Global Destination Cities Index 2019







Diana Munoz RobinoSenior Vice President of
Global Tourism Partnerships,
Mastercard

Global Destination Cities Index

2019 marks 10 years' worth of insights stemming from Mastercard's Global Destination Cities Index. Over the years, this annual report has shown the rise of international travel to cities around the world and the impact it is having in driving local commerce.

Travel is booming, but for host countries and cities, generating profits can't live in isolation. Holistic strategies must create pathways to sustainable and inclusive growth for all segments of society. With the right insights, innovations, and partnerships between the public and private sectors, we can help local leaders better understand how to anticipate, plan for, and manage increasing flows of visitors and how to empower businesses of all sizes to better serve the needs of international visitors. The benefits of good planning will extend beyond commerce to inclusive, sustainable growth and being respectful of local natural habitats.

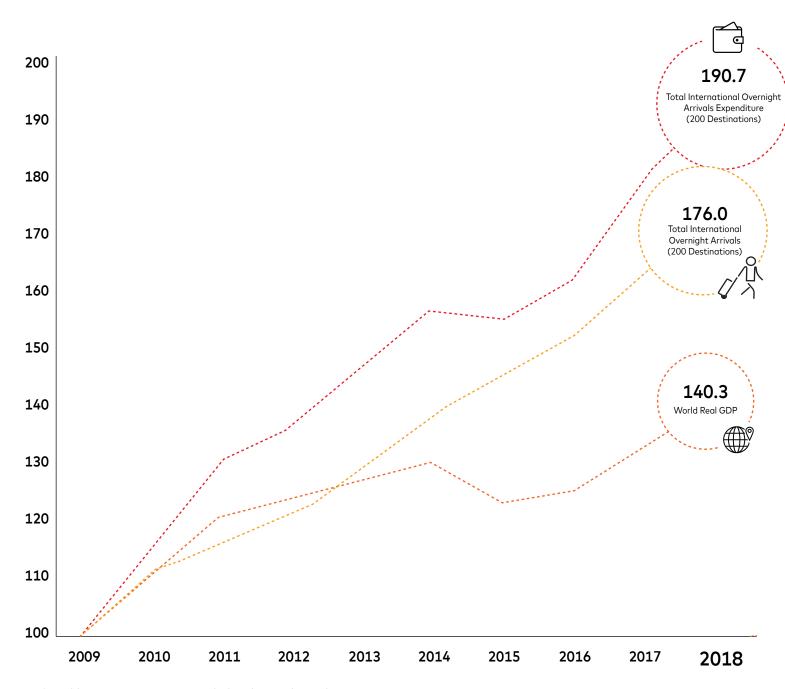
This year, Mastercard's Global Destination Cities Index reveals Bangkok as the No. 1 city for the fourth consecutive year while Paris overtakes London for the No. 2 spot. With a decade of insights, we can identify trends of how people are traveling internationally while showcasing emerging markets and the continuous growth of the industry.

- Consistent and Steady Growth Over the past decade, the one constant has been continual change. Each year, more people are traveling internationally and spending more in the cities. Between all of the destinations within the Index, arrivals have grown on average 6.5 percent year-over-year since 2009, with expenditure growing on average 7.4 percent.
- Sustained Dominance of Major Cities While there has been significant movement in visitors to smaller cities, the top 10 has remained largely consistent. London, Paris, and Bangkok have been the top 3 since 2010, with Bangkok as No. 1 six of the past seven years. New York is another top 10 stalwart, with 13.6 million overnight visitors this year.
- Rise of Asia-Pacific International Travelers Cities in Asia-Pacific have seen the largest increase in international travelers since 2009, growing 9.4 percent. In comparison, Europe, which saw the second highest growth, was up 5.5 percent. This is spurred on by the growth in mainland Chinese travelers. Since 2009, mainland China has jumped six places to be the No. 2 origin country for travelers to the 200 included destinations—behind only the U.S.

Mastercard acts as the technology partner for the global travel and tourism industry. We provide complete solutions that bundle data insights, digital identity, payment and security solutions, visitor management and infrastructure consulting in order to solve for the unique needs of a destination. Simply put: We help our travel and tourism partners better understand tourism spending patterns and deliver more connected and inclusive experiences.

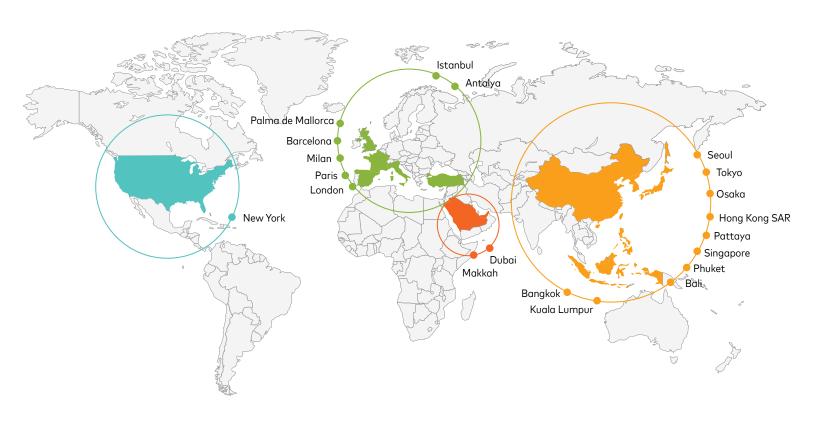
Through the insights from the Global Destination Cities Index and Mastercard's work with partners across the world, we continue our commitment to support economic, sustainable tourism and inclusive travel.

Growth of International Visitor Arrivals, Spend Still Outpaces World Real GDP



^{*} World GDP Source: IMF WEO, calculated at market exchange rates

Bangkok Continues to Lead Among Top Destination Cities



Rank	City	Total international visitors		
01	Bangkok	22.78MM		
02	Paris	19.10MM		
03	London	19.09MM		
04	Dubai	15.93MM		
05	Singapore	14.67MM		
06	Kuala Lumpur	13.79MM		
07	New York	13.60MM		
80	Istanbul	13.40MM		
09	Tokyo	12.93MM		
10	Antalya	12.41MM		

Rank	City	Total international visitors
11	Seoul	11.25MM
12	Osaka	10.14MM
13	Makkah	10.00MM
14	Phuket	9.89MM
15	Pattaya	9.44MM
16	Milan	9.10MM
17	Barcelona	9.09MM
18	Palma de Mallorca	8.96MM
19	Bali	8.26MM
20	Hong Kong SAR	8.23MM

Global Top 20 Destination Cities by International Overnight Visitors (2018)

		OVERNIGHT INTERNATIONAL VISITORS (MM)					
Rank	DESTINATION CITY	2017	2018	2019 *			
1	Bangkok Thailand	21.09	22.78	3.34%			
2	Paris France	17.41	19.10	2.24%			
3	London United Kingdom	19.83	19.09	3.47%			
4	Dubai UAE	15.79	15.93	1.68%			
5	Singapore Singapore	13.90	14.67	4.00%			
6	Kuala Lumpur Malaysia	12.58	13.79	9.87%			
7	New York United States	13.13	13.60	2.94%			
8	lstanbul Turkey	10.70	13.40	8.14%			
9	Tokyo Japan	11.93	12.93	10.02%			
10	Antalya Turkey	9.42	12.41	8.14%			
11	Seoul South Korea	9.54	11.25	8.94%			
12	Osaka Japan	8.42	10.14	9.24%			
13	Makkah Saudi Arabia	10.53	10.00	6.62%			
14	Phuket Thailand	9.68	9.89	3.28%			
15	Pattaya Thailand	8.96	9.44	3.43%			
16	Milan Italy	9.19	9.10	2.02%			
17	Barcelona Spain	8.70	9.09	4.78%			
18	Palma de Mallorca Spain	8.82	8.96	4.40%			
19	Bali Indonesia	7.76	8.26	1.30%			
20	Hong Kong SAR China	8.17	8.23	1.70%			



^{*} Growth rate forecast

Top 20 Origin Markets: Top 3 Destinations

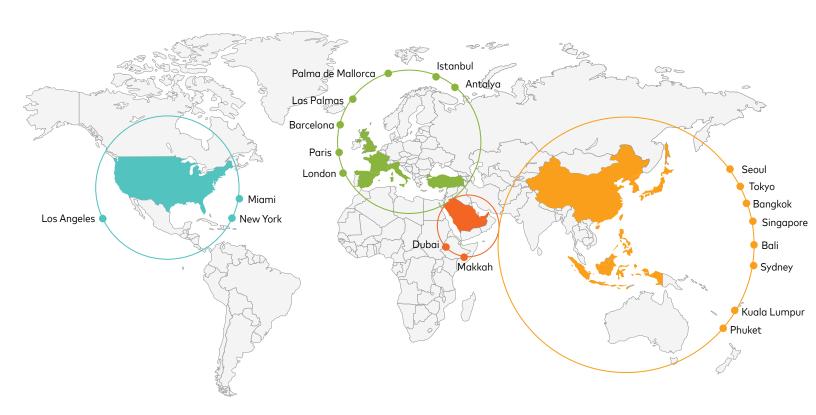
Rank	ORIGIN MARKETS		E CONTRIB BAL DESTI		3Y	TOP 3 GLOBA	L DESTINATION	S
		OVN INTI ARRIVAL	ERNATIONAL S	EXPE	NDITURE		DESTINATION	
		2009	2018	2009	2018	Cancun	Toronto	London
1	United States	10.40%	10.00%	9.60%	9.30%	3,387 5.3%	2,928 4.6%	2,631 4.1%
						Bangkok	Seoul	Tokyo
2	Mainland China	2.50%	8.90%	2.60%	9.40%	8,505 15.0%	3,710 6.5%	3,540 6.2%
						Palma de Mallorca	Bolzano	Tiroler Unterland
3	Germany	8.40%	6.50%	9.00%	6.40%	3,313 8.0%	3,287 7.9%	2,636 6.3%
	Haitad Kiasalasa	7.000	F 999/	0.500/	(F00(Palma de Mallorca	Paris	Dublin
4	United Kingdom	7.30%	5.90%	8.50%	6.50%	2,431 6.5%	1,831 4.9%	1,792 4.8%
						London	Marrakech	Barcelona
5	France	4.90%	3.70%	4.20%	3.10%	1,835 7.8%	1,145 4.9%	1,053 4.5%
						Osaka	Hokkaido	Tokyo
6	South Korea	1.90%	3.50%	2.00%	3.30%	2,289 10.4%	1,771 8.0%	1,459 6.6%
						Taipei	Seoul	Bangkok
7	Japan	4.30%	3.10%	4.50%	3.40%	2,307 11.8%	2,111 10.0%	1,798 9.2%
						Washington	Las Vegas	New York
8	Canada	3.60%	2.90%	3.60%	2.80%	1,460 7.9%	1,440 7.8%	1,004 5.4%
						Antalya	Pattaya	Phuket
9	Russia	2.00%	2.50%	1.80%	2.10%	4,766 29.4%	1,123 6.9%	972 6.0%
						Bali Singapor		New York
10	Australia	2.40%	2.30%	2.80%	2.60%	1,591 10.9	883 6.0%	714 4.9%

Rank	ORIGIN MARKETS	% SHARE CONTRIBUTION TO 200 GLOBAL DESTINATIONS BY		TOP 3 GLOBAL DESTINATIONS							
		OVN INT ARRIVAL	ERNATIONAL S	EXPE	ENDITURE			DESTI	NATION		
11	1. 15	2009	2018	2009	2018	D	ubai	Sing	gapore	М	akkah
	11 India	1.70%	2.00%	1.90%	2.80%	2,032	16.0%	1,250	9.9%	982	7.7%
10	le ol					P	aris	Lo	ndon	Ba	rcelona
12	ltaly	2.60%	1.90%	2.70%	1.70%	1,266	10.3%	990	8.0%	616	5.0%
12	Caria	2 (22)	4.000/	2.422/		P	aris	Lo	ndon	L	isbon
13	Spain	2.40%	1.80%	2.10%	1.40%	1,458	12.7%	1,255	11.0%	575	5.0%
14	Taiwan, China	1.00%	1.50%	0.90%	1.50%	T	okyo	Hol	kaido	Ok	kinawa
14	raiwan, China	1.00%	1.50 %	0.70 %	1.50 %	1,387	14.2%	1,351	13.8%	1,342	342 13.7%
						Lo	ndon	Р	aris	Tiroler	Unterland
15	Netherlands	1.80%	1.40%	1.90%	1.30%	695	7.6%	604	6.6%	416	4.6%
1/						Porto	Alegre	Mon	tevideo	Val	paraiso
16	Argentina	1.20%	1.40%	1.00%	1.10%	812	8.9%	657	7.20%	624	6.9%
17	Brazil	1.000/	4.000/	4 2224	1 (22)	Nev	w York	Or	lando		1iami
	DI UZII	1.00%	1.30%	1.30%	1.40%	906	11.2%	879	10.9%	781	9.70%
18	Saudi Arabia	0.009/	1 209/	0.009/	1 50%	Ba	hrain	D	ubai	İst	tanbul
	Saudi Arabia	0.90%	1.20%	0.80%	1.50%	3,406	43.9%	1,568	20.2%	627	8.1%
19	Indonesia	1 / 09/	1 20%	1 209/	1 409/	Sing	gapore	Kuala	Lumpur	М	akkah
19	indonesid	1.40%	1.20%	1.30%	1.60%	2,095	27.3%	1,579	20.6%	886	11.6%
20	Malaysia	0.80%	1.10%	0.90%	1 20%	Sing	gapore	Ba	ngkok	CI	nennai
20	Malaysia	0.80%	1.10%	0.80%	1.30%	787	11.4%	695	10.1%	494	7.2%
						ARR	IVALS (MN	1)	ORIGII	N % SHAI	RE*

^{*}Origin % Share refers to the destination's share of all tourists coming from the origin country who are visiting the 200 Global Destinations. For example in 2018, 5.3% of all origin U.S.A. tourists going to 200 Global Destinations visited Cancun.



Dubai Leads in Overnight International Visitor Spending Globally



Rank	City	Total Spend (US\$)
01	Dubai	\$30.82B
02	Makkah	\$20.09B
03	Bangkok	\$20.03B
04	Singapore	\$16.56B
05	London	\$16.47B
06	New York	\$16.43B
07	Paris	\$14.06B
80	Tokyo	\$13.77B
09	Palma de Mallorca	\$12.69B
10	Phuket	\$12.01B

Rank	City	Total Spend (US\$)
11	Kuala Lumpur	\$11.13B
12	Seoul	\$9.31B
13	Las Palmas	\$9.02B
14	Bali	\$8.86B
15	Istanbul	\$8.26B
16	Los Angeles	\$8.24B
17	Sydney	\$8.03B
18	Barcelona	\$7.86B
19	Miami	\$7.70B
20	Antalya	\$7.65B

Global Top 20 Destination Cities by International Overnight Visitor Spend (2018)

	DESTINATION CITY	OVERNIGHT INTERNATIONAL VISITOR SPEND (US \$B)				
Rank	& COUNTRY	2017	2018	2019*		
1	Dubai UAE	\$29.70	\$30.82	4.18%		
2	Makkah Saudi Arabia	\$21.04	\$20.09	7.94%		
3	Bangkok Thailand	\$17.44	\$20.03	8.67%		
4	Singapore Singapore	\$16.34	\$16.56	2.66%		
5	London United Kingdom	\$17.45	\$16.47	4.64%		
6	New York United States	\$15.65	\$16.43	2.93%		
7	Paris France	\$12.56	\$14.06	-0.78%		
8	Tokyo Japan	\$11.92	\$13.77	12.74%		
9	Palma de Mallorca Spain	\$11.99	\$12.69	3.17%		
10	Phuket Thailand	\$11.01	\$12.01	9.16%		
11	Kuala Lumpur Malaysia	\$9.27	\$11.13	4.71%		
12	Seoul South Korea	\$6.99	\$9.31	16.41%		
13	Las Palmas Spain	\$8.50	\$9.02	-2.27%		
14	Bali Indonesia	\$8.77	\$8.86	3.05%		
15	Istanbul Turkey	\$6.75	\$8.26	9.74%		
16	Los Angeles United States	\$8.70	\$8.24	3.88%		
17	Sydney Australia	\$7.89	\$8.03	1.51%		
18	Barcelona Spain	\$6.60	\$7.86	2.84%		
19	Miami United States	\$7.68	\$7.70	3.22%		
20	Antalya Turkey	\$5.94	\$7.65	9.74%		

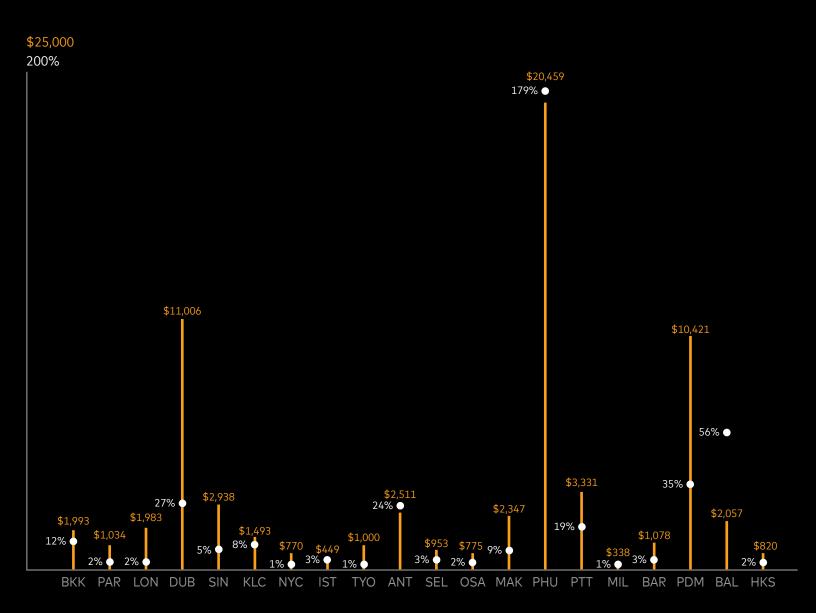


^{*} Growth rate forecast

Impact of Tourism to the Destination and Tourism Spend per Resident

_____ Visitor Expenditure per resident (US\$)

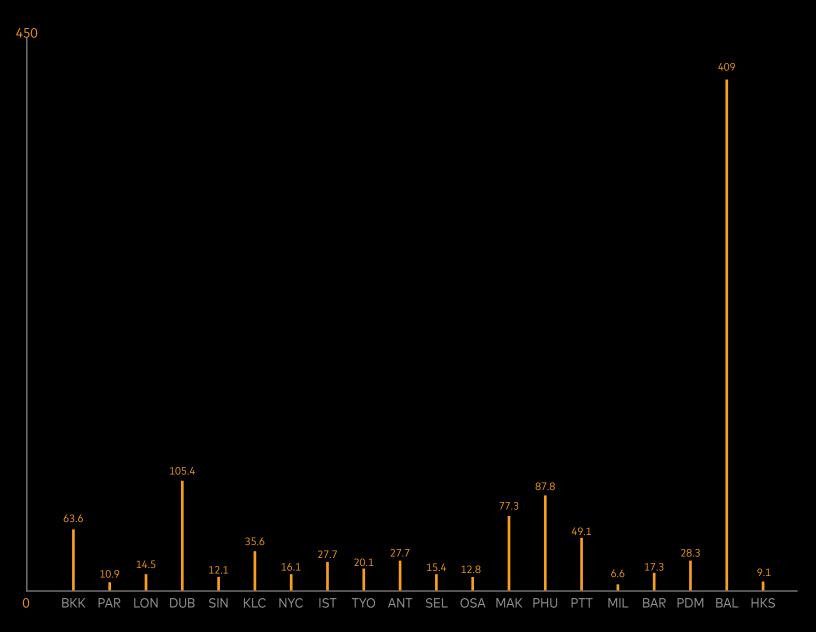
 Ratio of International Overnight Visitors Expenditure to GDP



BKK-Bangkok, PAR-Paris, LON-London, Dub-Dubai, SIN-Singapore, KLC-Kuala Lumpur, NYC-New York, IST-Istanbul, TYO-Tokyo, ANT-Antalya, SEL-Seoul, OSA-Osaka, MAK-Makkah, PTT-Pattaya, PHU-Phuket, MIL-Milan, BAR- Barcelona, PDM-Palma de Mallorca, BAL-Bali, HKS-Hong Kong SAR

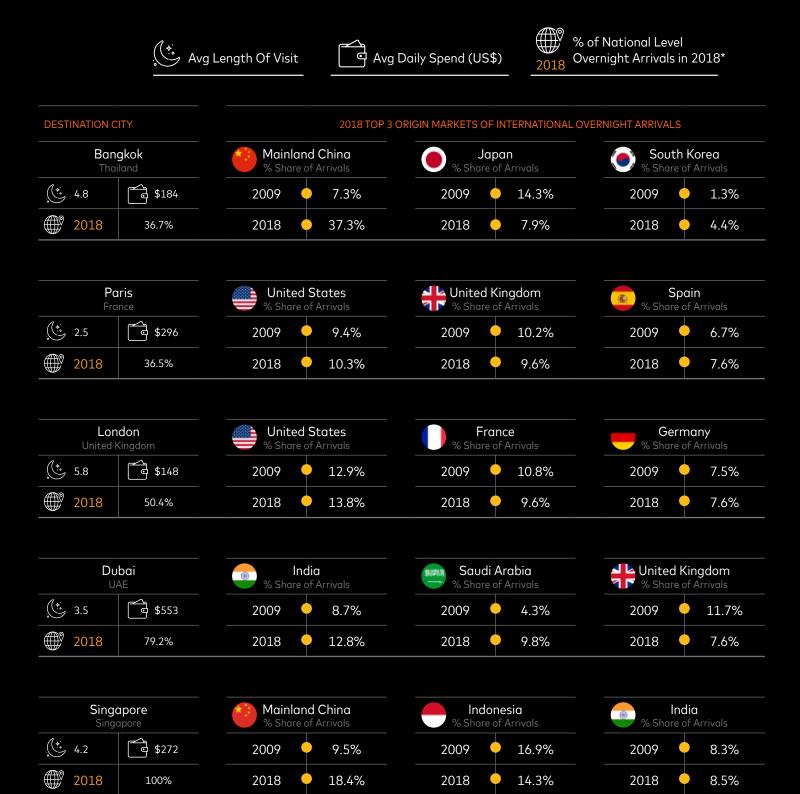
Top 20 Global Destinations Jobs Supported by 1,000 Additional Overnight Tourists

The number of jobs supported by 1,000 additional overnight tourists is a function how much tourism revenue is required to support one job (national level ratio) and the average spend per tourist (i.e. the more each tourist spends the more jobs are supported). For example, 1,000 additional tourists supports 409 jobs in Bali, 64 jobs in Bangkok but only 12 jobs in Singapore. As Singapore and Bali have very similar expenditure per tourist ratios, the implication here is that higher productivity among Singapore labor drives higher revenues per employee, while lower labor costs in Bali allows the destination to have more tourism-related employees per tourist.



BKK-Bangkok, PAR-Paris, LON-London, Dub-Dubai, SIN-Singapore, KLC-Kuala Lumpur, NYC-New York, IST-Istanbul, TYO-Tokyo, ANT-Antalya, SEL-Seoul, OSA-Osaka, MAK-Makkah, PTT-Pattaya, PHU-Phuket, MIL-Milan, BAR-Barcelona, PDM-Palma de Mallorca, BAL-Bali, HKS-Hong Kong SAR

Additional Insights Into Top 20 Destination Cities



^{* &}quot;% of National Level Ovn Arrivals" refers to the destination arrivals as a % of national arrivals (e.g. arrivals in Bangkok as % of arrivals in Thailand





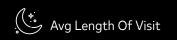




DESTINATION CITY 2018 TOP 3 ORIGIN MARKETS OF INTERNATIONAL OVERNIGHT ARRIVALS Mainland China Kuala Lumpur Thailand Indonesia Malaysia 5.7 ਰੋ \$142 2009 2.3% 2009 3.9% 2009 29.4% 2018 46.0% 2018 20.6% 2018 11.7% 2018 11.5% New York L United Kingdom Mainland China Canada % Share of Arrivals **3** \$152 2009 12.3% 2009 1.7% 2009 10.0% 2018 19.6% 2018 9.3% 2018 8.1% 2018 7.4% Istanbul Germany Iran Saudi Arabia 5.8 \$106 2009 14.8% 2009 3.0% 2009 0.7% 2018 44.6% 2018 8.0% 2018 7.0% 2018 4.7% South Korea Mainland China Taiwan, China Tokyo 5.4 ੋ \$196 11.1% 14.2% 14.4% 2009 2009 2009 2018 19.3% 2018 27.4% 2018 11.3% 2018 10.7% Antalya Russia Ukraine Germany ੋ \$44 ਰੀ 14.0 2009 25.6% 2009 27.7% 2009 4.2% 2018 41.3% 2018 38.4% 2018 18.6% 2018 5.7%

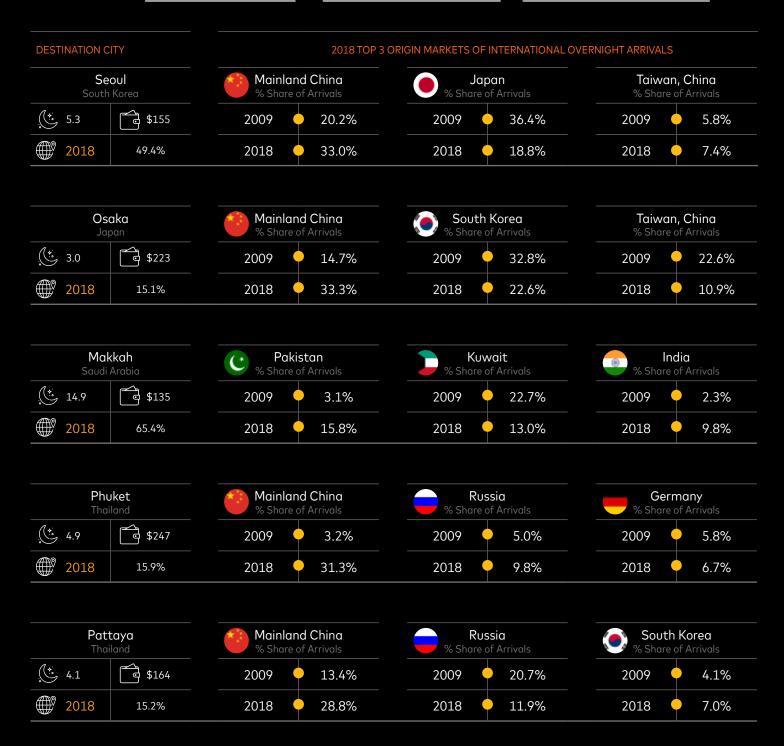
^{* &}quot;% of National Level Ovn Arrivals" refers to the destination arrivals as a % of national arrivals (e.g. arrivals in Bangkok as % of arrivals in Thailand











^{* &}quot;% of National Level Ovn Arrivals" refers to the destination arrivals as a % of national arrivals (e.g. arrivals in Bangkok as % of arrivals in Thailand









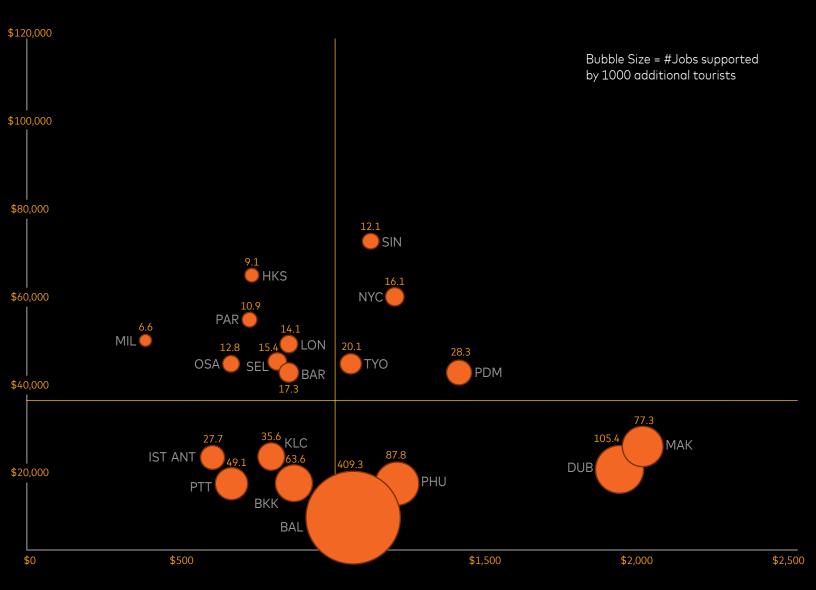
DESTINATION CITY 2018 TOP 3 ORIGIN MARKETS OF INTERNATIONAL OVERNIGHT ARRIVALS Germany Milan **United States** France 2.6 ਰੋ \$155 2009 16.8% 2009 5.6% 2009 7.2% 6.7% 2018 14.4% 2018 14.9% 2018 6.8% 2018 France 💶 United Kingdom **United States** Barcelona % Share of Arrivals 2.9 बै \$301 2009 12.3% 2009 12.9% 2009 9.0% 11.6% 2018 2018 10.9% 2018 10.1% 16.8% 2018 Palma de Mallorca Germany 💶 United Kingdom Italy \$233 2009 43.0% 2009 30.3% 2009 4.8% 2018 16.6% 2018 37.0% 2018 27.1% 2018 4.3% Bali Mainland China Australia India ੍ਰੀ \$125 8.6 8.9% 2009 2009 20.0% 2009 1.4% 2018 50.6% 2018 22.4% 2018 19.3% 2018 5.8% Hong Kong SAR South Korea **United States** Japan ੍ਰੀ \$218 2009 6.3% 2009 11.8% 2009 12.2% 2018 100% 2018 13.6% 2018 11.3% 2018 10.4%

^{* &}quot;% of National Level Ovn Arrivals" refers to the destination arrivals as a % of national arrivals (e.g. arrivals in Bangkok as % of arrivals in Thailand



Top 20 Global Destinations Revenue per Tourism Employee and Expenditure per Tourist Breakdown

The number of jobs supported by 1000 additional overnight tourists is a function how much tourism revenue is required to support one job and the average spend per tourist (i.e. the more each tourist spends the more jobs are supported). For example, 1000 additional tourists supports 409 jobs in Bali (which has a very low revenue per employee in that only US\$2,620 of tourism revenue is required to support 1 job, but has a relatively high expenditure per tourist at US\$1,072). Similarly only 12.1 jobs are supported by 1000 tourists in Singapore because of its very high revenue per employee (US93,062) although its expenditure per tourist is similar to Bali at US\$1,124 per tourist). Higher revenue per employee tend to be among destinations in developed markets and could be a function of higher labor productivity. Similarly, lower revenues per employees tend to be among emerging market destinations and could be a function of lower labor costs



BKK-Bangkok, PAR-Paris, LON-London, Dub-Dubai, SIN-Singapore, KLC-Kuala Lumpur, NYC-New York, IST-Istanbul, TYO-Tokyo, ANT-Antalya, SEL-Seoul, OSA-Osaka, MAK-Makkah, PTT-Pattaya, PHU-Phuket, MIL-Milan, BAR-Barcelona, PDM-Palma de Mallorca, BAL-Bali, HKS-Hong Kong SAR