

# Global Destination Cities Index

by Mastercard



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## Executive Summary

### Cities in Motion: Global Economic Changes Drive Regional Dynamics

Now in its seventh year, the Global Destination Cities Index (GDCI) has transcended the race to the number one ranking. Yes, it's an honor to be known as the world's most visited city (Bangkok). And to be recognized as the fastest-growing destination (Osaka) is a confirmation of capturing new dynamics and smart infrastructure management. But it's the stories within that distinguish this year's report and accentuate the wealth of data behind it.

As a tracking study of international travel destinations, cross-border spend, and the internal patterns, the 2016 report has a mass of data that show appreciable trends and impactful stories. The Mastercard GDCI shows three distinct story lines for 2016.

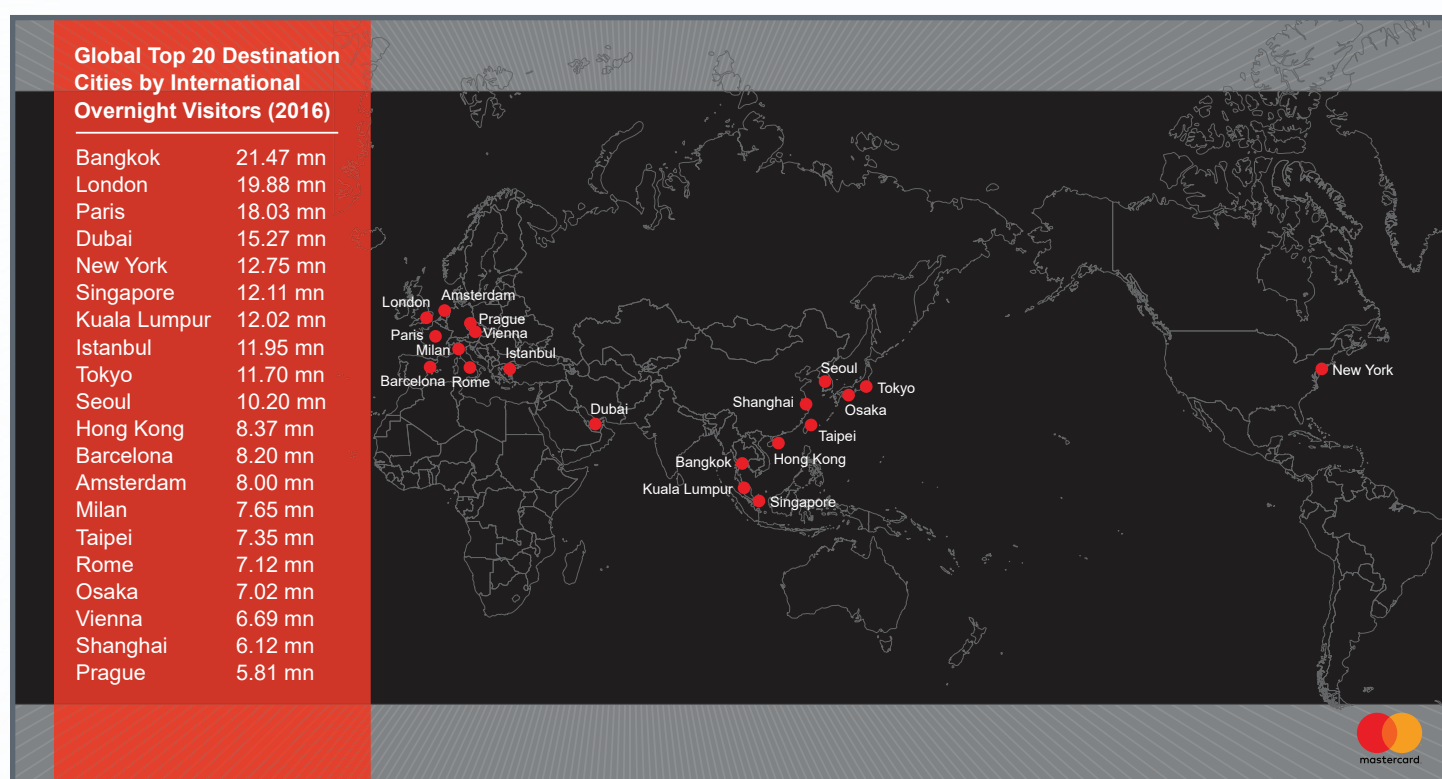
**One:** The growth trajectory of cities outside of the top 20 list.

**Two:** The deeper insights into the motivations and travel spend behavior of visitors to those cities.

**Three:** Changes in regional dynamics, especially in the Asia-Pacific region. Government officials, travel executives, and other sectors of business will find that this year's report reflects the changing nature of regional markets and illustrates the unpredictable nature of the global consumer.

Although the study shows these "below the radar" markets, it is important to note the composition of the top cities in the Index. Here the key metric is international visitors, in which Bangkok has achieved the top-ranked position in 2016. Dubai is top ranked in the Middle East & Africa (MEA) region (and ranked fourth globally). London is the top-ranked in Europe in international visitors and ranked second globally. Lima is top ranked in Latin America. New York tops North America (ranked fifth globally). In terms of visitor spending, also a critical metric, Dubai made a quantum leap to become the global top-ranked, based on a new estimate provided by the Dubai government. London ranks second in terms of visitor spend, followed by New York, Bangkok, and Paris.

### Chart A. Global Destination Cities Index 2016 Top 20





Global cross-border travel and spending among the 132 cities covered by Mastercard's Global Destination Cities Index continues to grow at a faster pace than world GDP. Looking deeper into this measurement, the growth trajectories of many of the global destination cities are dynamic and increasingly diverse, as many of them tapped into new sources of growth (feeder cities). Accordingly, this report features the fastest-growing destination cities over the 2009 to 2016 period both globally and regionally. At the global level, Asia-Pacific dominates with 11 cities in the top 20, followed by Middle East & Africa, which has four cities in the global top 20. Half of these 20 fastest-growing cities are currently not among the global top 20 destination cities. The fact that so many of the fastest-growing destination cities are not among the top 20 indicates strong and complex sources of momentum propelling many of these cities forward.

New to this year's report are spending breakdowns for each city. Defining where visitors eat, shop, and stay is a key source of insights for governments as well as the hospitality and travel category. It represents a detailed look at cross-border spend by business vs. leisure and then by key categories. Details of visitor expenditures by key categories, purpose of their visit, and the seasonal peaks of visitor arrivals are summarized in the chart below.

### Global Top 20 Destination Cities Expenditure Breakdown

2016 rank	Destination City	Purpose of Visit		Expenditure Breakdown at Destination						Peak Months for Visiting
		Business	Leisure Plus Other Purposes	Accommodation	Food & Beverage	Shopping	Local Transport	Local Services	Misc.	
1	Bangkok	14.4%	85.6%	26.0%	19.4%	21.7%	9.9%	20.8%	2.2%	April, January
2	London	20.9%	79.1%	30.1%	16.5%	46.7%	4.3%	1.9%	0.5%	July-August
3	Paris	29.7%	70.3%	44.8%	23.6%	16.7%	6.6%	8.3%	0.0%	December, March-May
4	Dubai	20.0%	80.0%	27.0%	15.0%	31.0%	9.0%	18.0%	0.0%	December-January
5	New York	13.6%	86.4%	29.1%	18.9%	24.7%	11.4%	13.1%	2.7%	July-August
6	Singapore	22.7%	77.3%	29.0%	12.3%	22.5%	4.5%	31.8%	0.0%	December, July-August
7	Kuala Lumpur	26.8%	73.2%	30.8%	16.0%	30.7%	12.8%	7.0%	2.7%	December-January, March, July
8	Istanbul	9.2%	90.8%	20.4%	30.8%	24.6%	11.0%	7.1%	6.1%	June-September
9	Tokyo	27.5%	72.5%	28.2%	20.3%	43.1%	6.9%	1.4%	0.3%	April, October, July
10	Seoul	16.3%	83.7%	24.1%	9.8%	58.7%	2.7%	2.8%	1.8%	December-January, October
11	Hong Kong	23.4%	76.6%	35.4%	19.5%	30.9%	4.5%	5.8%	4.0%	October-December
12	Barcelona	9.7%	90.3%	35.2%	29.0%	16.9%	6.8%	12.1%	0.0%	July-August
13	Amsterdam	27.0%	73.0%	44.0%	25.0%	11.9%	8.3%	4.8%	6.0%	July-August
14	Milan	27.2%	72.8%	40.4%	20.9%	20.1%	12.7%	5.8%	0.1%	July-August
15	Taipei	13.4%	86.6%	32.7%	15.0%	33.9%	13.6%	3.6%	1.2%	March, November-December
16	Rome	13.6%	86.4%	40.4%	20.9%	20.1%	12.7%	5.8%	0.1%	July-August
17	Osaka	12.0%	88.0%	23.5%	22.4%	43.4%	7.0%	1.9%	1.8%	April, July
18	Vienna	17.9%	82.1%	40.1%	18.7%	10.1%	12.5%	18.6%	0.0%	June-July
19	Shanghai	54.6%	45.4%	21.2%	9.9%	28.6%	4.8%	22.3%	13.3%	October, August, December
20	Prague	12.8%	87.2%	29.2%	27.4%	25.5%	4.8%	13.2%	0.0%	June-July

Historical data in each time series presented above has been updated with the latest figures or estimations and may not be comparable to the time series from previous editions of this report.

These details combine to form more granular profiles for each of these destination cities, and highlight their differences. For example, a vast majority of international visitors to Bangkok are there for leisure as opposed to business. Compare this to Shanghai, where a slight majority are there for business purposes.



## Regional Dynamics

Regional analysis shows similar change, most dynamic in Asia-Pacific. In this region, the fastest-growing destination city is Osaka. That's surprising because while its growth rate is the fastest, it still does not rank in overall volume. It currently ranks only eighth in the region. Six of the 10 fastest-growing destination cities in Asia-Pacific are not among the current regional top 10, and many of these are cities in China. In Europe, the fastest-growing destination city is Hamburg—again, not among Europe's top 10 today. Eight of the 10 fastest growing European destination cities are not among the current regional top 10, with Eastern European cities the most prominent among them.

### Top 20 Fastest-Growing Destination Cities with at Least One Million Overnight Visitors in 2016 (2009–2016 CAGR)

Rank in Growth Rate	Destination City	CAGR	Country	Region
1	Osaka	24.15%	Japan	Asia-Pacific
2	Chengdu	20.14%	China	Asia-Pacific
3	Abu Dhabi	19.81%	UAE	Middle East & Africa
4	Colombo	19.57%	Sri Lanka	Asia-Pacific
5	Tokyo	18.48%	Japan	Asia-Pacific
6	Riyadh	16.45%	Saudi Arabia	Middle East & Africa
7	Taipei	14.53%	Taiwan-China	Asia-Pacific
8	Xi'an	14.20%	China	Asia-Pacific
9	Tehran	12.98%	Iran	Middle East & Africa
10	Xiamen	12.93%	China	Asia-Pacific
11	Jakarta	12.89%	Indonesia	Asia-Pacific
12	Bangkok	12.57%	Thailand	Asia-Pacific
13	Hanoi	11.64%	Vietnam	Asia-Pacific
14	Mumbai	10.42%	India	Asia-Pacific
15	Lima	9.86%	Peru	Latin America
16	Bogota	9.61%	Colombia	Latin America
17	Seoul	9.49%	South Korea	Asia-Pacific
18	Ho Chi Minh City	9.22%	Vietnam	Asia-Pacific
19	Chennai	9.15%	India	Asia-Pacific
20	Dubai	9.07%	UAE	Middle East & Africa

On the contrary, Latin America aligns with overall spend and visitor volume. The current top-ranked destination city in the region, Lima, is also the fastest growing. In fact, there is a complete overlap between the current regional top-ranked cities and the fastest-growing cities in Latin America. In the Middle East & Africa region, the fastest-growing destination city is Abu Dhabi, which ranked fourth in the regional top 10 currently. In MEA there is also a complete overlap between the current regional top-ranked destination cities and the fastest-growing in the region. The overlap does not exist in North America, where the fastest-growing destination city in the region is Houston, which is not even among the current regional top 10. Apart from Houston, Atlanta is also among the fastest-growing destination cities that is not among the current regional top 10.

These growth trends are powerful indicators of the accelerating pace of change among the destination cities. Even as the current patterns of connectivity between these cities continue to deepen, powerful forces are at work in ramping up new connections and expanding existing ones such that many emergent destination cities, especially in Asia-Pacific (especially China) and Europe (especially Eastern Europe), are poised to overtake the current leaders in the coming years.





## Global Destination Cities Index: Regional Dynamics Define Cities in Motion

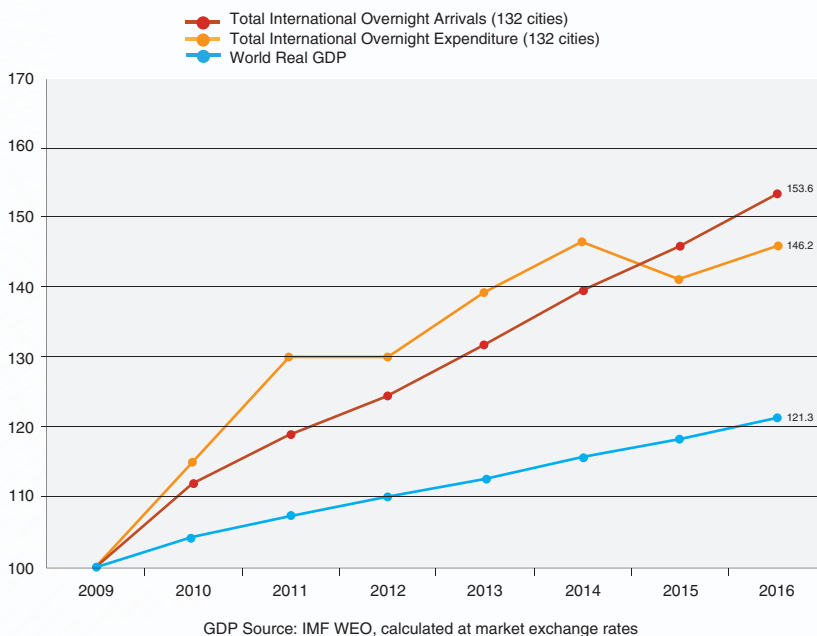
### 1. Introduction

Like any global company, international travel has two basic stories. There's the top-line revenue data that generally shows growth at the macro level—the "profit and loss" story. Then there's the deeper story of the elements that drive growth or will drive growth in the future. This year, Mastercard's Global Destination Cities Index (GDCI) is notable for the latter story. Now in its seventh year of aggregating and analyzing international travel data, it ranks 132 cities by overall tourist spend, total overnight visitors, pace of growth, and volume within regions. The 2016 GDCI shows that current changes in travel and cross-border spend go beyond simple rankings. The global dynamics of the past year are clearly reflected in the changes seen in individual city destinations, their relationships to their regions, and their relationship to consumer spending dynamics.

For the "top line" story, this year's GDCI is consistent with the slow growth predicted by several global sources. ATA, the aviation industry's main trade body, recently reported a slowing trend of growth in passenger traffic. In April, air passenger traffic grew by just 4.6% compared with the same period in 2015, the lowest monthly year-on-year growth rate since January 2015. The expectation is that while passenger traffic will continue to expand, overall growth is likely to be slower in the coming months and years compared with the past.

This outlook is reflected in the data surrounding the destination cities covered by the GDCI. As seen in chart 1, international visitors arriving in these 132 cities are on track to expand by about 5.2% in 2016, in line with the seven-year average. Growth in their cross-border spending in 2016, however, will only manage to recover to the level seen in 2014 at 3.5%. Growth in spend will be lower than growth in international visitors. However, growth in both international visitors and their spending continue to outperform growth in world GDP: 2.1 times higher in the former and 1.4 times higher in the latter.

**Chart 1. World GDP Growth versus the Growth of International Visitor Arrivals and Spend by the 132 Destinations**



While overall growth is critical for governments, travel executives, and businesses to measure, the more dramatic dynamics are regional. When the data is analyzed in the context of how visitors shop, dine, pick lodgings, and spend their leisure time, many of the 132 destination cities covered in this Index continue to evolve with great dynamism. Accordingly, in this report the global top 20 fastest-growing destination cities over the 2009 to 2016 period are identified and featured. They are also highlighted alongside the top-ranked destination cities in each of the regions. Those cities are tapping into diverse sources to increase international visitor arrivals as well as their spending. They are also highlighted alongside with the top-ranked destination cities in each of the regions.

<sup>1</sup> "IATA Warns Slowdown in Air Traffic," P. Hollinger, Financial Times, May 30, 2016.



## 2. Global Ranking by Visitors: Bangkok Takes Global Top Rank

Overall rankings show that Bangkok has achieved the top-ranked position in 2016 with 21.47 million overnight visitors.<sup>2</sup> Singapore and Kuala Lumpur moved up one rank to sixth and seventh rank respectively, while Istanbul dropped from sixth to eighth rank. Barcelona moved up one place to 12th rank, replacing Amsterdam. Similarly, Taipei moved up to 15th rank, replacing Rome; and Osaka moved up to 17th rank, replacing Vienna.

Chart 2 provides more details on the global top 20 destination cities and starts to show some of the individual destination growth. Among these top 20 cities, Osaka posted the strongest growth in international visitors at 13.3% over the 2015/2016 period (as shown in chart 4 on page 8, Osaka is actually the fastest-growing destination city over the 2009–2016 period among the 132 cities with at least one million overnight visitors in 2016), followed by Tokyo at 12.2% and Seoul at 10.2%. Bangkok's growth rate is 9.6%, putting it as the fourth fastest-growing among the top 20. At the other end of the spectrum, Hong Kong has the lowest growth rate at 0.2%, followed by Istanbul at 0.3%.

**Chart 2. Global Top 20 Destination Cities by International Overnight Visitors (2016)**

2016 rank	Destination City	Country	Overnight International Visitors (millions)					% Δ 2015 & 2016	2016 Visitor Spend (USD billions)
			2012	2013	2014	2015	2016		
1	Bangkok	Thailand	15.82	17.47	17.03	19.59	<b>21.47</b>	9.6%	\$14.8
2	London	United Kingdom	15.46	16.81	17.40	18.58	<b>19.88</b>	7.0%	\$19.8
3	Paris	France	15.76	17.20	17.19	17.66	<b>18.03</b>	2.1%	\$12.9
4	Dubai	UAE	10.95	12.19	13.21	14.20	<b>15.27</b>	7.5%	\$31.3
5	New York	U.S.	10.92	11.38	12.02	12.37	<b>12.75</b>	3.1%	\$18.5
6	Singapore	Singapore	11.10	11.90	11.86	11.63	<b>12.11</b>	4.1%	\$12.5
7	Kuala Lumpur	Malaysia	9.63	9.89	11.69	11.19	<b>12.02</b>	7.4%	\$11.3
8	Istanbul	Turkey	8.82	9.87	11.27	11.91	<b>11.95</b>	0.3%	\$7.5
9	Tokyo	Japan	4.89	5.40	7.68	10.43	<b>11.70</b>	12.2%	\$13.5
10	Seoul	South Korea	7.51	8.03	9.84	9.26	<b>10.20</b>	10.2%	\$12.3
11	Hong Kong	Hong Kong SAR of China	8.37	8.26	8.36	8.35	<b>8.37</b>	0.2%	\$6.8
12	Barcelona	Spain	6.91	7.18	7.42	7.70	<b>8.20</b>	6.4%	\$9.3
13	Amsterdam	Netherlands	6.10	6.65	7.35	7.78	<b>8.00</b>	2.9%	\$4.2
14	Milan	Italy	6.88	6.99	7.30	7.51	<b>7.65</b>	1.8%	\$4.6
15	Taipei	Taiwan-China	4.70	5.83	6.38	6.85	<b>7.35</b>	7.2%	\$9.6
16	Rome	Italy	6.66	6.66	6.76	6.95	<b>7.12</b>	2.3%	\$4.5
17	Osaka	Japan	2.41	3.32	4.22	6.19	<b>7.02</b>	13.3%	\$3.4
18	Vienna	Austria	5.38	5.55	5.85	6.23	<b>6.69</b>	7.5%	\$4.5
19	Shanghai	China	6.04	5.71	5.89	5.74	<b>6.12</b>	6.6%	\$5.0
20	Prague	Czech Republic	4.92	5.05	5.32	5.73	<b>5.81</b>	1.5%	\$2.7

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As stated previously, defining where visitors eat, shop, and stay is a key source of insights. Details of visitor 2 Visitors are defined as those arriving from outside of the country and who stay at least one night in the destination city. See appendix for more details.



expenditures by key categories, purpose of their visit, and the seasonal peaks of visitor arrivals are summarized in chart 3.<sup>3</sup> These details combine to form more granular profiles for each of these destination cities, and highlight their differences. For example, a vast majority of international visitors to Bangkok are there for leisure as opposed to business. Compare this to Shanghai, where a slight majority are there for business purposes. While spending on accommodation and food and beverage are usually the biggest expenditure items in all the destination cities, significant variations are found within each expenditure categories. Reflecting the differences in local cost of living, expenditures on accommodation can run over 40% in Paris, Milan, Rome, Amsterdam, and Vienna, whereas it is only 26.0% in Bangkok, 21.2% in Shanghai, and 20.4% in Istanbul. Shopping, on the other hand, is the highest in Seoul at 58.7%, followed by 46.7% in London, 43.4% in Osaka, and 43.1% in Tokyo. At the other end of the spectrum, shopping is clearly not a primary activity for international visitors in Amsterdam and Vienna. The peak seasons of the destination cities clearly reflect their climate. The warmer the climate the more popular are the winter months, as in Dubai and Hong Kong, for example. Spring, summer and fall are more popular in destination cities with a colder climate, such as London and New York.

**Chart 3. Global Top 20 Destination Cities Expenditure Breakdown**

2016 rank	Destination City	Purpose of Visit		Expenditure Breakdown at Destination						Peak Months for Visiting
		Business	Leisure Plus Other Purposes	Accommodation	Food & Beverage	Shopping	Local Transport	Local Services	Misc.	
1	Bangkok	14.4%	85.6%	26.0%	19.4%	21.7%	9.9%	20.8%	2.2%	April, January
2	London	20.9%	79.1%	30.1%	16.5%	46.7%	4.3%	1.9%	0.5%	July-August
3	Paris	29.7%	70.3%	44.8%	23.6%	16.7%	6.6%	8.3%	0.0%	December, March-May
4	Dubai	20.0%	80.0%	27.0%	15.0%	31.0%	9.0%	18.0%	0.0%	December-January
5	New York	13.6%	86.4%	29.1%	18.9%	24.7%	11.4%	13.1%	2.7%	July-August
6	Singapore	22.7%	77.3%	29.0%	12.3%	22.5%	4.5%	31.8%	0.0%	December, July-August
7	Kuala Lumpur	26.8%	73.2%	30.8%	16.0%	30.7%	12.8%	7.0%	2.7%	December-January, March, July
8	Istanbul	9.2%	90.8%	20.4%	30.8%	24.6%	11.0%	7.1%	6.1%	June-September
9	Tokyo	27.5%	72.5%	28.2%	20.3%	43.1%	6.9%	1.4%	0.3%	April, October, July
10	Seoul	16.3%	83.7%	24.1%	9.8%	58.7%	2.7%	2.8%	1.8%	December-January, October
11	Hong Kong	23.4%	76.6%	35.4%	19.5%	30.9%	4.5%	5.8%	4.0%	October-December
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15	Taipei	13.4%	86.6%	32.7%	15.0%	33.9%	13.6%	3.6%	1.2%	March, November-December
16	Rome	13.6%	86.4%	40.4%	20.9%	20.1%	12.7%	5.8%	0.1%	July-August
17	Osaka	12.0%	88.0%	23.5%	22.4%	43.4%	7.0%	1.9%	1.8%	April, July
18	Vienna	17.9%	82.1%	40.1%	18.7%	10.1%	12.5%	18.6%	0.0%	June-July
19	Shanghai	54.6%	45.4%	21.2%	9.9%	28.6%	4.8%	22.3%	13.3%	October, August, December
20	Prague	12.8%	87.2%	29.2%	27.4%	25.5%	4.8%	13.2%	0.0%	June-July

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<sup>3</sup> Data source for these details are the respective national tourism authorities.



### 3. Osaka Leads New Growth Trends

The difference between the global top 20 today and the global top 20 in terms of growth rates suggests a very dynamic situation where destination cities in the Asia-Pacific and the Middle East & Africa regions are becoming increasingly important. Chart 4 summarizes the details of the global top 20 fastest-growing destination cities with at least one million overnight visitors over the 2009–2016 period. It presents a picture very different from the global top 20 today, which is dominated equally by Europe and Asia-Pacific, each accounting for nine in the top 20. Only one destination city each from the two regions of Middle East & Africa and North America make it to the global top 20. In contrast, Asia-Pacific dominates overwhelmingly when it comes to the fastest-growing destination cities, accounting for 14 of the global top 20, and seven out of the top 10. The Middle East & Africa region is also better represented with four among the top 20. Latin America is represented by two cities among the top 20.

The fastest-growing destination city during this period is Osaka, followed by Chengdu, Abu Dhabi, Colombo, and Tokyo. The current top-ranked Bangkok is in 12th rank in growth rate. By country, Greater China leads with four Chinese cities in the fastest-growing global top 20, followed by Japan, UAE, and India, each with two among the global top 20.

Osaka's strong growth rate is due primarily to its success in attracting visitors from neighboring countries, especially Chinese tourists. In fact, Osaka is highly dependent on visitors from within the region, with only 11% of its visitors from outside of Asia-Pacific. In terms of origin/feeder<sup>4</sup> cities, visitors to Osaka via Taipei and via Seoul are the two most important, followed by Hong Kong, Shanghai, and B.U.S.n. In terms of origin country, South Korea is the most important, accounting for 33% of international visitors to Osaka, followed by China at 25%, Taiwan-China at 9%, the U.S. at 5%, and Malaysia at 4%.

**Chart 4. Top 20 Fastest-Growing Destination Cities with at Least One Million Overnight Visitors in 2016 (2009–2016 CAGR)**

Rank in Growth Rate	Destination City	CAGR	Country	Region
1	Osaka	24.15%	Japan	Asia-Pacific
2	Chengdu	20.14%	China	Asia-Pacific
3	Abu Dhabi	19.81%	UAE	Middle East & Africa
4	Colombo	19.57%	Sri Lanka	Asia-Pacific
5	Tokyo	18.48%	Japan	Asia-Pacific
6	Riyadh	16.45%	Saudi Arabia	Middle East & Africa
7	Taipei	14.53%	Taiwan-China	Asia-Pacific
8	Xi'an	14.20%	China	Asia-Pacific
9	Tehran	12.98%	Iran	Middle East & Africa
10	Xiamen	12.93%	China	Asia-Pacific
11	Jakarta	12.89%	Indonesia	Asia-Pacific
12	Bangkok	12.57%	Thailand	Asia-Pacific
13	Hanoi	11.64%	Vietnam	Asia-Pacific
14	Mumbai	10.42%	India	Asia-Pacific
15	Lima	9.86%	Peru	Latin America
16	Bogota	9.61%	Colombia	Latin America
17	Seoul	9.49%	South Korea	Asia-Pacific
18	Ho Chi Minh City	9.22%	Vietnam	Asia-Pacific
19	Chennai	9.15%	India	Asia-Pacific
20	Dubai	9.07%	UAE	Middle East & Africa

<sup>4</sup> Feeder cities both generate international overnight visitors from its pool of residents and also act as a funnel for residents of other cities/countries going to a specific destination.





## 4. Global Ranking by Expenditures: Dubai's Quantum Leap

The top 20 global destination cities by international visitor spending are presented in chart 5. The big surprise this year is Dubai's jump to the top rank in the world, reporting a total international visitor spending of USD 31.3 billion, a third higher than the second-ranked London, estimated at USD 19.8 billion.<sup>5</sup> This also implies a much higher spending per international visitor per visit in Dubai, which is USD 2,050, compared with USD 994 in London.

Apart from Dubai's jump to the top rank,<sup>6</sup> Miami moved up to 12th rank from 13th, Los Angeles from 14th to 13th, Madrid from 15th to 14th, and Berlin joined the top 20, moving from 22nd to 20th rank. On the other hand, Paris dropped from fifth to sixth, Seoul from sixth to eighth, and Istanbul from 12th to 15th.

Chart 5 shows the international visitor spend for the top 20 over the 2012 to 2016 period, which exhibit many divergent trends. Tokyo, in fifth rank, registers the highest-growth rate between 2015 and 2016 at 27.5%. It is followed by Kuala Lumpur at 11.5%, and Dubai at 11.0%. At the other end of the spectrum, Istanbul's international visitor arrivals decreased the most at -11.4%, followed by Taipei at -4.7%, and Hong Kong and Paris at -0.9%.

**Chart 5. Global Top 20 Destination Cities by International Overnight Visitor Spend (2016)**

2016 rank	Destination City	Country	Overnight International Visitor Spend (USD billions)						2016 Visitors (millions)
			2012	2013	2014	2015	2016	% Δ 2015 & 2016	
1	Dubai	UAE	\$22.99	\$26.69	\$27.07	\$28.20	<b>\$31.30</b>	11.0%	15.3
2	London	United Kingdom	\$15.97	\$17.97	\$19.47	\$18.39	<b>\$19.76</b>	7.4%	19.9
3	New York	U.S.	\$15.52	\$16.67	\$17.62	\$18.39	<b>\$18.52</b>	0.7%	12.7
4	Bangkok	Thailand	\$11.12	\$12.39	\$11.73	\$13.50	<b>\$14.84</b>	9.9%	21.5
5	Tokyo	Japan	\$6.09	\$6.30	\$8.26	\$10.57	<b>\$13.48</b>	27.5%	11.7
6	Paris	France	\$17.25	\$19.50	\$16.42	\$13.00	<b>\$12.88</b>	-0.9%	18.0
7	Singapore	Singapore	\$15.23	\$15.44	\$14.47	\$12.34	<b>\$12.54</b>	1.7%	12.1
8	Seoul	South Korea	\$9.87	\$11.96	\$14.31	\$12.53	<b>\$12.30</b>	-1.9%	10.2
9	Kuala Lumpur	Malaysia	\$10.23	\$10.85	\$12.67	\$10.17	<b>\$11.34</b>	11.5%	12.0
10	Taipei	Taiwan-China	\$7.57	\$8.96	\$9.42	\$10.08	<b>\$9.60</b>	-4.7%	7.3
11	Barcelona	Spain	\$7.61	\$8.65	\$8.88	\$8.95	<b>\$9.28</b>	3.6%	8.2
12	Miami	U.S.	\$5.74	\$6.75	\$8.09	\$8.17	<b>\$8.15</b>	-0.3%	5.2
13	Los Angeles	U.S.	\$6.58	\$6.84	\$7.51	\$7.88	<b>\$8.10</b>	2.9%	5.6
14	Madrid	Spain	\$6.06	\$6.40	\$7.16	\$7.78	<b>\$8.02</b>	3.1%	5.3
15	Istanbul	Turkey	\$6.31	\$7.39	\$8.73	\$8.51	<b>\$7.54</b>	-11.4%	12.0
16	Hong Kong	Hong Kong SAR of China	\$7.11	\$7.03	\$6.93	\$6.90	<b>\$6.84</b>	-0.9%	8.4
17	Sydney	Australia	\$6.55	\$6.47	\$6.39	\$6.35	<b>\$6.40</b>	0.8%	3.7
18	San Francisco	U.S.	\$4.80	\$5.32	\$5.57	\$5.82	<b>\$5.93</b>	1.9%	3.9
19	Munich	Germany	\$4.98	\$5.45	\$5.96	\$5.10	<b>\$5.32</b>	4.3%	5.3
20	Berlin	Germany	\$4.64	\$5.11	\$5.63	\$4.82	<b>\$5.00</b>	3.8%	4.9

Historical data in each time series presented above has been updated with the latest figures or estimations and may not be comparable to the time series from previous editions of this report.

<sup>5</sup> Dubai's Department of Tourism and Commerce Marketing has provided for the first time an estimate of spending by international visitors, based on their new statistically significant sampling in the Dubai International Visitors Survey. Accordingly, this new estimate is used for this report. Please see appendix A, section 3, for more details. <sup>6</sup> The data showing Dubai's visitor spending in the years 2012 to 2014 are based on recalculations using the new survey data of 2015 and the forecast of 2016 as benchmarks.



## 5. Destination Cities in Asia-Pacific

### Asia-Pacific Top 10 Destination Cities

Asia-Pacific changes are the most dramatic in this year's report. Chart 6 shows the top 10 destination cities, with Bangkok top-ranked in the world as well as its region. It stands alone in the region with 21.47 million international visitors, leaving Singapore in second position with 12.11 million international visitors. Kuala Lumpur is in third rank, followed by destination cities in East Asia—Tokyo, Seoul, Hong Kong, Taipei, and Osaka. Mumbai is the only Indian city that made it to the Asia-Pacific top 10 at 10th rank, behind Shanghai at ninth rank.

Osaka is currently ranked eighth in Asia-Pacific. But as discussed above, among the 132 cities with at least one million overnight tourists, it is the fastest-growing destination city globally over the 2009–2016 period, and it has increased its international visitors by 13.3% in the last year, the fastest growth among the regional top 10. It is poised to overtake Taipei at seventh rank if it can sustain its fast rate of growth. At 12.2%, Tokyo is the second-fastest-growing in the Asia-Pacific top 10 and is poised to overtake Kuala Lumpur.

**Chart 6. Top 10 Destination Cities by International Overnight Visitors (2016)**

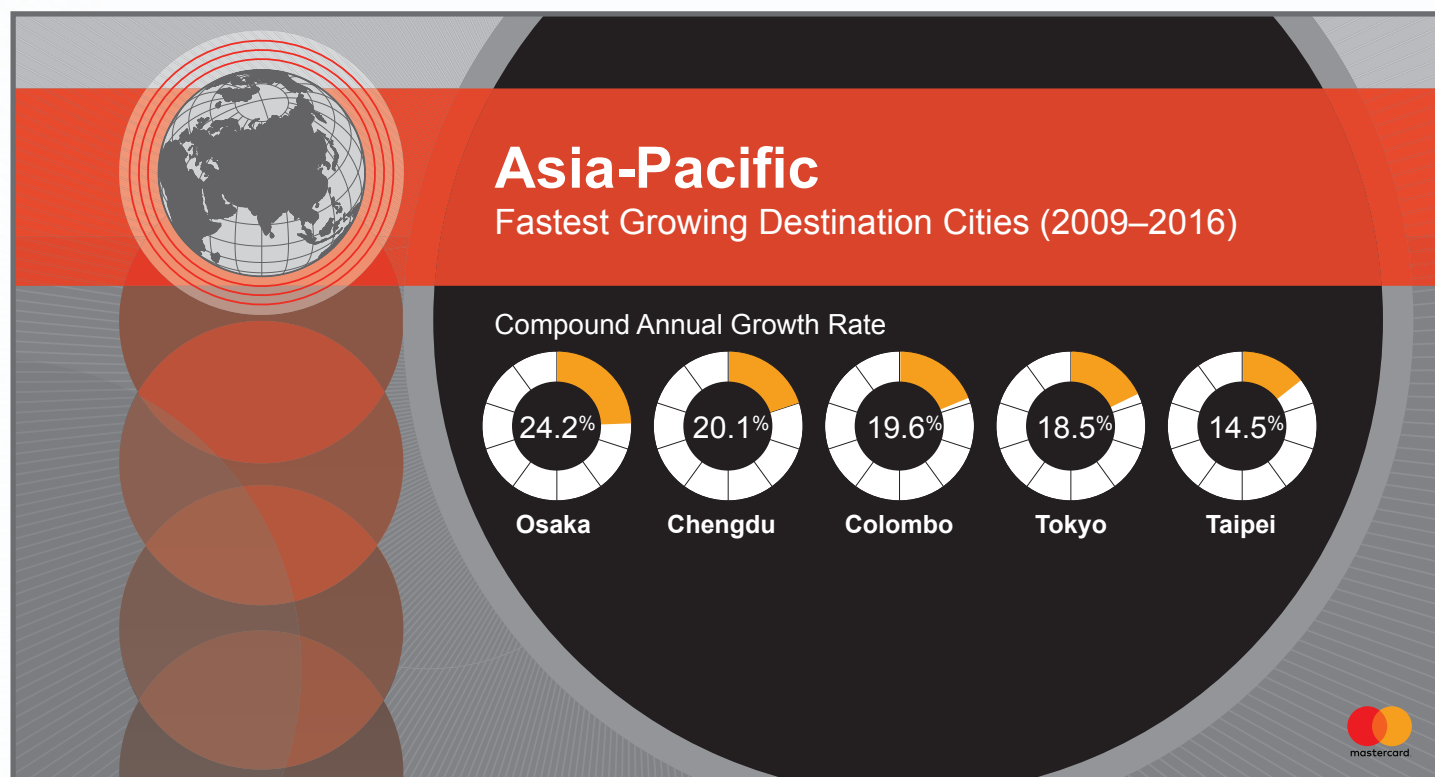
2016 rank	Destination City	Country	Overnight International Visitors (millions)						2016 Visitor Spend (USD billions)
			2012	2013	2014	2015	2016	% Δ 2015 & 2016	
1	Bangkok	Thailand	15.82	17.47	17.03	19.59	<b>21.47</b>	9.6%	\$14.8
2	Singapore	Singapore	11.10	11.90	11.86	11.63	<b>12.11</b>	4.1%	\$12.5
3	Kuala Lumpur	Malaysia	9.63	9.89	11.69	11.19	<b>12.02</b>	7.4%	\$11.3
4	Tokyo	Japan	4.89	5.40	7.68	10.43	<b>11.70</b>	12.2%	\$13.5
5	Seoul	South Korea	7.51	8.03	9.84	9.26	<b>10.20</b>	10.2%	\$12.3
6	Hong Kong	Hong Kong SAR of China	8.37	8.26	8.36	8.35	<b>8.37</b>	0.2%	\$6.8
7	Taipei	Chinese Taipei	4.70	5.83	6.38	6.85	<b>7.35</b>	7.2%	\$9.6
8	Osaka	Japan	2.41	3.32	4.22	6.19	<b>7.02</b>	13.3%	\$3.4
9	Shanghai	China	6.04	5.71	5.89	5.74	<b>6.12</b>	6.6%	\$5.0
10	Mumbai	India	2.65	4.16	4.37	4.56	<b>4.86</b>	6.4%	\$3.6



## Asia-Pacific — Fastest-Growing Destination Cities

The top five fastest-growing destination cities in Asia-Pacific over the 2009 – 2016 period are shown in chart 7. With a cumulative annual growth rate of 24.1% in seven years, Osaka leads as the fastest-growing destination city in Asia-Pacific with at least one million international overnight arrivals. It is followed by Chengdu<sup>7</sup> in China and Colombo in Sri Lanka, even though neither are in the regional top 10. Tokyo and Taipei followed as the fourth and fifth fastest-growing destination cities in the region.

**Chart 7. Asia-Pacific — Fastest-Growing Destination Cities (2009 – 2016)**



<sup>7</sup> Chengdu's high CAGR score is primarily due to low base effects from the 2008 Sichuan earthquake disaster, which had a very large negative effect on tourism in both 2008 and 2009.



## Asia-Pacific's Fastest-Growing Destination Cities

Chart 8 provides more details on the top 10 fastest-growing destination cities in Asia-Pacific. Six of them are currently not in the regional top 10 destination cities. Chengdu, Xian, and Xiamen – respectively, the second, sixth, and seventh fastest-growing – are Chinese cities, which testifies to China's growing attraction to international visitors. Colombo, the third fastest-growing, is in Sri Lanka, which is experiencing a strong recovery in attracting international visitors after the ending of its civil war. The Indonesian capital, Jakarta, is the eighth fastest-growing. Hanoi, the capital of Vietnam, is the 10th fastest-growing. These are destination cities to watch in the coming years.

**Chart 8. Asia-Pacific's Fastest-Growing Destination Cities by International Overnight Visitors (2009–2016 CAGR)**

2016 rank	Destination City	Country	Overnight International Visitors (millions)						2016 Visitor Spend (USD billions)
			2012	2013	2014	2015	2016	% CAGR 2009 & 2016	
1	Osaka	Japan	2.41	3.32	4.22	6.19	7.02	24.1%	\$3.4
2	Chengdu	China	1.30	1.49	1.68	1.63	1.74	20.1%	\$0.6
3	Colombo	Sri Lanka	0.69	0.72	0.87	1.02	1.13	19.6%	\$1.0
4	Tokyo	Japan	4.89	5.40	7.68	10.43	11.70	18.5%	\$13.5
5	Taipei	Taiwan-China	4.70	5.83	6.38	6.85	7.35	14.5%	\$9.6
6	Xi'an	China	0.80	1.14	1.17	1.14	1.21	14.2%	\$0.6
7	Xiamen	China	1.08	0.94	1.03	1.02	1.09	12.9%	\$0.9
8	Jakarta	Indonesia	1.23	1.16	1.40	1.44	1.55	12.9%	\$1.2
9	Bangkok	Thailand	15.82	17.47	17.03	19.59	21.47	12.6%	\$14.8
10	Hanoi	Viet Nam	1.60	1.84	2.04	2.06	2.20	11.6%	\$1.3

Chart 9 provides details on the top 10 fastest-growing cities in terms of purpose of visit, expenditure breakdown by category, and peak months for visiting.

**Chart 9. Asia-Pacific's Fastest-Growing Destination Cities Top 10 Details**

2016 rank	Destination City	Purpose of Visit		Expenditure Breakdown at Destination						Peak Months for Visiting
		Business	Leisure Plus Other Purposes	Accommodation	Food & Beverage	Shopping	Local Transport	Local Services	Misc.	
1	Osaka	12.0%	88.0%	23.5%	22.4%	43.4%	7.0%	1.9%	1.8%	April, July
2	Chengdu	27.5%	72.5%	15.4%	9.0%	41.6%	4.9%	18.1%	11.0%	August, October, April-May
3	Colombo	0.0%	100.0%	45.0%	23.7%	17.7%	6.8%	6.8%	0.0%	November-January
4	Tokyo	27.5%	72.5%	28.2%	20.3%	43.1%	6.9%	1.4%	0.3%	April, October, July
5	Taipei	13.4%	86.6%	32.7%	15.0%	33.9%	13.6%	3.6%	1.2%	March, November-December
6	Xi'an	14.9%	85.1%	19.5%	7.6%	28.1%	6.9%	24.3%	13.6%	August, October, April-May
7	Xiamen	30.7%	69.3%	18.8%	12.1%	30.5%	3.4%	21.9%	13.3%	August, October, April-May
8	Jakarta	59.1%	40.9%	45.7%	18.4%	14.7%	9.3%	9.9%	1.9%	July, November-December
9	Bangkok	14.4%	85.6%	26.0%	19.4%	21.7%	9.9%	20.8%	2.2%	April, January
10	Hanoi	29.7%	70.3%	31.8%	27.0%	13.5%	17.0%	7.2%	3.5%	December-January, October

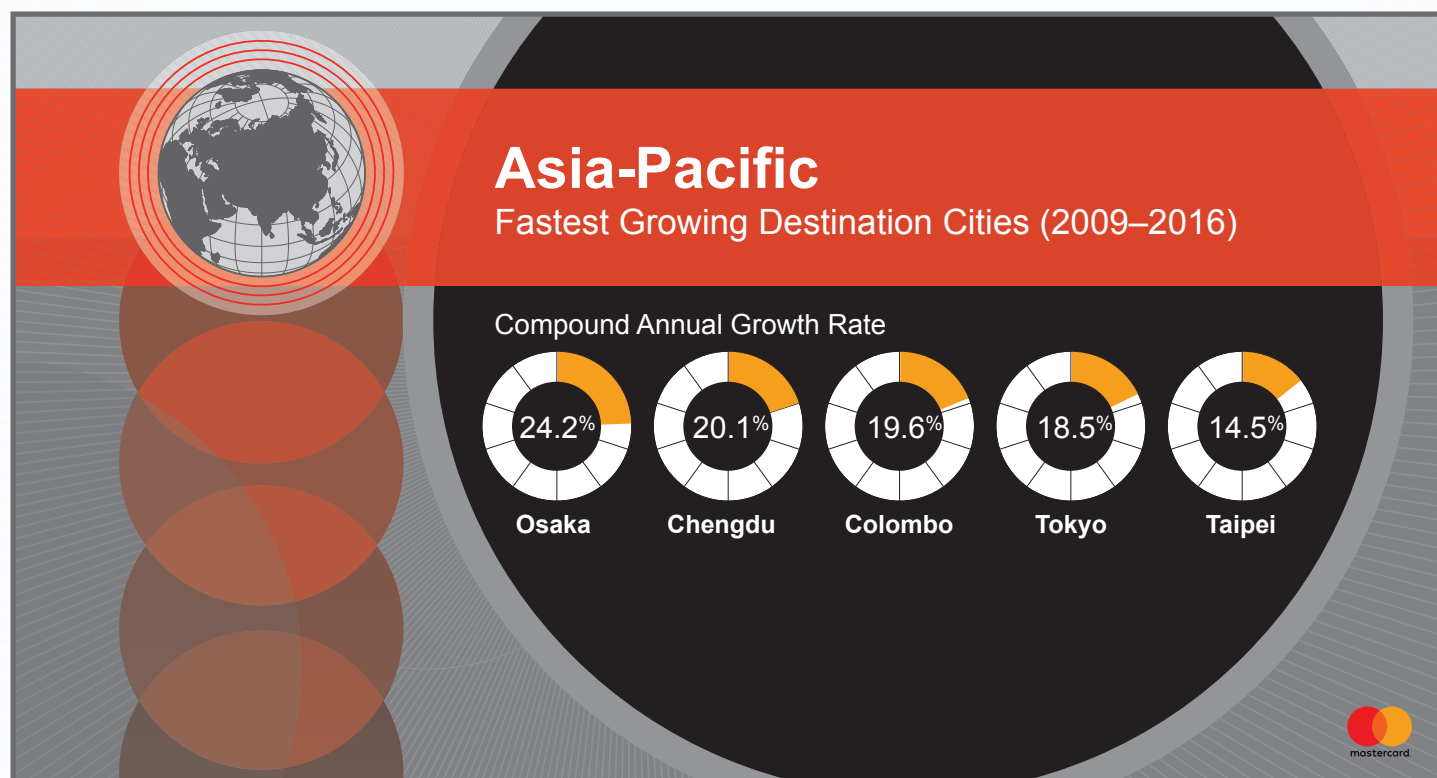




## Asia-Pacific's Fastest-Growing Destination Cities

In terms of spending by international visitors, Bangkok is also the regional top-ranked at USD 14.84 billion. Tokyo is not far behind in second rank at USD 13.48 billion. Tokyo's second-ranked position reflects a much higher-per-visitor spending, at USD 1,152 per visitor, compared with Bangkok's USD 691 per visitor. Sydney and Melbourne are in the regional top 10 in international visitor spending even though they do not make the top 10 in international visitor arrivals. This is due to their much higher spending per visitor at USD 1,709, and USD 1,862, respectively for Sydney and Melbourne.

**Chart 10.** Asia-Pacific's Fastest-Growing Destination Cities by International Overnight Visitor Spend (2009–2016 CAGR)





Growth in visitor spending is very different between the regional top 10 as seen in chart 10. Tokyo stands out as the fastest-growing among the top 10 recording 27.5% growth between 2015 and 2016. The top-ranked Bangkok also shows a healthy rate of growth of 9.9%. However, visitor spending in Seoul and Taipei are contracting, at -1.9% and -4.7%, respectively.

**Chart 11. Asia-Pacific Top 10 Destination Cities by International Overnight Visitor Spend (2016)**

2016 rank	Destination City	Country	2016 Overnight International Visitor Spend (USD billions)						2016 Visitors (millions)
			2012	2013	2014	2015	2016	% Δ 2015 & 2016	
1	Bangkok	Thailand	\$11.12	\$12.39	\$11.73	\$13.50	<b>\$14.84</b>	9.9%	21.5
2	Tokyo	Japan	\$6.09	\$6.30	\$8.26	\$10.57	<b>\$13.48</b>	27.5%	11.7
3	Singapore	Singapore	\$15.23	\$15.44	\$14.47	\$12.34	<b>\$12.54</b>	1.7%	12.1
4	Seoul	South Korea	\$9.87	\$11.96	\$14.31	\$12.53	<b>\$12.30</b>	-1.9%	10.2
5	Kuala Lumpur	Malaysia	\$10.23	\$10.85	\$12.67	\$10.17	<b>\$11.34</b>	11.5%	12.0
6	Taipei	Chinese Taipei	\$7.57	\$8.96	\$9.42	\$10.08	<b>\$9.60</b>	-4.7%	7.3
7	Hong Kong	Hong Kong (SAR) China	\$7.11	\$7.03	\$6.93	\$6.90	<b>\$6.84</b>	-0.9%	8.4
8	Sydney	Australia	\$6.55	\$6.47	\$6.39	\$6.35	<b>\$6.40</b>	0.8%	3.7
9	Shanghai	China	\$4.56	\$4.62	\$5.19	\$4.97	<b>\$5.00</b>	0.6%	6.1
10	Melbourne	Australia	\$4.53	\$4.53	\$4.51	\$4.90	<b>\$4.94</b>	0.8%	2.7

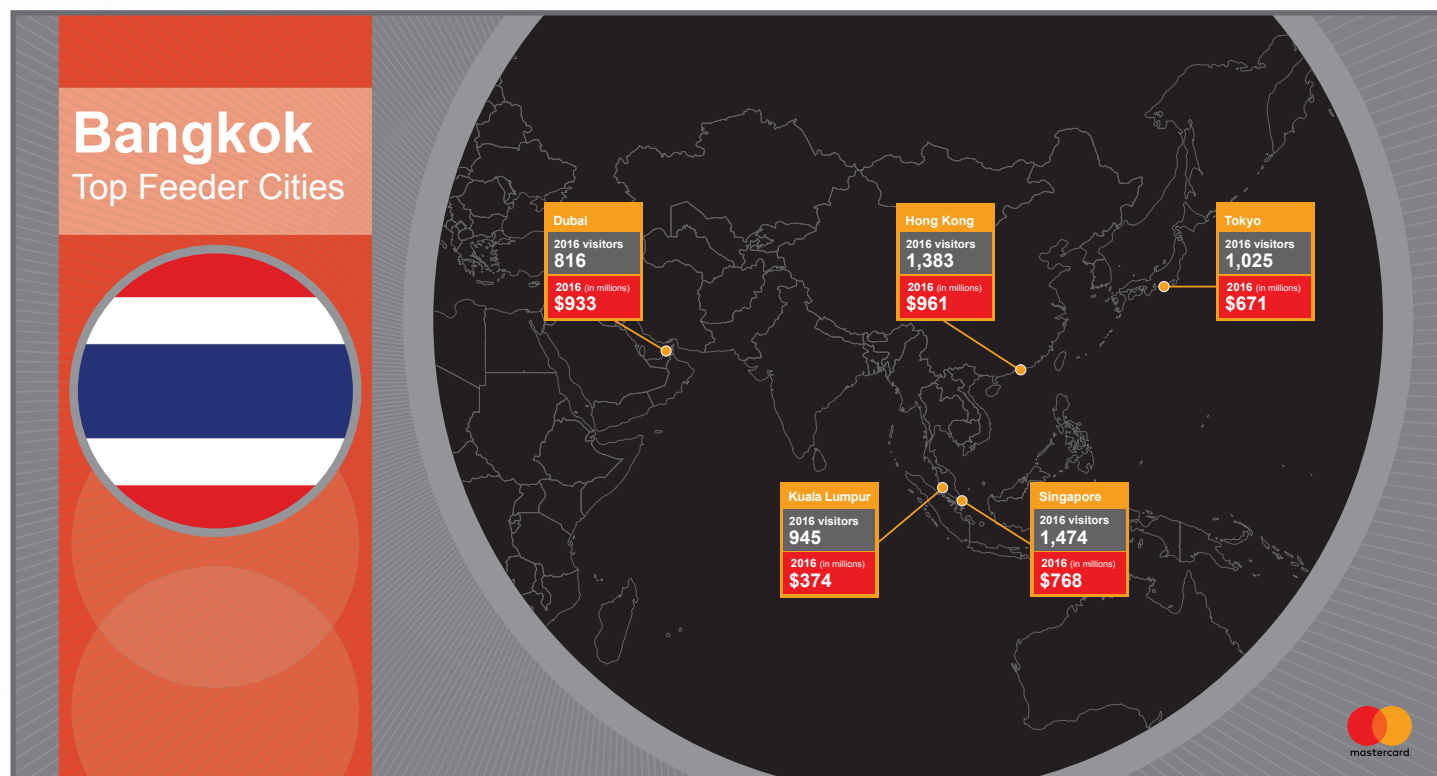


## Bangkok's Top Five Feeder Cities

As mentioned earlier, the growth of destination cities depends critically on their ability to tap into feeder cities' origin countries that are experiencing strong outbound tourism. In the case of top-ranked Bangkok, its five most important feeder cities are Singapore, Hong Kong, Tokyo, Kuala Lumpur, and Dubai, as shown in chart 12. About 32% of international visitors in Bangkok originate from outside of Asia-Pacific. In terms of visitors' countries of origin, China is the biggest, accounting for 37% of Bangkok's international visitors, followed by Japan at 8%, U.S. at 4%, and India and Germany at 3%.

While Singapore is the biggest feeder city for Bangkok in terms of visitors, Hong Kong as a feeder contributes the most in terms of visitor spending, followed closely by Dubai. Between 2015 and 2016, visitors coming via Dubai grew the strongest at 12.2%, whereas visitors via Tokyo barely grew at all at 0.1%. The fact that Bangkok is successfully tapping into a fast-growing feeder city like Dubai suggests that Bangkok's legendary resilience as a destination city is likely to endure.

**Chart 12.** Bangkok's Top Five Feeder Cities

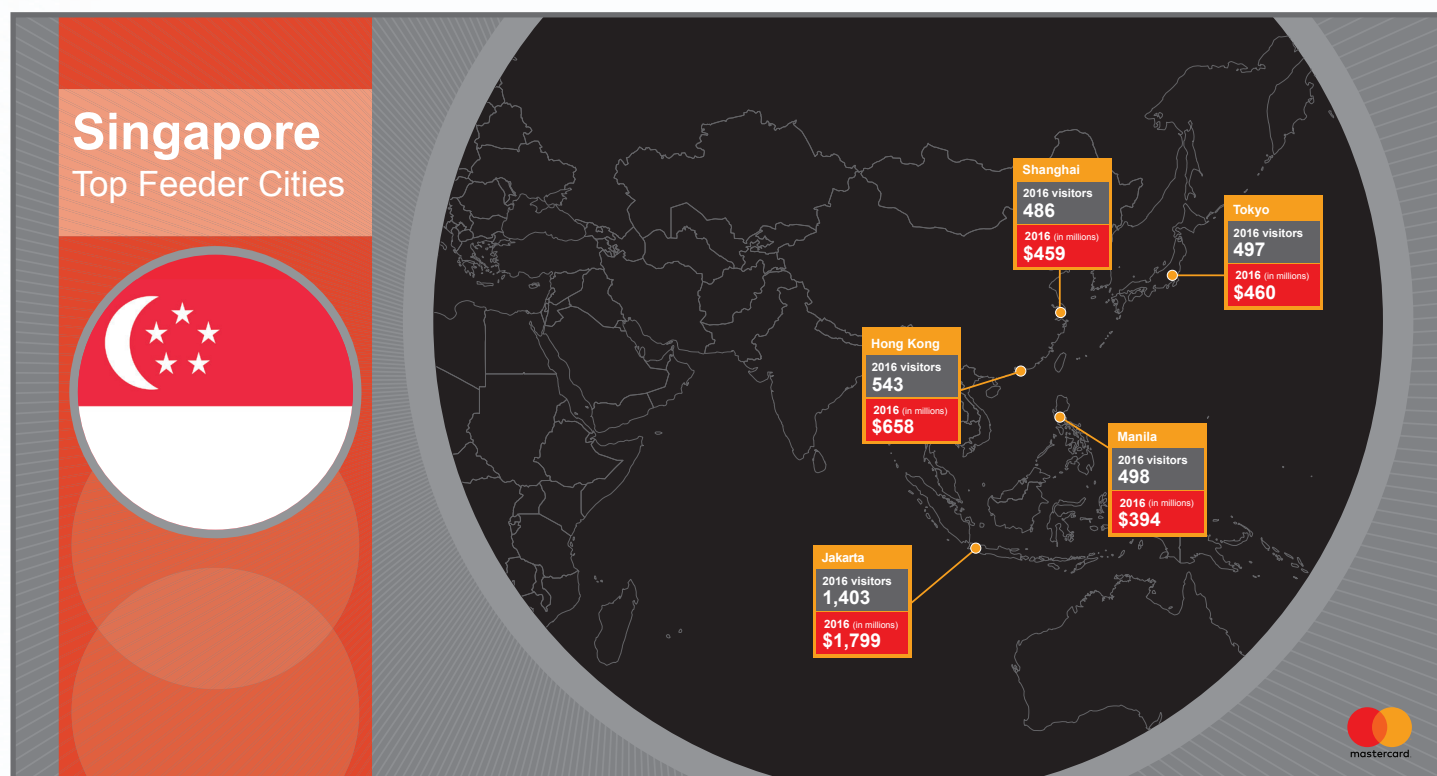




## Singapore's Top Five Feeder Cities

Singapore's top five feeder cities are all in Asia-Pacific, Jakarta being the most important and also geographically the closest to Singapore. It also grew strongly at 4.6% between 2015 and 2016. Singapore is highly dependent on international visitors from within the region; only 13% of its international visitors originate from outside of Asia-Pacific. In terms of countries of origin, international visitors from Indonesia account for 16% of the total in Singapore, followed by China at 14%, India and Australia both at 7%, and Malaysia<sup>8</sup> at 6%.

**Chart 13.** Singapore's Top Five Feeder Cities



<sup>8</sup> Malaysian nationals visiting Singapore via the two causeways are excluded from the number of international overnight visitors to Singapore as official statistics are unavailable for this.

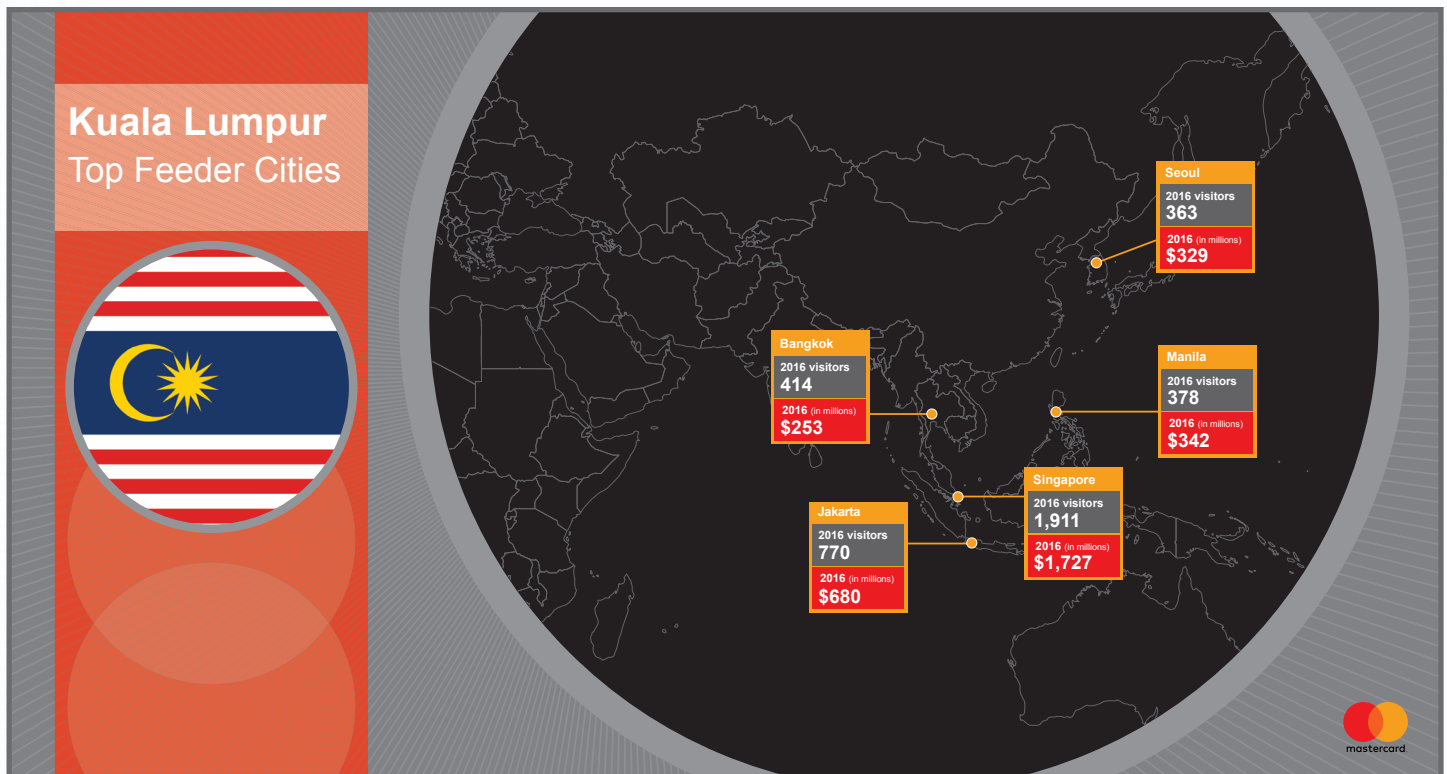




## Kuala Lumpur's Top Five Feeder Cities

All top five feeder cities for Kuala Lumpur are in Asia-Pacific, as shown in chart 14. Singapore, the top-ranked feeder city, is also the strongest growing at 22.1% between 2015 and 2016. But visitors via Manila shrank by 22.3% over the same time period. Overall, only 10% of international visitors in Kuala Lumpur originate from outside of Asia-Pacific. In terms of visitors' countries of origin, Singapore accounts for 23% of the total, followed by Indonesia at 14%, Thailand and China both at 8%, and Australia at 4%.

**Chart 14.** Kuala Lumpur's Top Five Feeder Cities

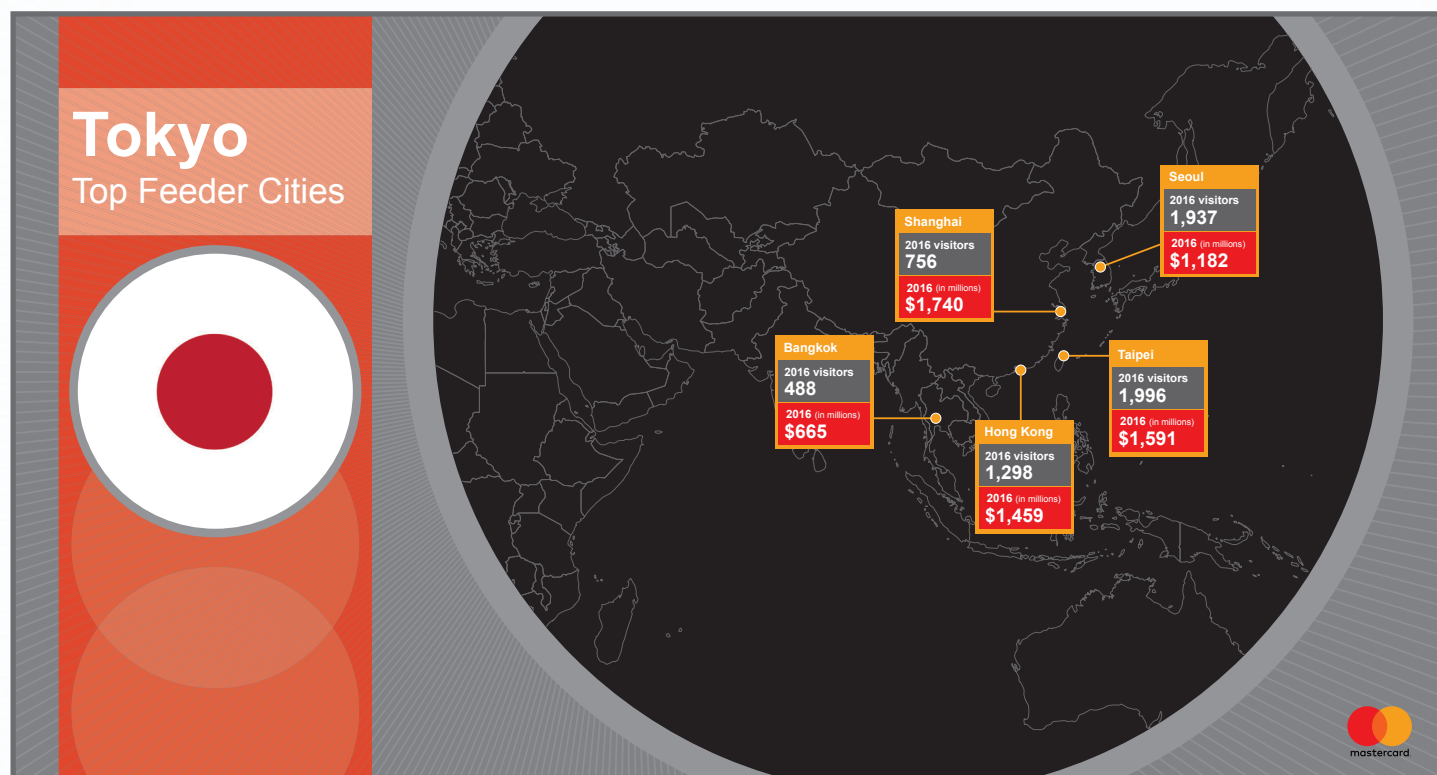




## Tokyo's Top Five Feeder Cities

The top five feeder cities for Tokyo are also in Asia-Pacific, and about 23% of its international visitors originate from outside of the region. Even though it is currently ranked fourth, visitors coming via Shanghai are increasing fast, registering a 23.4% growth between 2015 and 2016. In contrast, the top three ranked – Taipei, Seoul, and Hong Kong are growing at only 12.4%, 11.1%, and 9.4%, respectively. In terms of visitor origins, South Korea is the most important for Tokyo, accounting for 23% of the total, followed by China Mainland at 22%, U.S. at 10%, Taiwan at 8%, and Australia at 3%.

**Chart 15. Tokyo's Top Five Feeder Cities**

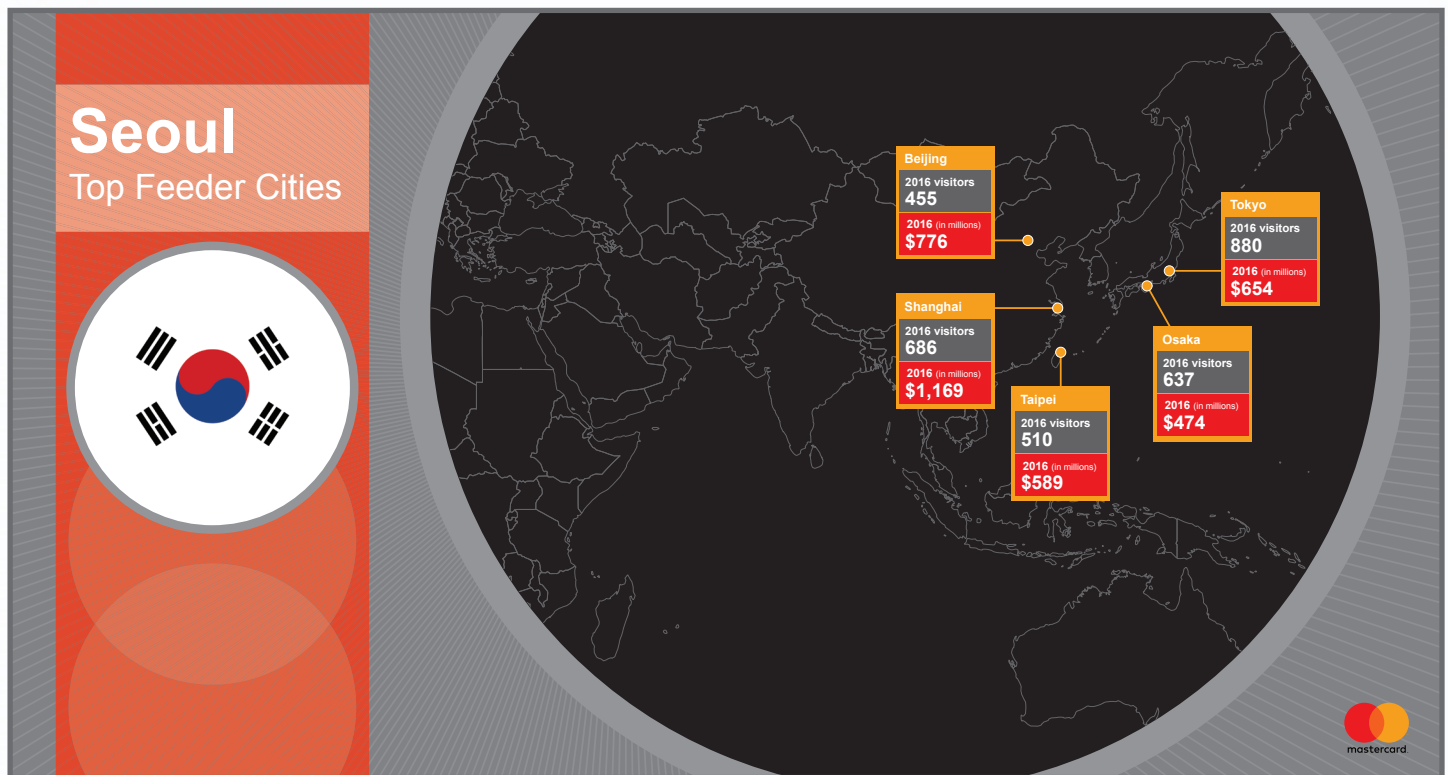




## Seoul's Top Five Feeder Cities

Chart 16 shows the top five feeder cities for Seoul, which are all within Asia-Pacific. While Tokyo is currently the most important feeder city, Taipei and Osaka are the fastest-growing at an astonishing 43.3% and 27.3%, respectively, between 2015 and 2016. If these are not one-off growth rates, then these two feeder cities will quickly become the most important for Seoul. In terms of visitor origins, China Mainland is of overwhelming importance, contributing 50% of Seoul's international visitors. This is followed by Japan at 10%, the U.S. and Taiwan both at 6%, and Hong Kong at 4%. Overall, some 18% of Seoul's international visitors originate from outside of Asia-Pacific.

**Chart 16. Seoul's Top Five Feeder Cities**





## 6. Destination Cities in the Middle East & Africa

Dubai is the top-ranked destination city in the Middle East & Africa region with 15.27 million international overnight visitors, which puts it completely in a league of its own in the region. Dubai's visitor number is over three times that of second-ranked Riyadh at 4.59 million. Johannesburg, in third rank, is the biggest destination city in Sub-Saharan Africa.

### Middle East & Africa Top 10 Destination Cities

Among the regional top 10, Abu Dhabi has the highest growth rate between 2015 and 2016, at 15.0%, followed closely by Casablanca at 14.5%. Cairo, at fifth rank, has the lowest growth rate at 1.5%. Dubai's growth rate, at 7.5%, is half that of Abu Dhabi.

**Chart 17.** Middle East & Africa Top 10 Destination Cities by International Overnight Visitors (2016)

2016 rank	Destination City	Country	Overnight International Visitors (millions)						2016 Visitor Spend (USD billions)
			2012	2013	2014	2015	2016	% Δ 2015 & 2016	
1	Dubai	UAE	10.95	12.19	13.21	14.20	15.27	7.5%	\$31.3
2	Riyadh	Saudi Arabia	3.73	3.93	4.17	4.35	4.59	5.5%	\$1.7
3	Johannesburg	South Africa	3.81	3.71	3.80	3.39	3.60	6.2%	\$1.7
4	Abu Dhabi	UAE	1.50	1.85	2.34	2.73	3.14	15.0%	\$2.6
5	Cairo	Egypt	1.83	1.50	1.58	1.53	1.55	1.5%	\$1.1
6	Tehran	Iran	1.11	1.38	1.43	1.47	1.52	3.1%	\$0.3
7	Cape Town	South Africa	1.15	1.33	1.39	1.29	1.37	6.2%	\$1.0
8	Beirut	Lebanon	0.98	0.93	0.99	1.11	1.16	4.6%	\$1.1
9	Casablanca	Morocco	0.85	0.94	0.95	0.91	1.05	14.5%	\$0.6
10	Tel Aviv	Israel	0.97	1.00	0.97	0.92	0.99	6.8%	\$1.3

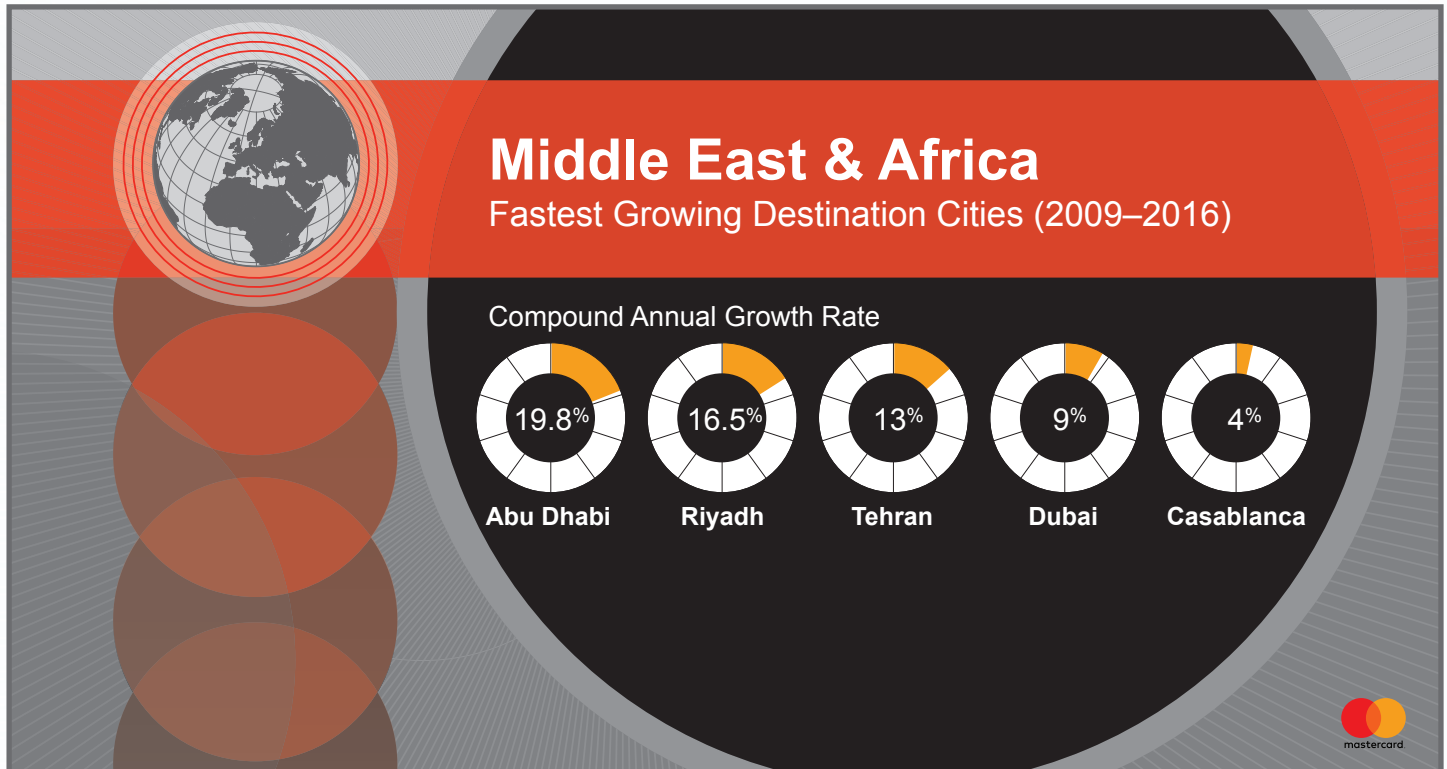




## Middle East & Africa — Fastest-Growing Destination Cities

Chart 18 presents the five fastest-growing destination cities in the region over the 2009 to 2016 period. Abu Dhabi, which ranked third among the global top 20 in growth rates, leads in the region with a CAGR of 19.8%, followed by Riyadh, Tehran, Dubai, and Casablanca.

**Chart 18.** Middle East & Africa - Fastest-growing destination cities (2009–2016)





## Middle East & Africa — Fastest-Growing Destination Cities

Chart 19 provides more details on the top nine fastest-growing destination cities in the region. The two South African cities of Cape Town and Johannesburg are ranked sixth and seventh. Cairo, in the ninth rank, actually shows a 2.5% contraction in international visitors over the 2009–2016 period.

**Chart 19. Middle East & Africa Fastest-Growing Destination Cities by International Overnight Visitors (2009–2016 CAGR)**

2016 rank	Destination City	Country	2016 Overnight International Visitors (millions)						2016 Visitor Spend (USD billions)
			2012	2013	2014	2015	2016	% CAGR 2009 & 2016	
1	Abu Dhabi	United Arab Emirates	1.50	1.85	2.34	2.73	3.14	19.8%	\$2.6
2	Riyadh	Saudi Arabia	3.73	3.93	4.17	4.35	4.59	16.5%	\$1.7
3	Tehran	Iran Islamic Republic of	1.11	1.38	1.43	1.47	1.52	13.0%	\$0.3
4	Dubai	United Arab Emirates	10.95	12.19	13.21	14.20	15.27	9.1%	\$31.3
5	Casablanca	Morocco	0.85	0.94	0.95	0.91	1.05	3.9%	\$0.6
6	Cape Town	South Africa	1.15	1.33	1.39	1.29	1.37	2.9%	\$1.0
7	Johannesburg	South Africa	3.81	3.71	3.80	3.39	3.60	2.3%	\$1.7
8	Beirut	Lebanon	0.98	0.93	0.99	1.11	1.16	0.2%	\$1.1
9	Cairo	Egypt	1.83	1.50	1.58	1.53	1.55	-2.5%	\$1.1

## Middle East & Africa's Fastest-Growing Destination Cities Details

Chart 20 provides details on the top 10 fastest-growing cities in terms of purpose of visit, expenditure breakdown by category and peak months for visiting.

**Chart 20. Middle East & Africa's Fastest-Growing Destination Cities Details**

2016 rank	Destination City	Purpose of Visit		Expenditure Breakdown at Destination						Peak Months for Visiting
		Business	Leisure Plus Other Purposes	Accommodation	Food & Beverage	Shopping	Local Transport	Local Services	Misc.	
1	Abu Dhabi	20.0%	80.0%	27.0%	15.0%	31.0%	9.0%	18.0%	0.0%	February, April, October, December
2	Riyadh	44.7%	55.3%	29.3%	11.3%	31.2%	11.0%	1.6%	15.6%	July-August
3	Tehran	13.0%	87.0%	NA	NA	NA	NA	NA	NA	March, August
4	Dubai	20.0%	80.0%	27.0%	15.0%	31.0%	9.0%	18.0%	0.0%	December, January, March
5	Casablanca	9.0%	91.0%	31.7%	20.7%	13.3%	13.5%	18.2%	2.6%	April-May, September-October
6	Cape Town	27.9%	72.1%	14.2%	14.2%	43.8%	10.0%	11.5%	6.2%	November-February
7	Johannesburg	24.4%	75.6%	14.2%	14.2%	43.8%	10.0%	11.5%	6.2%	August, October-December
8	Beirut	1.9%	98.1%	NA	NA	NA	NA	NA	NA	July-August
9	Cairo	1.5%	98.5%	18.8%	41.2%	9.8%	12.8%	17.3%	0.0%	July-August



## Middle East & Africa Top 10 Destination Cities

In terms of visitor spending, Dubai towers over other destination cities in the region as seen in chart 21. At USD 31.3 billion, Dubai is also the global top ranked as discussed in section 2 above. Visitor spending in Dubai is almost 12 times higher than Abu Dhabi in the second rank, and 18 times that of Johannesburg in third rank.

However, at 18% Abu Dhabi has the highest growth rate in visitor spending in the region between 2015 and 2016, followed by Casablanca at 15.3%. The top ranked Dubai grew by 11.0% over the same time period.

**Chart 21. Middle East & Africa Top 10 Destination Cities by International Overnight Visitor Spend (2016)**

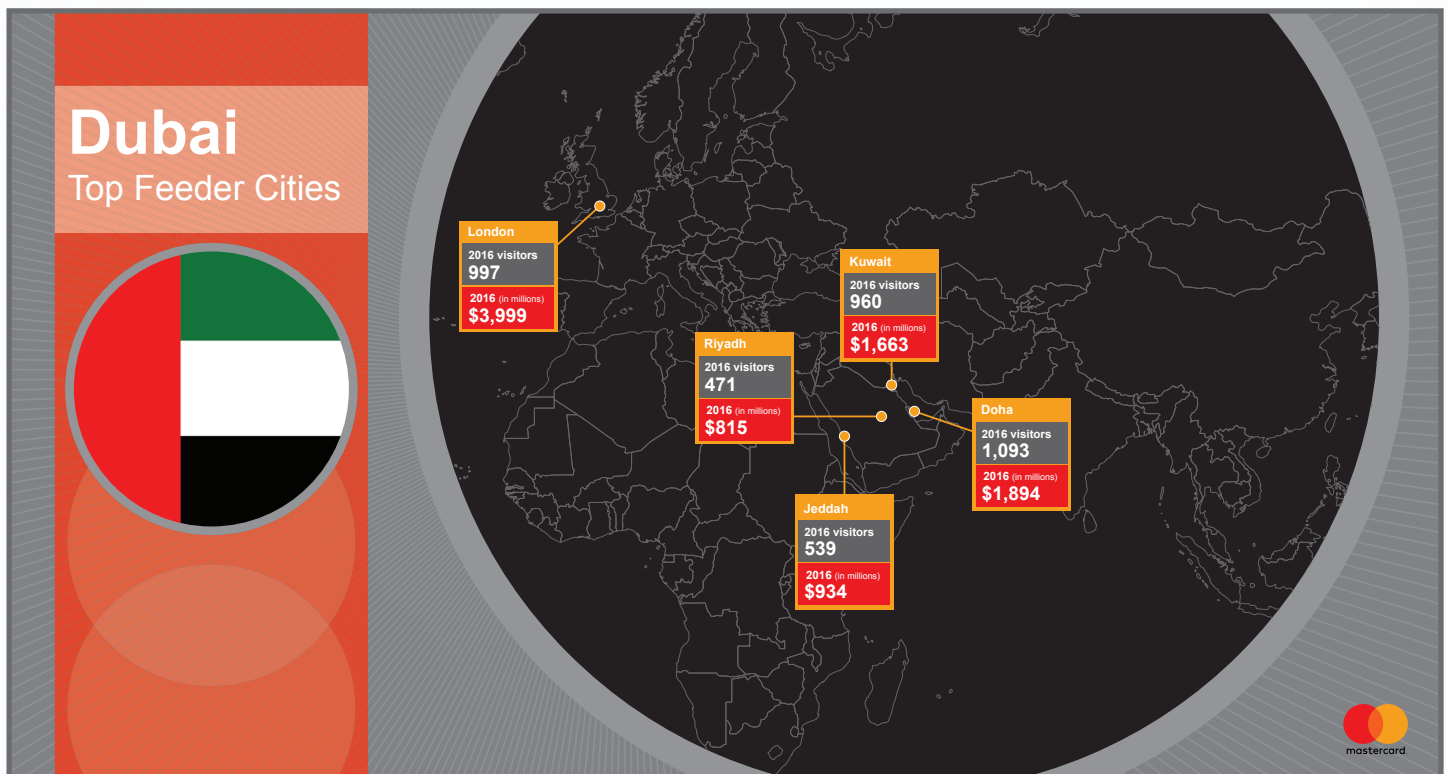
2016 rank	Destination City	Country	Overnight International Visitor Spend (USD billions)						2016 Visitors (millions)
			2012	2013	2014	2015	2016	% Δ 2015 & 2016	
1	Dubai	UAE	\$22.99	\$26.69	\$27.07	\$28.20	<b>\$31.30</b>	11.0%	15.3
2	Abu Dhabi	UAE	\$1.16	\$1.54	\$1.99	\$2.24	<b>\$2.65</b>	18.0%	3.1
3	Johannesburg	South Africa	\$3.81	\$2.65	\$2.41	\$1.99	<b>\$1.73</b>	-12.8%	3.6
4	Riyadh	Saudi Arabia	\$1.88	\$1.78	\$1.75	\$1.73	<b>\$1.69</b>	-2.4%	4.6
5	Tel Aviv	Israel	\$1.35	\$1.42	\$1.40	\$1.29	<b>\$1.31</b>	1.7%	1.0
6	Beirut	Lebanon	\$1.09	\$0.92	\$0.99	\$1.06	<b>\$1.12</b>	5.3%	1.2
7	Cairo	Egypt	\$1.62	\$0.99	\$1.18	\$1.11	<b>\$1.08</b>	-2.9%	1.5
8	Cape Town	South Africa	\$1.73	\$1.36	\$1.34	\$1.15	<b>\$1.00</b>	-12.8%	1.4
9	Amman	Jordan	\$1.12	\$1.13	\$1.14	\$0.89	<b>\$0.94</b>	5.1%	0.9
10	Casablanca	Morocco	\$0.60	\$0.63	\$0.65	\$0.54	<b>\$0.62</b>	15.3%	1.0



## Dubai's Top Five Feeder Cities

Dubai's five top feeder cities are presented in chart 22. Neighboring Doha is the most important, feeding some 1.1 million visitors to Dubai who spend USD 1.1 billion there. London is the second most important feeder city, accounting for just under one million visitors but almost USD 4 billion of spending. Dubai has, however, a highly diversified base of international visitors, with some 70% coming from outside of the region. India and Saudi Arabia each account for 11% of visitors, the U.K. 9%, Oman 7%, and the US 4%. But the remaining 58% come from a large number of countries each accounting for 3% or less of the total.

**Chart 22.** Dubai's Top Five Feeder Cities

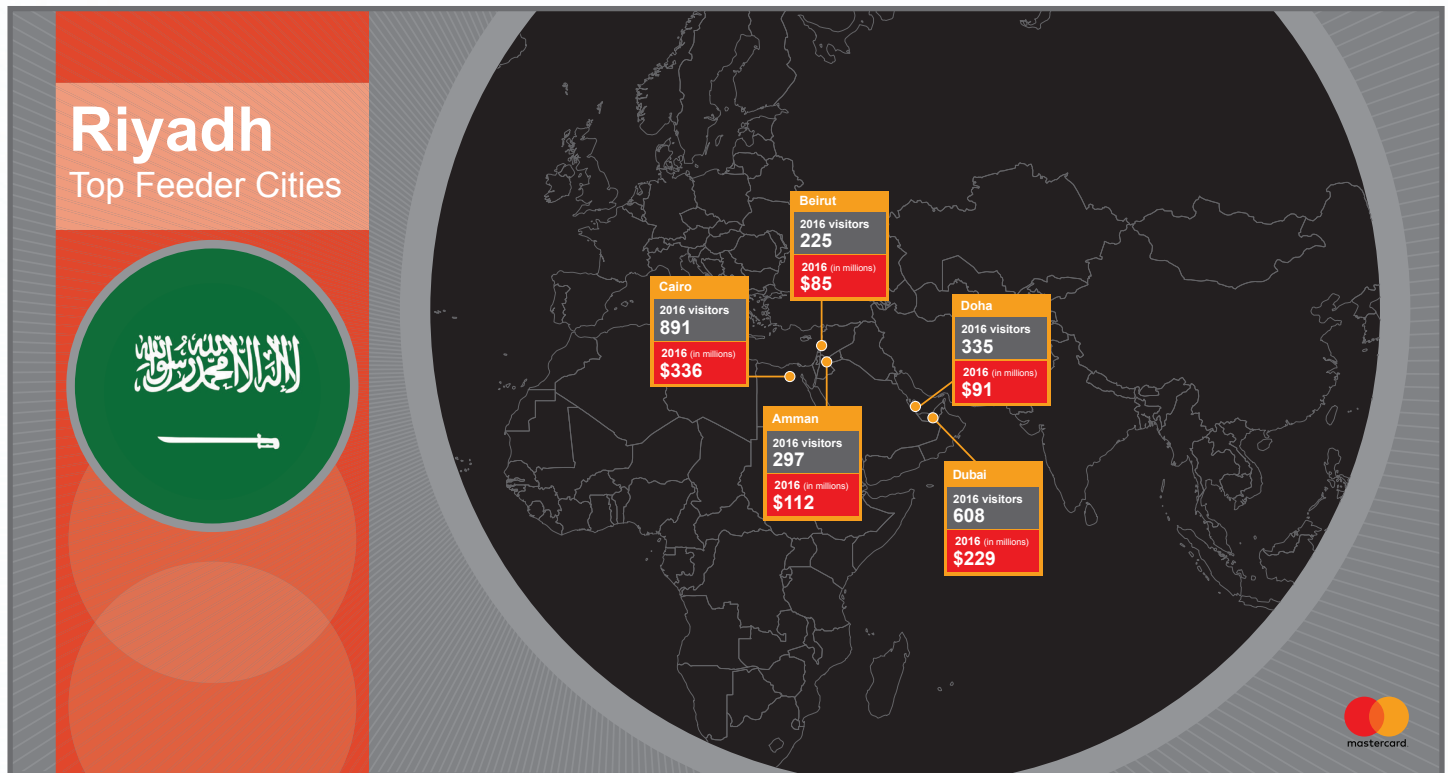




## Riyadh's Top Five Feeder Cities

Riyadh's top five feeder cities are seen in chart 23, which are all in the Middle East. In fact, only 34% of international visitors to Riyadh come from outside of the region. Visitors coming via Dubai are the fastest-growing at 39.2% between 2015 and 2016. In terms of country of origin, Kuwaiti residents account for 13% of international visitors, Jordan 10%, Egypt 9%, Pakistan, and UAE both at 8%.

**Chart 23.** Riyadh's Top Five Feeder Cities



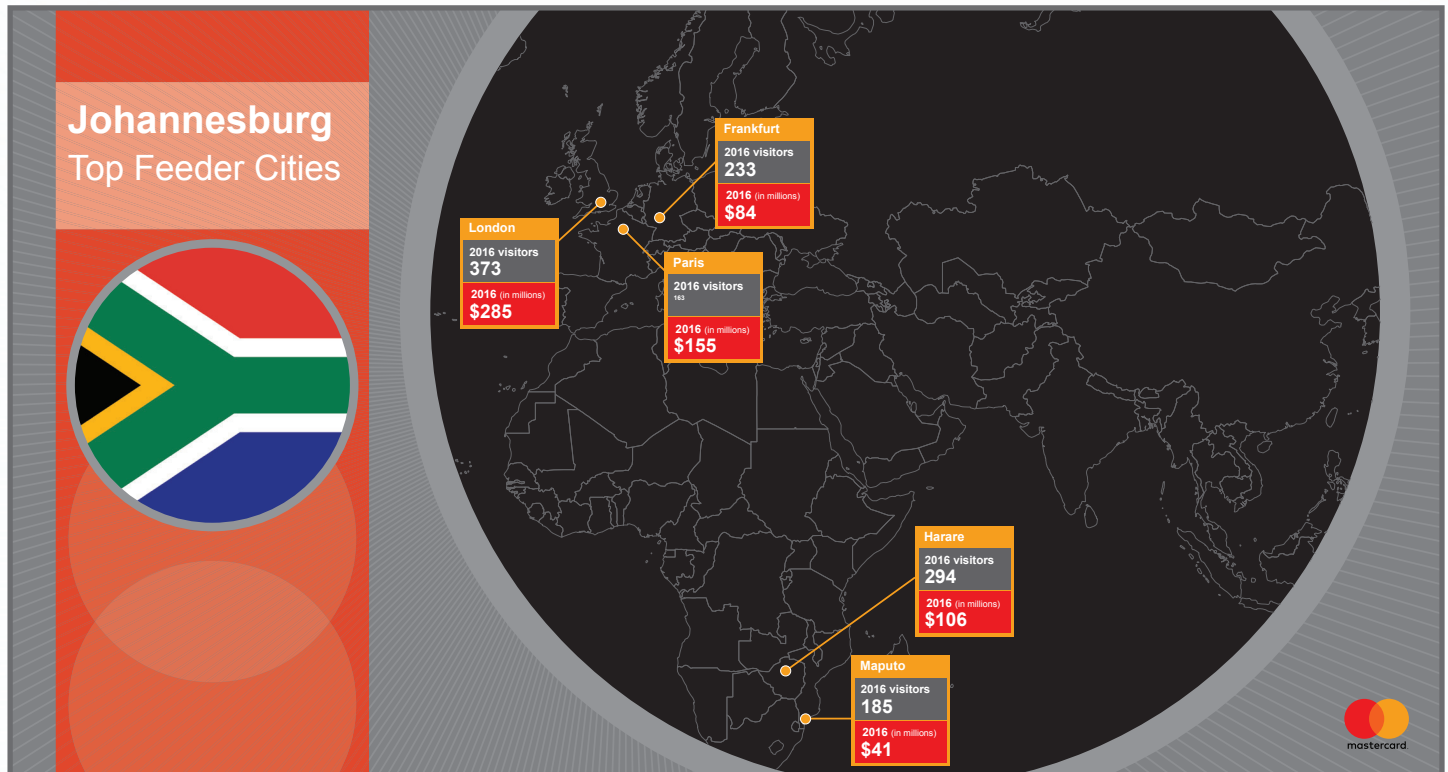




## Johannesburg's Top Five Feeder Cities

London is Johannesburg's most important feeder city, feeding 373,000 visitors who spend USD 285 million there. Harare in neighboring Zimbabwe is the second most important, feeding 294,000 visitors with USD 106 in spending followed by Frankfurt in Germany with 233,000 visitors and USD 84 million spending. Overall, Johannesburg is highly dependent on visitors from within the region, only 18% of its international visitors are from outside of the region.

**Chart 24.** Johannesburg's Top Five Feeder Cities

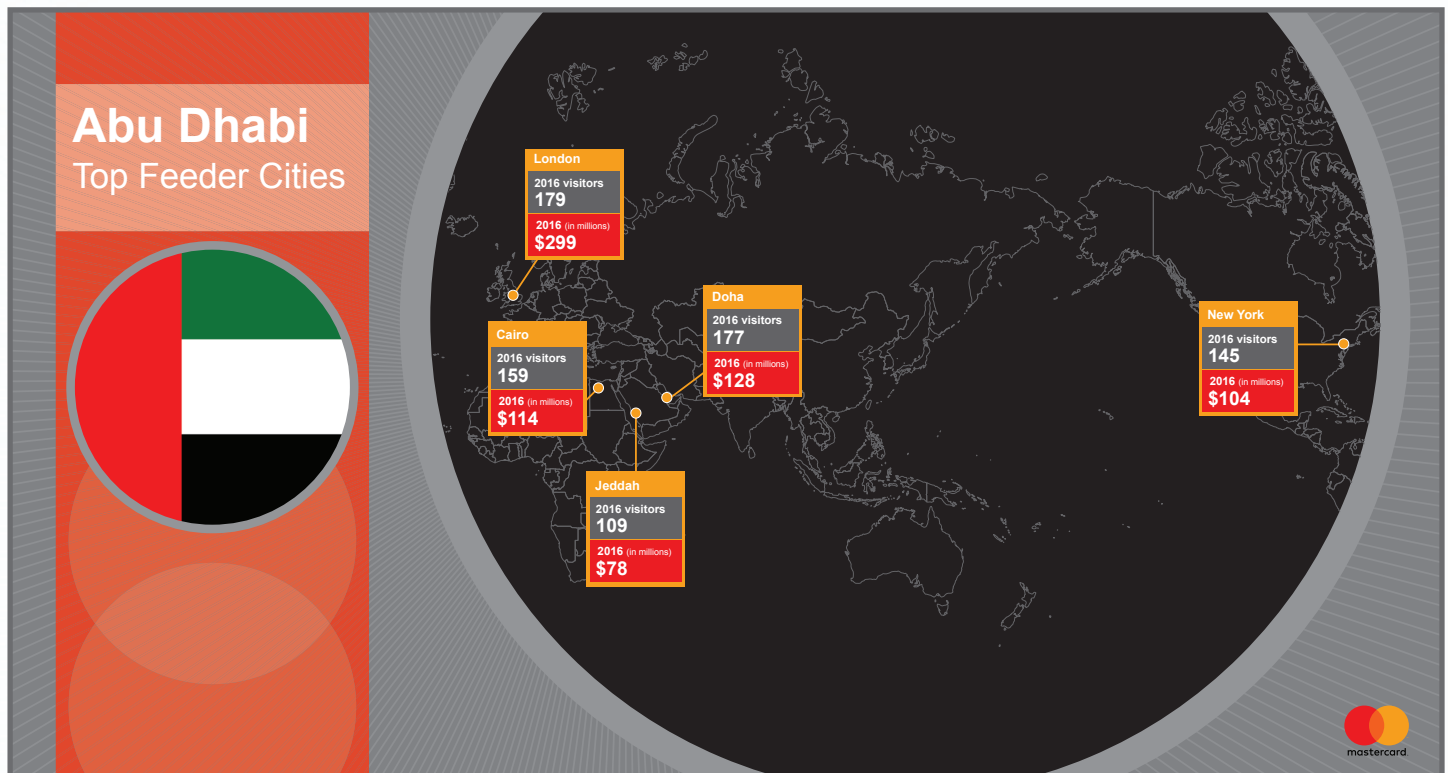




## Abu Dhabi's Top Five Feeder Cities

Abu Dhabi's top five feeder cities are presented in chart 25. Like for Dubai, London is the most important feeder city for Abu Dhabi, accounting for 179,000 visitors and USD 299 million in spending. London is followed by Doha, Cairo, New York, and Jeddah. Like Dubai, Abu Dhabi has a highly diversified network of feeder cities, with 81% of international visitors coming from outside the region. Visitors originating from India account for 10% of total visitors followed by U.K. at 8%, China at 7%, US at 6% and the Philippines at 5%.

**Chart 25.** Abu Dhabi's Top Five Feeder Cities

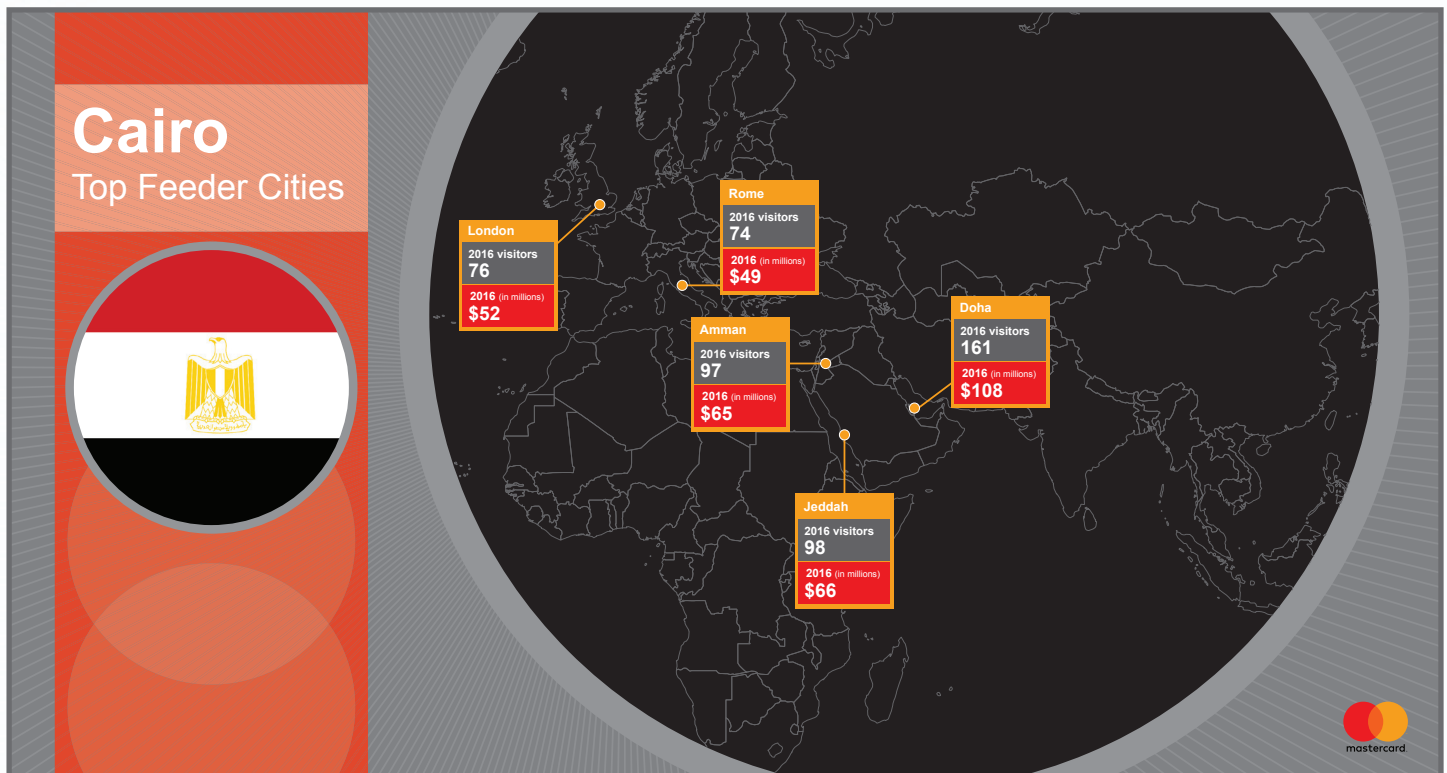




## Cairo's Top Five Feeder Cities

Doha, Jeddah, and Amman are the top three feeder cities for Cairo, followed by London, and Rome. However, visitors coming via Doha and Jeddah are declining between 2015 and 2016, whereas visitors from London and Rome are growing at 27.4% and 21.2% respectively. Cairo also has a very diversified mix of visitors, with 82% from outside the region. In terms of countries, Russia leads with 32% of visitors, followed by U.K. and Germany both at 9%, Italy at 4%, and Saudi Arabia at 3%.

**Chart 26. Cairo's Top Five Feeder Cities**





## 7. Destination Cities in Latin America

Lima is the top-ranked destination city in Latin America with over four million international visitors. Mexico City follows in second rank with almost three million visitors. Punta Cana, Sao Paulo, and Buenos Aires come after that in third, fourth and fifth ranks respectively.

### Latin America, Top 10 Destination Cities

The pace of growth diverges significantly between the regional top 10. The second ranked Mexico City and Bogota are the fastest-growing between 2015 and 2016 at 10.0%, whereas Montevideo, at ninth rank, registered a slight drop of -0.2% over the same time period.

**Chart 27.** Latin America Top 10 Destination Cities by International Overnight Visitors (2016)

2016 rank	Destination City	Country	Overnight International Visitors (millions)						2016 Visitor Spend (USD billions)
			2012	2013	2014	2015	2016	% Δ 2015 & 2016	
1	Lima	Peru	4.10	4.73	3.74	3.96	<b>4.03</b>	1.7%	\$1.4
2	Mexico City	Mexico	2.28	2.38	2.59	2.71	<b>2.98</b>	10.0%	\$2.3
3	Punta Cana	Dominican Republic	2.03	2.11	2.33	2.55	<b>2.73</b>	7.0%	\$2.9
4	Sao Paulo	Brazil	2.11	2.22	2.22	2.25	<b>2.30</b>	2.1%	\$1.5
5	Buenos Aires	Argentina	2.22	2.01	2.09	1.96	<b>2.02</b>	3.1%	\$1.7
6	San Jose	Costa Rica	1.41	1.45	1.51	1.59	<b>1.63</b>	2.3%	\$0.9
7	Rio de Janeiro	Brazil	1.13	1.18	1.57	1.34	<b>1.37</b>	2.1%	\$1.0
8	Bogota	Colombia	0.83	0.89	1.01	1.15	<b>1.26</b>	10.0%	\$1.3
9	Montevideo	Uruguay	0.78	0.77	0.84	0.94	<b>0.93</b>	-0.2%	\$0.6
10	Quito	Ecuador	0.53	0.63	0.70	0.71	<b>0.75</b>	5.6%	\$0.4



## Latin America, Fastest-Growing Destination Cities

Chart 28 shows the fastest-growing destination cities in the region over the 2009 to 2016 period. Lima is the fastest-growing with 9.9%, followed closely by Bogota at 9.6%. Punta Cana, Rio de Janeiro, and Mexico City are also in the top five.

**Chart 28.** Latin America, Fastest-Growing Destination Cities by International Overnight Visitors (2009–2016 CAGR)







## Latin America, Fastest-Growing Destination Cities

Chart 29 provides further details on the region's top eight fastest growing destination cities. San Jose, Sao Paulo and Buenos Aires join the list in sixth, seventh and eighth place respectively.

**Chart 29.** Latin America, Fastest-Growing Destination Cities by International Overnight Visitors (2009–2016 CAGR)

2016 rank	Destination City	Country	Overnight International Visitors (millions)						2016 Visitor Spend (USD billions)
			2012	2013	2014	2015	2016	% CAGR 2009 & 2016	
1	Lima	Peru	4.10	4.73	3.74	3.96	4.03	9.9%	\$1.4
2	Bogota	Colombia	0.83	0.89	1.01	1.15	1.26	9.6%	\$1.3
3	Punta Cana	Dominican Republic	2.03	2.11	2.33	2.55	2.73	7.3%	\$2.9
4	Rio de Janeiro	Brazil	1.13	1.18	1.57	1.34	1.37	6.4%	\$1.0
5	Mexico City	Mexico	2.28	2.38	2.59	2.71	2.98	6.2%	\$2.3
6	San Jose	Costa Rica	1.41	1.45	1.51	1.59	1.63	3.6%	\$0.9
7	Sao Paulo	Brazil	2.11	2.22	2.22	2.25	2.30	3.4%	\$1.5
8	Buenos Aires	Argentina	2.22	2.01	2.09	1.96	2.02	1.2%	\$1.7

## Latin America's Fastest-Growing Destination Cities Top 10 Details

Chart 30 provides details on the fastest-growing cities in terms of purpose of visit, expenditure breakdown by category and peak months for visiting.

**Chart 30.** Latin America's Fastest-Growing Destination Cities Top 10 Details

2016 rank	Destination City	Purpose of Visit		Expenditure Breakdown at Destination						Peak Months for Visiting
		Business	Leisure Plus Other Purposes	Accommodation	Food & Beverage	Shopping	Local Transport	Local Services	Misc.	
1	Lima	24.0%	76.0%	27.6%	28.2%	12.0%	11.2%	11.3%	9.6%	May, July, August, October
2	Bogota	27.0%	73.0%	11.0%	23.5%	18.0%	22.8%	24.7%	0.0%	July-August, December
3	Punta Cana	1.7%	98.3%	42.2%	28.2%	5.7%	11.0%	9.2%	3.7%	July, December-March
4	Rio de Janeiro	22.2%	77.8%	27.6%	28.2%	12.0%	11.2%	11.3%	9.6%	December, June-July
5	Mexico City	17.0%	83.0%	33.1%	20.5%	12.5%	5.0%	11.6%	17.2%	March, September-November
6	San Jose	13.7%	86.3%	27.6%	28.2%	12.0%	11.2%	11.3%	9.6%	December, March, July
7	Sao Paulo	48.5%	51.5%	27.2%	33.3%	9.3%	10.3%	8.9%	11.0%	November-December, February-March
8	Buenos Aires	16.3%	83.7%	27.2%	33.3%	9.3%	10.3%	8.9%	11.0%	January-March, July



## Latin America, Top 10 Destination Cities

The ranking is very different in terms of visitor spending as seen in chart 31. Punta Cana leads in the region with USD 2.95 billion, followed by Mexico City at USD 2.27 billion, Buenos Aires at USD 1.69 billion, Sao Paulo at USD 1.5 billion, and Lima, top-ranked in visitor arrivals, at USD 1.44 billion.

Behind the ranking, however, is a very dynamic picture of rapid changes. Between 2015 and 2016, international visitor spending in Bogota grew the strongest at 19.9%, in sharp contrast with Buenos Aires which shrank by 17.8%. Both Brazilian cities of Sao Paulo and Rio de Janeiro also shrank by 13.1%.

**Chart 31. Latin America, Top 10 Destination Cities by International Overnight Visitor Spend (2016)**

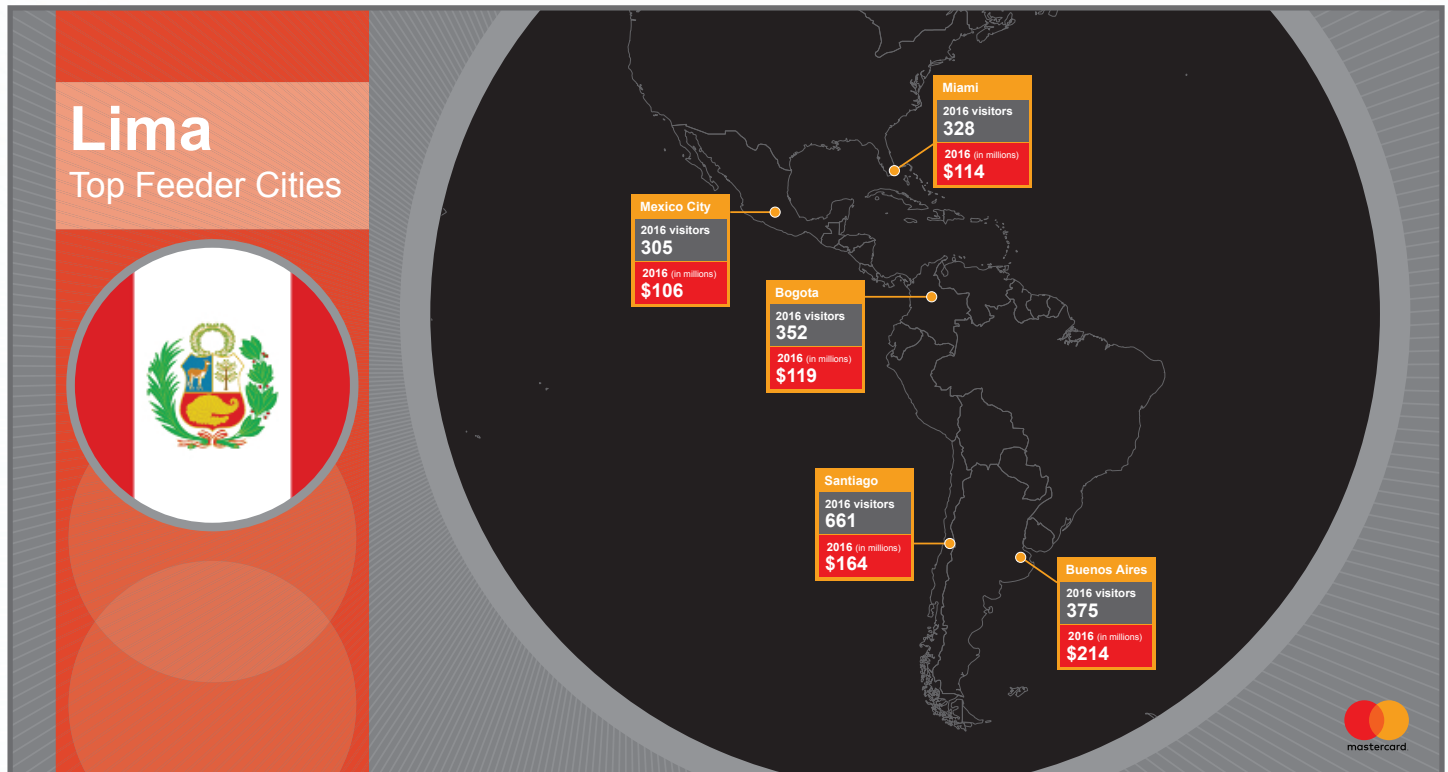
2016 rank	Destination City	Country	Overnight International Visitor Spend (USD billions)						2016 Visitors (millions)
			2012	2013	2014	2015	2016	% Δ 2015 & 2016	
1	Punta Cana	Dominican Republic	\$2.04	\$2.22	\$2.51	\$2.76	<b>\$2.95</b>	6.9%	2.7
2	Mexico City	Mexico	\$1.70	\$1.88	\$2.20	\$2.21	<b>\$2.27</b>	2.8%	3.0
3	Buenos Aires	Argentina	\$2.67	\$2.22	\$2.27	\$2.05	<b>\$1.69</b>	-17.8%	2.0
4	Sao Paulo	Brazil	\$2.06	\$2.18	\$2.23	\$1.72	<b>\$1.50</b>	-13.1%	2.3
5	Lima	Peru	\$1.22	\$1.55	\$1.37	\$1.45	<b>\$1.44</b>	-0.2%	4.0
6	Bogota	Colombia	\$0.84	\$0.91	\$1.10	\$1.12	<b>\$1.35</b>	19.9%	1.3
7	Rio de Janeiro	Brazil	\$0.99	\$0.95	\$1.70	\$1.11	<b>\$0.97</b>	-13.1%	1.4
8	San Jose	Costa Rica	\$0.65	\$0.63	\$0.82	\$0.85	<b>\$0.86</b>	1.2%	1.6
9	Montevideo	Uruguay	\$0.56	\$0.51	\$0.52	\$0.57	<b>\$0.55</b>	-3.1%	0.9
10	Santo Domingo	Dominican Republic	\$0.33	\$0.36	\$0.41	\$0.45	<b>\$0.48</b>	6.9%	0.4



## Lima's Top Five Feeder Cities

Lima's top five feeder cities are shown in chart 32, with Santiago as the most important, accounting for 661,000 visitors and USD 164 million of spending. However, visitors via Mexico City are the fastest-growing, registering an impressive 23.1% growth between 2015 and 2016. About 63% of Lima's international visitors are from outside the region, with US accounting for 21%, followed by Chile, Colombia, France, and Brazil all at 5%.

**Chart 32.** Lima's Top Five Feeder Cities

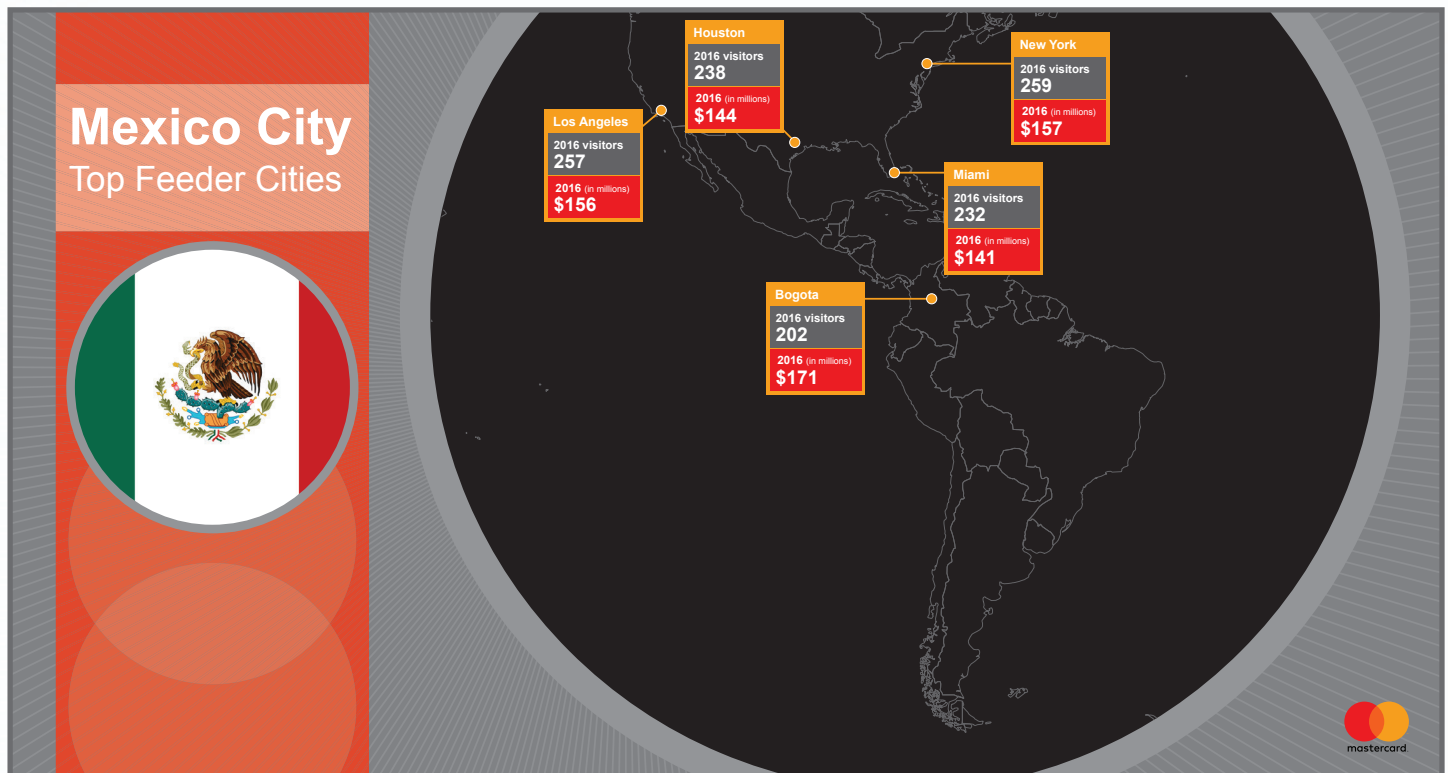




## Mexico City's Top Five Feeder Cities

Mexico City's top five feeder cities are shown in chart 33. The top four are cities in the US. Among them, Houston is the fastest-growing at 26% between 2015 and 2016. In terms of country origin, the US is naturally the most important, which accounts for 20% of total international visitors, followed by Colombia at 15%; Venezuela and Spain follow with 7% each and after that comes Argentina with 6%. About 49% of international visitors in Mexico City are from outside of the region.

**Chart 33.** Mexico City's Top Five Feeder Cities

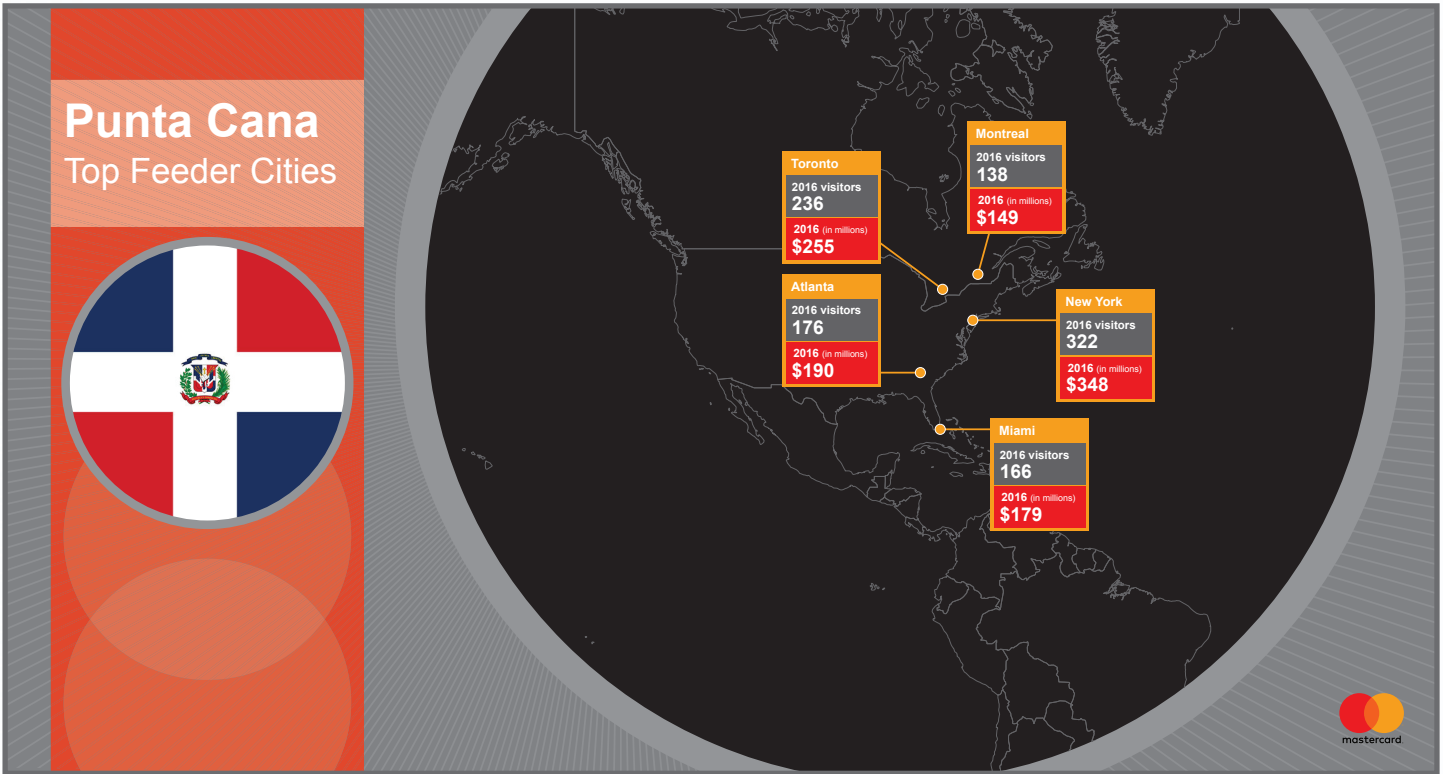




### Punta Cana's Top Five Feeder Cities

Punta Cana's top five feeder cities are in the US and Canada, attesting to its attraction to tourists from the north. Visitors via New York increased by an astonishing 43.6% between 2015 and 2016, followed by growth of visitors via Atlanta at 12.0%. The two Canadian cities of Toronto and Montreal are in the second and fifth rank respectively. Not surprisingly, 83% of international visitors in Punta Cana are from outside of the region. In terms of country of origin, the US accounts for 36%, followed by Canada with 16%, Germany and France at 5% each and finally Russia at 4%.

Chart 34. Punta Cana's Top Five Feeder Cities



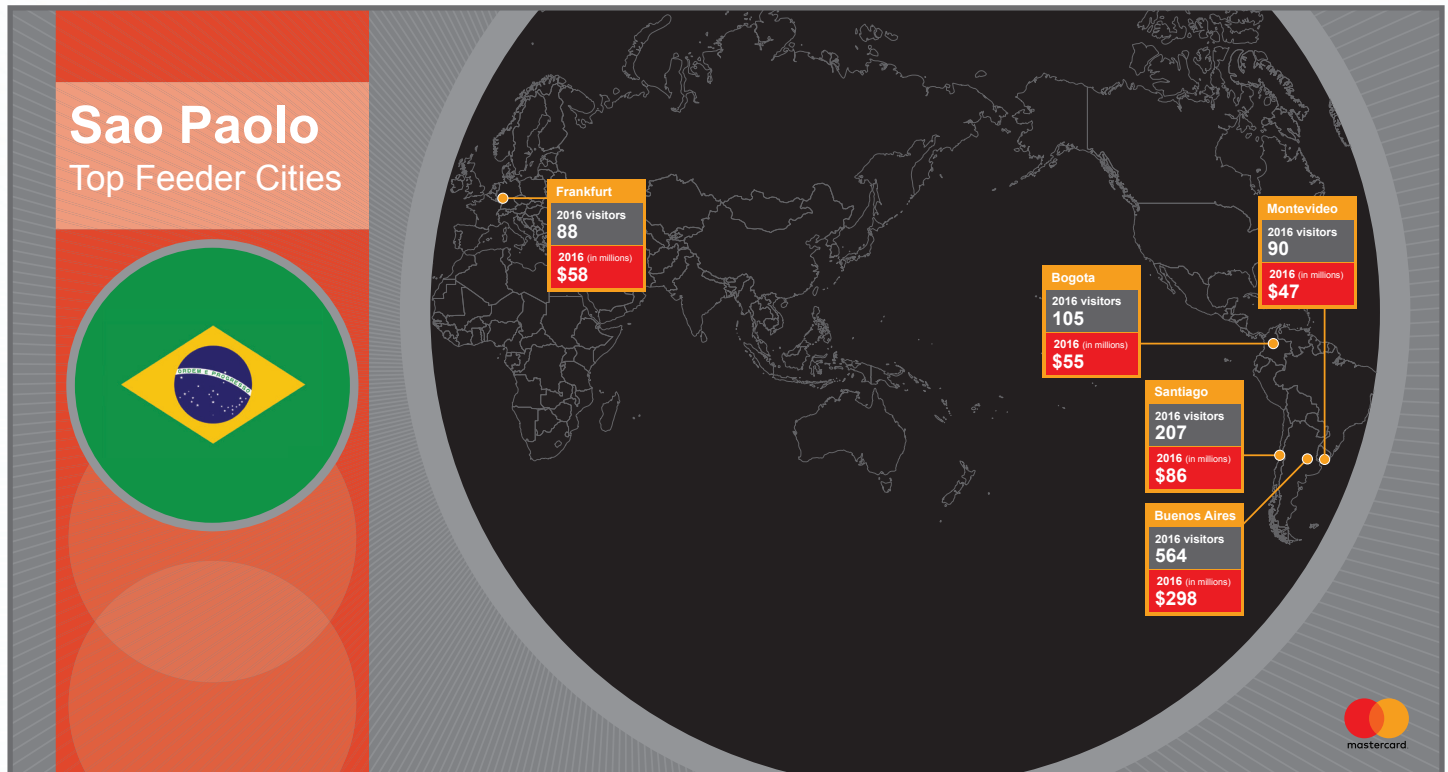




## Sao Paulo's Top Five Feeder Cities

Sao Paulo's top four feeder cities are within the region, with Frankfurt in fifth rank. Buenos Aires is the most important with 564,000 visitors and USD 298 million in spending. In terms of origin countries, Argentina is the most important, accounting for 17% of the total, followed by US at 12%, Chile at 7%, Germany at 5% and France at 4%. Overall, 60% of international visitors in Sao Paulo are from outside of the region.

**Chart 35.** Sao Paulo's Top Five Feeder Cities

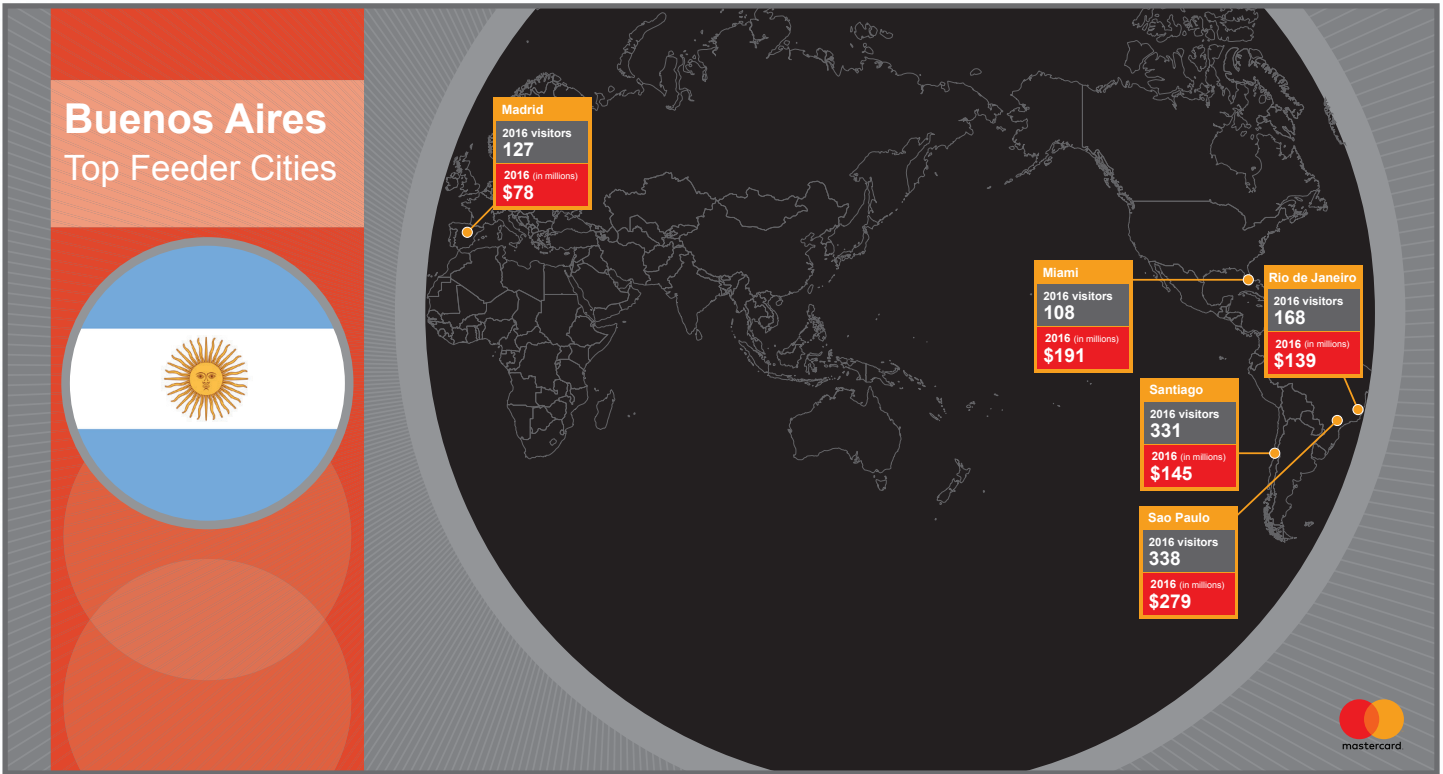




## Buenos Aires' Top Five Feeder Cities

Sao Paulo, Santiago and Rio de Janeiro are the top three feeder cities for Buenos Aires. They are followed by Madrid and Miami. Unlike other top destination cities in Latin America, Buenos Aires is very dependent on visitors from within the region. Only 21% of its international visitors are from outside of the region. In terms of origin countries Chile and Brazil each account for 22% of total international visitors, Uruguay for 18%, Paraguay for 13%, and US and Canada for 6% combined.

Chart 36. Buenos Aires' Top Five Feeder Cities





## 8. Destination Cities in Europe

London, ranked second in the world, is the top-ranked in Europe, with close to 20 million international visitors. The top 10 ranking in Europe is similar to the ranking in 2015, with Madrid moving up from 11th rank to 10th rank, displacing Munich, which was in 10th rank in 2015. Barcelona also replaced Amsterdam in fourth rank.

### Europe Top 10 Destination Cities

Vienna, at eighth rank, has the strongest growth between 2015 and 2016 at 7.5%. London has the second highest growth at 7.0%, followed by Barcelona at 6.4% and Madrid at 5.8%.

**Chart 37. Europe Top 10 Destination Cities by International Overnight Visitors (2016)**

2016 rank	Destination City	Country	Overnight International Visitors (millions)						2016 Visitor Spend (USD billions)
			2012	2013	2014	2015	2016	% Δ 2015 & 2016	
1	London	United Kingdom	15.46	16.81	17.40	18.58	<b>19.88</b>	7.0%	\$19.8
2	Paris	France	15.76	17.20	17.19	17.66	<b>18.03</b>	2.1%	\$12.9
3	Istanbul	Turkey	8.82	9.87	11.27	11.91	<b>11.95</b>	0.3%	\$7.5
4	Barcelona	Spain	6.91	7.18	7.42	7.70	<b>8.20</b>	6.4%	\$9.3
5	Amsterdam	Netherlands	6.10	6.65	7.35	7.78	<b>8.00</b>	2.9%	\$4.2
6	Milan	Italy	6.88	6.99	7.30	7.51	<b>7.65</b>	1.8%	\$4.6
7	Rome	Italy	6.66	6.66	6.76	6.95	<b>7.12</b>	2.3%	\$4.5
8	Vienna	Austria	5.38	5.55	5.85	6.23	<b>6.69</b>	7.5%	\$4.5
9	Prague	Czech Republic	4.92	5.05	5.32	5.73	<b>5.81</b>	1.5%	\$2.7
10	Madrid	Spain	4.30	4.06	4.47	4.97	<b>5.26</b>	5.8%	\$8.0



## Europe, Fastest-Growing Destination Cities

In terms of growth rates over the 2009 to 2016 period, two German cities lead in Europe – Hamburg at 8.7% and Berlin at 8.0%. They are followed by Istanbul at 7.8%, Copenhagen at 7.7% and Lisbon at 7.4%. Apart from Istanbul, four of the top five fastest-growing destination cities in Europe are not in the top 10 today.

**Chart 38.** Europe, Fastest-Growing Destination Cities by International Overnight Visitors (2009–2016 CAGR)





## Europe, Fastest-Growing Destination Cities

Chart 39 extends the fastest-growing cities top five to top 10. Three of these five additions, Budapest, Bucharest, and Sofia, are in Eastern Europe, and all are registering average annual growth rates of nearly 7% and above; none of them are currently in the regional top 10. This suggests a very dynamically changing situation in the emergence of destination cities in Europe.

**Chart 39. Europe, Fastest-Growing Destination Cities by International Overnight Visitors (2009–2016 CAGR)**

2016 rank	Destination City	Country	Overnight International Visitors (millions)						2016 Visitor Spend (USD billions)
			2012	2013	2014	2015	2016	% CAGR 2009 & 2016	
1	Hamburg	Germany	1.18	1.23	1.36	1.44	1.45	8.7%	\$1.5
2	Berlin	Germany	4.08	4.29	4.52	4.80	4.94	8.0%	\$5.0
3	Istanbul	Turkey	8.82	9.87	11.27	11.91	11.95	7.8%	\$7.5
4	Copenhagen	Denmark	1.31	1.39	1.50	1.57	1.63	7.7%	\$0.9
5	Lisbon	Portugal	2.64	2.93	3.50	3.58	3.63	7.4%	\$1.4
6	Budapest	Hungary	2.81	2.99	3.16	3.37	3.36	7.2%	\$1.0
7	Duesseldorf	Germany	1.60	1.69	1.77	1.88	1.95	7.2%	\$2.0
8	Bucharest	Romania	0.82	0.87	1.01	1.07	1.05	7.1%	\$0.3
9	Sofia	Bulgaria	0.80	0.86	0.95	0.97	1.01	6.9%	\$0.4
10	Barcelona	Spain	6.91	7.18	7.42	7.70	8.20	6.7%	\$9.3

## Europe's Fastest-Growing Destination Cities Top 10 Details

Chart 40 provides details on the top 10 fastest-growing cities in terms of purpose of visit, expenditure breakdown by category and peak months for visiting.

**Chart 40. Europe's Fastest-Growing Destination Cities Top 10 Details**

2016 rank	Destination City	Purpose of Visit		Expenditure Breakdown at Destination						Peak Months for Visiting
		Business	Leisure Plus Other Purposes	Accommodation	Food & Beverage	Shopping	Local Transport	Local Services	Misc.	
1	Hamburg	24.9%	75.1%	38.8%	20.4%	17.7%	7.1%	7.9%	8.2%	July, August
2	Berlin	24.9%	75.1%	38.8%	20.4%	17.7%	7.1%	7.9%	8.2%	July, August
3	Istanbul	9.2%	90.8%	20.4%	30.8%	24.6%	11.0%	7.1%	6.1%	June-September
4	Copenhagen	3.9%	96.1%	16.2%	15.5%	26.3%	21.0%	5.2%	15.8%	July-August
5	Lisbon	9.5%	90.5%	23.8%	25.2%	23.5%	24.2%	3.3%	0.0%	July-October
6	Budapest	9.0%	91.0%	12.9%	35.7%	22.2%	5.2%	13.2%	10.8%	July-August
7	Duesseldorf	24.9%	75.1%	38.8%	20.4%	17.7%	7.1%	7.9%	8.2%	August-October
8	Bucharest	60.2%	39.8%	27.8%	25.0%	22.0%	14.1%	11.0%	0.0%	May-June, September-October
9	Sofia	12.8%	87.2%	21.4%	29.4%	31.8%	8.1%	9.3%	0.0%	July-October
10	Barcelona	9.7%	90.3%	35.2%	29.0%	16.9%	6.8%	12.1%	0.0%	July, August





## Europe Top 10 Destination Cities

In terms of visitor spending, London is also the regional top-ranked with USD 19.76 billion, followed by Paris with USD 12.88 billion and Barcelona in third rank with USD 9.28 billion. Madrid, in 10th rank in international visitors is in fourth rank by visitor spending, an impressive performance. The German cities of Munich and Berlin are in sixth and seventh rank respectively, although neither is in the regional top 10 in international visitors.

London is also the fastest-growing in visitor spending among the top 10, with a growth rate of 7.4% between 2015 and 2016. In contrast, Paris, Istanbul, Milan, and Rome are all seeing contraction in visitor spending. At -11.4%, Istanbul's contraction is the most severe among them.

**Chart 41. Europe Top 10 Destination Cities by International Overnight Visitor Spend (2016)**

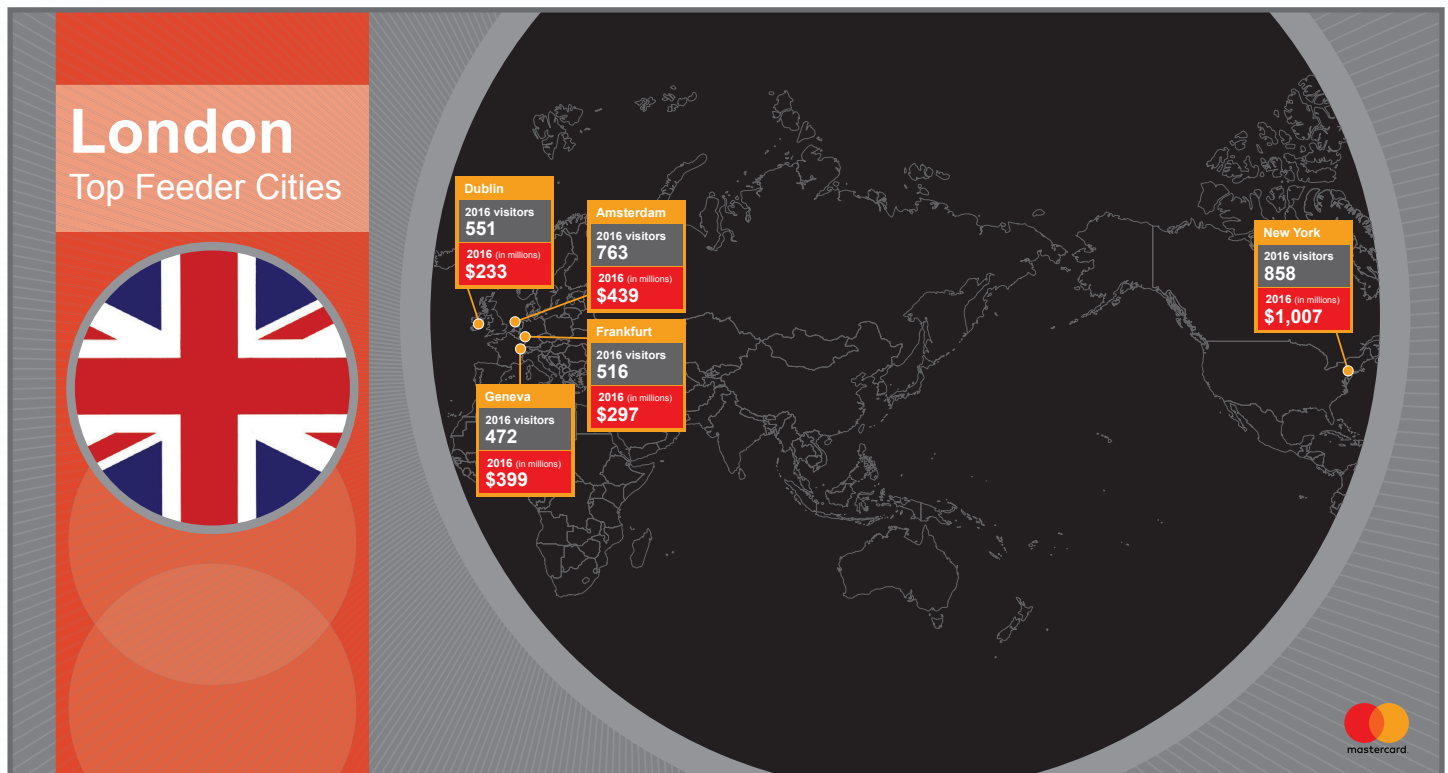
2016 rank	Destination City	Country	Overnight International Visitor Spend (USD billions)						2016 Visitors (millions)
			2012	2013	2014	2015	2016	% Δ 2015 & 2016	
1	London	United Kingdom	\$15.97	\$17.97	\$19.47	\$18.39	<b>\$19.76</b>	7.4%	19.9
2	Paris	France	\$17.25	\$19.50	\$16.42	\$13.00	<b>\$12.88</b>	-0.9%	18.0
3	Barcelona	Spain	\$7.61	\$8.65	\$8.88	\$8.95	<b>\$9.28</b>	3.6%	8.2
4	Madrid	Spain	\$6.06	\$6.40	\$7.16	\$7.78	<b>\$8.02</b>	3.1%	5.3
5	Istanbul	Turkey	\$6.31	\$7.39	\$8.73	\$8.51	<b>\$7.54</b>	-11.4%	12.0
6	Munich	Germany	\$4.98	\$5.45	\$5.96	\$5.10	<b>\$5.32</b>	4.3%	5.3
7	Berlin	Germany	\$4.64	\$5.11	\$5.63	\$4.82	<b>\$5.00</b>	3.8%	4.9
8	Milan	Italy	\$4.74	\$5.08	\$5.30	\$4.60	<b>\$4.56</b>	-0.8%	7.6
9	Vienna	Austria	\$4.22	\$4.52	\$4.83	\$4.33	<b>\$4.54</b>	4.8%	6.7
10	Rome	Italy	\$5.31	\$5.27	\$5.17	\$4.48	<b>\$4.47</b>	-0.3%	7.1



## London's Top Five Feeder Cities

Chart 42 shows London's top five feeder cities. New York is the most important accounting for 858,000 visitors and over USD 1 billion in spending. The other four in the top five are European cities. Between 2015 and 2016, Frankfurt is the fastest-growing feeder of visitors to London increasing by 11.4%. Overall, 37% of all international visitors to London are from outside of Europe, the most important origin country being the US which accounts for 12% of the total, followed by France at 11%, Germany at 8%, and Spain and Italy both at 6%.

**Chart 42. London's Top Five Feeder Cities**

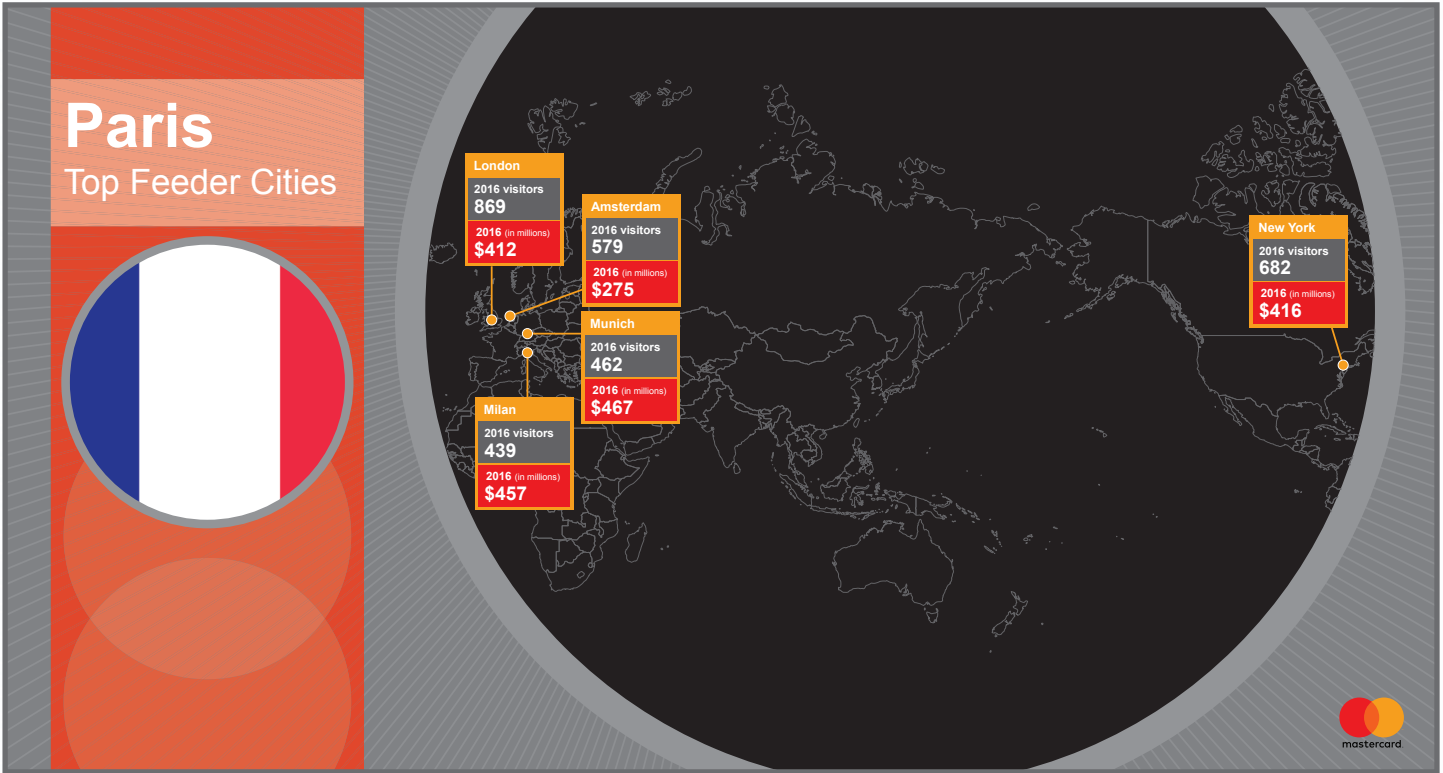




### Paris' Top Five Feeder Cities

London is the most important feeder city for Paris, followed by New York, Amsterdam, Munich, and Milan. Visitors via London are also growing the strongest at 19.2% between 2015 and 2016, followed by Munich at 17.5%. About 35% of all international visitors in Paris are from outside of Europe. In terms of origin countries, U.K. is the biggest accounting for 11% of the total, followed by US at 9%, Italy at 8%, and Spain and Germany at 7%.

Chart 43. Paris' Top Five Feeder Cities

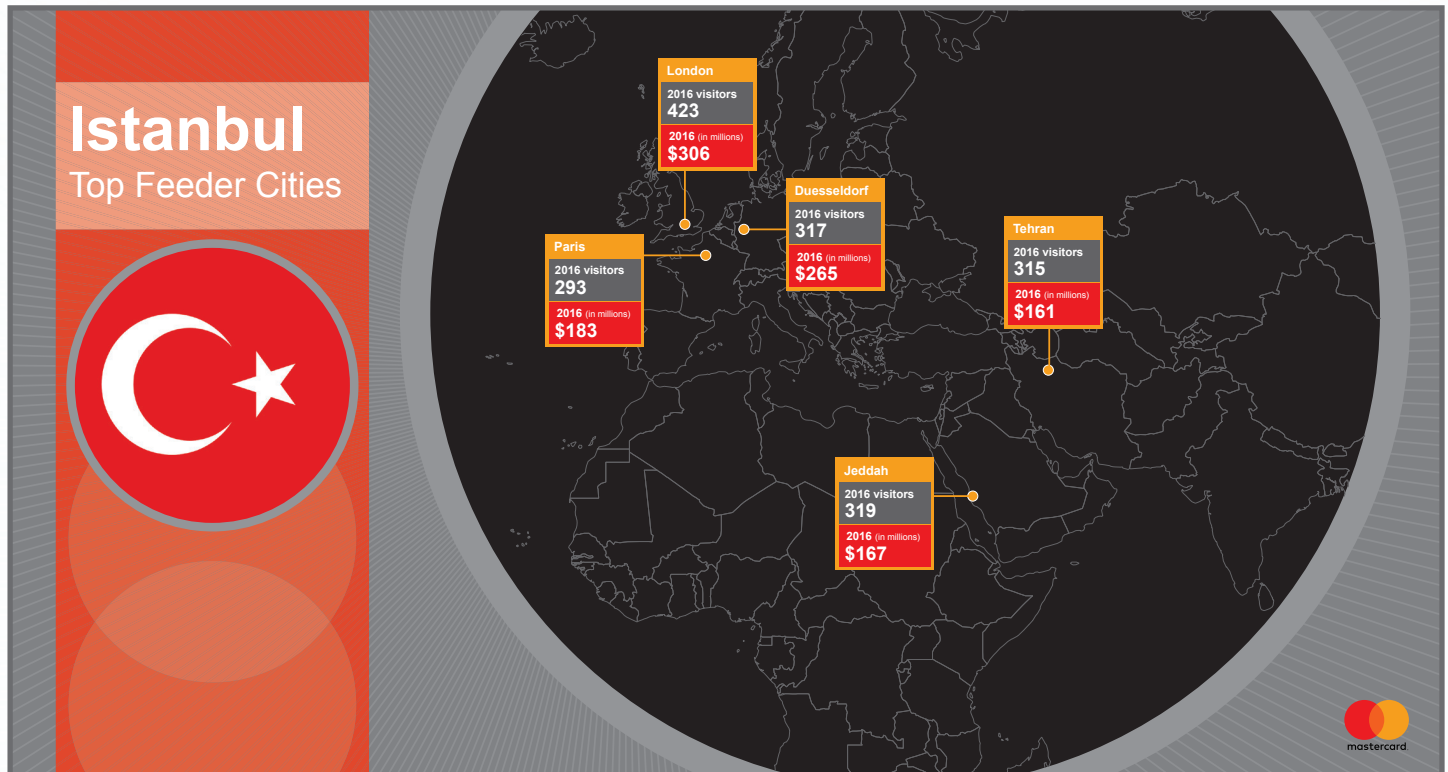




## Istanbul's Top Five Feeder Cities

London is, again, the most important feeder city for Istanbul, accounting for 423,000 visitors and USD 306 million in spending. Unlike other top-ranked European destination cities, 58% of international visitors in Istanbul are from outside of Europe. In terms of origin country, Germany leads with 11% of visitors to Istanbul, followed by Iran, Russia, and the US all at 5%, and the U.K. at 4%.

**Chart 44.** Istanbul's Top Five Feeder Cities

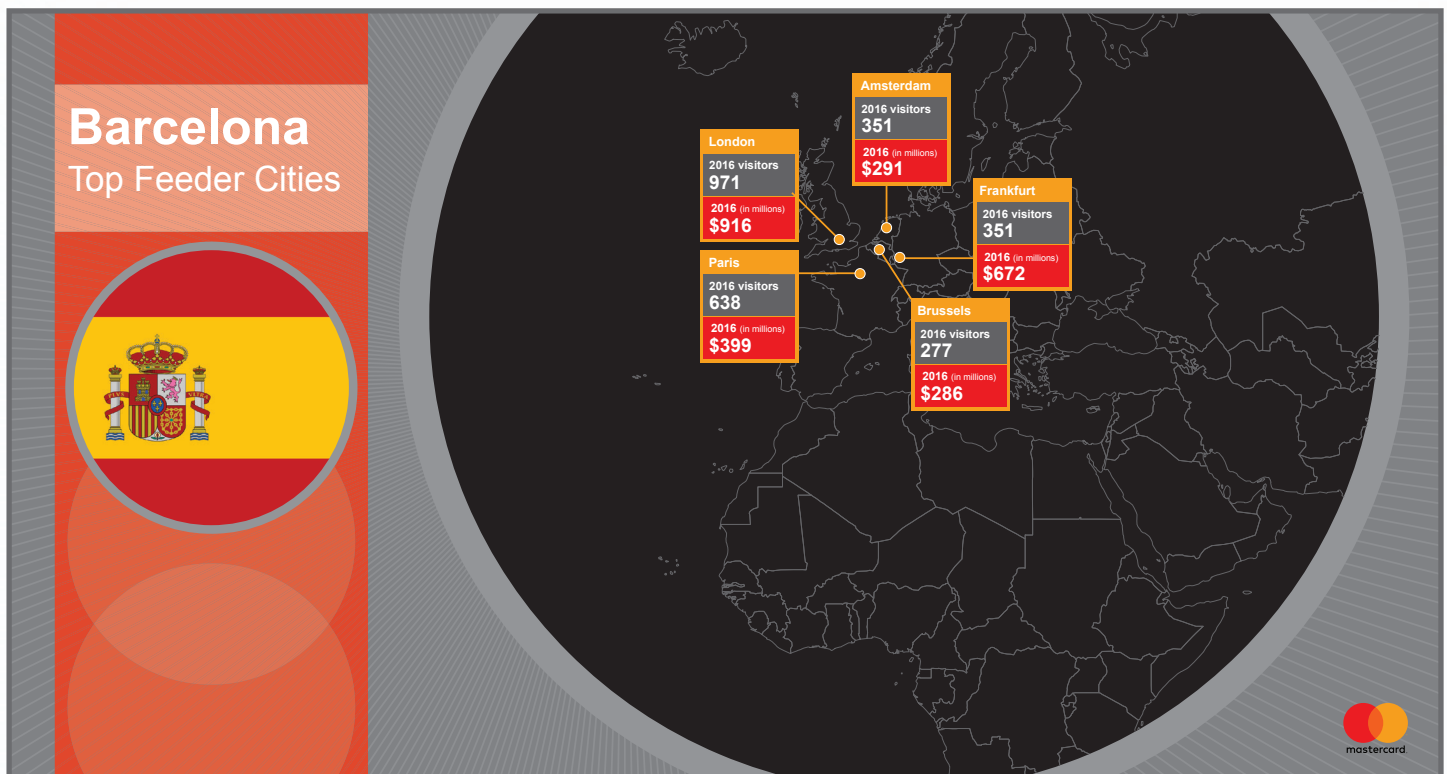




## Barcelona's Top Five Feeder Cities

Not surprisingly, London is also the most important feeder city for Barcelona with 971,000 visitors and USD 916 million in spending. Visitor numbers via London are also growing the strongest between 2015 and 2016 at 5.8%, in sharp contrast with Paris, Frankfurt, and Brussels where visitors being fed to Barcelona are shrinking by -4.0%, -3.6%, and -5.6% respectively. Only 38% of total international visitors in Barcelona come from outside of Europe. The most important origin country is France, accounting for 19% of the total, followed by U.K. at 12%, Germany at 8%, Russia, and US both at 7%.

**Chart 45. Barcelona's Top Five Feeder Cities**



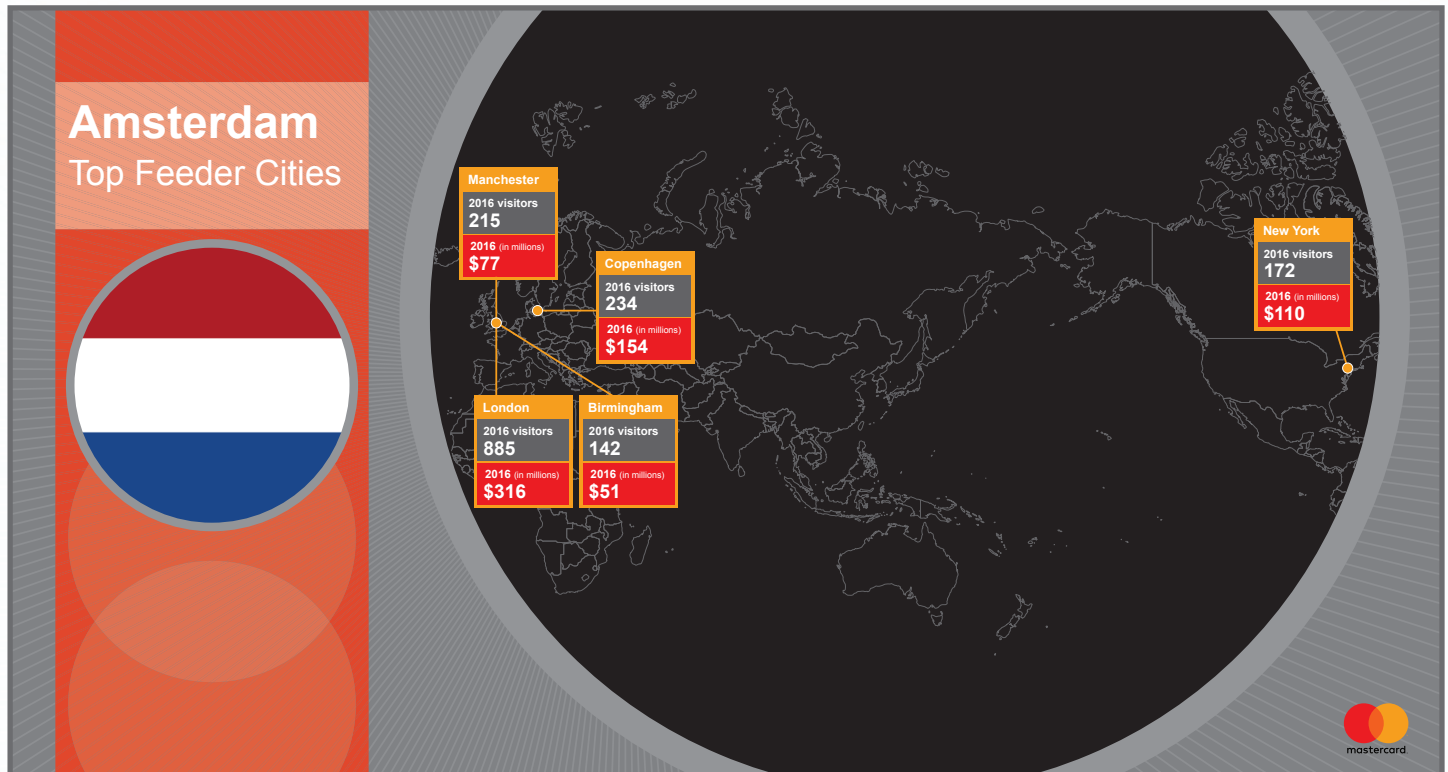




## Amsterdam's Top Five Feeder Cities

For Amsterdam, London is also the most important feeder city, sending some 885,000 visitors and spending USD 316 million there. Visitors via nearby Copenhagen are the next in size, 234,000, with USD 154 million in spending. Overall, 31% of international visitors in Amsterdam are from outside of Europe. U.K. is the biggest origin country, accounting for 18% of the total, followed by Germany at 14%, US at 12%, France at 6%, and Italy at 5%.

**Chart 46.** Amsterdam's Top Five Feeder Cities





## 9. Destination Cities in North America

New York, which ranks fifth globally, is the top-ranked in North America with 12.75 million international visitors. It is followed by Los Angeles and Miami in second and third rank. The three Canadian cities of Toronto, Vancouver, and Montreal are in fourth, sixth and seventh rank respectively.

### North America Top 10 Destination Cities

Among the regional top 10, Boston is the fastest-growing between 2015 and 2016 at 7.1%, followed by Vancouver at 5.5%, Los Angeles at 5.2%, Toronto at 5.1%. All top 10 destination cities are growing steadily.

**Chart 47.** North America Top 10 Destination Cities by International Overnight Visitors (2016)

2016 rank	Destination City	Country	Overnight International Visitors (millions)						2016 Visitor Spend (USD billions)
			2012	2013	2014	2015	2016	% Δ 2015 & 2016	
1	New York	U.S.	10.92	11.38	12.02	12.37	12.75	3.1%	\$18.5
2	Los Angeles	U.S.	4.65	4.69	5.14	5.32	5.60	5.2%	\$8.1
3	Miami	U.S.	3.77	4.30	5.15	5.13	5.24	2.0%	\$8.1
4	Toronto	Canada	3.53	3.60	3.91	4.30	4.52	5.1%	\$2.2
5	San Francisco	U.S.	3.25	3.50	3.66	3.77	3.93	4.2%	\$5.9
6	Vancouver	Canada	3.15	3.30	3.44	3.69	3.90	5.5%	\$2.1
7	Montreal	Canada	1.93	1.95	2.04	2.17	2.24	3.1%	\$1.1
8	Washington	U.S.	2.01	1.97	2.19	2.13	2.18	2.4%	\$2.5
9	Chicago	U.S.	2.17	2.19	2.17	2.03	2.08	2.5%	\$2.9
10	Boston	U.S.	1.46	1.48	1.62	1.63	1.74	7.1%	\$2.2



## North America, Fastest-Growing Destination Cities

The fastest-growing North American destination city over the 2009 to 2016 period, however, is Houston, which is not currently in the regional top 10. Miami, currently ranked third, is also the second fastest-growing, followed by Los Angeles (currently ranked second), San Francisco (currently ranked fifth) and New York (currently ranked first).

**Chart 48.** North America, Fastest-Growing Destination Cities by International Overnight Visitors (2009–2016 CAGR)





## North America, Fastest-Growing Destination Cities

Chart 49 expands the fastest-growing destination cities in North America from five to 10. Boston, currently ranked 10th, is the seventh fastest-growing. Atlanta, currently not among the regional top 10, is the eighth fastest-growing. The three Canadian cities are also among the 10 fastest-growing – Toronto in sixth place, Vancouver in ninth place, and Montreal in 10th.

**Chart 49. North America, Fastest-Growing Destination Cities by International Overnight Visitors (2009–2016 CAGR)**

2016 rank	Destination City	Country	Overnight International Visitors (millions)						2016 Visitor Spend (USD billions)
			2012	2013	2014	2015	2016	% CAGR 2009 & 2016	
1	Houston	U.S.	1.13	1.28	1.37	1.39	1.50	8.7%	\$2.5
2	Miami	U.S.	3.77	4.30	5.15	5.13	5.24	8.6%	\$8.1
3	Los Angeles	U.S.	4.65	4.69	5.14	5.32	5.60	7.9%	\$8.1
4	San Francisco	U.S.	3.25	3.50	3.66	3.77	3.93	5.7%	\$5.9
5	New York	U.S.	10.92	11.38	12.02	12.37	12.75	5.4%	\$18.5
6	Toronto	Canada	3.53	3.60	3.91	4.30	4.52	4.9%	\$2.2
7	Boston	U.S.	1.46	1.48	1.62	1.63	1.74	4.2%	\$2.2
8	Atlanta	U.S.	0.90	0.83	1.01	0.99	1.02	4.1%	\$1.5
9	Vancouver	Canada	3.15	3.30	3.44	3.69	3.90	3.4%	\$2.1
10	Montreal	Canada	1.93	1.95	2.04	2.17	2.24	3.4%	\$1.1

## North America's Fastest-Growing Destination Cities Top 10 Details

Chart 50 provides details on the top 10 fastest-growing cities in terms of purpose of visit, expenditure breakdown by category, and peak months for visiting.

**Chart 50. North America's Fastest-Growing Destination Cities Top 10 Details**

2016 rank (2015 rank)	Destination City	Purpose of Visit		Expenditure Breakdown at Destination						Peak Months for Visiting
		Business	Leisure plus other purposes	Accommodation	Food & Beverage	Shopping	Local Transport	Local Services	Misc.	
1	Houston	42.9%	57.1%	31.4%	18.9%	26.3%	10.3%	8.6%	4.6%	July, December
2	Miami	12.7%	87.3%	22.4%	16.6%	34.1%	11.7%	13.5%	1.7%	December-January, July
3	Los Angeles	15.7%	84.3%	27.8%	18.0%	23.2%	13.1%	14.2%	3.7%	July-August
4	San Francisco	17.9%	82.1%	35.2%	18.9%	17.3%	13.5%	12.8%	2.3%	July, December
5	New York	13.6%	86.4%	29.1%	18.9%	24.7%	11.4%	13.1%	2.7%	July-August
6	Toronto	20.8%	79.2%	35.5%	26.1%	20.5%	9.9%	7.9%	0.0%	June-August
7	Boston	24.1%	75.9%	33.3%	19.9%	21.2%	12.7%	10.2%	2.8%	July-August
8	Atlanta	18.4%	81.6%	30.6%	19.5%	23.7%	12.3%	10.8%	3.1%	July-August
9	Vancouver	8.9%	91.1%	36.0%	28.2%	16.8%	10.6%	8.4%	0.0%	June-August
10	Montreal	18.0%	82.0%	40.6%	23.3%	17.7%	7.8%	10.6%	0.0%	June-August



## North America, Top 10 Destination Cities

New York is also the regional top-ranked in terms of visitor spending at USD 18.52 billion. New York is in a league of its own, leaving Miami in a distant second at USD 8.15 billion, followed by Los Angeles at USD 8.1 billion. San Francisco, in fourth rank, drops to USD 5.93 billion. Chicago, in fifth rank, drops further to USD 2.95 billion. So there is a very steep difference in visitors spending between New York and the rest.

Between 2015 and 2016, Houston and Boston registered the fastest growth in visitor spending at 5.1% and 4.6% respectively. In contrast, visitor spending in Toronto and Vancouver declined by -1.8%, and -1.5% respectively.

**Chart 51. North America, Top 10 Destination Cities by International Overnight Visitor Spend (2016)**

2016 rank	Destination City	Country	Overnight International Visitor Spend (USD billions)						2016 Visitors (millions)
			2012	2013	2014	2015	2016	% Δ 2015 & 2016	
1	New York	U.S.	\$15.52	\$16.67	\$17.62	\$18.39	<b>\$18.52</b>	0.7%	12.7
2	Miami	U.S.	\$5.74	\$6.75	\$8.09	\$8.17	<b>\$8.15</b>	-0.3%	5.2
3	Los Angeles	U.S.	\$6.58	\$6.84	\$7.51	\$7.88	<b>\$8.10</b>	2.9%	5.6
4	San Francisco	U.S.	\$4.80	\$5.32	\$5.57	\$5.82	<b>\$5.93</b>	1.9%	3.9
5	Chicago	U.S.	\$3.01	\$3.14	\$3.10	\$2.94	<b>\$2.95</b>	0.2%	2.1
6	Washington	U.S.	\$2.29	\$2.30	\$2.56	\$2.54	<b>\$2.54</b>	0.1%	2.2
7	Houston	U.S.	\$1.84	\$2.14	\$2.29	\$2.36	<b>\$2.48</b>	5.1%	1.5
8	Boston	U.S.	\$1.78	\$1.86	\$2.04	\$2.08	<b>\$2.18</b>	4.6%	1.7
9	Toronto	Canada	\$2.13	\$2.16	\$2.28	\$2.20	<b>\$2.16</b>	-1.8%	4.5
10	Vancouver	Canada	\$2.39	\$2.26	\$2.27	\$2.15	<b>\$2.12</b>	-1.5%	3.9



## New York's Top Five Feeder Cities

New York's top five feeder cities are shown in chart 52. London is the most important, sending over one million visitors with USD 1.16 billion of spending. Paris is in a distant second with 697,000 visitors, but USD 1.05 billion of spending. Sao Paulo in Brazil, Toronto in Canada, and Beijing in China are in third, fourth and fifth places, respectively. In terms of origin countries, U.K. residents lead with 12% of international overnight visitors to New York City, followed by Canada (11%), Brazil (10%), China (8%) and France (8%). This diversity is a testimony to New York's status as a global destination where 89% of international visitors are from outside of North America.

Chart 52. New York's Top 5 Feeder Cities



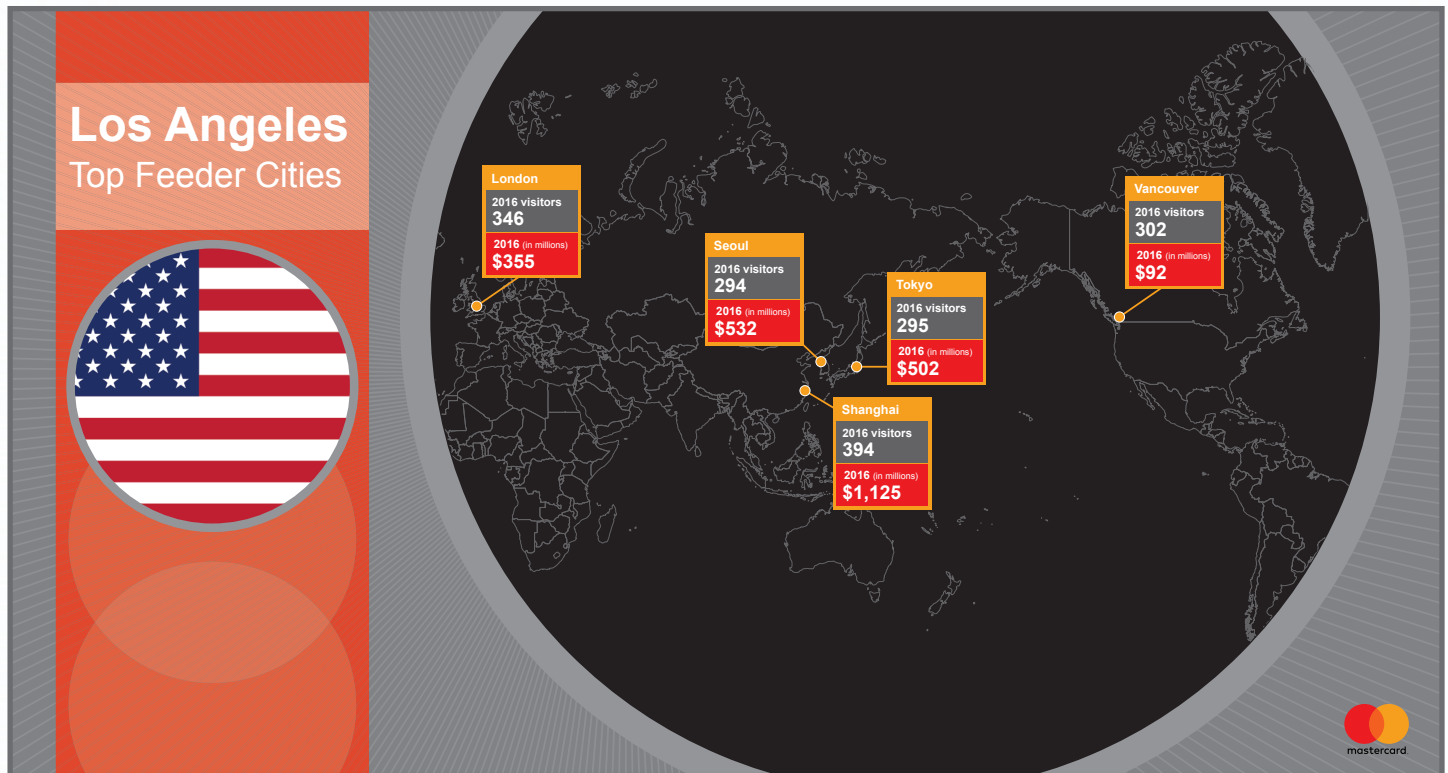




## Los Angeles' Top Five Feeder Cities

Los Angeles' top five feeder cities are shown in chart 53. The three Asian cities of Shanghai, Tokyo, and Seoul are among the top five. In fact, Shanghai is in first place as a feeder city for Los Angeles, accounting for 394,000 visitors and USD 1.125 billion in spending. In terms of origin country, Canada accounts for 15% of total visitors, China 14%, Australia 8%, and the U.K. and Japan 7%.

**Chart 53.** Los Angeles' Top Five Feeder Cities





## Miami's Top Five Feeder Cities

Miami's five leading feeder cities are shown in chart 54. With the exception of London, cities in Latin America are the major feeders of international visitors for Miami. An extraordinary 95% of international visitors in Miami are from outside of the North America region. Sao Paulo is the top feeder city, sending 441,000 visitors to Miami accounting for USD 1.1 billion of spending. But visitors via Sao Paulo declined by a precipitous 22.7% between 2015 and 2016, compared with a 20.2% increase in visitors from Buenos Aires, 11.1% from London, 2.9% from Bogota, and 2.2% from Caracas. In terms of origin country, Brazil residents lead with 11% of international overnight visitors to Miami, followed by Colombia (8%), Argentina (6%), Germany (5%), and the U.K. (5%).

**Chart 54. Miami's Top Five Feeder Cities**

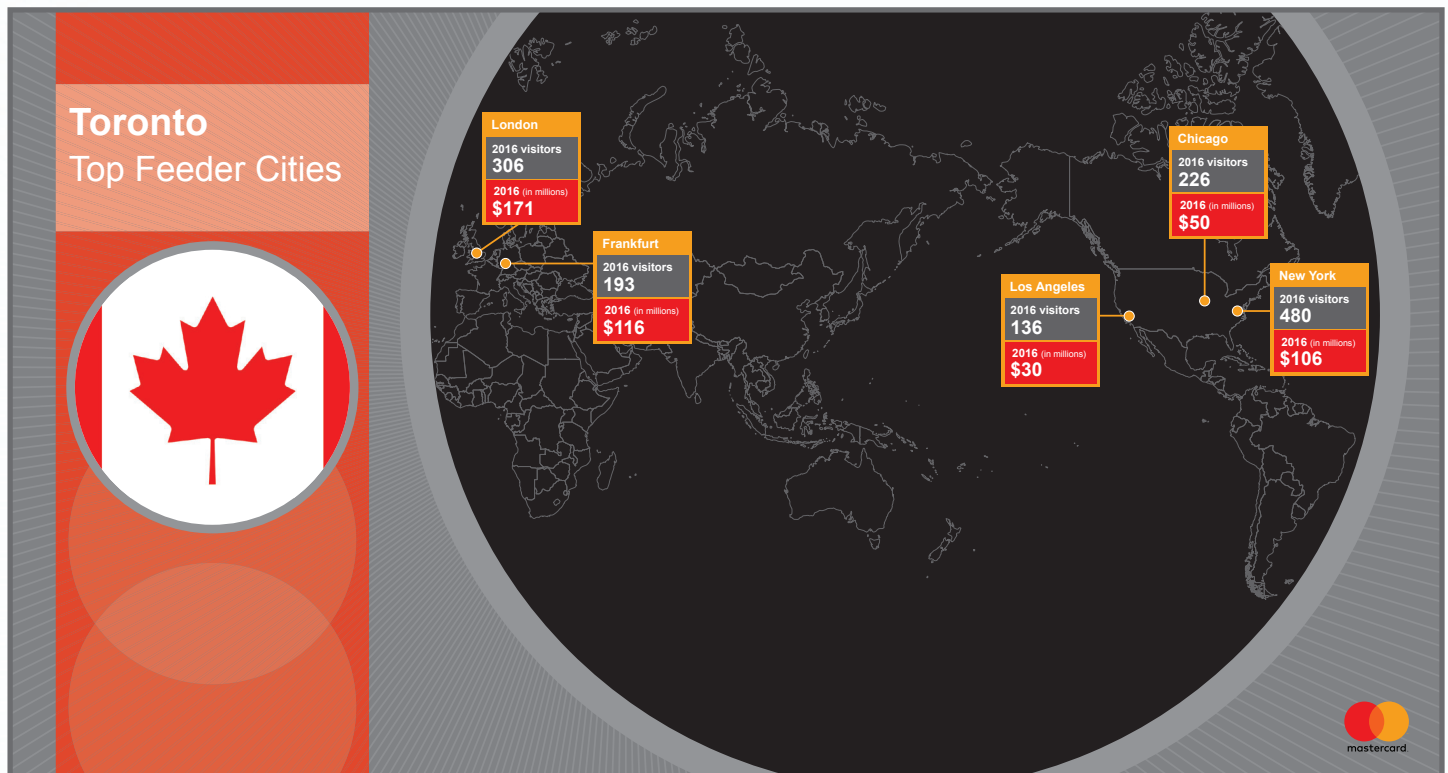




## Toronto's Top Five Feeder Cities

Toronto's top five feeder cities are shown in chart 55. New York and London are in first and second place respectively. While there is a slight decline of -0.7% in visitors from New York between 2015 and 2016, there is an impressive 22.4% increase in visitors from London. Not surprisingly, the US is the most important country for Toronto in terms of visitors, accounting for 48% of the total, followed in a distant second by China accounting for 9%, U.K. for 5%, and both India and Germany for 2%.

**Chart 55.** Toronto's Top Five Feeder Cities

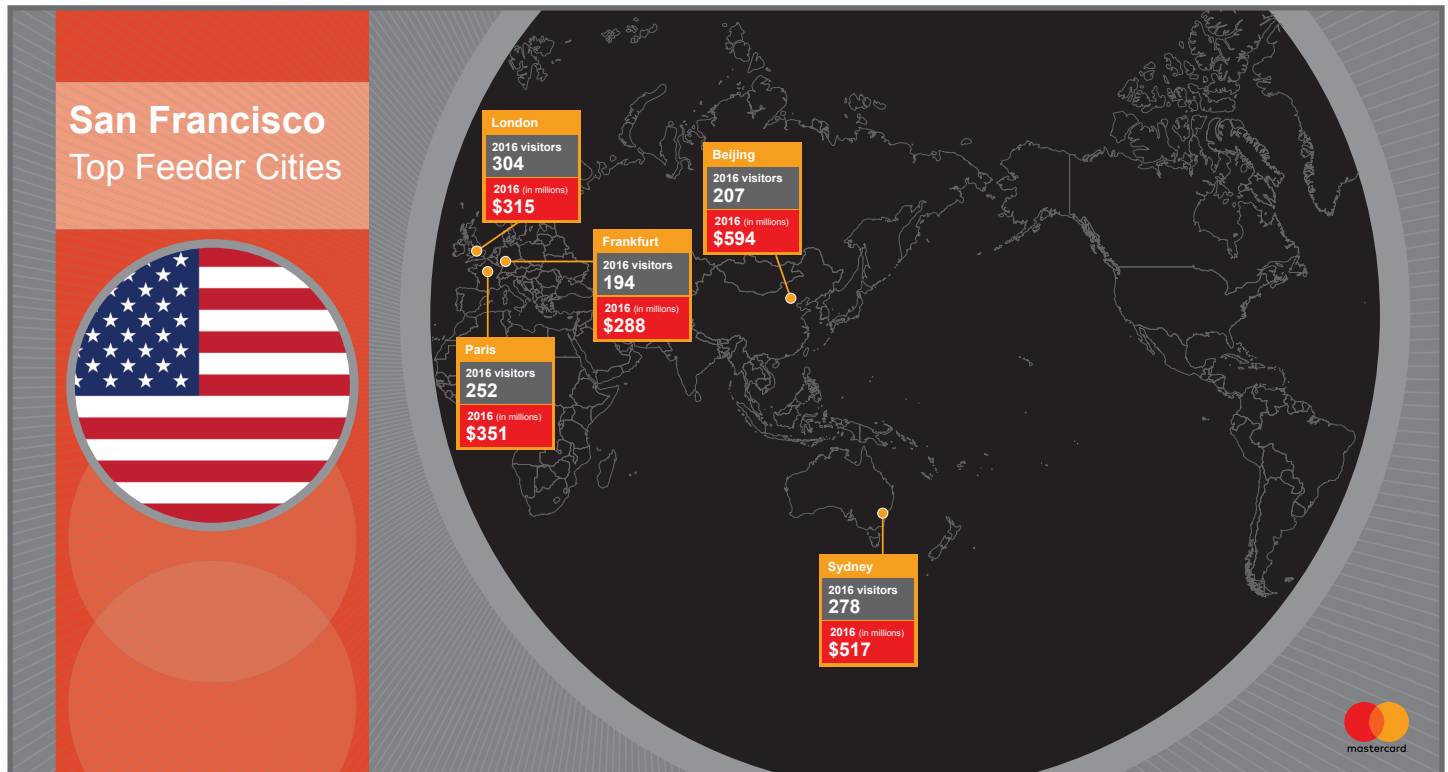




## San Francisco's Top Five Feeder Cities

San Francisco's top five feeder cities are a diverse mix: London, Paris and Frankfurt in Europe, Sydney in Australia, and Beijing in China. An impressive 88% of international visitors in San Francisco are from outside of North America. In terms of origin country, U.K. leads with 9% of the total, followed by China and Germany at 8%, and Australia and France at 7%.

**Chart 56.** San Francisco's Top Five Feeder Cities





## 10. Conclusions

The growth trajectories of many of the destination cities are becoming increasingly diverse as they tap into new sources of growth (feeder cities) within as well as outside their own region. Look at the juxtaposition of the current top ranked destination cities with the fastest-growing ones at both the global and regional levels and see a dynamic picture of changing pace and patterns of growth. At the global level, Asia-Pacific dominates overwhelmingly with 14 cities in the top 20 fastest-growing destination cities, followed by Middle East & Africa which has four cities in the global top 20. Interestingly, more than half of these 20 cities are currently not among the global top 20. The fact that so many of the fastest-growing destination cities are not among the top ranked today indicates strong and increasingly differentiated momentum of growth propelling many of these cities forward.

The situation is very similar in some of the regions. The pace of change is the most dynamic in Asia-Pacific. In this region, the fastest-growing destination city is Osaka, which currently ranks only eighth regionally. Six of the 10 fastest-growing destination cities in Asia-Pacific are not among the current regional top 10. In Europe, the fastest-growing destination city is Hamburg, which is not even among Europe's top 10 today. Eight of the 10 fastest-growing European destination cities are not among the current regional top 10, with Eastern European cities the most prominent among them.

The situation is quite the opposite in Latin America where the current top ranked destination city in the region, Lima, is also the fastest-growing. In fact, there is a complete overlap between the current regional top-ranked cities and the fastest-growing cities in Latin America. In the Middle East & Africa region, the fastest-growing destination city in the region is Abu Dhabi, which ranked fourth in the regional top 10 currently. There is also a complete overlap between the current regional top-ranked destination cities and the fastest-growing ones in the region. In North America, the fastest-growing destination city in the region is Houston, which is not even among the current regional top 10. Apart from Houston, Atlanta is also among the fastest-growing destination cities that is not among the current regional top 10.

These growth trends are powerful indicators of the accelerating pace of change among the destination cities. Even as the current patterns of connectivity between these cities continue to deepen, powerful forces are at work in ramping up new connections and expanding existing ones such that many emergent destination cities, especially in Asia-Pacific and Europe (especially Eastern Europe), are poised to overtake the current leaders in the coming years.





## Appendix A. Methodology

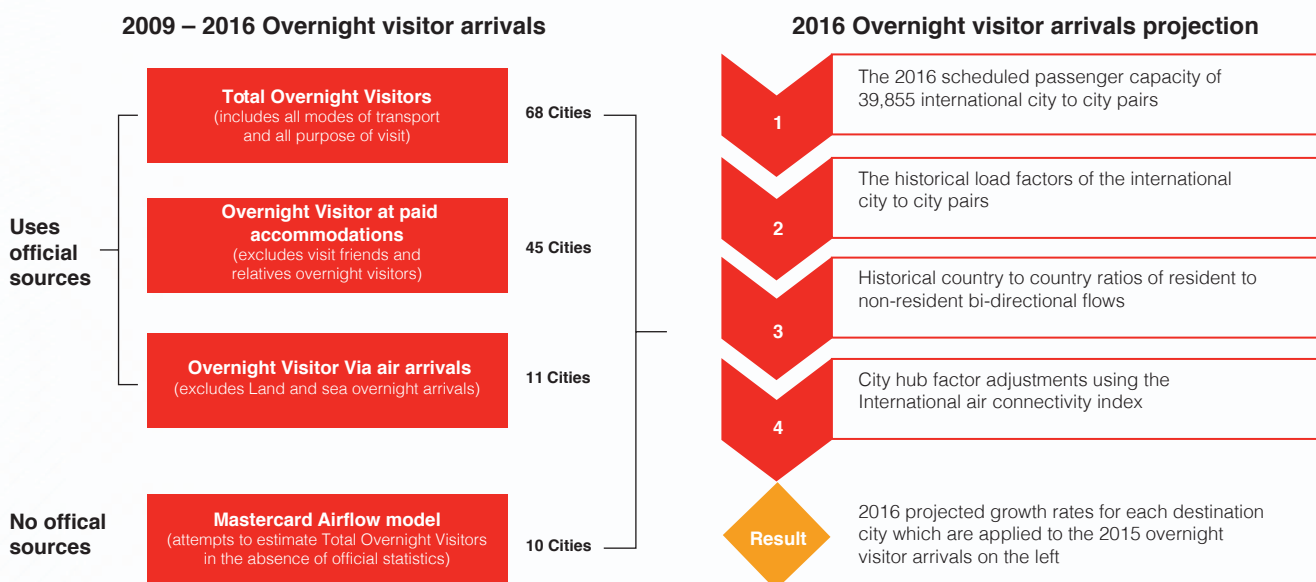
### 1. The 132 Destination Cities of the Index

Region	Destination Cities
<b>Asia-Pacific (42 cities)</b>	Ahmedabad, Almaty, Bangkok, Beijing, Bengaluru, Chengdu, Chennai, Coimbatore, Colombo, Dalian, Delhi, Dhaka, Guangzhou, Hangzhou, Hanoi, Harbin, Ho Chi Minh City, Hong Kong, Hyderabad, Islamabad, Jakarta, Karachi, Kolkata, Kuala Lumpur, Lahore, Manila, Melbourne, Mumbai, Nanjing, Osaka, Pune, Qingdao, Seoul, Shanghai, Shenzhen, Singapore, Sydney, Taipei, Tianjin, Tokyo, Xi'an, Xiamen
<b>Europe (36 cities)</b>	Amsterdam, Ankara, Athens, Barcelona, Berlin, Brussels, Bucharest, Budapest, Copenhagen, Dublin, Dusseldorf, Edinburgh, Frankfurt, Geneva, Hamburg, Istanbul, Kiev, Lisbon, London, Madrid, Milan, Minsk, Moscow, Munich, Novosibirsk, Paris, Prague, Rome, Sofia, St Petersburg, Stockholm, Vienna, Vladivostok, Warsaw, Yekaterinburg, Zurich
<b>Latin America (19 cities)</b>	Belo Horizonte, Bogota, Brasilia, Buenos Aires, Caracas, Cordoba, Curitiba, Lima, Medellin, Mexico City, Monterrey, Montevideo, Quito, Recife, Rio de Janeiro, San Jose, Punta Cana, Santo Domingo, Sao Paulo
<b>Middle East &amp; Africa (21 cities)</b>	Abu Dhabi, Accra, Amman, Beira, Beirut, Cairo, Cape Town, Casablanca, Dakar, Damascus, Dubai, Durban, Kampala, Johannesburg, Lagos, Maputo, Nairobi, Riyadh, Tehran, Tel Aviv, Tunis
<b>North America (14 cities)</b>	Atlanta, Boston, Chicago, Dallas, Houston, Los Angeles, Miami, Montreal, New York, Philadelphia, San Francisco, Toronto, Vancouver, Washington

### 2. Estimation of International Overnight Visitors

City level international overnight arrivals are those who actually stay in the destination city for at least one night. In other words we only count cases where the disembarkation city is also an overnight destination city. This is opposed to cases where the disembarkation city is merely a transit point while the destination city maybe some other city in the same country.

The sources for city level overnight arrivals by foreign visitors are typically the National Statistics Boards of the relevant countries or their Tourism Boards. The indicators for 122 out of the 132 cities were directly sourced from or estimated from official data. The other 10 cities were estimated using the Airflow Model (see below). The estimation procedures are as follows:







### 3. Changes in Estimation Methods or Data Sources from Previous Edition

#### International Overnight Arrivals

<b>Paris</b>	Change in method of counting international overnight arrivals to include camping grounds, recreational vehicle parks and trailer parks, which were previously excluded.
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#### International Overnight Arrival Expenditure

<b>Dubai</b>	<p>International visitor expenditure for Dubai has been estimated by the Dubai Department of Tourism and Commerce Marketing (DTCM) for 2015 (and forecast for 2016). The results are based on the Dubai International Visitor Survey (DIVS) which saw statistically significant sampling introduced for 2015 around visitor expenditure as well as reported hotel room revenues incl. service charges, Municipality and local Tourism fees (Tourism dirham).</p> <p>DIVS is an ongoing survey that covers a sample of approximately 24,000 visitors a year. Face-to-Face interviews are conducted with visitors at Dubai International Airport and other major public spaces in Dubai. Respondents are qualified based on their status as an international visitor, the amount of time they have spent in Dubai and they must be leaving Dubai within 24 hours' time to be eligible for the survey; this is to ensure sufficient representation of their full experiences in the emirate. The sample is selected based on a monthly quota to ensure adequate sample for descriptives on key dimensions. The data collected in DIVS are weighted by country of residence, month of visit and catchment area based on actual visitor arrival statistics for a full calendar year to ensure any impact of seasonality are eliminated. This also ensures that the profile of visitors surveyed resembles the distribution of visitor arrivals in the total population.</p>
<b>US Cities</b>	A new survey source from the US tourism bureau is used to estimate overnight arrival average expenditure.
<b>Japanese Cities</b>	Currently the average expenditure for the Japanese cities are obtained from surveys at the prefecture level. An adjustment was made to these numbers to bring the total expenditure of the Japanese prefectures in line with the national total.
<b>Barcelona</b>	Barcelona's average expenditure now follows the regional average expenditure of Catalonia as opposed to the national average expenditure.

### 4. The Airflow Model

Every month the OAG collects the airline flight schedules for the next 12 months on a global basis. Using only non-stop flights we extract for each city to city pair the number of

- Weekly flight frequencies
- Passenger capacity

On any airline flight route, the average % of seats filled (called the "load factor") varies. This information is extremely sensitive for competitive reasons and airlines will only release this data with a one year lag. Nevertheless, by using the historical load factor on most city to city flight routes, we can estimate a proxy for the current and forecasted load factor. We used a weighted average of the historical load factors with heavier emphasis on the most recent years which ranges from 30% to 100%, but airlines will try to maintain a load factor of between 70 to 80% by changing



the number of weekly flights or by changing the aircraft type to increase or decrease passenger capacity. As such, for determining the years for which we do not have load factor numbers we apply an increasing improvement of 5% per year on the historical average, starting at 70% and improving to 85% over time.

Using the data above a first estimate of the number of passengers departing from one city to another can be made using: Estimated Travelers = Load Factor \* Passenger Capacity

Now, on any flight there will also be passengers who are returning home after having visited the departure city. For example, in the case of a Caracas to Miami flight there will be US passengers returning back to Miami (after having visited Caracas). We want to net out those passengers. As airlines do not reveal the residency of their passengers there is no way to know at a city to city level what portion of passengers on each flight is returning home. We need to go to the country-country level for this and for that we use UNWTO (United Nations World Tourism Organization) data. They collect the number of annual residents traveling between country pairs and we use these numbers to create a ratio of:

Departure Country A to Arrival Country B Ratio =  
 Annual Number of Residents from Country A going to Country B /  
 {Annual Number of Residents from Country A going to Country B + Annual Number of Residents from Country B going to Country A}

For example, in the case of the Caracas — Miami route, in 2009 there were 340,403 Venezuelans in total traveling to the US, and 43,752 US residents in total traveling to Venezuela via the Miami – Caracas route, implying a ratio of 88.6%, which is the estimated ratio of Venezuelans on any given flight from Venezuela to the US. We use this ratio to net out returning US residents and to obtain the number of Venezuelans traveling from Caracas to Miami as follows:

Estimated Venezuelan Resident Travelers from Caracas to Miami =  
 Estimated Travelers \* Ratio of Venezuelan Resident Travelers to Total Travelers {US & Venezuela}

Where UNWTO data was not available for a country pair (data available for 76% of the country pairs), data was sourced at the National level where available (2% of city pairs) or we used the ratio of the IMF Balance of Payments travel debit accounts to construct a secondary proxy ratio. In this release we have focused on key border regions around the world where the UNWTO cross-country visitor data may give less accurate ratios. In all cases, the general idea was to use overnight visitors (where data was available) instead of overall visitors to construct more accurate departure-arrival ratios of air travelers. This has resulted in some shifts to the flow of travel between these areas (and therefore overall expenditure as well). The border regions include the Mexican-US border, EU countries which share a border, the Singapore-Malaysia border, and the Ukraine-Russia-Belarus-Moldova border areas.

In this release, out of the 132 cities, 10 were estimated using the airflow model as we were unable to find a source for official statistics. They are:

Eastern Europe	Asia	Africa
Novosibirsk, Yekaterinburg, Kiev, Minsk, Almaty	Dhaka, Tehran	Dakar, Lagos, Accra



To estimate the number of visitors to each of the destination cities, the following steps are followed:

- (i) As explained previously, on any given flight there are departing residents from the departure country, returning visitors, and a third group of residuals. The residuals group can be a low proportion of the passengers for typically non-hub cities, and very high for hub cities. To estimate the proportion of this group, we use:  $\text{Residuals} = \text{Total Estimated Passengers} - \text{Number of Departing Residents} - \text{Number of Returning Visitors}$
- (ii) Residuals constitute two main groups: (A) non-residents (of either the origin or destination country) who are visiting the destination city from the origin city, and are residents of the origin country, and (B) non-residents (of either the origin or destination country) who will be transiting through the destination city without visiting it. We are interested in (A) but in order to separate the residuals into its two components we use a relative connectivity ratio "RCR" that is based on the International Air Connectivity Index (IACI) scores previously created.

$$\text{RCRo-d} = ( \text{IACIo} / ( \text{IACIo} + \text{IACId} ) )^2$$

Where

RCRo-a : Is the Relative Connectivity Ratio of the Origin City relative to the Destination City

IACIo : Is the International Air Connectivity Index of the Origin City

IACId : Is the International Air Connectivity Index of the Destination City

We then separate out (A) using

$$A = \text{Residual} \times \text{RCR} \text{ \& } B = \text{Residual} - A$$

We then add A {Non-residents (of either the departing or arrival country) who from the departure city are visiting the arrival city} to the number of residents visiting the arrival country {calculated earlier} to obtain the estimated number of travelers who will visit the destination city, which is equal to:

$$\text{Visitors} = \text{Origin Country Residents} + \text{Non-Residents from other Countries}$$

## 5. Overnight Foreign Visitor Arrivals Measurement Unit Type

In most cases the estimated total number of international overnight visitors at the city level was directly sourced from official statistics (68 cities used this method). This is our preferred method of measurement type for overnight foreign visitor arrivals. Where the total number was unavailable we used the total number of international overnight arrivals at the paid accommodations level which excludes arrivals staying at unpaid accommodations, for example staying with friends and relatives (45 cities used this method). Where the total number of international overnight visitors or arrivals at paid accommodations at the city level was unavailable we used overnight arrivals by air (11 cities used this method). Finally where all three measurement types were unavailable, we used the Mastercard Airflow model to estimate international overnight visitors (10 cities used this method).

Some notable exclusions to the measurement of international overnight visitors to certain cities include:

<b>U.S. Cities</b>	All cities exclude Mexican arrivals by land and sea. All U.S. cities other than New York and Los Angeles exclude Canadian arrivals by land and sea.
<b>Singapore</b>	Excludes arrivals of Malaysians by land.
<b>Hong Kong</b>	Excludes China mainland and Macao arrivals.
<b>China Cities</b>	Excludes Hong Kong and Macao arrivals.



## 6. Estimates of Visitors' Cross-Border Expenditure

In most cases the estimated visitor spend at the city level was directly sourced from official statistics, or estimated using data from national and international visitor surveys (71 cities). Where survey level data at the city level was unavailable but available at the national level, we used the latter in terms of the national average expenditure per overnight tourist, which we multiplied with city level overnight visitors to obtain total expenditure (30 cities). Where survey data was not available at either the city or country level, we calculated and used the average expenditure in destination countries using IMF Balance of Payments Travel Credit data (adjusted down to include only overnight visitors as the Balance of Payments data includes both excursionist and overnight visitors) and the total number of overnight visitors to the country (31 cities).

## 7. Additional Detail (Purpose of Visit, Expenditure Breakdown by Category and Peak Months for Visiting)

In this edition of the Global Destinations report we have provided additional details for the top 20 global destinations by overnight arrivals and also for the top 10 fastest-growing regional destinations with more than one million overnight visitors.

1. Purpose of Visit Details, Expenditure Breakdown by Category – Where possible we used the latest percentages at the city or state/region level. In cases where this was not available we defaulted to national level percentages. For expenditure breakdown by category, we use the average of seven Latin American cities for Lima, San Jose and Buenos Aires as national percentages are not available. Abu Dhabi uses Dubai as a proxy for both purpose of visit and expenditure breakdown by category. No data was available for expenditure breakdown by category for Beirut and Tehran. Purpose of Visit for Tehran was estimated with the kind assistance of online survey data from Donyaye Safar (an Iranian tourism news website).
2. Peak Months for Visiting – Where possible this was estimated using monthly arrivals to the destinations between 2009 and 2015. Where monthly data was not available we used the monthly variation in air passenger capacity from 2009 to 2015 to determine the peak months. Cities using this method included Kuala Lumpur, Seoul, Taipei, Hanoi, Bogota, Houston, Miami, Los Angeles, San Francisco, New York, Boston, Atlanta, Riyadh, Tehran, Beirut, Cairo, Budapest and Amsterdam.

## 8. Data Sources

Indicators	Source
Dynamic One Year Forward Flight Schedules	OAG
Traffic by Flight Stage & Load Factor	IATA
Country and City Based Tourism Statistics	UNWTO & National Tourism Boards
Dubai's International Overnight Visitors (2009-2016) and expenditure (2015-2016)	Dubai DTCM
Tehran Purpose of Visit estimates	Donyaye Safar
Trade in Services	UN
WEO Data Base	IMF
Global Data Base	CEIC
World Tourism Indicators	WTTC



## 9. Glossary

**International Visitor:** Person who visits his or her destination and stays at least one night and is not a resident of the destination country. Once inside the destination country, that visitor may visit more than one destination city staying at least one night in each. In such cases this visitor is counted in each of the destination cities he or she visits.

**Visitor Spend:** The estimated total amount that visitors spend in the destination city. It excludes air ticket expenditure required to get the visitor to the destination city.

**Origin Country:** The country where international overnight visitors reside.

**Destination City:** The city where non-resident international visitors stay at least one night.

**Feeder City/Country:** Feeder cities both generate international visitors from their pool of residents and also act as a funnel for residents of other cities /countries going to a specific destination. For example, visitors who arrive in London from Frankfurt airport may be either residents of Frankfurt, residents from other parts of Germany who may have domestically flown or driven to Frankfurt to take their flight to London and residents of countries other than Germany who are on their way to London and have either visited Frankfurt before going to London or who are simply transiting through Frankfurt on their way to London. The point is that the feeder city is the most recent place from which travelers embarked before arriving at their destination.

## Appendix B. Summary Results of the Top 100 Destination Cities

Ranking	Destination	Int'l Overnight Visitors	Int'l Overnight Visitor Spend	Ranking	Destination	Int'l Overnight Visitors	Int'l Overnight Visitor Spend
1	Bangkok	21.47	\$14.84	51	Montreal	2.24	\$1.08
2	London	19.88	\$19.76	52	Hanoi	2.20	\$1.28
3	Paris	18.03	\$12.88	53	Washington	2.18	\$2.54
4	Dubai	15.27	\$31.30	54	Shenzhen	2.12	\$0.83
5	New York	12.75	\$18.52	55	Chicago	2.08	\$2.95
6	Singapore	12.11	\$12.54	56	Stockholm	2.08	\$1.68
7	Kuala Lumpur	12.02	\$11.34	57	Buenos Aires	2.02	\$1.69
8	Istanbul	11.95	\$7.54	58	Duesseldorf	1.95	\$1.98
9	Tokyo	11.70	\$13.48	59	Moscow	1.83	\$0.94
10	Seoul	10.20	\$12.30	60	Boston	1.74	\$2.18
11	Hong Kong	8.37	\$6.84	61	Chengdu	1.74	\$0.60
12	Barcelona	8.20	\$9.28	62	Kolkata	1.72	\$1.27
13	Amsterdam	8.00	\$4.20	63	Edinburgh	1.66	\$1.13
14	Milan	7.65	\$4.56	64	San Jose	1.63	\$0.86
15	Taipei	7.35	\$9.60	65	Copenhagen	1.63	\$0.91
16	Rome	7.12	\$4.47	66	Jakarta	1.55	\$1.19
17	Osaka	7.02	\$3.39	67	Cairo	1.55	\$1.08
18	Vienna	6.69	\$4.54	68	Tehran	1.52	\$0.31
19	Shanghai	6.12	\$5.00	69	Houston	1.50	\$2.48
20	Prague	5.81	\$2.70	70	Hamburg	1.45	\$1.47
21	Los Angeles	5.60	\$8.10	71	Rio de Janeiro	1.37	\$0.97
22	Madrid	5.26	\$8.02	72	Warsaw	1.37	\$0.51



Ranking	Destination	Int'l Overnight Visitors	Int'l Overnight Visitor Spend	Ranking	Destination	Int'l Overnight Visitors	Int'l Overnight Visitor Spend
23	Munich	5.25	\$5.32	73	Cape Town	1.37	\$1.00
24	Miami	5.24	\$8.15	74	Manila	1.32	\$0.98
25	Dublin	4.97	\$1.87	75	Bogota	1.26	\$1.35
26	Berlin	4.94	\$5.00	76	Xi'an	1.21	\$0.63
27	Mumbai	4.86	\$3.60	77	Beirut	1.16	\$1.12
28	Riyadh	4.59	\$1.69	78	Geneva	1.15	\$1.14
29	Toronto	4.52	\$2.16	79	Colombo	1.13	\$0.95
30	Chennai	4.37	\$3.24	80	Xiamen	1.09	\$0.93
31	Beijing	4.05	\$4.08	81	Bucharest	1.05	\$0.31
32	Lima	4.03	\$1.44	82	Casablanca	1.05	\$0.62
33	San Francisco	3.93	\$5.93	83	Atlanta	1.02	\$1.47
34	Vancouver	3.90	\$2.12	84	Sofia	1.01	\$0.44
35	Sydney	3.75	\$6.40	85	St Petersburg	0.99	\$0.51
36	Guangzhou	3.70	\$1.66	86	Tel Aviv	0.99	\$1.31
37	Lisbon	3.63	\$1.43	87	Dalian	0.94	\$0.55
38	Frankfurt	3.62	\$3.67	88	Montevideo	0.93	\$0.55
39	Johannesburg	3.60	\$1.73	89	Amman	0.93	\$0.94
40	Budapest	3.36	\$0.95	90	Hangzhou	0.90	\$0.43
41	Abu Dhabi	3.14	\$2.65	91	Pune	0.90	\$0.66
42	Ho Chi Minh City	3.05	\$3.12	92	Durban	0.83	\$0.29
43	Mexico City	2.98	\$2.27	93	Dallas/Fort Worth	0.78	\$1.13
44	Punta Cana	2.73	\$2.95	94	Accra	0.76	\$0.53
45	Brussels	2.71	\$1.92	95	Quito	0.75	\$0.42
46	Athens	2.68	\$1.62	96	Tianjin	0.75	\$2.24
47	Melbourne	2.65	\$4.94	97	Bengaluru	0.74	\$0.55
48	Delhi	2.58	\$1.91	98	Qingdao	0.73	\$0.53
49	Sao Paulo	2.30	\$1.50	99	Philadelphia	0.72	\$1.05
50	Zurich	2.24	\$2.23	100	Lagos	0.71	\$0.16



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