

# Global Destination Cities Index 2019



mastercard



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# Global Destination Cities Index

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

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

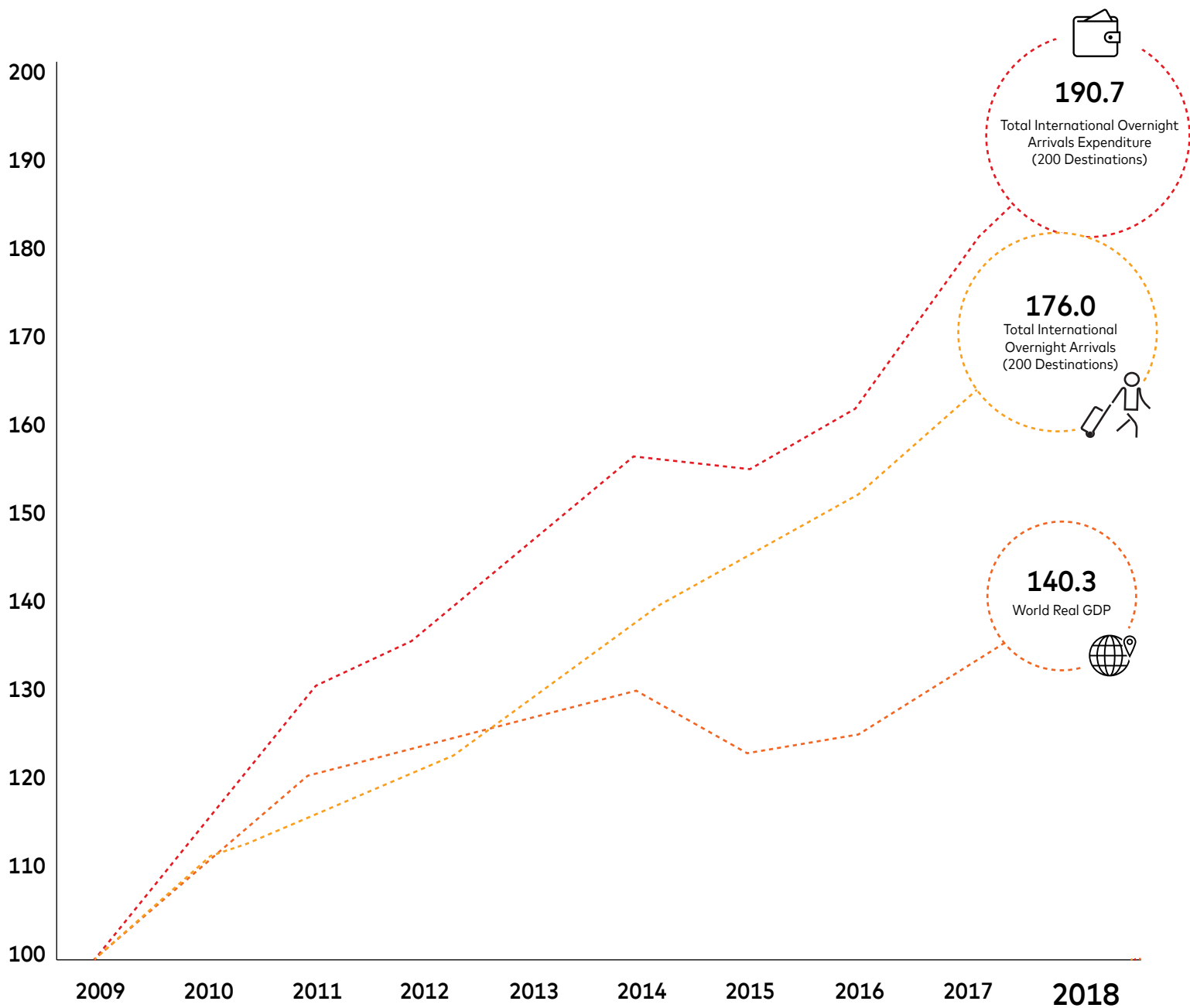
This year, Mastercard's Global Destination Cities Index reveals Bangkok as the No. 1 city for the fourth consecutive year while Paris overtakes London for the No. 2 spot. With a decade of insights, we can identify trends of how people are traveling internationally while showcasing emerging markets and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

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

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

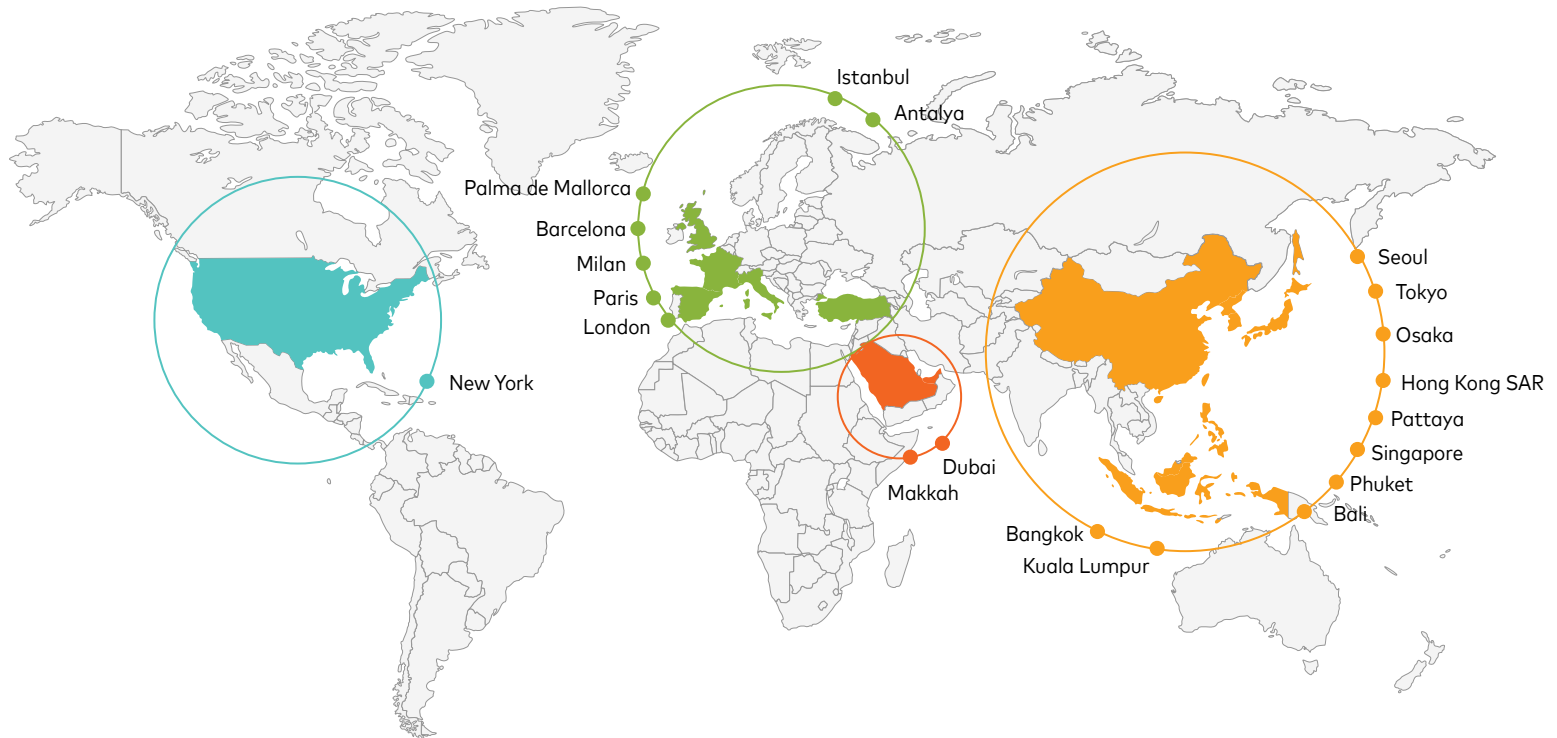
Through the insights from the Global Destination Cities Index and Mastercard's work with partners across the world, we continue our commitment to support economic, sustainable tourism and inclusive travel.

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



\* World GDP Source: IMF WEO, calculated at market exchange rates

# Bangkok Continues to Lead Among Top Destination Cities



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

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

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

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

Historical data in each times 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.

\* Growth rate forecast

# Top 20 Origin Markets: Top 3 Destinations

Rank	ORIGIN MARKETS	% SHARE CONTRIBUTION TO 200 GLOBAL DESTINATIONS BY				TOP 3 GLOBAL DESTINATIONS					
		OVN INTERNATIONAL ARRIVALS		EXPENDITURE		DESTINATION					
		2009	2018	2009	2018	Cancun		Toronto		London	
1	United States	10.40%	10.00%	9.60%	9.30%	3,387	5.3%	2,928	4.6%	2,631	4.1%
2	Mainland China	2.50%	8.90%	2.60%	9.40%	Bangkok		Seoul		Tokyo	
						8,505	15.0%	3,710	6.5%	3,540	6.2%
3	Germany	8.40%	6.50%	9.00%	6.40%	Palma de Mallorca		Bolzano		Tiroler Unterland	
						3,313	8.0%	3,287	7.9%	2,636	6.3%
4	United Kingdom	7.30%	5.90%	8.50%	6.50%	Palma de Mallorca		Paris		Dublin	
						2,431	6.5%	1,831	4.9%	1,792	4.8%
5	France	4.90%	3.70%	4.20%	3.10%	London		Marrakech		Barcelona	
						1,835	7.8%	1,145	4.9%	1,053	4.5%
6	South Korea	1.90%	3.50%	2.00%	3.30%	Osaka		Hokkaido		Tokyo	
						2,289	10.4%	1,771	8.0%	1,459	6.6%
7	Japan	4.30%	3.10%	4.50%	3.40%	Taipei		Seoul		Bangkok	
						2,307	11.8%	2,111	10.0%	1,798	9.2%
8	Canada	3.60%	2.90%	3.60%	2.80%	Washington		Las Vegas		New York	
						1,460	7.9%	1,440	7.8%	1,004	5.4%
9	Russia	2.00%	2.50%	1.80%	2.10%	Antalya		Pattaya		Phuket	
						4,766	29.4%	1,123	6.9%	972	6.0%
10	Australia	2.40%	2.30%	2.80%	2.60%	Bali		Singapore		New York	
						1,591	10.9	883	6.0%	714	4.9%



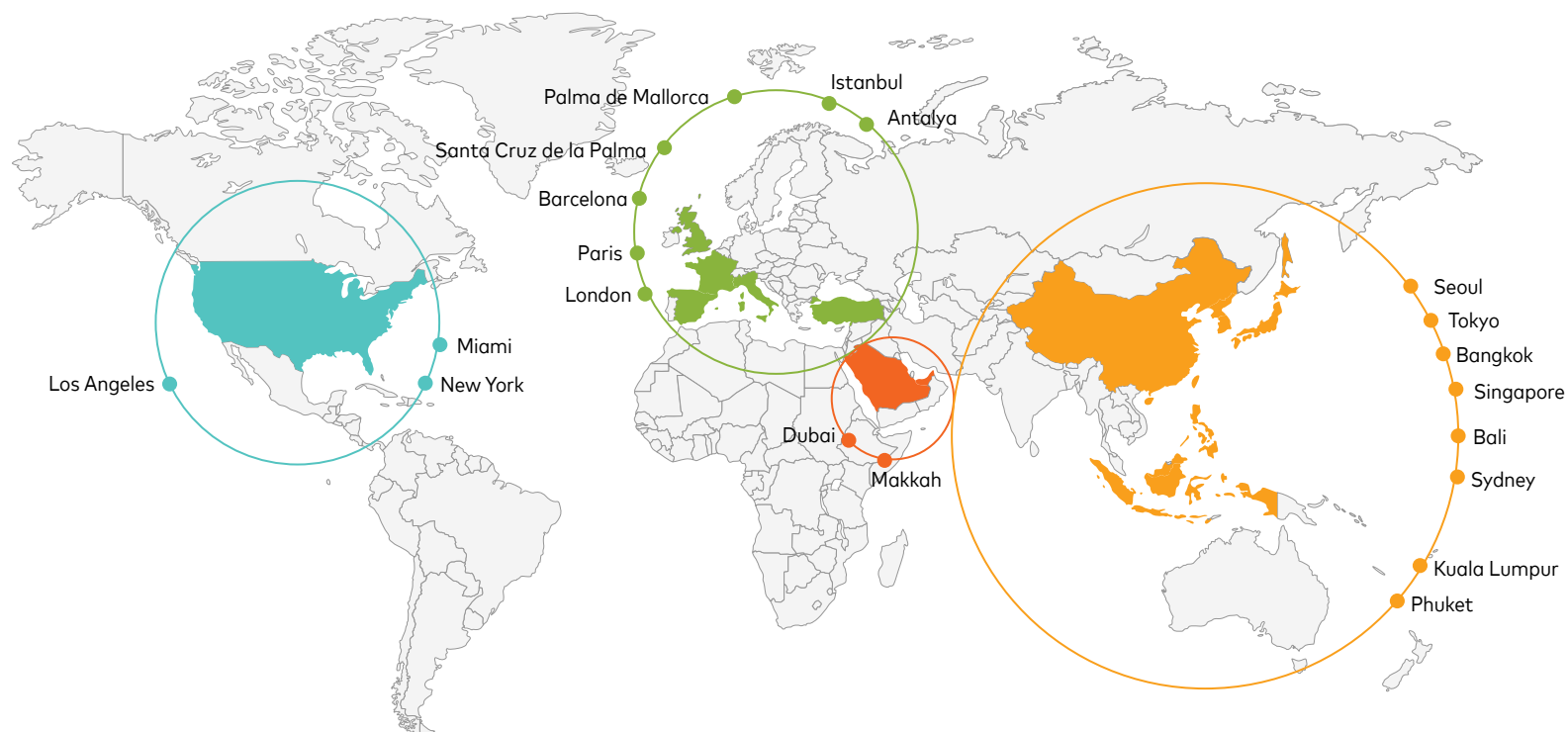
Rank	ORIGIN MARKETS	% SHARE CONTRIBUTION TO 200 GLOBAL DESTINATIONS BY				TOP 3 GLOBAL DESTINATIONS					
		OVN INTERNATIONAL ARRIVALS		EXPENDITURE		DESTINATION					
		2009	2018	2009	2018	Dubai		Singapore		Makkah	
11	India	1.70%	2.00%	1.90%	2.80%	2,032	16.0%	1,250	9.9%	982	7.7%
12	Italy	2.60%	1.90%	2.70%	1.70%	1,266	10.3%	990	8.0%	616	5.0%
13	Spain	2.40%	1.80%	2.10%	1.40%	1,458	12.7%	1,255	11.0%	575	5.0%
14	Taiwan, China	1.00%	1.50%	0.90%	1.50%	1,387	14.2%	1,351	13.8%	1,342	13.7%
15	Netherlands	1.80%	1.40%	1.90%	1.30%	695	7.6%	604	6.6%	416	4.6%
16	Argentina	1.20%	1.40%	1.00%	1.10%	812	8.9%	657	7.20%	624	6.9%
17	Brazil	1.00%	1.30%	1.30%	1.40%	906	11.2%	879	10.9%	781	9.70%
18	Saudi Arabia	0.90%	1.20%	0.80%	1.50%	3,406	43.9%	1,568	20.2%	627	8.1%
19	Indonesia	1.40%	1.20%	1.30%	1.60%	2,095	27.3%	1,579	20.6%	886	11.6%
20	Malaysia	0.80%	1.10%	0.80%	1.30%	787	11.4%	695	10.1%	494	7.2%

● ARRIVALS (MM)

● ORIGIN % SHARE\*

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

# Dubai Leads in Overnight International Visitor Spending Globally



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

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



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

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

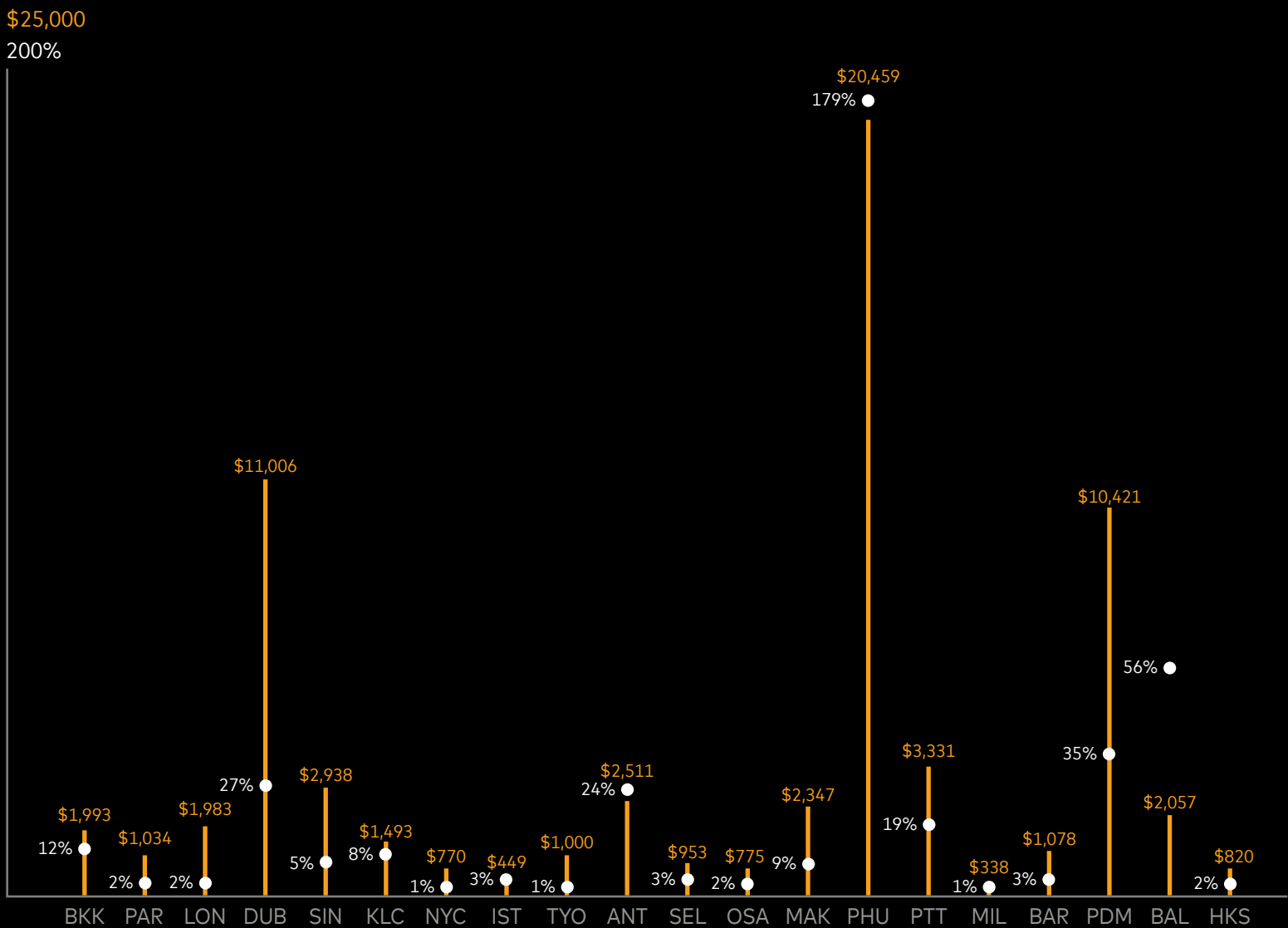
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\* Growth rate forecast

# Impact of Tourism to the Destination and Tourism Spend per Resident

— Visitor Expenditure per resident (US\$)

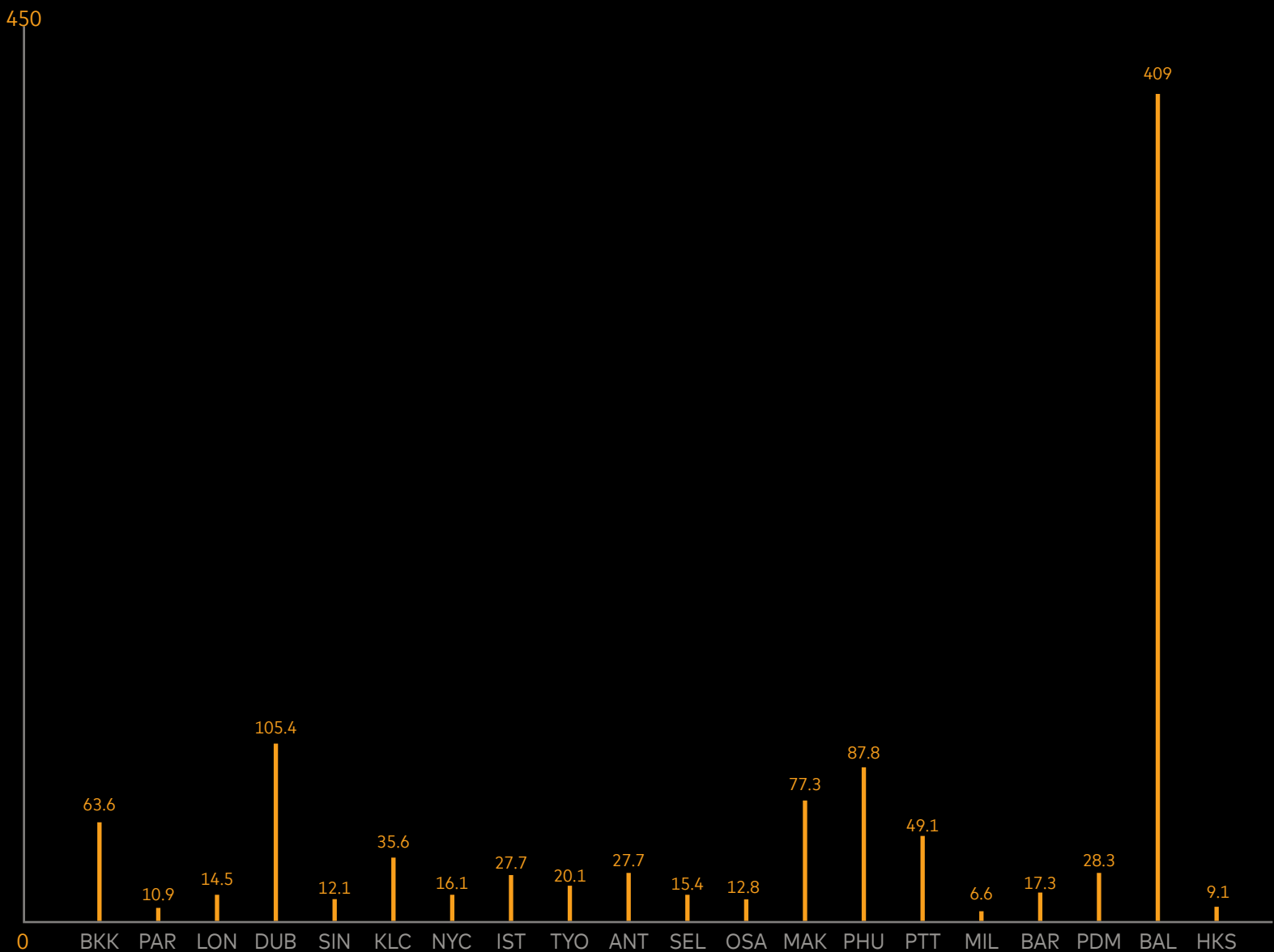
● Ratio of International Overnight Visitors Expenditure to GDP



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

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

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



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

# Additional Insights Into Top 20 Destination Cities



Avg Length Of Visit



Avg Daily Spend (US\$)



% of National Level  
Overnight Arrivals in 2018\*


## DESTINATION CITY

## 2018 TOP 3 ORIGIN MARKETS OF INTERNATIONAL OVERNIGHT ARRIVALS

<b>Bangkok</b> Thailand	<b>Mainland China</b> % Share of Arrivals	<b>Japan</b> % Share of Arrivals	<b>South Korea</b> % Share of Arrivals
4.8	\$184	2009  7.3%	2009  1.3%
2018	36.7%	2018  37.3%	2018  4.4%
<b>Paris</b> France	<b>United States</b> % Share of Arrivals	<b>United Kingdom</b> % Share of Arrivals	<b>Spain</b> % Share of Arrivals
2.5	\$296	2009  9.4%	2009  6.7%
2018	36.5%	2018  10.3%	2018  7.6%
<b>London</b> United Kingdom	<b>United States</b> % Share of Arrivals	<b>France</b> % Share of Arrivals	<b>Germany</b> % Share of Arrivals
5.8	\$148	2009  12.9%	2009  7.5%
2018	50.4%	2018  13.8%	2018  7.6%
<b>Dubai</b> UAE	<b>India</b> % Share of Arrivals	<b>Saudi Arabia</b> % Share of Arrivals	<b>United Kingdom</b> % Share of Arrivals
3.5	\$553	2009  8.7%	2009  11.7%
2018	79.2%	2018  12.8%	2018  9.8%
<b>Singapore</b> Singapore	<b>Mainland China</b> % Share of Arrivals	<b>Indonesia</b> % Share of Arrivals	<b>India</b> % Share of Arrivals
4.2	\$272	2009  9.5%	2009  8.3%
2018	100%	2018  18.4%	2018  14.3%




























































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\* "% of National Level Ovn Arrivals" refers to the destination arrivals as a % of national arrivals (e.g. arrivals in Bangkok as % of arrivals in Thailand)

 Avg Length Of Visit


 Avg Daily Spend (US\$)

 % of National Level  
2018 Overnight Arrivals in 2018\*

DESTINATION CITY		2018 TOP 3 ORIGIN MARKETS OF INTERNATIONAL OVERNIGHT ARRIVALS			
<b>Kuala Lumpur</b> Malaysia		 <b>Mainland China</b> % Share of Arrivals	 <b>Thailand</b> % Share of Arrivals	 <b>Indonesia</b> % Share of Arrivals	
 5.7	 \$142	2009  2.3%	2009  3.9%	2009  29.4%	
 2018	46.0%	2018  20.6%	2018  11.7%	2018  11.5%	
<b>New York</b> United States		 <b>United Kingdom</b> % Share of Arrivals	 <b>Mainland China</b> % Share of Arrivals	 <b>Canada</b> % Share of Arrivals	
 7.9	 \$152	2009  12.3%	2009  1.7%	2009  10.0%	
 2018	19.6%	2018  9.3%	2018  8.1%	2018  7.4%	
<b>Istanbul</b> Turkey		 <b>Germany</b> % Share of Arrivals	 <b>Iran</b> % Share of Arrivals	 <b>Saudi Arabia</b> % Share of Arrivals	
 5.8	 \$106	2009  14.8%	2009  3.0%	2009  0.7%	
 2018	44.6%	2018  8.0%	2018  7.0%	2018  4.7%	
<b>Tokyo</b> Japan		 <b>Mainland China</b> % Share of Arrivals	 <b>South Korea</b> % Share of Arrivals	<b>Taiwan, China</b> % Share of Arrivals	
 5.4	 \$196	2009  11.1%	2009  14.2%	2009  14.4%	
 2018	19.3%	2018  27.4%	2018  11.3%	2018  10.7%	
<b>Antalya</b> Turkey		 <b>Russia</b> % Share of Arrivals	 <b>Germany</b> % Share of Arrivals	 <b>Ukraine</b> % Share of Arrivals	
 14.0	 \$44	2009  25.6%	2009  27.7%	2009  4.2%	
 2018	41.3%	2018  38.4%	2018  18.6%	2018  5.7%	































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 Avg Length Of Visit

 Avg Daily Spend (US\$)


 % of National Level  
Overnight Arrivals in 2018\*

DESTINATION CITY		2018 TOP 3 ORIGIN MARKETS OF INTERNATIONAL OVERNIGHT ARRIVALS			
<b>Seoul</b> South Korea		 <b>Mainland China</b> % Share of Arrivals	 <b>Japan</b> % Share of Arrivals	 <b>Taiwan, China</b> % Share of Arrivals	
 5.3	 \$155	2009 ● 20.2%	2009 ● 36.4%	2009 ● 5.8%	
 2018	49.4%	2018 ● 33.0%	2018 ● 18.8%	2018 ● 7.4%	
<b>Osaka</b> Japan		 <b>Mainland China</b> % Share of Arrivals	 <b>South Korea</b> % Share of Arrivals	 <b>Taiwan, China</b> % Share of Arrivals	
 3.0	 \$223	2009 ● 14.7%	2009 ● 32.8%	2009 ● 22.6%	
 2018	15.1%	2018 ● 33.3%	2018 ● 22.6%	2018 ● 10.9%	
<b>Makkah</b> Saudi Arabia		 <b>Pakistan</b> % Share of Arrivals	 <b>Kuwait</b> % Share of Arrivals	 <b>India</b> % Share of Arrivals	
 14.9	 \$135	2009 ● 3.1%	2009 ● 22.7%	2009 ● 2.3%	
 2018	65.4%	2018 ● 15.8%	2018 ● 13.0%	2018 ● 9.8%	
<b>Phuket</b> Thailand		 <b>Mainland China</b> % Share of Arrivals	 <b>Russia</b> % Share of Arrivals	 <b>Germany</b> % Share of Arrivals	
 4.9	 \$247	2009 ● 3.2%	2009 ● 5.0%	2009 ● 5.8%	
 2018	15.9%	2018 ● 31.3%	2018 ● 9.8%	2018 ● 6.7%	
<b>Pattaya</b> Thailand		 <b>Mainland China</b> % Share of Arrivals	 <b>Russia</b> % Share of Arrivals	 <b>South Korea</b> % Share of Arrivals	
 4.1	 \$164	2009 ● 13.4%	2009 ● 20.7%	2009 ● 4.1%	
 2018	15.2%	2018 ● 28.8%	2018 ● 11.9%	2018 ● 7.0%	

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 Avg Length Of Visit

 Avg Daily Spend (US\$)

 % of National Level  
Overnight Arrivals in 2018\*

DESTINATION CITY		2018 TOP 3 ORIGIN MARKETS OF INTERNATIONAL OVERNIGHT ARRIVALS											
Milan Italy		 Germany % Share of Arrivals				 United States % Share of Arrivals				 France % Share of Arrivals			
 2.6	 \$155	2009		16.8%	2009		5.6%	2009		7.2%			
 2018	14.4%	2018		14.9%	2018		6.8%	2018		6.7%			
Barcelona Spain		 France % Share of Arrivals				 United Kingdom % Share of Arrivals				 United States % Share of Arrivals			
 2.9	 \$301	2009		12.3%	2009		12.9%	2009		9.0%			
 2018	16.8%	2018		11.6%	2018		10.9%	2018		10.1%			
Palma de Mallorca Spain		 Germany % Share of Arrivals				 United Kingdom % Share of Arrivals				 Italy % Share of Arrivals			
 6.1	 \$233	2009		43.0%	2009		30.3%	2009		4.8%			
 2018	16.6%	2018		37.0%	2018		27.1%	2018		4.3%			
Bali Indonesia		 Mainland China % Share of Arrivals				 Australia % Share of Arrivals				 India % Share of Arrivals			
 8.6	 \$125	2009		8.9%	2009		20.0%	2009		1.4%			
 2018	50.6%	2018		22.4%	2018		19.3%	2018		5.8%			
Hong Kong SAR China		 South Korea % Share of Arrivals				 United States % Share of Arrivals				 Japan % Share of Arrivals			
 3.4	 \$218	2009		6.3%	2009		11.8%	2009		12.2%			
 2018	100%	2018		13.6%	2018		11.3%	2018		10.4%			

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# Top 20 Global Destinations

## Revenue per Tourism Employee and Expenditure per Tourist Breakdown

The number of jobs supported by 1000 additional overnight tourists is a function how much tourism revenue is required to support one job and the average spend per tourist (i.e. the more each tourist spends the more jobs are supported). For example, 1000 additional tourists supports 409 jobs in Bali (which has a very low revenue per employee in that only US\$2,620 of tourism revenue is required to support 1 job, but has a relatively high expenditure per tourist at US\$1,072). Similarly only 12.1 jobs are supported by 1000 tourists in Singapore because of its very high revenue per employee (US\$93,062) although its expenditure per tourist is similar to Bali at US\$1,124 per tourist). Higher revenue per employee tend to be among destinations in developed markets and could be a function of higher labor productivity. Similarly, lower revenues per employees tend to be among emerging market destinations and could be a function of lower labor costs



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