



EU-GCC Dialogue on Economic Diversification

A Project funded by the European Union

The Travel & Tourism Competitiveness Report
GCC Results
6th of October 2019

A project implemented by
GFA Consulting Group GmbH
Centre for European Policy studies
DMI Associates

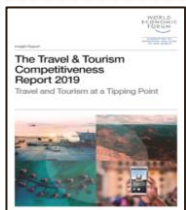


Executive Summary

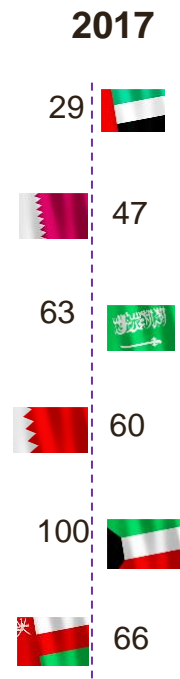
- **Oman** demonstrated the greatest improvement, moving up eight places to 58th
- MENA's safest (3rd) country recorded the regions fastest improvement for its human resources and labour markets (103rd to 65th), and is among the most improved when it comes to international openness (116th to 97th), environmental sustainability (109th to 57th) and overall infrastructure (60th to 52nd).
- The **UAE** had the Middle East's largest decline, falling from 29th to 33rd, including the biggest percentage decline in score on the Safety and Security pillar (falling from 2nd to 7th) and Ground and Port Infrastructure (19th to 31st) and the region's only decline on Environmental Sustainability (40th to 41st).
- The United Arab Emirates still remains MENA's highestscoring economy, ranking 33rd globally. The country has the best overall enabling environment in the region (17th), with the highest score for this subindex of any country outside of Europe, Asia-Pacific and North America. The UAE has a very good business environment (9th), human resource and labour market (26th) and safety and security conditions (7th), and is gaining momentum on ICT readiness (15th to 4th).
- **Saudi Arabia**- the largest T& T economy in the Middle scores above the subregion's average on most pillars, but near the bottom on international openness (137th).
- The **Gulf countries** have been able to use their natural resource wealth, central geographic location and relative security to develop world-class T&T infrastructure, defined by quality airports, ports, roads, tourist services and some of the world's leading airlines.
- **Europe** remains the world's most competitive region when it comes to T&T; it outscores the global average score on nearly all pillars and includes six of the top 10 scorers on the TTCl.
- The region is able to maintain the largest T&T export economy in the world, accounting for half the international tourist arrivals and over 40% of international receipts of economies.
- **Spain** remains the most T&T competitive country in the world thanks to rich natural (9th) and cultural (3rd) resources and₂ impressive tourist service infrastructure (3rd).

UAE is leading GCC followed by Qatar, Oman, Bahrain, Saudi Arabia and Kuwait

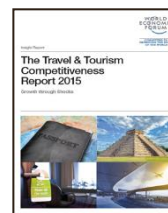
GCC Countries



Out of 140 Countries



Out of 136 Countries



Out of 141 Countries



Out of 140 Countries

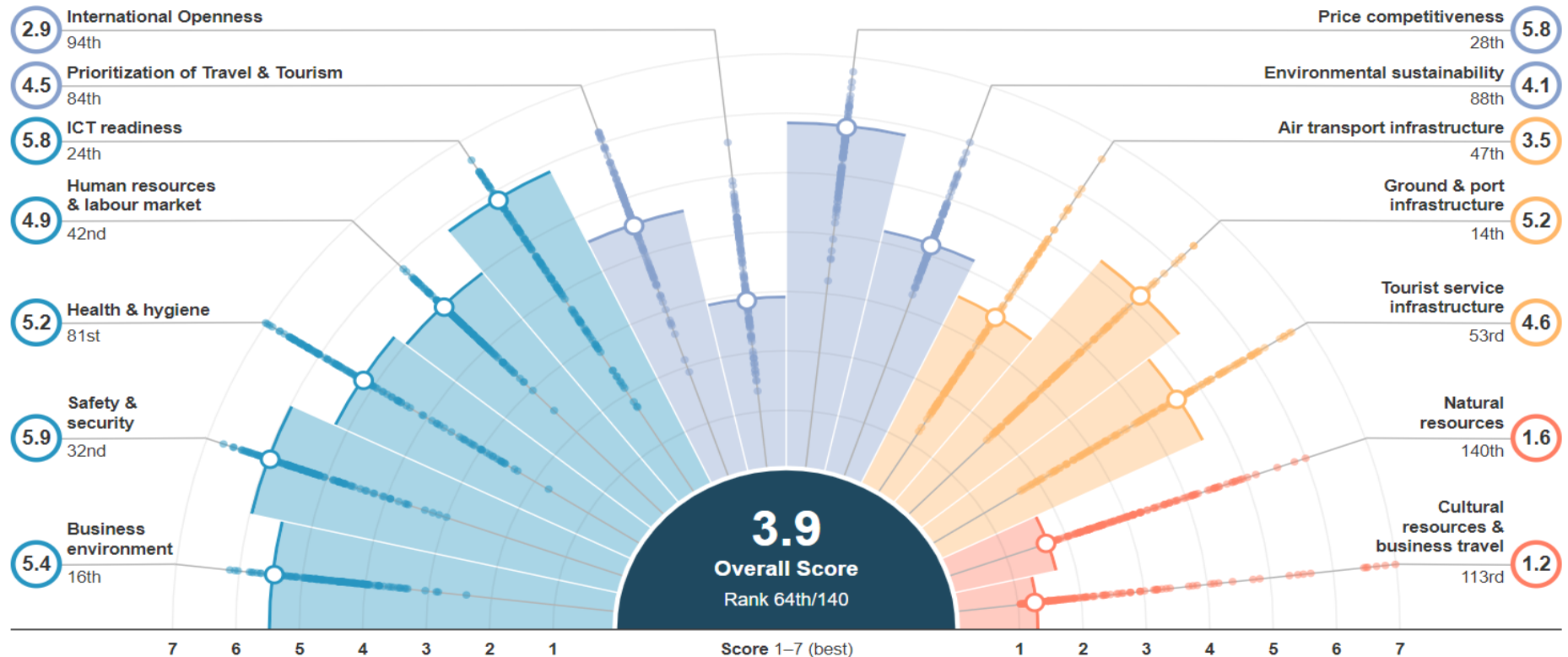
Bahrain Ranks 64 / 140 - Key Indicators and Performance Overview

| | | | |
|---|----------------------|--|-------------|
| International tourist arrivals | 4,372,000 | T&T industry Share of GDP (% GDP) | 6.0 |
| International tourism inbound receipts | US \$3,642.1 Mio | T&T industry employment | 36,400 jobs |
| Average receipts per arrival | US \$404.5 | T&T industry Share of Employment (% total employment) | 5.6 |
| T&T industry GDP | US \$2,562.5 million | | |

Sources: World Tourism Organization (UNWTO) and World Travel and Tourism Council (WTTC)

Bahrain Performance Overview

Key  Score **Compare with**  No comparator




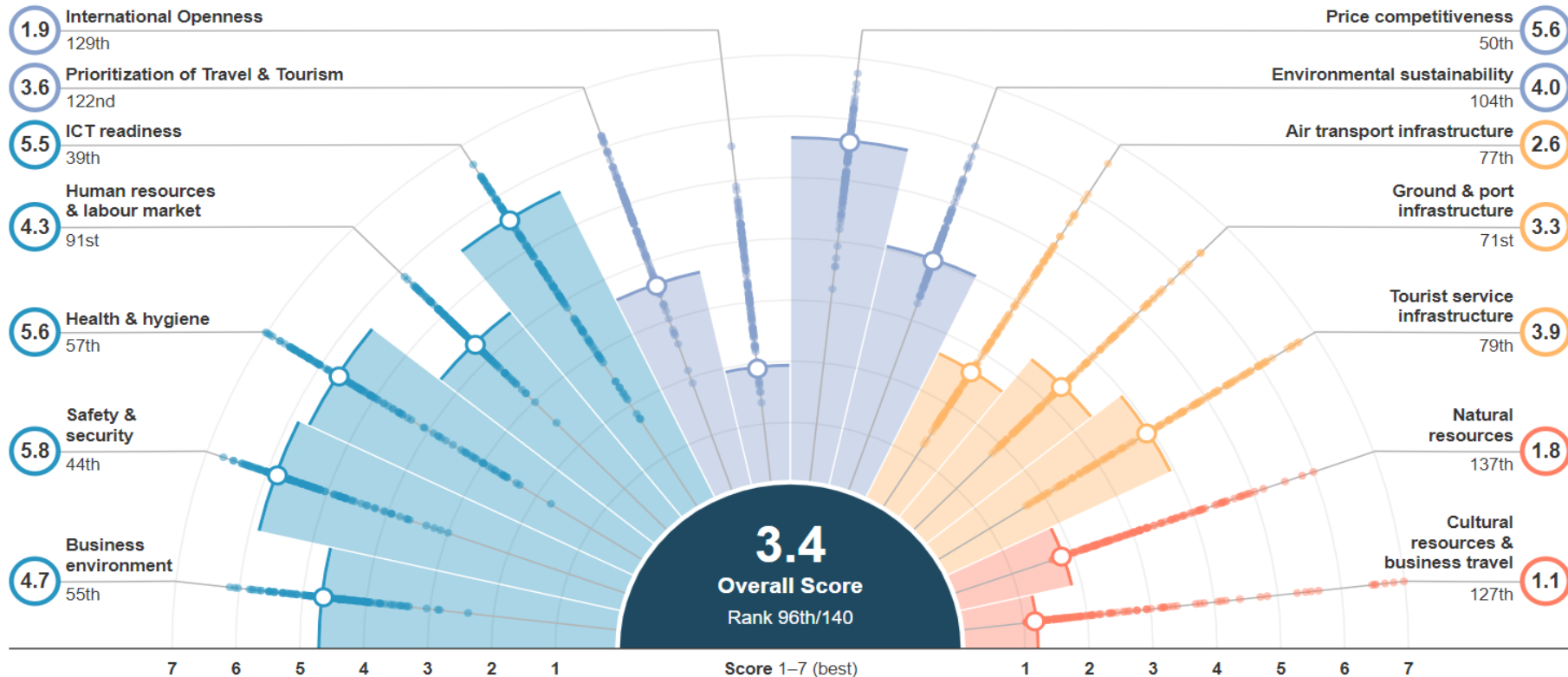
Kuwait Ranks 96 / 140 - Key Indicators and Performance Overview

| | | | |
|--|----------------------|---|-------------|
| International tourist arrivals | 203,000 | T&T industry Share of GDP (% GDP) | 2.6 |
| International tourism inbound receipts | US \$313.2 million | T&T industry employment | 52,500 jobs |
| Average receipts per arrival | US \$463.5 | T&T industry Share of Employment (% total employment) | 2.4 |
| T&T industry GDP | US \$3,360.7 million | | |

Sources: World Tourism Organization (UNWTO) and World Travel and Tourism Council (WTTC)

Kuwait Performance Overview

Key  Score **Compare with** No comparator





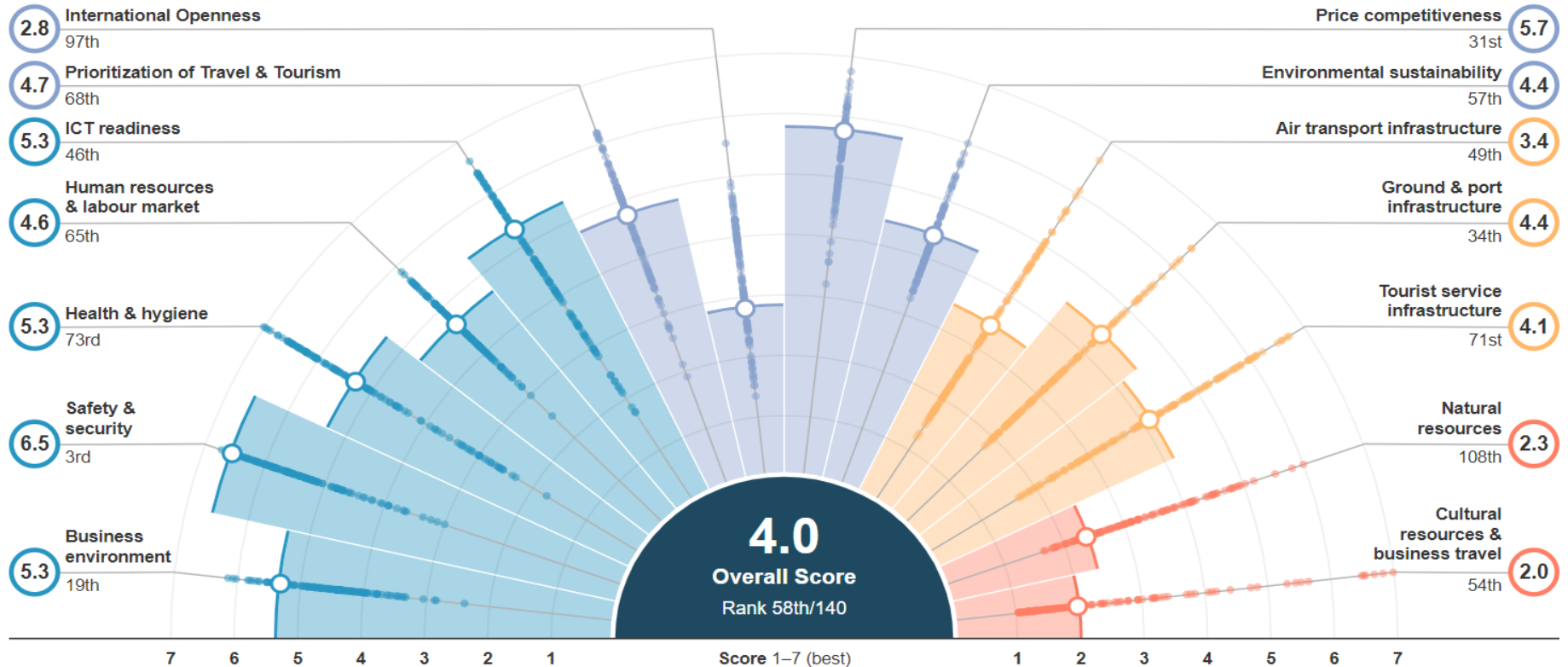
Oman Ranks 58 / 140 - Key Indicators and Performance Overview

| | | | |
|---|----------------------|--|--------------|
| International tourist arrivals | 2,372,000 | T&T industry Share of GDP (% GDP) | 4.5 |
| International tourism inbound receipts | US \$1,747.7 million | T&T industry employment | 108,900 jobs |
| Average receipts per arrival | US \$492.5 | T&T industry Share of Employment (% total employment) | 4.8 |
| T&T industry GDP | US \$3,416.2 million | | |

Sources: World Tourism Organization (UNWTO) and World Travel and Tourism Council (WTTTC)

Oman Performance Overview

Key  Score **Compare with**  No comparator 

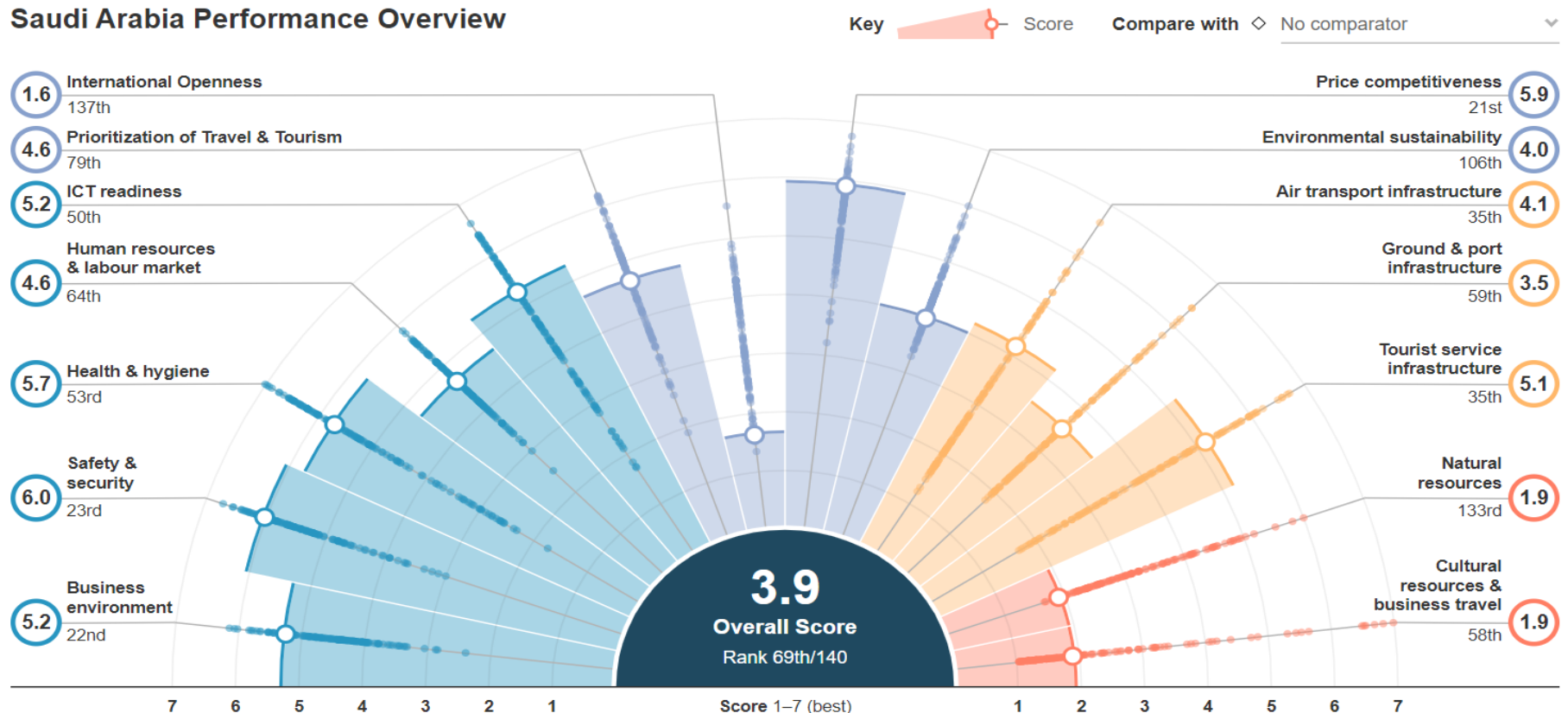


Saudi Arabia Ranks 69 / 140 - Key Indicators and Performance Overview

| | | | |
|---|-----------------------|--|--------------|
| International tourist arrivals | 16,109,000 | T&T industry Share of GDP (% GDP) | 3.3 |
| International tourism inbound receipts | US \$12,056.1 million | T&T industry employment | 621,500 jobs |
| Average receipts per arrival | US \$504.5 | T&T industry Share of Employment (% total employment) | 4.7 |
| T&T industry GDP | US \$23,844.3 million | | |

Sources: World Tourism Organization (UNWTO) and World Travel and Tourism Council (WTTC)

Saudi Arabia Performance Overview





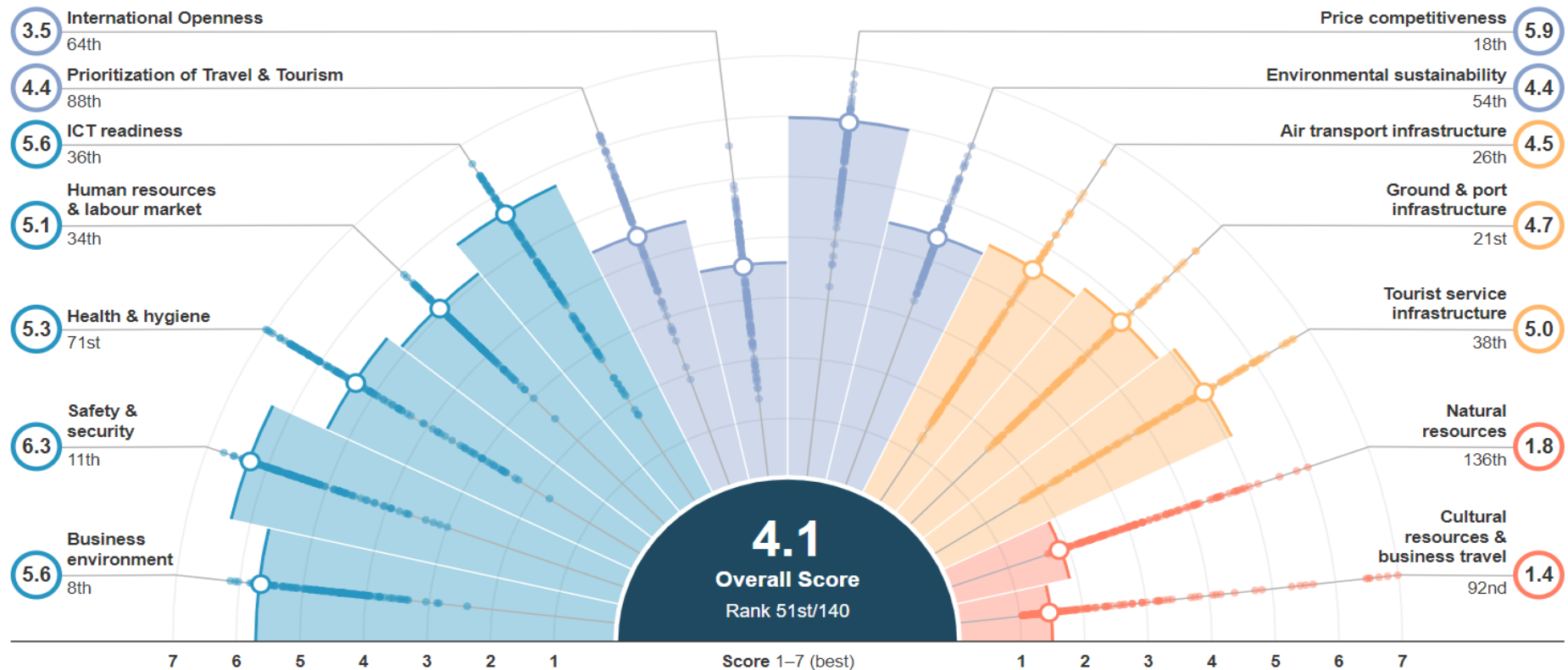
Qatar Ranks 51 / 140 - Key Indicators and Performance Overview

| | | | |
|---|----------------------|--|--------------|
| International tourist arrivals | 2,256,500 | T&T industry Share of GDP (% GDP) | 3.3 |
| International tourism inbound receipts | US \$5,970.9 million | T&T industry employment | 114,300 jobs |
| Average receipts per arrival | US \$500.5 | T&T industry Share of Employment (% total employment) | 5.6 |
| T&T industry GDP | US \$6,171.7 million | | |

Sources: World Tourism Organization (UNWTO) and World Travel and Tourism Council (WTTC)

Qatar Performance Overview

Key  Score **Compare with**  No comparator ▼




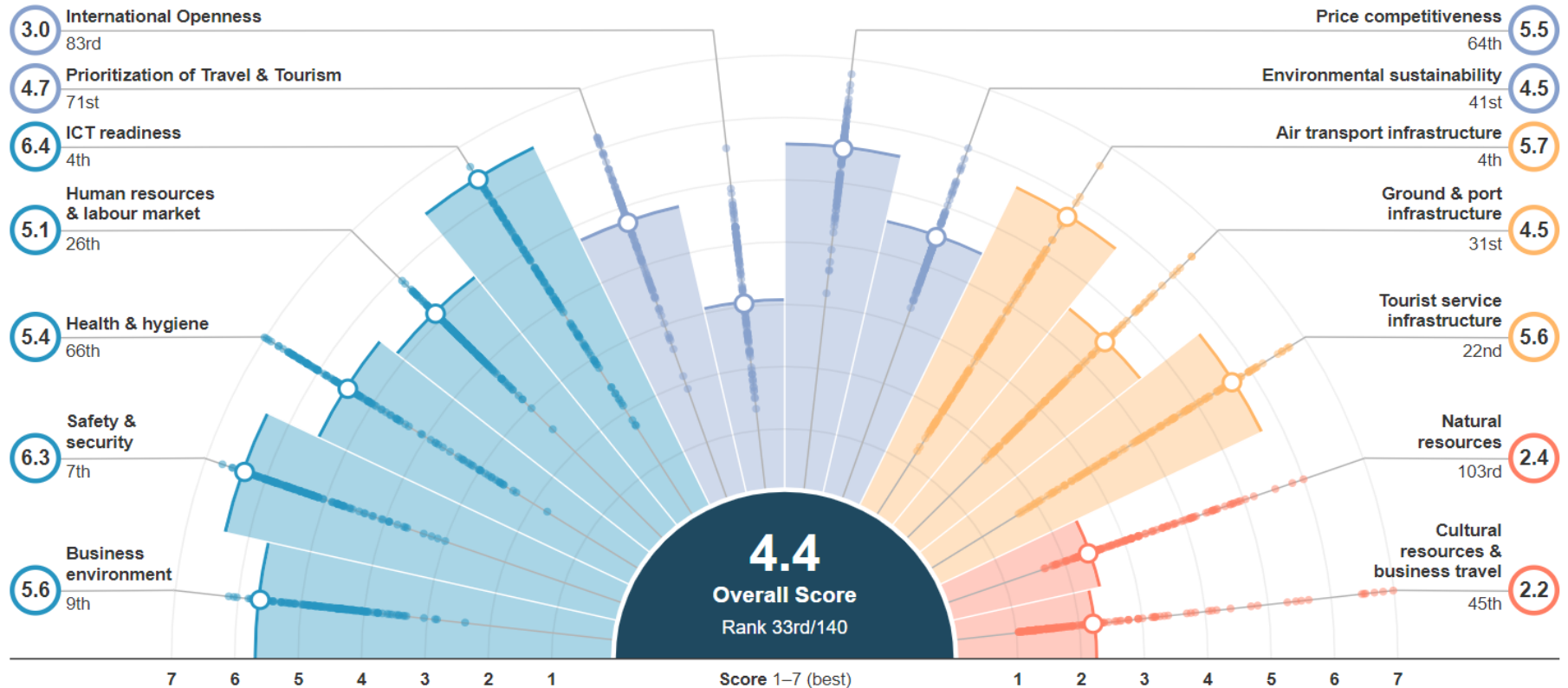
UAE Ranks 51 / 140 - Key Indicators and Performance Overview

| | | | |
|---|-----------------------|--|--------------|
| International tourist arrivals | 15,790,000 | T&T industry Share of GDP (% GDP) | 5.5 |
| International tourism inbound receipts | US \$21,048.3 million | T&T industry employment | 335,300 jobs |
| Average receipts per arrival | US \$527.5 | T&T industry Share of Employment (% total employment) | 5.3 |
| T&T industry GDP | US \$22,059.4 million | | |

Sources: World Tourism Organization (UNWTO) and World Travel and Tourism Council (WTTC)

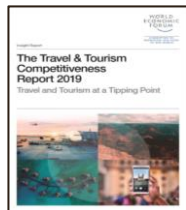
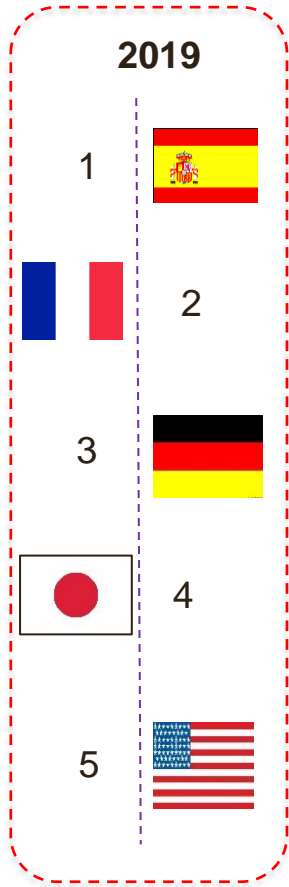
United Arab Emirates Performance Overview

Key  Score **Compare with**  No comparator

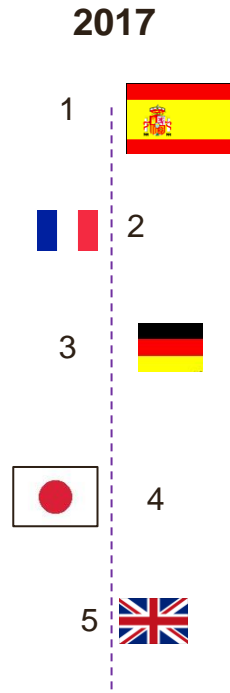


Spain remains the most T&T competitive country in the world

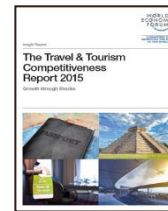
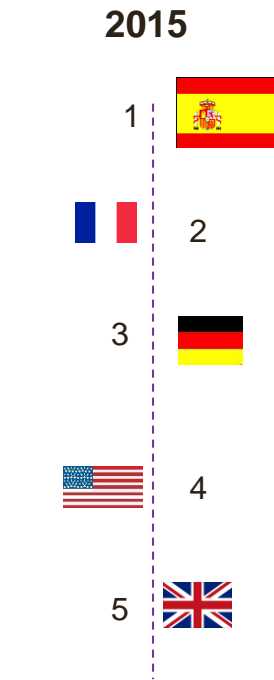
World Top 5



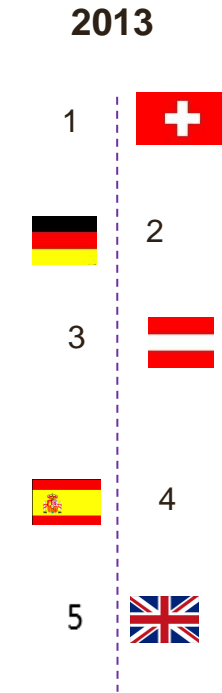
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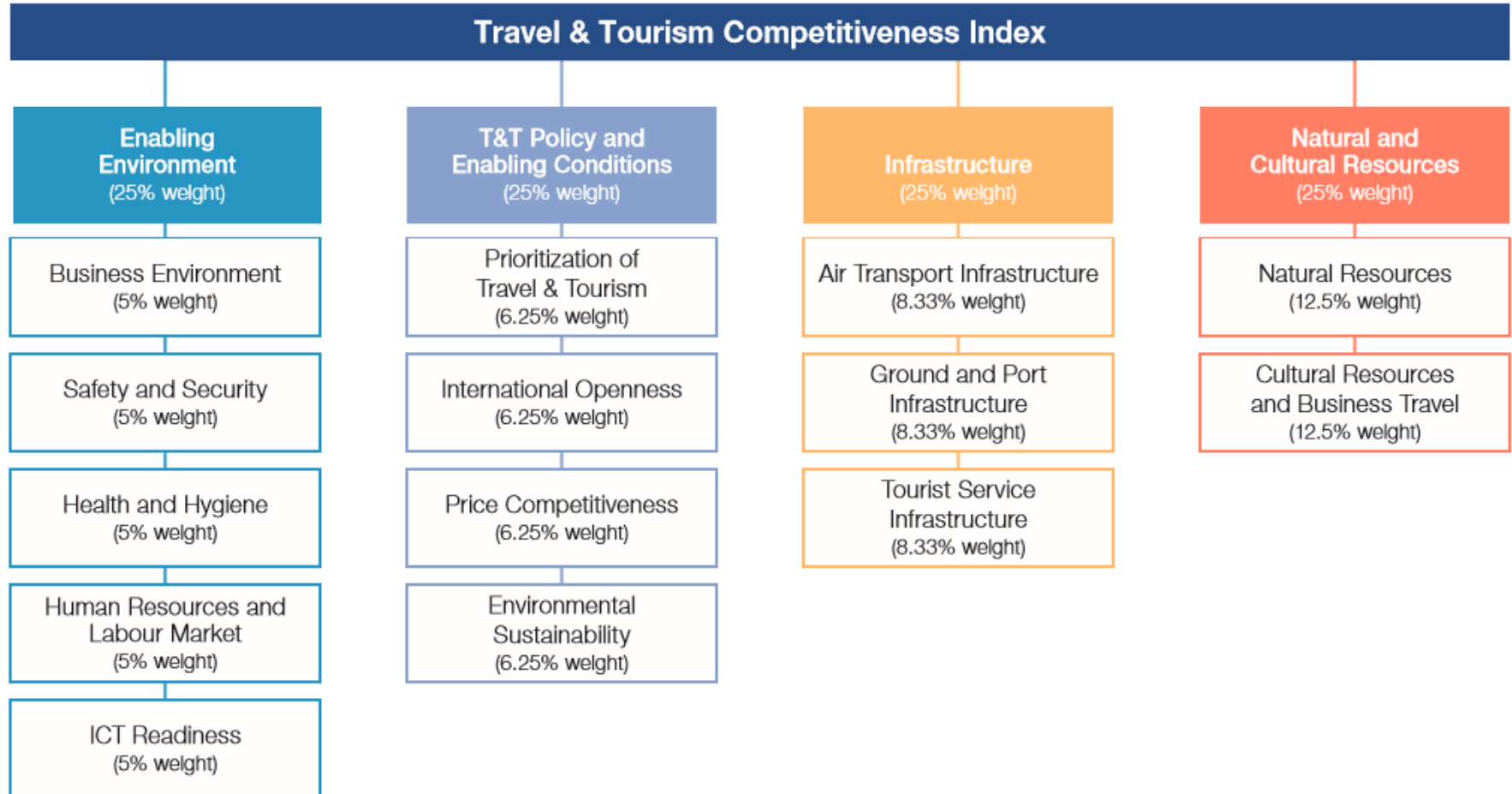
Out of 140 Countries

The Travel & Tourism Competitiveness Report

GCC Results

Methodology

The Travel & Tourism Competitiveness Index is composed of 14 pillars organized into four subindexes and 90 indicators



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



Executive Opinion Survey



- Counts 34 % of the result
- Perception Driven

Data from other sources



- Counts 66 % of the result
- Issue of data consistency

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Stefan Kraxner

Phone: +971 (0) 2-6411260

Mobile: +971 (0) 50 829 47 93

E-mail: Stefan.Kraxner@gfa-group.de

Douglas Aitkenhead

Phone: +971 (0) 2- 6411260

Mobile: +971 (0) 58 586 2662

E-mail: douglas.Aitkenhead@gfa-group.de

Rawan Khatib

Phone: +971 (0) 2-6411260

Mobile: +971 (0) 55 696 4094

E-mail: rawan.khatib@gfa-group.de

Tarek Sabasi

Phone: +971 (0) 2- 6411260

Mobile: +971 (0) 50 814 70 36

E-mail: tarek.sabassi@gfa-group.de

Project Address:
MBC Makateb, Tourist Club
Makeen Tower, 15th floor
P.O. Box 35243, Abu Dhabi,
United Arab Emirates
