



CITY TRAVEL & TOURISM IMPACT 2018 HIGHLIGHTS

The World Travel & Tourism Council's (WTTC) annual City Travel & Tourism Impact Report quantifies the economic contribution of Travel & Tourism in 72 cities around the world. With 54% of the world's population living in urban areas, cities have become global economic hubs, driving growth and innovation, while attracting more and more people who will come to live, do business and discover them. This growth has also resulted in a rise in city tourism - a trend which is forecasted to last.

Here are the highlights from the report:

1. **Cities represent 45% of global international travel.** With over half a billion trips taken to cities annually, they have become catalysts of global travel, driving significant increases in Travel & Tourism within city boundaries and for wider country destinations. Travel to cities has grown faster than total international travel demand in the past decade.
2. **Shanghai and Beijing are the two largest of the top 10 cities in the ranking** in terms of market size followed by Paris, Orlando, New York, Tokyo, Bangkok, Mexico City, Las Vegas and Shenzhen.
3. **Among the largest cities, Bangkok, Paris, Mexico City and Tokyo** are the biggest contributors to their country's Travel & Tourism GDP, accounting respectively for 50.4%, 29.8%, 24.0% and 20.2% of their country's tourism revenue.
4. **Emerging and developing markets continue to rise**, with ten of the top 20 largest cities by market size in 2017 and the ten fastest growing cities over the past decade including Chongqing, Shanghai, Lagos, Tehran and Mumbai, located in emerging and developing countries.
5. **Cairo, Istanbul, Antalya and Tehran have made a big comeback** in 2017, growing 34.4%, 13.1%, 9.2% and 9.0% respectively. This growth is the result of improved political stability including the removal of sanctions and increased security.
6. **Hong Kong and Macau have the highest international visitor spending**,¹ followed by Dubai, New York, Bangkok, Singapore, Shenzhen, Istanbul, Miami and London.
7. **Domestic travel accounts for 73% of global Travel & Tourism expenditure in cities**, with Chinese cities showing a heavier reliance on domestic than international demand. The domestic share of Travel & Tourism GDP in Shanghai and Beijing is over 85%.
8. **The proportion of international travel vs. domestic in cities is expected to rise** with the rapid growth of emerging markets. Macau and Dublin currently have the highest reliance on international visitors – foreign visitor spending accounts for 97% of their tourism GDP; followed by Dubrovnik (92%) and Istanbul (91%).
9. **Leisure travel provides 78% of total global tourism expenditure**, and at city level, contributions to GDP are notably higher in leisure-driven cities, resulting in increasing sectoral reliance. The eight highest ranked destinations in terms of Travel & Tourism's share of GDP are leisure-driven, with Cancún (49.6%), Orlando (18.7%) and Antalya (17.6%) taking the top spots.

¹ Mainland Chinese visitors to Macau SAR and Hong Kong SAR are treated as 'international' visitors for the purpose of this research.

10. **Cancún, Marrakech, Orlando, Las Vegas & Antalya** are the top 5 cities with a greater reliance on Travel & Tourism than their respective countries.
11. **The top ten cities in terms of employment growth cross all continents**, with Abu Dhabi (10.4%), Tehran (6.8%) and Chongqing (6.0%) as leaders over the 2007-2017 period. In contrast, the leaders in terms of absolute number of Travel & Tourism jobs in 2017 are Jakarta, Beijing, Mexico City, Shanghai and Bangkok.
12. **The Chinese domestic and outbound markets will drive growth** in the coming decade, with the majority of top performers maintaining their positions. Chinese cities will continue to lead, although a slowdown in growth is expected. With the exception of Marrakech, the cities in the top ten ranking of fastest growing Travel & Tourism GDP in the coming decade are in Asia-Pacific.
13. **Macau stands out in the rankings** taking 2nd place as the fastest growing city in terms Travel & Tourism GDP in 2017 and ranking 2nd globally in international visitor spend in 2017. Macau shows heavy reliance on Travel & Tourism, with 29.3% of its GDP directly attributed to the sector.
14. **Look out for Shanghai, Guangzhou, Bangkok and Chongqing** for 2027. Shanghai went from being the 8th largest city in terms of Travel & Tourism GDP in 2007 to become the largest in 2017; a position it is expected to maintain until 2027. While Beijing and Paris are forecast to remain the 2nd and 3rd largest destinations, the rapid growth of Guangzhou will take it to 4th place, followed by Bangkok in 5th position. Chongqing will join the top 15 for the first time.

TOP 10

Top 10 largest cities (direct T&T GDP contribution 2017 US\$ bn)

1	Shanghai	35.0
2	Beijing	32.5
3	Paris	28.0
4	New York	24.8
5	Orlando	24.8
6	Tokyo	21.7
7	Bangkok	21.3
8	Mexico City	19.7
9	Las Vegas	19.5
10	Shenzhen	19.0

Top 10 fastest growing cities (2016-2017 % growth in direct T&T GDP)

1	Cairo	34.4%
2	Macau SAR	14.2%
3	Istanbul	13.1%
4	Dublin	11.5%
5	Chongqing	11.3%
6	Manila	11.0%
7	Beijing	10.7%
8	Shanghai	10.5%
9	Guangzhou	10.3%
10	Antalya	9.2%

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