Travel & Tourism accounts for 10.4% of GDP and one in every ten jobs worldwide when direct, indirect and induced impacts are accounted for. As the world urbanises, the sector is becoming increasingly important in cities. Over half (55%) of the world’s population currently lives in urban areas and this is due to increase to 68% over the next 30 years according to the United Nations. As more people come to live, do business and discover these urban centres, we will continue to see increased growth, opportunity and innovation.

International visitor spending is more important to cities than it usually is to countries as a whole. International visitors accounted for 45% of tourism spending across the 73 cities in our study, compared to just 29% for economies worldwide. These important revenues will in some cases pay for infrastructure projects, the provision of public workers and services that improve the quality of life for residents – such as clean roads and beaches, festivals and outdoor art.

Achieving sustainable growth for Travel & Tourism in cities requires a focus that extends far beyond the sector itself and one that is integrated into the broader urban agenda. Success requires the engagement of a variety of stakeholders – ranging from city planning authorities, developers, investors and legislators to community groups – from the very start of the planning process. Successful policies include those that first understand the city’s DNA, assess the current state of the city’s tourism ecosystem, set sustainable end goals and develop plans to achieve the goals and finally, incorporate systems that implement, monitor, evaluate and communicate the impact.

Gloria Guevara Manzo
President & CEO
Hong Kong recorded the highest international visitor spending in 2018 (US$44 bn), followed by Macau (US$36 bn) and Dubai (US$28 bn).

Cities with the strongest reliance on international visitor spending in relative terms include Macau, Dublin and Dubrovnik, where more than 95% of tourism spending comes from international visitors.

International spend per visitor is higher than domestic spend across 48 cities in our study. For instance, in Riyadh and Toronto international spend per visitor is nine times higher than domestic spend per visitor, while in Auckland it is over four times higher.

Revenues from international visitors will in many cases pay for city infrastructure projects, the provision of public workers and services that improve the quality of life for residents.

- For instance, in London, international visitors spent US$17.5 billion in 2018. This is nearly twice as much as the operating costs of Transport for London and nearly four times higher than total expenditure associated with policing and crime in the city.

- In New York City, international visitor spending of US$21.0 billion is 3.8 times higher than the costs of New York City Police Department and nearly twice as much as the budget for the city’s schools.

### Top 10 largest cities

<table>
<thead>
<tr>
<th>City</th>
<th>International visitor spending 2018 US$ billion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hong Kong</td>
<td>43.9</td>
</tr>
<tr>
<td>Macau</td>
<td>36.1</td>
</tr>
<tr>
<td>Dubai</td>
<td>27.9</td>
</tr>
<tr>
<td>Bangkok</td>
<td>23.4</td>
</tr>
<tr>
<td>Tokyo</td>
<td>21.7</td>
</tr>
<tr>
<td>New York</td>
<td>21.0</td>
</tr>
<tr>
<td>Singapore</td>
<td>19.9</td>
</tr>
<tr>
<td>Shenzhen</td>
<td>19.5</td>
</tr>
<tr>
<td>London</td>
<td>17.5</td>
</tr>
<tr>
<td>Miami</td>
<td>17.0</td>
</tr>
</tbody>
</table>

### Reliance on international tourism spend, 2018

- **Macau**: 97.3%
- **Dublin**: 96.9%
- **Dubrovnik**: 95.7%
- **Venice**: 92.5%
- **Budapest**: 89.1%
- **Dubai**: 89.0%
- **Istanbul**: 87.2%
- **Riyadh**: 85.5%
- **Prague**: 85.5%
- **London**: 84.8%
- **Teheran**: 11.7%
- **Riyadh**: 9.1%
- **Toronto**: 8.6%
- **Dublin**: 6.8%
- **Chengdu**: 6.3%
- **Vancouver**: 5.2%
- **Auckland**: 4.3%
- **Istanbul**: 3.5%
- **Mumbai**: 3.5%
- **Delhi**: 3.5%

### Top 10 cities - International spend per tourist vs. Domestic spend per tourist

<table>
<thead>
<tr>
<th>City</th>
<th>International spend per visitor vs. Domestic spend per visitor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tokyo</td>
<td>51% vs. 49%</td>
</tr>
<tr>
<td>Tokyo</td>
<td>49% vs. 51%</td>
</tr>
<tr>
<td>San Francisco</td>
<td>53% vs. 47%</td>
</tr>
<tr>
<td>Mecca</td>
<td>48% vs. 52%</td>
</tr>
<tr>
<td>Osaka</td>
<td>40% vs. 60%</td>
</tr>
<tr>
<td>Miami</td>
<td>38% vs. 62%</td>
</tr>
<tr>
<td>New York</td>
<td>36% vs. 64%</td>
</tr>
<tr>
<td>Toronto</td>
<td>35% vs. 65%</td>
</tr>
<tr>
<td>Osaka</td>
<td>34% vs. 66%</td>
</tr>
<tr>
<td>New York</td>
<td>34% vs. 66%</td>
</tr>
</tbody>
</table>

*The ratios in the chart above were calculated by dividing international spend per overnight visitor over domestic spend per overnight visitor.
DOMESTIC VISITOR SPENDING

- Shanghai recorded the highest domestic visitor spending in 2018 (US$ 79 bn), followed by Beijing (US$ 75 bn) and Orlando (US$ 41 bn).
- Five of the top ten largest cities for domestic visitor spending in 2018 were Chinese.
- Cities with the strongest reliance on domestic spending in relative terms include Brasilia (96%), Chongqing (95%), Rio de Janeiro (93%), Guangzhou (90%), Chicago (88%) and Mexico City (87%).
- Cities which are over-reliant on domestic or international demand are more exposed to economic and geo-political risks.

<table>
<thead>
<tr>
<th>Top 10 largest cities (Domestic visitor spending 2018 US$ billion)</th>
<th>Top 10 largest cities (Domestic visitor spending 2018 % of total spending)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Shanghai 79.1</td>
<td>1. Brasilia 96.5%</td>
</tr>
<tr>
<td>2. Beijing 75.4</td>
<td>2. Chongqing 94.7%</td>
</tr>
<tr>
<td>3. Orlando 40.7</td>
<td>3. Rio de Janeiro 92.7%</td>
</tr>
<tr>
<td>4. Guangzhou 37.0</td>
<td>4. Guangzhou 90.0%</td>
</tr>
<tr>
<td>5. Shenzhen 19.1</td>
<td>5. Chicago 88.3%</td>
</tr>
<tr>
<td>6. Las Vegas 29.3</td>
<td>6. Mexico City 87.2%</td>
</tr>
<tr>
<td>7. Chongqing 29.1</td>
<td>7. Beijing 87.2%</td>
</tr>
<tr>
<td>8. New York 21.3</td>
<td>8. Buenos Aires 87.0%</td>
</tr>
<tr>
<td>9. Tokyo 22.3</td>
<td>9. Shanghai 86.9%</td>
</tr>
<tr>
<td>10. Mexico City 16.0</td>
<td>10. Orlando 86.3%</td>
</tr>
</tbody>
</table>

TRAVEL & TOURISM GDP

- Shanghai, Paris and Beijing have the largest Travel & Tourism economies of the cities in the study. These are followed by Macau, Orlando and New York.
- Macau and Cancún had the largest share of GDP from Travel & Tourism in 2018, with the sector directly accounting for around half of each city’s economy.
- Budapest, Dublin and Lima provide a higher share of their respective countries’ overall Travel & Tourism GDP than the other 70 cities analysed. Direct Travel & Tourism GDP in Budapest accounts for 81.4% of all direct GDP from the sector in Hungary.
- The two fastest growing cities in 2018 in terms of direct Travel & Tourism GDP were both in Turkey, namely Antalya and Istanbul, which grew by 87.3% and 11.5% respectively.
- This reflects the continued recovery of Turkish Travel & Tourism, driven by safety improvements and the depreciation of its currency, making the country more attractive to foreign visitors.
- The third fastest growing city in 2018 was Moscow, growing by 13.7%, on the back of the 2018 FIFA World Cup. International spending was particularly strong, growing by 20.5% over the year.
- Seven of the 10 fastest growing cities over the past decade, and seven out of the 15 fastest growing cities in 2018, were in the Asia-Pacific region, in terms of direct Travel & Tourism GDP.
- The two fastest growing cities in 2018 in terms of direct Travel & Tourism GDP were both in Turkey, namely Antalya and Istanbul, which grew by 87.3% and 11.5% respectively.
- Infrastructure development and prioritisation of tourism has been a key driver of Travel & Tourism growths.

6/10 of largest Travel & Tourism cities are in Asia-Pacific (Direct T&T GDP)
7/10 of fastest growing cities in 2018 are in Asia-Pacific (Direct T&T GDP)
3/5 of fastest growing cities in the last ten years are in China
Top 15 cities by market size, direct Travel & Tourism GDP by city

<table>
<thead>
<tr>
<th>City</th>
<th>Direct T&amp;T GDP</th>
<th>Share of City GDP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Las Vegas</td>
<td>US$ 19.3 BN</td>
<td>27.4%</td>
</tr>
<tr>
<td>Mexico City</td>
<td>US$ 24.6 BN</td>
<td>8.9%</td>
</tr>
<tr>
<td>Orlando</td>
<td>US$ 26.3 BN</td>
<td>19.8%</td>
</tr>
<tr>
<td>Miami</td>
<td>US$ 15.3 BN</td>
<td>9.2%</td>
</tr>
<tr>
<td>Paris</td>
<td>US$ 35.6 BN</td>
<td>4.1%</td>
</tr>
<tr>
<td>Tokyo</td>
<td>US$ 23.1 BN</td>
<td>2.4%</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>US$ 16.9 BN</td>
<td>4.6%</td>
</tr>
<tr>
<td>Shanghai</td>
<td>US$ 35.9 BN</td>
<td>6.1%</td>
</tr>
<tr>
<td>Bangkok</td>
<td>US$ 25.1 BN</td>
<td>10.6%</td>
</tr>
<tr>
<td>Guangzhou</td>
<td>US$ 20.6 BN</td>
<td>5.6%</td>
</tr>
<tr>
<td>New York</td>
<td>US$ 33.2 BN</td>
<td>6.9%</td>
</tr>
<tr>
<td>Macau</td>
<td>US$ 27.4 BN</td>
<td>50.3%</td>
</tr>
<tr>
<td>Shenzhen</td>
<td>US$ 21.0 BN</td>
<td>8.0%</td>
</tr>
</tbody>
</table>

Top 10 cities - Share of City
(City direct T&T GDP % of total city GDP)

<table>
<thead>
<tr>
<th>City</th>
<th>Share of City GDP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Macau</td>
<td>50.3%</td>
</tr>
<tr>
<td>Cancun</td>
<td>46.8%</td>
</tr>
<tr>
<td>Marrakech</td>
<td>30.6%</td>
</tr>
<tr>
<td>Las Vegas</td>
<td>27.4%</td>
</tr>
<tr>
<td>Orlando</td>
<td>19.8%</td>
</tr>
<tr>
<td>Budapest</td>
<td>17.8%</td>
</tr>
<tr>
<td>Dublin</td>
<td>17.8%</td>
</tr>
<tr>
<td>Antalya</td>
<td>17.8%</td>
</tr>
<tr>
<td>Miami</td>
<td>17.8%</td>
</tr>
<tr>
<td>Kuala Lumpur</td>
<td>17.8%</td>
</tr>
</tbody>
</table>

Top 10 cities - Share of Country
(City direct T&T GDP % of country direct T&T GDP)

<table>
<thead>
<tr>
<th>City</th>
<th>Share of Country GDP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budapest</td>
<td>81.4%</td>
</tr>
<tr>
<td>Barcelona</td>
<td>81.4%</td>
</tr>
<tr>
<td>Moscow</td>
<td>81.4%</td>
</tr>
<tr>
<td>Macau</td>
<td>81.4%</td>
</tr>
<tr>
<td>Prague</td>
<td>81.4%</td>
</tr>
<tr>
<td>Dubai</td>
<td>81.4%</td>
</tr>
<tr>
<td>Zagreb</td>
<td>81.4%</td>
</tr>
<tr>
<td>Prague</td>
<td>81.4%</td>
</tr>
<tr>
<td>Prague</td>
<td>81.4%</td>
</tr>
<tr>
<td>Singapore</td>
<td>81.4%</td>
</tr>
</tbody>
</table>

10 fastest growing cities, direct T&T GDP, 2008-2018 (real 2018 prices)

<table>
<thead>
<tr>
<th>City</th>
<th>Direct T&amp;T GDP Growth, 2008-2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ciudad de Alcalá</td>
<td>8.5%</td>
</tr>
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<td>8.5%</td>
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</tr>
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<td>8.5%</td>
</tr>
</tbody>
</table>

10 fastest growing cities, direct T&T GDP, 2007-2018 (real 2018 prices)

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<tbody>
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<td>Ciudad de Alcalá</td>
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<tr>
<td>Ciudad de Alcalá</td>
<td>8.5%</td>
</tr>
<tr>
<td>Ciudad de Alcalá</td>
<td>8.5%</td>
</tr>
</tbody>
</table>
Beijing leads the rankings for direct Travel & Tourism employment (1.5 million jobs), followed by Shanghai (1.4 million jobs) and Jakarta (1.2 million jobs).

Nine of the ten cities with the highest number of jobs coming from Travel & Tourism directly are in the Asia-Pacific region. Mexico City was the only non-Asian city in the top 10 – it ranked fifth with 905,000 jobs directly supported by the sector.

Las Vegas has the strongest dependence on Travel & Tourism, with the sector directly supporting more than 48.3% of city employment (234,000 jobs). Cancún follows in second place with 40.3% (161,000 jobs) and Macau in third place with 32.3% (125,000 jobs).

Moscow (18.2%), Istanbul (14.3%) and Brasilia (14.2%) led the rankings for direct T&T employment growth in 2018.

Abu Dhabi has witnessed the strongest employment growth over the last ten years, expanding by 8.0% per year. The city tourism policy has encouraged employment in the sector. Meanwhile, Riyadh’s strong employment growth of 5.9% per year during 2008-18 has been supported by strong growth in international spending at 13.8% per year during the same time period.

Fastest growing cities, direct T&T growth, 2008-2018

<table>
<thead>
<tr>
<th>Rank</th>
<th>City</th>
<th>Growth Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Moscow</td>
<td>18.2%</td>
</tr>
<tr>
<td>2</td>
<td>Istanbul</td>
<td>14.3%</td>
</tr>
<tr>
<td>3</td>
<td>Brasilia</td>
<td>14.2%</td>
</tr>
<tr>
<td>4</td>
<td>Antalya</td>
<td>13.7%</td>
</tr>
<tr>
<td>5</td>
<td>Cairo</td>
<td>9.1%</td>
</tr>
<tr>
<td>6</td>
<td>Marrakech</td>
<td>8.9%</td>
</tr>
<tr>
<td>7</td>
<td>Dublin</td>
<td>8.5%</td>
</tr>
<tr>
<td>8</td>
<td>Macau</td>
<td>8.4%</td>
</tr>
<tr>
<td>9</td>
<td>Budapest</td>
<td>7.0%</td>
</tr>
<tr>
<td>10</td>
<td>Tokyo</td>
<td>6.8%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fastest growing cities, direct T&amp;T growth, 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rank</td>
</tr>
<tr>
<td>------</td>
</tr>
<tr>
<td>1</td>
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<tr>
<td>2</td>
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<td>10</td>
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<tr>
<td>City</td>
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<tr>
<td>------------</td>
</tr>
<tr>
<td>Shanghai</td>
</tr>
<tr>
<td>Paris</td>
</tr>
<tr>
<td>Beijing</td>
</tr>
<tr>
<td>Macau</td>
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<tr>
<td>Orlando</td>
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<tr>
<td>New York</td>
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<tr>
<td>Bangkok</td>
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<tr>
<td>Mexico City</td>
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<tr>
<td>Tokyo</td>
</tr>
<tr>
<td>Shanghai</td>
</tr>
<tr>
<td>Las Vegas</td>
</tr>
<tr>
<td>London</td>
</tr>
<tr>
<td>Guangzhou</td>
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<tr>
<td>Hong Kong</td>
</tr>
<tr>
<td>Miami</td>
</tr>
<tr>
<td>Singapore</td>
</tr>
<tr>
<td>Dubai</td>
</tr>
<tr>
<td>Los Angeles</td>
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<tr>
<td>Changping</td>
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<tr>
<td>Istanbul</td>
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<tr>
<td>Munich</td>
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<tr>
<td>Buenos Aires</td>
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<td>Sydney</td>
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<tr>
<td>Rome</td>
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<td>Barcelona</td>
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<td>Chicago</td>
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<tr>
<td>Fort Lauderdale</td>
</tr>
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<td>Kuala Lumpur</td>
</tr>
<tr>
<td>Madrid</td>
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<td>Osaka</td>
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<tr>
<td>Jakarta</td>
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<td>Berlin</td>
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<tr>
<td>Chengdu</td>
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<td>Brussels</td>
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<td>Amsterdam</td>
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<td>Stockholm</td>
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<tr>
<td>San Francisco</td>
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<td>Lima</td>
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<tr>
<td>Delhi</td>
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<tr>
<td>Moscow</td>
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<tr>
<td>Lisbon</td>
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<tr>
<td>Cancun</td>
</tr>
<tr>
<td>Seoul</td>
</tr>
<tr>
<td>Dublin</td>
</tr>
</tbody>
</table>
### City Direct T& T GDP (US$ bn) Direct T& T GDP % of city GDP Direct T& T GDP growth (%) International spend (US$ bn) International spend, % share of total Domestic spend, % share of total Direct T& T employment (000s) Direct T& T % of city employment

<table>
<thead>
<tr>
<th>City</th>
<th>Direct T&amp; T GDP (US$ bn)</th>
<th>Direct T&amp; T GDP % of city GDP</th>
<th>Direct T&amp; T GDP growth (%)</th>
<th>International spend (US$ bn)</th>
<th>International spend, % share of total</th>
<th>Domestic spend, % share of total</th>
<th>Direct T&amp; T employment (000s)</th>
<th>Direct T&amp; T % of city employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Warsaw</td>
<td>4.5</td>
<td>4.6</td>
<td>4.7</td>
<td>4.9</td>
<td>50.7</td>
<td>49.3</td>
<td>101</td>
<td>5.4</td>
</tr>
<tr>
<td>Honolulu</td>
<td>4.4</td>
<td>6.3</td>
<td>3.2</td>
<td>4.2</td>
<td>59.8</td>
<td>85</td>
<td>17.7</td>
<td></td>
</tr>
<tr>
<td>Washington DC</td>
<td>4.4</td>
<td>3.2</td>
<td>0.4</td>
<td>2.1</td>
<td>73.9</td>
<td>26.1</td>
<td>73</td>
<td>65.1</td>
</tr>
<tr>
<td>Rio De Janeiro</td>
<td>4.9</td>
<td>3.7</td>
<td>5.9</td>
<td>0.6</td>
<td>73.2</td>
<td>26.8</td>
<td>165</td>
<td>10.1</td>
</tr>
<tr>
<td>Auckland</td>
<td>4.9</td>
<td>6.4</td>
<td>3.7</td>
<td>2.7</td>
<td>73.6</td>
<td>26.4</td>
<td>83</td>
<td>9.9</td>
</tr>
<tr>
<td>Brisbane</td>
<td>4.3</td>
<td>3.2</td>
<td>8.4</td>
<td>1.4</td>
<td>32.9</td>
<td>67.1</td>
<td>58</td>
<td>4.6</td>
</tr>
<tr>
<td>Riyadh</td>
<td>3.8</td>
<td>2.6</td>
<td>6.7</td>
<td>3.8</td>
<td>85.6</td>
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The World Travel & Tourism Council is the global authority on the economic and social contribution of Travel & Tourism. WTTC promotes sustainable growth for the Travel & Tourism sector, working with governments and international institutions to create jobs, to drive exports and to generate prosperity. Council Members are the Chairs, Presidents and Chief Executives of the world’s leading private sector Travel & Tourism businesses. Together with Oxford Economics, WTTC produces annual research that shows Travel & Tourism to be one of the world’s largest sectors, supporting over 330 million jobs and generating 10.4% of global GDP in 2018. Comprehensive reports quantify, compare and forecast the economic impact of Travel & Tourism on 185 economies around the world. In addition to individual country fact sheets, and fuller country reports, WTTC produces a world report highlighting global trends and 25 further reports that focus on regions, sub-regions and economic and geographic groups.

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