forbes Global 2000 companies based in an economy to the economy's share of global GDP | 2023, 2024, 2025 moving average

Forbes Global 2000 is a list of the 2,000 largest public companies in the world based on sales, profits, assets and market value. A company needs to qualify for at least one of the category lists to be eligible for the final Global 2000 ranking. For more information on the Global 2000 methodology, please visit: https://www.forbes.com/sites/andreamurphy/2025/05/27/2025-global-2000-methodology/.

Source: Forbes, Global 2000; The World Bank, World Development Indicators

14.02 Presence of global cities

The indicators measure the presence of cities ranked by Globalization and World Cities Research Network (GaWC) | 2024

GaWC ranking results are derived from the activities of 175 leading firms providing advanced producer services (finance, management consultancy, accountancy, corporate law and advertising) across 785 cities worldwide. The results should be interpreted as indicating the importance of cities as nodes in the world city network (i.e. enabling corporate globalization). The connectivity measures are used to classify cities into levels of world city network integration. Alpha-level cities are linked to major economic states and regions and into the world economy and are classified into four sections, Alpha ++, Alpha +, Alpha and Alpha – cities. Beta-level cities are cities that link moderate economic regions to the world economy and are classified into three sections, Beta +, Beta and Beta – cities. Gamma-level cities are cities that link smaller economic regions into the world economy and are classified into three sections, Gamma +, Gamma and Gamma – cities. Sufficiency-level cities are cities that have a sufficient degree of services so as not to be overly dependent on world cities. For the purpose of calculating this indicator, each country's score is the sum of points of all of the ranked cities based in the economy, with points determined by city classification. A logarithmic transformation is applied to final point values.

Source: Globalization and World Cities (GaWC) Research Network

14.03 Number of top universities

Number of top 10,000 universities as ranked by Webometrics Ranking of World Universities | 2025

This indicator is the weighted average of all universities based on ranking tier. A university's rank is based on a composite index that looks at its web content impact, top-cited researchers and top-cited papers. Universities ranked 1–100 receive full weight, 101–500 receive 1/2 weight, 501–1,000 receive 1/4 weight, 1,001–5,000 receive 1/6 weight and 5,001– 10,000 receive 1/16 weight. Institutions ranked 10,001 and above are not counted. Data undergoes a log transformation before being normalized. For more information on the ranking, please see https://www.webometrics.org/.

Source: Cybermetrics Lab, Consejo Superior de Investigaciones Cient.ficas (CSIC)

14.04 Non-leisure tourism Digital Demand

This indicator measures the total online search volume related to business tourism, study and health tourism brandtags: Business, Entrepreneurship, Exchange Programmes and Financial Aid, Degrees and Courses, Voluntary and Medical Tourism | 2023, 2024, 2025 moving average

The calculation is based on the proprietary D2 Digital Demand © software, which assesses the attractiveness of each country by analysing online tourism-related search data across the relevant brandtags, each comprising destination-specific keywords correlated to tourist activities and attractions. A total of 3,721,000 keywords were analysed across 199 countries and territories, in 21 languages: Arabic, Chinese (Mandarin), Danish, Dutch, English, Estonian, Finnish, French, German, Italian, Japanese, Korean, Lithuanian, Norwegian, Polish, Portuguese, Russian, Spanish, Swedish, Turkish and Vietnamese.

Source: Bloom Consulting and D2 Digital Demand © data, market leader search engines across the world (mobile and desktop)

Pillar 15: Environmental Sustainability

T&T Energy Sustainability subpillar

15.01 T&T GHG intensity

GHG emissions in CO_2e kg per US$ of T&T GDP | 2024

GHG emissions include Scope 1, 2 and 3 plus international transport. Transport activity includes all modes of transport.

Source: World Travel & Tourism Council, Sustainable Tourism Global Center, 2026: https://wttc.org/sustainability

15.02 T&T energy intensity

Megajoule of energy, per real US$ of GDP | 2024

Energy sources include Scope 1, 2 and 3 plus international transport.

Source: World Travel & Tourism Council, Sustainable Tourism Global Center initiated by the Ministry of Tourism of Saudi Arabia, 2026: https://wttc.org/sustainability

15.03 T&T use of low-carbon energy

Low carbon energy as a share of total energy usage in travel and tourism | 2024

Low-carbon energy is defined as renewable energy (wind, wave, solar and geothermal), plus hydro and nuclear.

Source: World Travel & Tourism Council, Sustainable Tourism Global Center initiated by the Ministry of Tourism of Saudi Arabia, 2026: https://wttc.org/sustainability

15.04 Renewable energy regulation

Renewable energy pillar score of the RISE index, which gives a snapshot of a country's policies and regulations in the energy sector | 2023

The renewable energy pillar score is composed of indicators that assess: 1) governance; 2) electricity; 3) heating and cooling; 4) transport; and 5) levelling the playing field. For more information, please see https://rise.esmap.org/analytics.

Source: The World Bank/ESMAP, Regulatory Indicators for Sustainable Energy (RISE)

15.05 Energy efficiency regulation

Energy efficiency regulations pillar score of the RISE index, which gives a snapshot of a country's policies and regulations in the energy sector | 2023

The energy efficiency regulations pillar score is composed of indicators that assess: 1) energy efficiency governance (merged with national energy efficiency planning and energy efficiency entities); 2) industrial and commercial end users; 3) public sector; 4) incentives and mandates: energy utility programmes; 5) financing mechanisms for energy efficiency; 6) minimum energy efficiency performance standards; 7) energy labelling systems; 8) building energy codes; 9) transport sector. For more information, please see https://rise.esmap.org/analytics.

Source: The World Bank/ESMAP, Regulatory Indicators for Sustainable Energy (RISE)

Pollution and Environmental Conditions subpillar

15.06 Particulate matter (2.5) concentration

Population-weighted exposure to PM 2.5 (micrograms per cubic metre) | 2023

Fine-particle outdoor air pollution (PM 2.5) consists of airborne particles measuring less than 2.5 micrometres in aerodynamic diameter, most often produced as a result of combustion. PM 2.5 concentrations are measured in micrograms of particulate matter per cubic metre of air, or µg/m^3. To estimate concentrations of PM 2.5, Global Burden of Disease (GBD) scientists combine data from 10,408 air-quality monitors representing urban and rural data in 116 countries, satellite

observations and global chemical transport models that use data on emissions, chemical reactions and meteorological conditions to estimate the movement and concentration of pollutants. To estimate PM 2.5 exposures for people living in a specific area, scientists combine the number of people living within that area and the PM 2.5 concentration to which they are exposed. This method produces a population-weighted annual average concentration for a given country or region. Population-weighted annual average concentrations are better estimates of population exposures, because they give proportionately greater weight to the air pollution experienced where most people live. For more information, please visit: https://www.stateofglobalair.org/data/estimate-exposure.

Source: Health Effects Institute, State of Global Air 2025, Boston MA

15.07 Level of water stress

Freshwater withdrawal as a proportion of available freshwater sources | 2022

Source: The World Bank, World Development Indicators

15.08 Red List Index

The Red List Index measures changes in aggregate extinction risk across groups of species | 2025

This indicator is based on genuine changes in the number of species in each category of extinction risk on the International Union for Conservation of Nature and Natural Resources (IUCN) Red List of Threatened Species and is expressed as changes in an index ranging from 0 to 1, with 0 meaning all species have gone extinct and 1 meaning all species are classified as Least Concern (i.e. not expected to become extinct in the near future).

Source: United Nations Statistics Division (UNSD), Global SDG Indicators Database

15.09 Forest cover loss

Five-year moving average of annual tree cover loss to forest extent in 2000, in areas with greater or equal to 30% tree cover | 2020 through 2024 moving average

This indicator is calculated by taking the most recent five-year average of annual tree cover loss divided by forest extent in 2000. In this dataset, “tree cover” is defined as all vegetation greater than 5 metres (m) in height and may take the form of natural forests or plantations across a range of canopy densities. “Loss” indicates the removal or mortality of tree cover and can be due to a variety of factors, including mechanical harvesting, fire, disease or storm damage. For more information refer to: https://www.globalforestwatch.org/.

Source: Global Forest Watch

15.10 Proportion of safely treated domestic wastewater flows

Share of domestic wastewater that is safely treated | 2024

This indicator measures share of wastewater volumes (1,000 m^3/day), generated through different activities, that are safely treated before being discharged into the environment. Domestic flows are those that are generated from private households.

Source: United Nations Department of Economic and Social Affairs, SDG Indicators Database

15.11 Clean ocean water

Ocean Health Index score for clean waters | 2025

This indicator measures to what degree marine waters under national jurisdictions have been contaminated by chemicals, excessive nutrients (eutrophication), human pathogens and waste. For more information, please see https://dashboards.sdgindex.org/map/indicators/ocean-health-index-clean-waters-score/.

Source: Global Ocean Health Index

Preservation of Nature subpillar

15.12 Number of environmental treaty ratifications

Total number of ratified environmental treaties | 2023

This indicator measures the total number of international treaties from a set of 29 for which a state is a participant. A state is acknowledged as a participant whenever its status for each treaty appears as Ratified, Accession or In Force. The treaties included are: the International Convention for the Regulation of Whaling; the Convention on Wetlands of International Importance especially as Waterfowl Habitat, 1971 Ramsar; the Convention Concerning the Protection of the World Cultural and Natural Heritage, 1972 Paris; the Convention on the Prevention of Marine Pollution by Dumping of Wastes and Other Matter, 1972 London, Mexico City, Moscow, Washington; the Convention on International Trade in Endangered Species of Wild Fauna and Flora, 1973 Washington; the International Convention for the Prevention of Pollution from Ships (MARPOL) as modified by the Protocol of 1978, London; the Convention on the Conservation of Migratory Species of Wild Animals, 1979 Bonn; the United Nations Convention on the Law of the Sea, 1982 Montego Bay; the Convention for the Protection of the Ozone Layer, 1985 Vienna; the Protocol on Substances that Deplete the Ozone Layer, 1987 Montreal; the Convention on the Control

of Transboundary Movements of Hazardous Wastes and their Disposal, 1989 Basel; the International Convention on Oil Pollution Preparedness, Response and Co-operation, 1990 London; the United Nations Framework Convention on Climate Change, 1992 New York; the Convention on Biological Diversity, 1992 Rio de Janeiro; the United Nations Convention to Combat Desertification in Those Countries Experiencing Serious Drought and/or Desertification, particularly Africa, 1994 Paris; the 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; the 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; the Kyoto Protocol to the United Nations Framework Convention on Climate Change, Kyoto 1997; the Convention on the Law of the Non-Navigational Uses of International Watercourses, 1997; the Rotterdam Convention on the Prior Informed Consent Procedure for Certain Hazardous Chemicals and Pesticides in International Trade, 1998 Rotterdam; the Cartagena Protocol on Biosafety to the Convention on Biological Diversity, 2000 Montreal; the Protocol on Preparedness, Response and Co-operation to Pollution Incidents by Hazardous and Noxious Substances, 2000 London; the Stockholm Convention on Persistent Organic Pollutants, 2001 Stockholm; the International Treaty on Plant Genetic Resources for Food and Agriculture, 2001 Rome; the International Tropical Timber Agreement, 2006 Geneva; the Supplementary Protocol on Liability and Redress to the Cartagena Protocol on Biosafety, 2010 Nagoya – Kuala Lumpur; the Protocol on Access to Genetic Resources and the Fair and Equitable Sharing of Benefits Arising from Their Utilization to the Convention on Biological Diversity, Nagoya 2010; the Convention on Mercury, Minamata, 2013; and the Paris Agreement 2015.

Source: International Union for Conservation of Nature and Natural Resources (IUCN), Environmental Law Centre ELIS Treaty Database (received via direct communication)

15.13 Adequate protection for nature

Response to the survey question: "In your country to what extent is the environment and nature adequately protected?" [1 = Not at all; 7 = To a great extent] | 2024–2025 weighted average

Source: World Economic Forum, Executive Opinion Survey

15.14 Total protected areas coverage

Total square kilometres of terrestrial and marine under protection as a share of the country's total area | 2026

Based on the IUCN's definition, a protected area is a clearly defined geographical space, recognized, dedicated and managed, through legal or other effective means, to achieve the long-term conservation of nature with associated ecosystem services and cultural values. Protected areas include nature reserves, wilderness areas, national parks, natural monuments, habitat/species management, protected landscape/seascape and protected areas with sustainable use of natural resources.

Source: United Nations Environment Programme–World Conservation Monitoring Centre (UNEP–WCMC), World Database of Protected Areas

15.15 Average proportion of all key biodiversity areas covered by protected areas

Mean percentage of each terrestrial/freshwater Key Biodiversity Area (KBA) covered by (i.e. overlapping with protected areas and/or OECMs) | 2023

The indicator shows temporal trends in the mean percentage of each important site for terrestrial and freshwater biodiversity (i.e. those that contribute significantly to the global persistence of biodiversity) that is covered by designated protected areas and Other Effective area-based Conservation Measures (OECMs).

Source: BirdLife International, International Union for Conservation of Nature and Natural Resources (IUCN) and United Nations Environment Programme–World Conservation Monitoring Centre (UNEP–WCMC)

Pillar 16: T&T Socioeconomic Impact

16.01 T&T GDP multiplier

Ratio of indirect and induced tourism GDP to direct travel and tourism GDP contribution | 2023, 2024, 2025 moving average

Direct contribution reflects internal travel and tourism spending, which includes resident and non-resident spending on industry services. Total contribution reflects wider sector impact on an economy such as spending on supply-chain goods and consumer spending of sector and supplier employees.

Source: World Travel & Tourism Council, Travel & Tourism Economic Impact Research 2026: https://researchhub.wttc.org/

16.02 T&T employment multiplier

Ratio of indirect and induced tourism employment to direct travel and tourism employment contribution | 2023, 2024, 2025 moving average

Source: World Travel & Tourism Council, Travel & Tourism Economic Impact Research 2026: https://researchhub.wttc.org/

16.03 T&T high-wage jobs

Proportion of direct T&T jobs that are in high-wage sectors | 2024

High-wage sectors are defined as those in which average wages are roughly in the top third of earnings in a given country (above the 65th percentile).

Source: World Travel & Tourism Council, Sustainable Tourism Global Center initiated by the Ministry of Tourism of Saudi Arabia, 2026: https://wttc.org/sustainability

16.04 T&T labour gender parity

Absolute difference between male and female share of direct travel and tourism employment | 2024

Source: World Travel & Tourism Council, Sustainable Tourism Global Center initiated by the Ministry of Tourism of Saudi Arabia, 2026: https://wttc.org/sustainability

Pillar 17: T&T Demand Sustainability

17.01 Inbound length of stay

Length of stay refers to the number of days spent in the destination country | 2023, 2024, 2025 moving average

Source: Euromonitor International

17.02 Seasonality of international tourist arrivals

Top three months' share of total yearly international tourist arrivals | 2024, 2025 moving average

International tourist arrivals are defined as tourists who travel to a country other than that in which they have their usual residence, but outside their usual environment, for a period not exceeding 12 months and whose main purpose in visiting is other than an activity remunerated from within the country visited.

Source: United Nations World Tourism Organization (UN Tourism)

17.03 Concentration of interest in cultural attractions

Share of an economy's total page views that its top 10% of viewed cultural attractions received on Tripadvisor | 2023, 2024, 2025 year end August moving average

This indicator acts as a proxy for potential overcrowding at attractions. Cultural attractions include places of worship and other religious sites, historic walking areas, ancient ruins, educational sites, military bases/facilities, missions, libraries, civic centres, mines, castles, government buildings, historic sites, cemeteries, battlefields, scenic/historic walking areas, neighbourhoods and ghost towns. Economies that have 10 or fewer attractions are excluded. Data is received by direct communication.

Source: Tripadvisor

17.04 Concentration of interest in nature attractions

Share of an economy's total page views that its top 10% of viewed nature attractions received on Tripadvisor | 2023, 2024, 2025 year end August moving average

This indicator acts as a proxy for potential overcrowding at attractions. Nature and park attractions include nature/wildlife areas, islands, beaches, playgrounds, national parks, forests, dams, biking trails, waterfalls, off-road/all-terrain vehicle trails, hot springs/geysers, geologic formations, motorcycle trails, state parks, equestrian trails, volcanoes, bodies of water, parks, caverns/caves, gardens, valleys, mountains, zoos, ski/snowboarding areas, canyons, reefs, hiking trails, marinas, aquariums, deserts, other nature and parks. Economies that have 10 or fewer attractions are excluded. Data is received by direct communication.

Source: Tripadvisor

17.05 Geographically dispersed tourism

Response to the survey question: "In your country, to what extent are foreign visitors (tourists and business travellers) dispersed throughout the country?" [1 = Visitors are heavily concentrated in a few destinations; 7 = Visitors are equally distributed throughout the country] | 2024–2025 weighted average

Source: World Economic Forum; Executive Opinion Survey

Appendix C | Income group and regional classifications

Income group classifications, 2026

The following income group classifications were used for the index and report.

TABLE C1 **Per capita income classifications**

Low income (< $1,135)	Lower-middle income ($1,136–$4,495)	Upper-middle income ($4,496–$13,935)	High income (> $13,935)
Malawi	Angola	Albania	Australia
Mali	Bangladesh	Algeria	Austria
Rwanda	Benin	Argentina	Bahrain
Sierra Leone	Bolivia	Armenia	Belgium
	Cameroon	Azerbaijan	Bulgaria
	Côte d'Ivoire	Bosnia and Herzegovina	Canada
	Egypt	Botswana	Chile
	Ghana	Brazil	Costa Rica
	Honduras	China	Croatia
	India	Colombia	Cyprus
	Jordan	Dominican Republic	Czechia
	Kenya	Ecuador	Denmark
	Kyrgyz Republic	El Salvador	Estonia
	Lao PDR	Georgia	Finland
	Morocco	Guatemala	France
	Namibia	Indonesia	Germany
	Nepal	Jamaica	Greece
	Nicaragua	Kazakhstan	Hungary
	Nigeria	Malaysia	Iceland
	Pakistan	Mauritius	Ireland
	Philippines	Mexico	Israel
	Senegal	Mongolia	Italy
	Sri Lanka	North Macedonia	Japan
	Tanzania	Paraguay	Korea, Rep.
	Tunisia	Peru	Kuwait
	Uzbekistan	Serbia	Latvia
	Viet Nam	South Africa	Lithuania
	Zambia	Thailand	Luxembourg
	Zimbabwe	Türkiye	Malta
			Netherlands
			New Zealand
			Oman
			Panama
			Poland
			Portugal
			Qatar
			Romania
			Saudi Arabia
			Singapore
			Slovak Republic
			Slovenia
			Spain
			Sweden
			Switzerland
			United Arab Emirates
			United Kingdom
			United States
			Uruguay

Note: Classification corresponds to the World Bank's income classification based on gross national income per capita, for fiscal year 2025.

TABLE C2 | **Regional group classifications, 2026**

The Americas	Asia-Pacific (APAC)	Europe and Eurasia	Middle East and North Africa (MENA)	Sub-Saharan Africa
North and Central America	**Eastern Asia-Pacific**	**Balkans and Eastern Europe**	**Middle East**	**Eastern Africa**
Canada	Australia	Albania	Bahrain	Kenya
Costa Rica	China	Bosnia and Herzegovina	Israel	Malawi
Dominican Republic	Japan	Bulgaria	Jordan	Mauritius
El Salvador	Korea, Rep.	Hungary	Kuwait	Rwanda
Guatemala	Mongolia	North Macedonia	Oman	Tanzania
Honduras	New Zealand	Poland	Qatar	**Southern Africa**
Jamaica	**South Asia**	Romania	Saudi Arabia	Angola
Mexico	Bangladesh	Serbia	United Arab Emirates	Botswana
Nicaragua	India	Slovak Republic	**North Africa**	Namibia
Panama	Nepal	Slovenia	Algeria	South Africa
United States	Pakistan	**Eurasia**	Egypt	Zambia
South America	Sri Lanka	Armenia	Morocco	Zimbabwe
Argentina	**South-East Asia**	Azerbaijan	Tunisia	**Western Africa**
Bolivia	Indonesia	Georgia		Benin
Brazil	Lao PDR	Kazakhstan		Cameroon
Chile	Malaysia	Kyrgyz Republic		Côte d'Ivoire
Colombia	Philippines	Uzbekistan		Ghana
Ecuador	Singapore	**Northern Europe**		Mali
Paraguay	Thailand	Denmark		Nigeria
Peru	Viet Nam	Estonia		Senegal
Uruguay		Finland		Sierra Leone
		Iceland		
		Latvia		
		Lithuania		
		Sweden		
		Southern Europe		
		Croatia		
		Cyprus		
		Greece		
		Italy		
		Malta		
		Portugal		
		Spain		
		Türkiye		
		Western Europe		
		Austria		
		Belgium		
		Czechia		
		France		
		Germany		
		Ireland		
		Luxembourg		
		Netherlands		
		Switzerland		
		United Kingdom		

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Data Partners

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AirDNA
AirDNA is a leading provider of global short-term rental data offering destinations a complete understanding of their local lodging and tourism industry. Through a combination of interactive dashboards, market trend reports and future-looking data, AirDNA helps destinations gauge supply and demand, understand travellers' changing priorities and accelerate the economic impact of tourism.

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Bloom Consulting is a global consulting firm specializing in Nation and City Branding, working with countries, regions and cities across six continents. Headquartered in Lisbon, with offices in London, Paris, Riyadh and Madrid, Bloom Consulting has been operating since 2003 and has completed more than 190 projects. Every two years, the company publishes its Bloom Consulting Country Brand Ranking, which analyses the brand performance of 180 countries and territories worldwide. For more information, please visit www.bloom-consulting.com.

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The International Air Transport Association (IATA)
The International Air Transport Association (IATA) is the trade association for the world's airlines, representing more than 370 airlines accounting for some 85% of global air traffic. It supports many areas of aviation activity and helps formulate industry policy on critical aviation issues.

International Union for the Conservation of Nature (IUCN)
IUCN is a membership union composed of both government and civil society organizations. It harnesses the experience, resources and reach of more than 1,400 member organizations and the input of more than 16,000 experts. IUCN is the global authority on the status of the natural world and the measures needed to safeguard it.

MMGY TCI Research
MMGY TCI Research, UN Tourism-awarded and trusted by more than 150 destinations and travel organizations worldwide, stands at the forefront of travel intelligence. MMGY TCI propels the success of destinations with data-driven insights, offering global, proprietary analytical solutions tailored for DMOs of all sizes. Specializing in visitor experience, destination reputation and resident sentiment, MMGY TCI has pioneered in combining hybrid analytics from surveys and curated big data for guiding and evaluating destinations' management and marketing.

Tripadvisor
Tripadvisor, the world's largest travel guidance platform, helps hundreds of millions of people each month with their travel plans, from planning to booking to taking a trip. Travellers across the globe use the Tripadvisor site and app to discover where to stay, what to do and where to eat based on guidance from those who have been there before. With more than a billion reviews and contributions, travellers turn to Tripadvisor to find deals on accommodations, book experiences, reserve tables at restaurants and discover a host of places nearby.

United Nations World Tourism Organization (UN Tourism)
UN Tourism – the new name of the World Tourism Organization (UNWTO) – is the United Nations specialized agency for fostering tourism as a vehicle for equal, inclusive and sustainable development. Working with its Member States, international organizations and the private sector, UN Tourism promotes safe and seamless travel for all. It also works to make tourism the foundation of trust and international cooperation and a central pillar of growth and opportunity. As part of the wider UN system, UN Tourism is at the forefront of global efforts to achieve the 2030 Agenda for Sustainable Development, including through its ability to create decent jobs, promote equality and preserve natural and cultural heritage.

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