For nearly three decades, WTTC has quantified the contribution that Travel & Tourism brings to national economies across the world. It is only with this important data that governments are able to understand the opportunities that the sector affords and set appropriate policies to help it thrive and communities prosper.

As the world urbanises, this important sector that accounts for 10.4% of GDP and one in every ten jobs at the global level, is increasingly taking place 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 UN. 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 many 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.

Our new research of 73 major Travel & Tourism cities around the world reveals that the sector in these centres directly accounted for 4.4% of city GDP and 17 million jobs, or 5.7% of total employment in these cities in 2018.

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.

This report highlights successful initiatives, strategies and policies that have been implemented by cities. Our hope is that this work will equip the sector with a wealth of insights that will in turn enable cities to learn from the experiences of others as they develop, review and implement Travel & Tourism related policies.

Gloria Guevara Manzo
President & CEO

Travel & Tourism accounts for 10.4% of global GDP and supports 319 million jobs worldwide when direct, indirect and induced impacts are accounted for – it is an important sector all across the world and is a significant contributor to city economies. With over half (55%) of the world’s population living in urban areas, cities have become global economic hubs, driving growth and innovation, while attracting more and more people who will come to live, do business and discover them. Not surprisingly, nearly half of global international travel takes place in cities. For many cities, both the share of tourism within the economy and tourism growth are higher than the sector’s share and growth in countries as a whole. Across the cities covered in our analysis, 4.4% of GDP was directly attributed to Travel & Tourism, compared with a 3.2% direct sector share of GDP across the world.

The 73 cities in this study account for around one quarter of direct global Travel & Tourism GDP. They directly support over 17 million jobs in the sector, which represents 5.7% of all city jobs. These cities are destinations in their own right, and also serve as gateways to other destinations within countries.

Cities are more reliant on international travel demand than wider economies, with international visitor spending accounting for 45% of tourism spending across the 73 cities, compared to 29% globally.

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. Meanwhile, New York is one of the cities that is more evenly balanced than most others in terms of its share of domestic and international spend (55% vs. 45%).

Six of the top ten largest cities in terms of the size of Travel & Tourism sector, as measured by direct Travel & Tourism GDP, are in Asia-Pacific. As of 2018, Shanghai, Paris and Beijing have the largest Travel & Tourism economies of the cities in the study.

LEISURE-DRIVEN CITIES HAVE THE STRONGEST RELIANCE ON TRAVEL & TOURISM

To better understand the dynamics driving city tourism, the 73 cities have been grouped into the following categories: Capital Cities, Largest Cities, Port Cities, Secondary Cities and Leisure Cities.

Travel & Tourism’s contribution to city GDP is significantly higher in leisure-driven cities than other cities, in turn leading to increased reliance on the sector. In 2018, Travel & Tourism was responsible for directly generating 16.7% of GDP across the 11 leisure cities included in this study.

Macau and Cancún were the largest leisure cities for Travel & Tourism’s share of GDP in 2018, with around half of their respective city economies directly supported by the sector. Marrakech and Las Vegas are also strongly reliant on Travel & Tourism, with 33% and 27% of city GDP directly generated by the sector.

In terms of jobs, nine out of the top ten cities with the strongest reliance on Travel & Tourism are leisure-driven cities. 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% (66,000 jobs) and Macau in third place with 32.3% (125,000 jobs).

CITY TRAVEL GROWTH REMAINED STRONG IN 2018

Direct Travel & Tourism GDP across 73 cities grew by 3.6% in 2018, above the overall city economy growth of 3.0%. While seven of the 15 fastest growing cities in 2018 were in the Asia-Pacific region, all but one of the ten global cities with the highest direct Travel & Tourism GDP growth over the past decade are in emerging and developing economies. Looking ahead, nine of the ten cities with the fastest growing Travel & Tourism GDP in the coming decade are forecast to be in Asia-Pacific.

In 2018, the two fastest growing cities in our study were in Turkey, namely Antalya and Istanbul, which grew year on year by 15.7% and 15.1% respectively. This reflects the continued recovery of the Turkish Travel & Tourism sector, driven by safety improvements and depreciation of its currency, making the country more attractive to foreign visitors.

Moscow placed third for year on year growth at 13.7%, on the back of the 2018 FIFA World Cup. International spending was particularly strong, growing by 20.5% over the year.

The fastest growing cities in terms of direct Travel & Tourism GDP over recent years are expected to remain among the top performers over the next decade. However, slower growth is expected for most cities as the global economy as a whole slows down.

ENABLING TRAVEL & TOURISM POLICIES

Achieving sustainable growth for Travel & Tourism in cities requires a focus that extends far beyond the sector itself and 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.

Diverse tourism policies, strategies and initiatives are being implemented by cities. 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.
Asia-Pacific is the world’s largest region in terms of Travel & Tourism activity, accounting for one third of global direct Travel & Tourism GDP in 2018. It was the fastest growing region in 2018 (rising by 6.4%) and also between 2010 and 2018, when it expanded by 7.7% per year. Strong growth has been supported by a large domestic travel segment, expanding middle-class, greater connectivity and improving infrastructure. As average incomes continue to rise, the economic importance of the sector in Asia-Pacific will increase further.

Most global Travel & Tourism expenditure is generated by domestic travel, accounting for 71.2% of total global spending in 2018, with the remaining 28.8% coming from international visitors. The division of overall spend is firmly weighted towards the leisure market which in 2018 accounted for 78.5% of the total compared with 21.5% from business spend. Asia-Pacific has been the fastest growing region in terms of leisure travel; at 7.8% growth per year over the last decade, more than double the global average (3.7% per annum).
A HIGHER SHARE OF GDP IS GENERATED BY TRAVEL & TOURISM IN CITIES THAN IN THE WIDER ECONOMIES

1.2 THE IMPORTANCE OF CITIES AS TOURISM DESTINATIONS

This report focuses on 73 major tourism city destinations and provides estimates of the GDP and employment directly generated by the Travel & Tourism sector. Collectively, the 73 cities in this report account for around one quarter of global direct Travel & Tourism GDP.

The report also looks at the types of policies across all of the cities that are helping to support or drive the sustainable growth of the sector.

The city data analysis does not include the further GDP and employment impacts generated by tourism across supply chains and through the spending of revenues generated from the tourism sector – so-called indirect and induced employment and income impacts. These wider impacts are not quantified due to the additional complexity in estimating the supply chain impacts within a city.

Calculations are consistent with the WTTC Economic Impact Research (EIR) which quantifies the contribution of the Travel & Tourism sector by country and relies on inputs from the Global Cities Travel (GCT) databases from Oxford Economics.

FIGURE 2: DIRECT TRAVEL & TOURISM GDP AS SHARE OF GLOBAL DIRECT T&T GDP
Direct T&T GDP in 73 cities as share of world activity

4.4% OF GDP IS GENERATED BY TRAVEL & TOURISM ACTIVITY ACROSS 73 CITIES COVERED IN OUR ANALYSIS

Cities are not only popular destinations in their own right, but often gateways to other regions within their country, given their proximity to international airports and other transport infrastructure. What’s more, they are often more reliant on Travel & Tourism than regions within their country, given their proximity to international airports and other transport infrastructure.

In terms of direct Travel & Tourism GDP, six of the top ten largest cities are in Asia-Pacific, with Singapore leading the rankings. In terms of share however, Budapest, Dublin and Lima are the top three largest tourism cities in their respective countries. For instance, direct Travel & Tourism GDP in Budapest accounts for 81.4% of all direct GDP from the sector in Hungary, 61.6% for Dublin and 60.1% for Lima.

FIGURE 3: TOP 15 CITIES BY MARKET SIZE, DIRECT TRAVEL & TOURISM GDP BY CITY
US$bn and share of total city GDP, 2018

FIGURE 4: TOP GLOBAL CITY DESTINATIONS, 2018

13 INTERNATIONAL DEMAND IS MORE IMPORTANT FOR CITIES THAN WIDER ECONOMIES

CITIES ARE MORE RELIANT ON INTERNATIONAL TRAVEL THAN WIDER ECONOMIES

Perhaps not surprisingly, cities are more reliant on international travel demand than wider economies. International visitor spending accounted for 43% of tourism spending across the 73 cities, compared to 29% globally.

FIGURE 6: RELIANCE ON INTERNATIONAL TOURISM SPEND, 2018
International visitor spending as % of total city T&T spend

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

Dubrovnik has taken vast steps towards keeping the city a preserved and protected place of interest. Through responsible tourism management, destination stewardship monitoring and effective communication, Dubrovnik continues to protect its city and encourages its Travel & Tourism sector to thrive. In July 2019, the City of Dubrovnik and Cruise Lines International Association (CLIA) signed a Memorandum of Understanding to work together to preserve and protect the cultural heritage of Dubrovnik through responsible tourism management as well as to help establish Dubrovnik as a model of sustainable tourism in the Adriatic region and beyond. Another essential campaign in the works is the Respect the City visitor education drive which will encourage tourists to be mindful in the city centre, stop littering and avoid engaging with illegal bookings.

Similarly, in Budapest, where international travellers accounted for 89.1% of spending, the focus is on educating tourists firsthand on how they can help take care of the city and make sure they are spending their time in Budapest as respectable visitors. The approach used by Budapest has involved the use of education posters. One initiative launched by the Budapest Festival and Tourism Centre (BFTK) is its Tourist Education Mini Poster Campaign, which was implemented to raise awareness about the maintenance of clean public places in the capital as well as to promote respectful tourism among travellers. Through this campaign, BFTK asked tourists to be respectful of the environment, local people and the economy. The Campaign conveyed the message through a poster with the following phrase: Travel. Enjoy. Respect. Welcome to Budapest.

International visitor spending accounts for 81.5% of total tourism spending in Bangkok, supported by continued demand from China and other emerging markets. Whereas in 2008, Bangkok’s top source market was Japan, in 2018, China accounted for 47% of international travel to the city.

The importance of international travel demand for cities is also underscored by spend per visitor. International spend per visitor is higher than domestic spend across 48 cities. The chart below shows the top 20 cities where international spend per visitor exceeds domestic spend by the highest margin. For instance, in Riyadh and Toronto international spend per visitor is around nine times higher than domestic spend per visitor.

FIGURE 7: TOP 20 CITIES - INTERNATIONAL SPEND PER TOURIST VS. DOMESTIC SPEND PER TOURIST*

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

The relative importance of international and domestic demand varies by city. For example, Orlando and New York are the largest city destinations in the USA in terms of direct Travel & Tourism GDP but have very different shares of international and domestic spending. Orlando is heavily reliant on domestic demand, which accounts for 87% of Travel & Tourism spending within the city. In contrast, domestic spending accounts for 55% of total spending in New York City, with the remaining 45% coming from international visitors.

FIGURE 5: LARGEST TRAVEL & TOURISM CITY DESTINATIONS, 2018
Direct Travel & Tourism GDP split by inbound and domestic contribution, US$ bn

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*The ratios in the chart above were calculated by dividing international spend per overnight visitor over domestic spend per overnight visitor
In some cities, the revenues from international visitors will make a significant contribution to the city authority budget that supports the running of its public services. 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 the costs of New York City Police Department and nearly twice as much as the budget for the city’s schools. On the other side of the world, in Singapore, international visitors bring in nearly twice as much money (US$ 19.9 billion) as the budget allocated to the city state’s healthcare.

Still, cities with an over-reliance on domestic or international demand are more exposed to economic and geo-political risks. Some large Brazilian and Chinese cities which are highly reliant on domestic demand could be exposed to changes in the domestic economy. On the other hand, cities which are more reliant on international demand and/or particular source markets may be vulnerable to external disruptions.

1.4 TRAVEL & TOURISM CONTRIBUTION TO GDP BY CITY CATEGORY

For this study, the 73 cities have been grouped into the following categories: Capital Cities, Largest Cities, Port Cities, Secondary Cities and Leisure Cities. Annex 2 provides a brief description and a full list of cities in each category.

- **Capital Cities**: includes 11 cities, which are the capital of their respective country.
- **Largest Cities**: includes 10 cities, which are defined as the largest city within their respective country, according to population. This group includes many, but not all, of the capital cities.
- **Port Cities**: includes 33 cities, which are defined as those with a large sea port within its geographic boundary.
- **Secondary Cities**: includes ten sub-national cities that hold important economic and functional roles within their respective country.
- **Leisure Cities**: includes 11 cities, where leisure travel is the dominant segment. Selection criteria is somewhat subjective, but this includes cities where over 80% of travel spending is from leisure visitors.

Leisure destinations have a higher reliance on Travel & Tourism than other cities. In 2018, 16.7% of total city GDP was directly generated by Travel & Tourism across the 11 leisure cities in this study. Cities with the highest relative contribution to city GDP were Macau (50.1%), Cancún (46.8%), Marrakech (30.6%) and Las Vegas (27.4%).

While Orlando (in the ‘leisure city’ category) and New York (“largest city” category) are often compared as US destinations with similar levels of visitor volumes and spending, the relative importance of the sector to the wider economy differs significantly. Whereas Travel & Tourism is one of the largest sectors for Orlando, accounting for 19.8% of the city’s total GDP, it only accounts for 3.5% of New York’s GDP.

A strong reliance on a narrow set of source markets can represent a risk for a city, particularly external shocks and shifts in demand patterns. For example, Macau, with the highest share of city GDP generated by Travel & Tourism, is highly reliant on mainland Chinese visitors. This reliance exposes Macau to shifts in policy by Beijing. For instance, in 2014 and 2015, following the implementation of China’s anti-corruption campaign during which gift-giving (which included paid trips to Macau casinos) was curtailed, Macau suffered declines in direct Travel & Tourism GDP. As a result, the diversification of the current tourism offer is now well underway.

On the other side of the world, Cancún, with the second highest share of GDP generated by the sector, has over three quarters of international demand coming from just two source markets, namely the USA and Canada.

1.5 LEISURE CITIES ARE HIGHLY RELIANT ON TRAVEL & TOURISM

The chart above shows the relative contribution of direct Travel & Tourism GDP to total city GDP across the five city categories. The largest relative contribution of the sector can be seen across leisure cities (16.7%), followed by port cities (4.2%), capitals and largest cities (3.8%) and finally secondary cities (2.3%).
1.6 CITY CHARACTERISTICS DETERMINE THE IMPORTANCE OF TRAVEL & TOURISM

Across the other city categories in our study including port cities, capitals, largest cities and secondary cities, Travel & Tourism accounts for a much lower share of total city GDP than for leisure cities.

Across the capital and largest cities where high value-added economic activity is centred, Travel & Tourism directly generated 3.8% of GDP. The scale of the financial and business services sector in these cities, combined with a substantial public sector presence, often attracts significant numbers of business travellers. However, the Travel & Tourism contribution to GDP generated by these visitors is lower than the output generated by these sectors. For instance, Shanghai, Paris and New York rank among the six largest cities by volume of Travel & Tourism GDP generated, but the sector generates less than 7% of total city GDP.

FIGURE 10: CITIES WITH HIGH TOURISM CONCENTRATION, 2018

<table>
<thead>
<tr>
<th>CITY TRAVEL &amp; TOURISM CONTRIBUTION</th>
<th>COUNTRY TRAVEL &amp; TOURISM GDP</th>
</tr>
</thead>
<tbody>
<tr>
<td>LAS VEGAS</td>
<td>27.4% 2.7%</td>
</tr>
<tr>
<td>ORLANDO</td>
<td>19.8% 2.7%</td>
</tr>
<tr>
<td>CANNON</td>
<td>44.6% 8.0%</td>
</tr>
<tr>
<td>MARRAKECH</td>
<td>30.6% 8.3%</td>
</tr>
<tr>
<td>MIAMI</td>
<td>9.2% 2.7%</td>
</tr>
<tr>
<td>FORT LAUDERDALE</td>
<td>7.7% 2.7%</td>
</tr>
<tr>
<td>CAPE TOWN</td>
<td>7.7% 3.8%</td>
</tr>
<tr>
<td>MECCA</td>
<td>8.2% 3.3%</td>
</tr>
<tr>
<td>BEIJING</td>
<td>6.9% 2.8%</td>
</tr>
<tr>
<td>WARSAW</td>
<td>4.6% 1.9%</td>
</tr>
</tbody>
</table>

Direct T&T GDP % total GDP by city and country

1.6 CITY CHARACTERISTICS DETERMINE THE IMPORTANCE OF TRAVEL & TOURISM

Marrakech has a high reliance on Travel & Tourism, with over 30% of its GDP directly generated by the sector. The city is proactively working to diversify its mix of source markets. Currently, 30% of the city’s international travel demand comes from France, with other main source markets being Spain (10%), the UK (9%), Italy (7%) and Germany (7%). This represents a change from 2017, when 35% of the city’s international demand originated from France. This shift has been supported by Marrakech hosting the COP22 Climate Change Summit in November 2016, enabling the city to increasingly position itself as a green city that encourages eco-tourism.

The importance of a city as a tourism destination can be showcased by comparing the direct contribution of Travel & Tourism to GDP of that city with that of the wider country. The graph below ranks cities by the percentage point difference between the city and country GDP contribution. Six of the top ten cities in tourism concentration are leisure cities, namely Las Vegas, Orlando, Cancun, Marrakech, Miami and Fort Lauderdale. For instance, Las Vegas direct Travel & Tourism contribution to city GDP is more than ten times higher than the sector’s contribution to US GDP. Similarly, in Orlando, the sector’s share of the city’s economy is more than seven times higher than the US share, while in Cancun, the sector’s contribution to city GDP is nearly six times higher than Mexico’s contribution. For more information about the tourism concentration, please see Annex 3.

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2.1 INTENSITY OF TOURISM IN A CITY

Tourism growth in recent years has involved an increased concentration of visitors in some ‘must see’ destinations. Countries with the highest tourism intensity, defined as the number of tourists per resident, are either islands or relatively small countries. The highest tourism intensity by country is evident in Aruba, the Cayman Islands, Seychelles and Anguilla – with Malta ranking fifth globally and the highest in Europe. Other non-island destinations with high tourism intensities include relatively small European countries such as Croatia and Montenegro. Measured in a similar way to countries, cities with the highest tourism intensity span across all regions, with Cancún, Las Vegas and Dubrovnik topping the ranking.

2.2 TOURISM INTENSITY AND SEASONALITY IN CITIES

This report looked at both the number of tourism days per capita and the seasonal distribution of travel to measure intensity. Destinations can better accommodate visitors when numbers are evenly distributed throughout the year. Still, a macro level approach only offers limited understanding of tourism pressure on destinations. To fully understand the impact, micro level analysis with a focus on specific areas and/or local communities within a destination needs to be considered.

INTENSITY

Tourism intensity has been estimated for each city as the ratio of days spent by visitors relative to the residents in a city. Tourism days per capita are calculated as the sum of visitor days divided by population in each city. Measurement includes overnight foreign visitors, domestic overnight visitors and cruise visitors, but excludes day visits as these are hard to quantify consistently for all cities.

SEASONALITY

A high degree of seasonality can at times exacerbate pressure on infrastructure and tensions at the destination level if all travellers need to be accommodated within a narrow space of time. The summer peak tends to be more pronounced in some leisure destinations, with a high proportion of visitors arriving during a relatively short period.

City destinations tend not to be overly reliant on beaches or summer sun activities when attracting visitors. Most of the city destinations in our study therefore have relatively similar seasonality, with on average 9% of annual tourism overnight visits in the peak month, 27% within the three peak months of the year and 45% within the five busiest months. Clear exceptions are Dubrovnik and Antalya, where there is much more of a focus around sea and leisure. They receive 79% and 59% of all visitors respectively within a five-month period.

Cities with the lowest seasonality include Honolulu, Sydney and Tokyo, where travel activity is more evenly distributed throughout the year.
2.3 ECONOMIC IMPACT AND POLICY RESPONSES

To ensure the benefits from Travel & Tourism are fully accounted for across destinations, these need to include social and environmental impacts as well as economic.

Not all travel provides the same value. Indeed, some destinations are now seeking to attract higher value visitors to maximise the return from tourism activity, or are considering policies that engage the local community and improve the tourism experience for visitors. In effect, there is no one-size-fits-all, with different policies needing to be tailored to the specific context. Policy responses implemented or considered by cities include the following:

Success in destination readiness requires engaging all key stakeholders including the public and private sector as well as the local community. City governments, tourism operators, and residents need to proactively engage to ensure that the sector benefits both the local community as well as visitors.

By working together with its residents, Paris has been able to include them in major redevelopment plans on public spaces whilst also making sure the city’s upcoming plans and initiatives for the years to come are encompassed in a clear, accessible outline as per the 2022 Tourism Strategy.

Paris is committed to improving the tourism experience for visitors to the city, as well as benefiting the lives of residents. The city’s 2022 Tourism Strategy outlines the main initiatives and strategies that the city plans to implement over the coming years. By working with nearly 400 stakeholders across the Travel & Tourism sector, Paris was able to formulate its ideas and incentives in one cohesive voice.

Use taxation as a tool for re-investment in Travel & Tourism related projects which will enhance the experience of residents as well as travellers to the destination.

For instance, Dubai started levying a tax, named the ‘Tourism Dirham’, on all tourist accommodation in 2014. The fee varies depending on the type of lodging, the maximum is Dh20 (just over US$5) and the revenue raised supports international promotion of the emirate, funds Expo 2020 projects and helps to drive growth of tourism and trade.

In Barcelona, a tax is charged on all overnight stays in the city’s tourist accommodation. The local government, which directly administers 50% of the funds raised, reinvests this amount into many tourism-related projects. A badge has been created so residents and visitors can see which projects are funded by the tourist tax. In addition, €4.5 million raised from the tourist tax was given to the Barcelona Tourism Consortium in 2017 to help set up a joint work plan for Barcelona as a sustainable destination.

Ensure that the benefits of Travel & Tourism are distributed across neighbourhoods in the destination. Several creative strategies are being implemented to drive tourists to less visited areas.

In New York City, NYC & Company and other travel businesses have introduced several measures aimed at dispersing visitors. These include creating the ‘True York City’ marketing campaign to entice visitors to stay longer and explore beyond the centre, across the city’s ‘real’ five boroughs and their small businesses and arts communities. NYC & Company’s “Tourism Ready” programme provides education to businesses throughout the five boroughs, equipping them with the necessary tools to accelerate successful engagement with the Travel & Tourism sector. A ‘see your city’ campaign was also developed to encourage New Yorkers across the five boroughs to share experiences in their local neighbourhood on social media, so attracting visitors to explore other districts.

Introduce technology to ensure that travellers have a more seamless experience.

For instance, cities such as Venice and Barcelona have introduced advance booking systems for key tourist sites. These systems help to monitor the number of visitors at tourist sites on particular days, in turn providing visitors with full information as they decide which sites to visit.

To ensure that destinations benefit from Travel & Tourism throughout a year, strategies such as promoting travel during shoulder periods as well as broadening the range of activities on offer should be considered.

In 2017, Brazil’s Federal Government unveiled a tourism plan to attract more visitors to Rio de Janeiro throughout the year. The program entitled, Rio de Janeiro – A Janeiro (Rio from January to January) focused on 100 strategic events occurring throughout the year in the areas of culture, sports, tourism and business. Examples have included Rio Music Carnival, Samba Schools Parade, Chocolate Festival, Japan Festival, Super Rio Esportivo (The Latin Americas’ second largest food sector trade fair), Rio Boat Show, World Surfing Championship and many others.

The sustainable and balanced development of tourism is also a policy priority for Portugal. In 2017, the Valonz scar program, promoted by the WTTTC Destination Partner (Turismo de Portugal), aims to stimulate a more balanced distribution of tourism demand and reduce seasonality.

New York City also worked to entice visitors to discover the city in the quieter winter season of 2019 with a series of ‘Winter Outing’ promotions such as 2-for-1 admission to NYC’s top attractions and Broadway shows.

More examples of good city initiatives can be found in: Annex 4
3.1 CITY TRAVEL GROWTH REMAINED STRONG IN 2018

Direct Travel & Tourism GDP across 73 cities in our study grew by 3.6% in 2018. The fastest growing cities include a number of cities which have been growing rapidly for some time, but also a few destinations which have been influenced by short-term shifts.

While seven of the 15 fastest growing cities in terms of direct Travel & Tourism GDP in 2018 were in the Asia-Pacific region, these fastest growing cities are more geographically dispersed than in previous years.

The two fastest growing cities in 2018 were both in Turkey, namely Antalya and Istanbul, which grew year on year by 15.7% and 15.5% 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 government in Turkey has recognised the importance of Travel & Tourism and opportunities that tourism brings as a catalyst for socio-economic development. To support the continued growth of the sector, the new mega airport is under construction in Istanbul. Once fully completed and utilised in 2027, it will be the largest airport in the world and is planned to be capable of handling 200 million passengers per year. Through its new airport, Istanbul will be much better equipped to deal with current and future visitors to its city and the broader region. What’s more, the new M11 high-speed metro will enable visitors to get from the city centre to the airport in just 30 minutes.

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.

Similarly, strong growth in Cairo, at 9.9% in 2018, is driven by the continued safety improvements in the country and follows a 34% growth in 2017.

Cairo aims to continue growing its Travel & Tourism sector by making visitor satisfaction a top priority. In this context, Cairo continues to invest in infrastructure and cultural projects designed to benefit tourists. By successfully enhancing and promoting cultural tourism, Cairo’s Travel & Tourism sector continues to thrive, standing out as a strong example of tourism growth.

One of the largest projects that the city of Cairo is undertaking is the construction of the Grand Egyptian Museum, which is scheduled to open in 2020. The museum has been designed to provide panoramic views of the Pyramids to the south-east from all galleries. Once completed, it will be home to 50,000 artefacts and will exhibit the complete collection of Tutankhamun. The museum is expected to attract on average five million visitors a year.
When comparing 2018 year-on-year direct Travel & Tourism GDP growth with the 10-year average (2008-18), stand-out cities where 2018 growth significantly exceeded the average include Istanbul, Antalya and Moscow. In contrast, slowdowns have been noted in several cities across the world, including China, which are partly driven by the slowing economy. While some Chinese cities such as Chengdu continued to grow rapidly over the last year, this was at a slower pace than over the ten-year period.

In Bangkok, the fourth largest city globally for international visitor spending, direct T&T GDP growth in 2018 (5.1%) kept pace with growth witnessed over the last ten years (5.2% pa). The city is undertaking initiatives to position itself as a well-equipped hub for business travel and retail tourism.

One of the most important incentives with regards to MICE (meetings, incentives, conferences and exhibitions) tourism is the “Convene in Paradise” campaign which provides 1 million THB in support of conventions that cover five main industries, notably, health, energy, food, infrastructure and electronics. Through these incentives, Thailand, and Bangkok specifically, aims to promote its destination and attract further investment.

To increase the amount spent by tourists in the city, Bangkok launched its shopping tourism initiative. Through innovative new market insights, this initiative helps to gather information on tourist preferences for local producers and businesses, who in turn are able to adjust their product offering to match customer preferences. To facilitate luxury shopping, Bangkok has also put in place processes to better inform tourists of VAT refund procedures, ease the process of refunds, help tourists send their purchases to other countries, review the tax structure of luxury goods as well as cater for tour packages revolving around Bangkok’s luxury shopping market.

3.2 GROWTH OVER THE LAST TEN YEARS

The majority of the fastest growing cities over the past decade were in Asia-Pacific. Three of the five fastest growing cities were Chinese, namely Chongqing, Chengdu and Shanghai. Other fast-growing Asian cities include Ho Chi Minh City and Manila, all of which benefitted from rising prosperity in their Asian source markets, particularly China. Growth in all these cities significantly exceeded the average growth of 3.5% witnessed across the 73 cities combined.

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Growth over the last ten years has varied across the different city categories. ‘Port cities’ experienced the fastest growth in direct Travel & Tourism GDP over the past decade, at 3.7% per annum. This has taken place on the back of infrastructure improvements, with these cities also acting as gateways for travel to other regions of the country.

Leisure cities’ growth of 3.5% per annum continues to be supported by leisure travel spending, particularly by the expanding middle class in emerging countries.

Travel & Tourism GDP in the ‘secondary cities’ grew at an annual rate of 3.1%, while ‘largest cities’ grew at an average rate of 3.0%. Capital cities experienced the slowest growth at 2.7% per annum.

3.3 GROWTH TO CONTINUE OVER 2018-28

Annualised growth over period

When comparing 2018 year-on-year direct Travel & Tourism GDP growth with the 10-year average (2008-18), stand-out cities where 2018 growth significantly exceeded the average include Istanbul, Antalya and Moscow. In contrast, slowdowns have been noted in several cities across the world, including China, which are partly driven by the slowing economy. While some Chinese cities such as Chengdu continued to grow rapidly over the last year, this was at a slower pace than over the ten-year period.

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FIGURE 13: 15 FASTEST GROWING CITIES, DIRECT T&T GDP, 2007-2018 (REAL 2018 PRICES)

FIGURE 14: FASTEST GROWING CITIES, DIRECT T&T GDP, 2008-2018 (2018 PRICES)

FIGURE 15: CITY CLASSIFICATION - DIRECT T&T GDP GROWTH OVER 2008-2018

When comparing 2018 year-on-year direct Travel & Tourism GDP growth with the 10-year average (2008-18), stand-out cities where 2018 growth significantly exceeded the average include Istanbul, Antalya and Moscow. In contrast, slowdowns have been noted in several cities across the world, including China, which are partly driven by the slowing economy. While some Chinese cities such as Chengdu continued to grow rapidly over the last year, this was at a slower pace than over the ten-year period.

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Travel & Tourism GDP in the ‘secondary cities’ grew at an annual rate of 3.1%, while ‘largest cities’ grew at an average rate of 3.0%. Capital cities experienced the slowest growth at 2.7% per annum.
3.3 GROWTH TO CONTINUE OVER 2018-28

Travel & Tourism city performance forecasts to 2028 are consistent with the country level outlook in the WTTC Economic Impact Research (EIR) and are based on Oxford Economics’ global macroeconomic expectations.

The fastest growing cities in terms of direct Travel & Tourism GDP over recent years are expected to remain among the top performers over the next decade. However, slower growth is expected for most cities as the world economy overall slows down.

The strongest growth is expected in Marrakech at 8.8% per annum, supported by an increasing number of flight routes, a relatively relaxed visa regime and improving tourism infrastructure.

The remaining nine out of the top ten fastest growing cities over the next ten years are expected to be in Asia-Pacific, including five Chinese cities. In fact, the Chinese cities of Chongqing and Shanghai are expected to be the second and third fastest growing, expanding by 7.8% and 7.4% per annum respectively over the next ten years. Guangzhou and Beijing will complete the top five, growing by 7.2% and 6.5% per annum, respectively.

With strong growth set to continue, Chongqing is expected to join the “top 15” largest cities in terms of direct Travel & Tourism GDP by 2028, with other Asian cities expected to rise up the rankings. Shenzhen is set to overtake Orlando into fifth place while Mexico City is expected to overtake New York to become the second largest tourism city in the Americas by 2028.

**FIGURE 16: TOP 10 FASTEST GROWING CITIES, DIRECT T&T GDP 2018-28, % PA**

<table>
<thead>
<tr>
<th>City</th>
<th>Growth Rate (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marrakech</td>
<td>8.8</td>
</tr>
<tr>
<td>Chongqing</td>
<td>7.8</td>
</tr>
<tr>
<td>Shanghai</td>
<td>7.4</td>
</tr>
<tr>
<td>Guangzhou</td>
<td>7.3</td>
</tr>
<tr>
<td>Delhi</td>
<td>6.5</td>
</tr>
<tr>
<td>Beijing</td>
<td>6.5</td>
</tr>
<tr>
<td>Ho Chi Minh</td>
<td>5.9</td>
</tr>
<tr>
<td>Jakarta</td>
<td>5.9</td>
</tr>
<tr>
<td>Chengdu</td>
<td>5.9</td>
</tr>
<tr>
<td>Mumbai</td>
<td>5.9</td>
</tr>
</tbody>
</table>

**FIGURE 17: LARGEST CITIES BY DIRECT T&T GDP CONTRIBUTION IN 2028**

Forecast direct T&T GDP 2028, US$ bn

<table>
<thead>
<tr>
<th>City</th>
<th>GDP (US$ bn)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shanghai</td>
<td>72.9</td>
</tr>
<tr>
<td>Beijing</td>
<td>62.4</td>
</tr>
<tr>
<td>Paris</td>
<td>44.4</td>
</tr>
<tr>
<td>Bangkok</td>
<td>36.7</td>
</tr>
<tr>
<td>Shenzhen</td>
<td>36.3</td>
</tr>
<tr>
<td>Orlando</td>
<td>35.6</td>
</tr>
<tr>
<td>Macau</td>
<td>35.4</td>
</tr>
<tr>
<td>Guangzhou</td>
<td>35.1</td>
</tr>
<tr>
<td>Mexico City</td>
<td>35.1</td>
</tr>
<tr>
<td>New York</td>
<td>32.7</td>
</tr>
<tr>
<td>Tokyo</td>
<td>28.8</td>
</tr>
<tr>
<td>Chongqing</td>
<td>26.3</td>
</tr>
<tr>
<td>Las Vegas</td>
<td>23.8</td>
</tr>
<tr>
<td>London</td>
<td>21.0</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>22.3</td>
</tr>
</tbody>
</table>

**FIGURE 17: LARGEST CITIES BY DIRECT T&T GDP CONTRIBUTION IN 2028**

Forecast direct T&T GDP 2028, US$ bn
Travel & Tourism directly supports over 17 million jobs (5.7% of all city jobs) across 73 cities. Nine out of the top ten cities with the strongest reliance on Travel & Tourism for employment are ‘leisure cities’. Las Vegas has the strongest dependence on Travel & Tourism of all 73 cities, with the sector directly supporting more than 48.3% of the city’s employment (234,000 jobs). Cancún follows in second place with 40.3% (161,000 jobs) of employment directly supported by the sector. Macau SAR, in third position, has 32.3% of its employment (125,000 jobs) directly generated by Travel & Tourism.

The chart below shows the cities with the largest contribution of Travel & Tourism to city employment and compares it with the sector’s direct contribution to GDP. Some cities have a higher share of Travel & Tourism employment than the sector’s GDP, including Las Vegas, Orlando and Honolulu amongst others. In contrast, cities such as Cancún, Macau SAR and Marrakech have a higher share of Travel & Tourism GDP than employment. These differences are attributed to Travel & Tourism’s productivity relative to that of the wider economy, which differs significantly across the cities.

With GDP growth expected to slow over the next ten years, Travel & Tourism employment is forecast to follow the same trend. The chart below shows the fastest growing cities in terms of employment, with Marrakech, Lagos and Abu Dhabi in the top spots.

In Abu Dhabi, the city tourism policy has encouraged employment in the sector. As part of the efforts, the Khubrat programme is aimed at Emirati students who are keen to explore various career options and are able to commit 20 hours per week to work within the hospitality and tourism sector. This opportunity gives students an insight into the operational components of the industry and how it contributes to the emirate’s socio-economic pulse.

### FIGURE 18: LARGEST TRAVEL & TOURISM CONTRIBUTION TO CITY EMPLOYMENT, 2018

<table>
<thead>
<tr>
<th>City</th>
<th>Tourism % Total Employment</th>
<th>Tourism % Total GDP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Las Vegas</td>
<td>48.3%</td>
<td>27.4%</td>
</tr>
<tr>
<td>Cancún</td>
<td>40.3%</td>
<td>44.6%</td>
</tr>
<tr>
<td>Macau</td>
<td>32.1%</td>
<td>50.3%</td>
</tr>
<tr>
<td>Marrakech</td>
<td>26.1%</td>
<td>35.6%</td>
</tr>
<tr>
<td>Orlando</td>
<td>23.7%</td>
<td>19.8%</td>
</tr>
<tr>
<td>Honolulu</td>
<td>17.3%</td>
<td>6.3%</td>
</tr>
<tr>
<td>Dubrovnik</td>
<td>17.5%</td>
<td>4.5%</td>
</tr>
<tr>
<td>Fort Lauderdale</td>
<td>14.0%</td>
<td>7.7%</td>
</tr>
<tr>
<td>Miami</td>
<td>12.5%</td>
<td>9.2%</td>
</tr>
<tr>
<td>Beijing</td>
<td>8.8%</td>
<td>6.9%</td>
</tr>
</tbody>
</table>

### FIGURE 19: FASTEST GROWING CITIES, DIRECT T&T GROWTH, 2008-2018

<table>
<thead>
<tr>
<th>City</th>
<th>EMPLOYMENT % Growth</th>
<th>GDP % Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abu Dhabi</td>
<td>8.0%</td>
<td>5.4%</td>
</tr>
<tr>
<td>Tehran</td>
<td>6.6%</td>
<td>6.7%</td>
</tr>
<tr>
<td>Riyadh</td>
<td>5.9%</td>
<td>5.0%</td>
</tr>
<tr>
<td>Macau</td>
<td>5.6%</td>
<td>6.2%</td>
</tr>
<tr>
<td>Chongqing</td>
<td>5.1%</td>
<td>16.0%</td>
</tr>
<tr>
<td>Singapore</td>
<td>5.4%</td>
<td>4.0%</td>
</tr>
<tr>
<td>Rome</td>
<td>4.6%</td>
<td>3.1%</td>
</tr>
<tr>
<td>Budapest</td>
<td>4.6%</td>
<td>4.1%</td>
</tr>
<tr>
<td>Berlin</td>
<td>4.2%</td>
<td>3.4%</td>
</tr>
<tr>
<td>Santiago</td>
<td>3.8%</td>
<td>4.8%</td>
</tr>
</tbody>
</table>

### FIGURE 20: FASTEST GROWING CITIES, DIRECT T&T EMPLOYMENT GROWTH, 2018-2028

<table>
<thead>
<tr>
<th>City</th>
<th>EMPLOYMENT % Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marrakech</td>
<td>7.5%</td>
</tr>
<tr>
<td>Lagos</td>
<td>5.4%</td>
</tr>
<tr>
<td>Abu Dhabi</td>
<td>3.9%</td>
</tr>
<tr>
<td>Guanzhou</td>
<td>3.8%</td>
</tr>
<tr>
<td>Chongqing</td>
<td>3.7%</td>
</tr>
<tr>
<td>Jakarta</td>
<td>3.7%</td>
</tr>
<tr>
<td>Auckland</td>
<td>3.4%</td>
</tr>
<tr>
<td>Dublin</td>
<td>3.4%</td>
</tr>
<tr>
<td>Brussels</td>
<td>3.2%</td>
</tr>
<tr>
<td>Kuala Lumpur</td>
<td>3.1%</td>
</tr>
</tbody>
</table>

In terms of jobs, Las Vegas, Cancún and Macau are the top three cities with the strongest reliance on Travel & Tourism. Abu Dhabi was the fastest growing city in terms of employment over the last ten years.
As demand for travel has become more mainstream in China, the share of luxury travel has declined over time. This has resulted in an increase in more affordable travel and consequently in a significant rise in labour productivity. This has meant that in some cities, despite remarkable GDP growth over the years 2008-18, employment has declined.

For instance, in the world’s largest Travel & Tourism city, Shanghai, Travel & Tourism GDP has more than doubled since 2008, however employment effectively declined by 0.9% per annum. Similarly, in Beijing, the sector’s GDP grew by 4.4% per annum over the last ten years, while employment fell by 2.7%.

As markets mature over the next decade and structural labour market shifts become less common, Travel & Tourism GDP growth (at 7.4% per annum in Shanghai and 6.5% per annum in Beijing) is expected to generate an average annual increase in employment of 2.3% in Shanghai and 2.2% in Beijing.
5. ENHANCING A FUTURE POSITION

Achieving sustainable and inclusive growth for Travel & Tourism in cities requires a focus far beyond the sector itself and is integrated into the broader urban agenda. Success will continue to require considering the knowledge and opinions of a variety of stakeholders – ranging from city planning authorities, developers, investors and legislators to local community groups – from the very start of the planning process. What’s more, city destinations should learn from the experience of others as they plan for their own future sustainable and inclusive growth.

For cities to enhance their positioning for the future, WTTC and JLL2 developed a four-step framework to provide guidance on key considerations and policy recommendations that help achieve sustainable tourism growth, notably, understanding a city’s DNA, assessing the current state of the city’s tourism ecosystem, setting sustainable end goals and developing a plan to achieve the goals as well as implementing, monitoring, evaluating and communicating changes.

5.1 STEP 1: UNDERSTAND A CITY’S DNA

As a first step, it is essential to understand the DNA of a city - its assets and unique features, its culture, history and way of life that make people want to live in, invest in, and visit it. This will require public-private cooperation and engagement with key stakeholders including local community.

These insights should help shape the vision for the strategic plan and set the parameters by which the destination could develop into the future.

5.2 STEP 2: ASSESS THE CURRENT STATE OF THE CITY’S TRAVEL & TOURISM ECOSYSTEM

It is then key to have a holistic overview of the Travel & Tourism economy, as well as the city’s infrastructure which supports it. This not only includes the level of tourist concentration, the overall scale of the Travel & Tourism sector, and the driving factors behind it, but also a city’s broader urban readiness especially as it relates to labour, infrastructure, environment and stability.

5.3 STEP 3: SET SUSTAINABLE END GOALS AND DEVELOP A PLAN WITH POLICIES TO ACHIEVE THE GOALS

After a thorough assessment, key stakeholders should collectively determine a detailed roadmap to achieve the desired end goal.

Travel & Tourism can bring significant financial and employment benefits to cities around the world. In embracing the value from the sector, the authorities and destination management and marketing organisations should be proactive in embracing tourism policies that take into consideration the needs of visitors, the local population, and the resources available.

5.4 STEP 4: IMPLEMENT, MONITOR, EVALUATE AND COMMUNICATE

Following steps one to three, it is essential for the government and tourism bodies to monitor and evaluate the impact on the sector. This can be done from both a qualitative and quantitative perspective.

Satisfaction surveys of tourists and local residents can reveal the general sentiment towards the Travel & Tourism sector, while compiling indicators can provide supporting and measurable data on the status of the sector. Continuously communicating the progress that has been made towards achieving the goals to all stakeholders and fine tuning the strategy is a key component of this final step.

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ANNEX 1: METHODOLOGY OVERVIEW

BACKGROUND

Calculations in this report are reliant upon WTTC's annual economic research which estimates the contribution of the tourism sectors worldwide and in 185 countries.

Impacts for the cities within these countries are derived from Oxford Economics' Global City Travel (GCT) database which quantifies travel to and from 305 cities worldwide in terms of visits, spend and overnights. The GCT database collates data for the past 15 years and combines this with expected economic and travel trends to produce ten-year forecasts. All city forecasts are produced with a consistent set of assumptions and are fully comparable to country travel and economic forecasts.

CITY AND METRO DEFINITIONS

A wide geographic definition of cities has been used in this study to include metros or greater city areas rather than measuring just the urban core. The bulk of the reliable and consistent economic data across cities is available for this broader definition. Hence, to ensure consistent estimates of economic contribution, this definition was adopted.

Consistent definitions across cities have been used in all cases to ensure comparability. In the instances where travel data are only reported for a narrow city centre definition or for a wider geographic area, estimates are based on multipliers using all available sector or industry data. City travel data are collated in Oxford Economics’ GCT database using a narrow definition of the city in many cases, consistent with widespread reporting. GCT data used in this study have been adjusted accordingly.

GVA METHODOLOGY

Calculation of economic impact reconciles two methodologies for cities consistent with the country level economic impacts estimated as part of the WTTC annual economic research. Results from the two methodologies are used as cross-checks to refine assumptions and derive a final combined estimate.

Calculated impacts are for the direct contribution of Travel & Tourism to the wider economy. The wider indirect and induced impacts are not quantified in this study due to the additional complexity in estimating the supply chain impacts within a city.

Supply-side: Sectoral output by city is the starting point for analysis. Tourism ratios consistent with country level estimates are imposed to understand the proportion of output generated by tourism activity.

As an example, if a city has a high concentration of activity in the hotels and restaurants sector then it is fair to assume that a large proportion of this activity is generated by tourist spending. This city will therefore have a large economic contribution from tourism.

Demand-side: Tourism spend for each city as a destination is calculated first according to GCT definitions of cities which quantifies arrivals, overnights average spending and total tourism revenue. Where necessary, this is grossed-up to the wider metro definition for consistency. A ratio of GVA to Gross Output is then applied, consistent with the WTTC annual economic research and the industrial structure for the country and the city.

Spending and GVA impacts are all estimated in both nominal and real price terms in calculation. Real price growth is the key measure in this report for consistency with reporting by country in the annual Economic Impact Research (EIR). Deflators for the calculation are taken from the EIR for the relevant country. City specific deflators are not reported for the vast majority of the cities within this study. Using national deflators ensures consistency across cities and with EIR.

EMPLOYMENT METHODOLOGY

Tourism employment by city is derived from the Travel & Tourism GVA and labour productivity. As for GVA, only the direct impact of Travel & Tourism on employment has been quantified within this study.

Labour productivity for tourism characteristic sectors is estimated for the cities and the countries. A productivity multiplier is derived for the city relative to the country according to this sectoral detail and is then applied to country labour productivity from WTTC's annual economic research.

ANNEX 2

CITY CATEGORIES
The 73 cities have been grouped into several categories. There is considerable overlap as several cities fit multiple criteria. A brief description of each category is provided below followed by a full list of cities in each category.

- **Capital Cities**: includes 33 cities, which are the capital of their respective country.
- **Largest Cities**: includes 38 cities, which are defined as the largest city within their respective country, according to population. This group includes many, but not all, of the capital cities.
- **Port Cities**: includes 33 cities, which are defined as those with a large port within its boundaries.
- **Secondary Cities**: includes ten cities, which are defined as the next largest cities within their respective country.
- **Leisure Cities**: includes 11 cities, where leisure travel is the dominant segment. Selection criteria is somewhat subjective, but this includes cities where over 80% of travel spending is from leisure visitors while they must also be an important leisure destination within the country.

<table>
<thead>
<tr>
<th>Capital Cities</th>
<th>Largest Cities</th>
<th>Port Cities</th>
<th>Secondary Cities</th>
<th>Leisure Cities</th>
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Tourism concentration ratios have been calculated by comparing direct contribution of Travel & Tourism to GDP of that city with that of the wider country. For example, if a city’s Travel & Tourism share of GDP is 30%, and the country’s Travel & Tourism share is 20%, the Travel & Tourism concentration ratio would be 1.5.

Of the 73 cities in the study, 50 have a concentration ratio greater than 1. This implies that these cities make a larger direct contribution to total city GDP from Travel & Tourism, compared to their national averages.

Cities with the highest ratios include Las Vegas, Orlando and Cancún. For instance, in Las Vegas, direct Travel & Tourism contribution to city GDP is more than ten times higher than the sector’s contribution to overall US GDP. Similarly, in Orlando, the sector’s share of the city’s economy is more than seven times higher than the US share, while in Cancún, the sector’s contribution to city GDP is nearly six times higher than its contribution to Mexico’s GDP.

In contrast, city destinations with a low concentration of Travel & Tourism activity are largely business travel destinations with a high dependence on activity from other sectors. London, Madrid, Los Angeles, Abu Dhabi and Lisbon are all examples of such cities. Low Travel & Tourism concentration relative to the country also emerges in countries which have other larger tourism destinations. For example, Madrid and Lisbon are affected by the high concentration of leisure tourism in the Algarve and Costa Brava while Manila is affected by the country’s island destinations such as Boracay.

<table>
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<tr>
<th>CITY TRAVEL &amp; TOURISM INDICES, 2018</th>
<th>HIGHEST CONCENTRATION INDICES</th>
<th>LOWEST CONCENTRATION INDICES</th>
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<td>Warsaw</td>
<td>2.4</td>
<td>Rio de Janeiro</td>
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</tbody>
</table>
This section highlights a selection of successful city initiatives, strategies and policies, which focus on cultural heritage, resilience, community engagement, destination stewardship, sustainability, infrastructure, promotion of events, area redevelopment, education & training, and re-investment in the sector.

1. CULTURAL HERITAGE

Seoul

Seoul has made heritage protection and sustainability the top priorities for its Travel & Tourism sector, through initiatives and policies such as ‘A Great City for Walking’ and ‘Shared City Seoul’.

Seoul’s ‘A Great City for Walking’ initiative has been used to diversify and spread tourists across the city’s many districts. Walking trails and paths can be found all over the city and include an elevated arboretum ‘Seoulo 707’, which is an overpass converted into a 1.024 m long pedestrian walkway. The objective of this initiative is to connect and expand existing paths to major rail and bus stops as well as large shopping areas and centres. At the same time, Seoul has launched the Future Heritage Project which aims to protect and maintain historical sites and objects of cultural heritage found within the city in the past century, while infusing a sense of value and appreciation for these historic pieces.

The broader ‘Shared City Seoul’ policy is focused on creating a more sustainable and liveable city, developing new economic opportunities, reducing waste and improving the life of its residents by encouraging a concept of ‘sharing’ into their daily lives. This policy was enabled through the active engagement of the city’s 25 district offices and schools, in turn stimulating their ability to share and help one another. To ensure inclusivity, Seoul’s annual ‘Sharing Festival’ enables the city’s residents to come together to experience and discuss the future direction of these policies.

Washington DC

Washington DC is renowned for its cultural heritage, incredible fine museums and its many tourism attractions. The city plans to continue building on these past successes and reach out to more visitors by creating new events and initiatives that actively involve visitors with the city’s culture and heritage.

In September 2019, for instance, the city further improved the cultural and arts offer by introducing the REACH, DC’s newest arts and culture incubator and the first expansion of the Kennedy Centre. To ensure the success of this initiative, Washington DC created a free 16-day festival inviting families, performing arts enthusiasts and artists to experience the flexible new space. The new National Museum of African American History and Culture is also generating more tourists into the city and creating a buzz.

What’s more, after a 37-month closure, the Washington Monument reopened in September 2019 with a newly modernised elevator, taking visitors up to see the highest view of the city. Washington DC will also be inaugurating its National Children’s Museum in November 2019, creating an incredible new world inspiring imagination, innovation and discovery for children. Families can expect a next generation, hands-on experience.

2. RESILIENCE

Las Vegas

Las Vegas provides a clear, positive example of efficient and effective crisis preparedness, management and response. In the wake of the October 2017 shooting, Las Vegas was able to successfully “bounce back” by building strong coalitions and an effective emergency action plan. This allowed the city to move more seamlessly towards normalising in the aftermath and opening up its doors to tourists once more.

Las Vegas provides a shrinking example of a city that came together and created a positive framework which will enhance its resilience in the event of a crisis in the future. After the events of October 2017, Las Vegas kickstarted its planned crisis response which was enabled by ample planning and clear coalition-building. Las Vegas promptly enacted its crisis plan through private communication between key stakeholders ensured that the Sheriff was fully aligned in terms of messaging, with, among others, the Las Vegas Convention & Visitors Authority. This in turn allowed for coherent and consistent messaging both to the visitors and the citizens of Las Vegas.

Miami

Miami has cemented itself as a city that is well versed in dealing with crises. From hurricanes to epidemics, Miami has proven its strong preparedness, effective management and ability to swiftly recover. This is through effective coalition building, having strong emergency action plans in place, strategic and transparent communication, and honesty when inviting the world back to the city once ready.

For instance, the Zika virus emerged in Miami and Miami Beach in 2015 and resulted in a minor contraction in international visitation. Early identification of the disease enabled Miami to isolate the main geographical area of transmission to a few blocks’ radius, and led to the launch of a detailed programme of increased mosquito surveillance and control efforts. By the US Department of Health and Human Services. As part of its successful programme, Miami was proactive in its communication and enlisted the support of both the private sector and the local community.

What’s more, Miami has used effective communication and marketing to let travellers know when they were ready to welcome tourists back and motivate them to travel to the city. Specifically, to help inform travellers of its readiness to welcome them back after an event, Greater Miami and the Beaches created a live feed, so that travellers can see for themselves in real time what is happening on their beaches and boardwalks.

Cape Town

Cape Town experienced a severe water shortage in 2018; however careful planning and crisis preparedness allowed Cape Town to deal with the issues effectively. Water saving initiatives were implemented in the city to counteract the crisis, such as rules about showering (no longer than two minutes). Campaigns were applied such as the “If it’s yellow, let it mellow” to promote flushing toilets only when necessary. The use of recycled water (known as grey water) was pushed as well.

Cape Town has also fine-tuned its approach towards Travel & Tourism in the city, focusing on connecting Cape Town’s creative industries with key stakeholders and city departments. The idea of this strategy is to encourage and support local artists whilst also enticing tourists into the creative city as well. Creative initiatives were also utilised during Cape Town’s 2018 water crisis.

The City of Cape Town’s creative industries relationship (LACIP) was created in 2014 to guide the allocation of resources towards the support of arts, culture and the creative industries as well as to build coordination with other stakeholders and city departments. The policy works...
to preserve tangible and intangible heritage and support artists and institutions for its local community, support healthy neighbourhoods and support regeneration through culture. It also aims to position Cape Town as a leading cultural and creative capital and thus become a more attractive international destination for tourists, growing jobs as well as the creative economy.

3. COMMUNITY ENGAGEMENT

Cancún
To enhance its social and cultural impact, Cancún has designed and implemented the Maya K'aan campaign - a strategy which encourages tourists to learn more about the rich Mayan culture by proactively engaging indigenous communities. Maya K’aan’s purpose is to showcase the magnificence of the Mayan culture through an eco-tourism friendly lens. The Mayan culture is shared with tourists through a series of interactive experiences, in the hope that this concept will help continue to encourage tourism in the region as well as to continue to develop the region culturally and socially. The project was established to help ensure the inclusivity of tourism by positively benefiting the indigenous Mayans whilst also making sure it remained sustainable and community-based. All of the activities, experiences and services are managed by local communities. As well as learning first-hand from the locals about Mayan culture, visitors can also take part in activities in the natural environment such as kayaking in the Laguna Negra, fauna observation at sea and birdwatching in Muyilt.

Fort Lauderdale
Fort Lauderdale, one of WTTC’s Destination Partners, is focusing on celebrating diversity and inclusion by bringing together the local and wider community. Fort Lauderdale’s #GreaterTogether campaign addresses the need for people to come together despite cultural, religious or racial differences and further emphasizes the fact that Fort Lauderdale remains an open city, that will welcome everyone. The #GreaterTogether initiative was launched to welcome different segments of the international travel community to the city. The initiative highlights how investment policy can promote the preservation of public places with a special focus on tourism. The project aims to spotlight the country’s cultural and natural heritage, enhance the visitor experience through innovation and digital uptake as well as encourage improved access for disadvantaged travellers.

The Valoriza initiative also encourages the development of projects that better integrate residents with tourists. For instance, the Manicomio project implemented an art gallery showcasing artists and other creative talents who have all experienced mental illness. This project is helping connect artists to tourists and position Lisbon on the cultural map.

To address dispersion, New York City has worked closely with NYC & Company, one of WTTC’s Destination Partners, and other travel businesses in the city, to introduce several initiatives. These include creating the ‘True York City’ marketing campaign to entice visitors to stay longer and explore beyond the city centre, across the city’s authentic five boroughs and their small businesses and arts communities.

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Honolulu
Honolulu is taking climate change seriously and is building strategies and initiatives to help curb the effects of climate change, while continuing to build the island’s resilience and sustainability capabilities.

In 2016, Oahu voters approved a City Charter Amendment for Honolulu to

To ensure the whole city was ready to welcome tourists, NYC & Company’s Tourism Ready programme worked to provide education to businesses throughout the five boroughs, equipping them with the necessary tools to accelerate successful engagement with the Travel & Tourism sector. What’s more, a ‘See Your City’ campaign was developed to encourage New Yorkers across the five boroughs to share experiences in their localhood and on social media, to attract visitors to explore other districts.

5. SUSTAINABILITY

Chongqing
The major Yangtze River port of Chongqing is working towards building up capacity and resources to further increase its domestic tourism spending, with the long-term goal of continuing to grow its international tourism market. As part of a large-scale campaign to protect the river, the city government is using the market to help determine resource allocation. Specifically, the municipality established the Chongqing Resources and Environment Exchange to trade pollution rights. It also set up an environment investment company based on a public-private partnership model and launched the country’s first equity fund for environmental protection. The revenues earned from these measures will be reinvested into ecological projects such as sewage treatment and wetland development.

Recent pollution concerns. By executing a well-planned campaign appeal, Chongqing is working towards building up capacity and resources to further increase its domestic tourism spending, with the long-term goal of continuing to grow its international tourism market.
create an Office of Climate Change, Sustainability and Resilience. The mandate introduced a process of approaching resilience through assessing and addressing shocks and stresses, identifying challenges early and taking short term actions. Ambitious targets have been set to adopt 100% renewable fuel supply for transportation and electrical generation as well as achieve island-wide carbon neutrality by 2045. The City will also take bold action on climate adaptation, addressing coastal erosion and responding to sea level rise.

6. INFRASTRUCTURE
Mecca
Mecca has made vast steps to enhance its infrastructure. Specifically, a new and innovative high-speed rail service has been introduced into the region, transporting large quantities of people between Mecca and Medina in less than an hour. The Haramain High Speed Rail (HHR), which was inaugurated in October 2018, has significantly facilitated the movement of people between the two cities, and passes through three main stations: Jeddah, King Abdul Aziz International Airport and King Abdullah Economic City in Rabigh. Currently running at speeds of 300 km per hour, with an average capacity of 60 million passengers a year, the new HHR rail line is providing a more comfortable and much faster route to Mecca rather than the alternative 10 hour driving time it would take to reach the city during Haj.

Delhi
The City of Delhi is on a mission to change from its status quo and turn into a world-class tourist destination and a leader in art, culture, music, theatre, film and entertainment. Delhi has set out to achieve these goals by creating new and vast infrastructure whilst also focusing on a long-term tourism plan which aims to prioritise eco-friendly tourism whilst also emphasising the city’s rich cultural heritage.

While Delhi already has a modern, well-planned and extensive Metro network, the city is working to further expand the network. In addition, new roadways and flyovers have also improved the city’s connectivity. One of the latest developments is the Signature Bridge, which opened in November 2018. Not only does the Signature Bridge provide the much-needed traffic relief for the commuters of North Delhi and North East Delhi, but it is also a big boost for Delhi’s tourism. The Delhi Tourism and Transportation Development Corporation has completed work on the 114-metre-high deck, which sits atop the bridge’s tall pylons, and is now working on installing lifts to take visitors to the viewing platform.

Kuala Lumpur
Kuala Lumpur came to the realisation that its existing infrastructure and pedestrian transport links were not as effective as they could potentially be. By initiating a re-development of busy areas in the city, Kuala Lumpur is working to ensure that pedestrians will have better access to the city and their safety is being maintained as a priority.

Specifically, Kuala Lumpur identified that its city centre provided little or no space for pedestrian linkages between areas and not many buildings provided pedestrians with proper protection from the sun and rain. To overcome the challenges, a pedestrian network is being implemented for the city centre to facilitate pedestrian movement in busy areas and to encourage transit usage by giving priority to pedestrians over cars. In addition, footpath widening, landscape treatment, including tree planting, the provision of safer road crossings, the removal of high kerb obstacles and other enhancement projects within Kuala Lumpur’s centre, have been initiated to facilitate and promote pedestrianisation.

7. PROMOTION OF EVENTS
Lagos
Lagos takes pride in and celebrates its cultural heritage and artistic integrity openly. The city’s focus on arts and culture has been a key pillar to its tourism strategy, with Lagos showcasing and promoting its artwork whilst working together with the government to attract visitors.

Lagos has become an important location for celebrating African cultural identity with festivals of food, arts and music held regularly across the city. While many have developed organically over time, the government has recognised the importance of these festivals to support social cohesion, artistic development and drive the economy, including through Travel & Tourism. In effect, Lagos has highlighted the need to develop the festival sector to boost domestic and international tourism.

Rio de Janeiro
In 2017, Brazil’s Federal Government prioritised enhancing the attractiveness of Rio de Janeiro to international visitors throughout the year. As a result of investments estimated at R$1 billion and the development of partnerships with the private sector, a campaign was initiated to encourage visitors from all different backgrounds and of different interests to choose Rio de Janeiro as their next holiday destination.

This initiative was dubbed ‘Rio de Janeiro a Janeiro’ (Rio from January to January) and focused on 100 strategic events which took place throughout the year, with a focus on culture, sports, tourism and business. Featured events included the Rio Music Carnival, the Samba Schools Parade, the Chocolate Festival, the Japan Festival, the Super Expofood (The Latin America’s second largest food sector trade fair), the Rio Boat Show and the World Surfing Championship among others. The hope of the campaign was to appeal to as many different types of tourists as possible, through the wide variety of activities and festivals available in the city.

Bogota
Bogota has focused its attention on redeveloping the previously notorious Bronx Street as a creative hub, filled with attractions and points of interests for tourists. While the street was once extremely run-down and home to most of the city’s biggest drug cartels, Bogota was successfully able to redevelop it and built new and innovative infrastructure, in turn creating a name for itself, but this time for the right reasons.

Given its emphasis on security and the prioritisation of Travel & Tourism, the city decided to develop the first ever planned creative district in the country – the Bronx Creative District – using the old Recruitment Battalion, a historic building of national significance as the centrepiece. Creative industries were encouraged to move to the area, alongside homes, food outlets, distilleries and breweries, bookstores and a new National Vocational Training Centre. What’s more, two outdoor public spaces were also developed to host larger format events to showcase the creativity of the district.

8. AREA REDEVELOPMENT
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Beijing
To build up its tourism capacity, Beijing has examined how the land in the city is being used and how available land can be further developed. Beijing has integrated this approach into the city’s overall development plan, effectively enabling this to be the focus of Beijing’s tourism industry policies. What’s more, Beijing has also benefited from the 144-hour transit visa exemption available in selected cities across China, to further enable the growth of Travel & Tourism in the city.

Beijing’s focus on tourism ‘land’ has enabled the city to plan the sector’s growth through the selection and allocation of preferred land and locations for the development of tourism projects. These strategies have been built within the broader city’s overall development plan. As a result, tourism projects established on ‘brownfield’ sites receive more support.

To enable the growth of Travel & Tourism, Beijing became one of seven Chinese cities to employ the 144-hour transit visa exemption in December 2014, is a tax levied on all tourist accommodation. Fifty percent of the funds gathered are then invested into local tourism related projects, in turn enabling Barcelona to be a more sustainable and engaging city. To show both tourists and locals how their money is supporting the local economy and benefiting the city, specific badges have been created to highlight which projects, buildings and parks have been funded through tourism taxes. For instance, in 2017, €4.5 million were allocated to the Barcelona Tourism Consortium in 2017 to set up a joint work plan for the city to showcase its sustainable approach.

Dubai
Dubai has focused on how to better raise funds for the promotion of its city and country and continues to drive the growth of its tourism and trade. To help with crowd control during the peak times, certain locations use differentiated pricing based on demand. For instance, the Burj Khalifa charges different prices for tickets through its online booking system depending on the time of day, with a mark-up for sunset hour, for example.

9. EDUCATION & TRAINING

Budapest
Budapest is focusing its efforts on educating tourists first-hand on how they can help take care of the city and make sure they are spending their time in Budapest as respectable visitors. The approach used by Budapest has involved the use of education posters.

One initiative launched by the Budapest Festival and Tourism Centre (BFTK) is its Tourist Education Mini Poster Campaign, which was implemented to raise awareness about the maintenance of clean public places in the capital as well as to promote respectful tourism among travellers. Through this campaign, BFTK asked tourists to be respectful of the environment, local people and the economy. The Campaign conveyed the message through a poster with the following phrase: Travel. Enjoy. Respect. Welcome to Budapest.

Abu Dhabi
Abu Dhabi has been focusing on engaging its citizens in tourism programmes and initiatives. This has been beneficial to the city’s residents by providing locals with training and knowledge of the tourism industry, whilst also bettering the resources and activities for tourists to participate in when they come to visit.

Specifically, steps have been made to encourage the youth in Abu Dhabi to take an interest and engage in the tourism industry and the benefits that it can bring to their city. The Tourism Youth Summer Programme, for instance, offers students an opportunity to get a sense of how the tourism industry works and see the important contributions of the industry to Abu Dhabi’s Economic Vision 2030.

The Khebraty programme promotes the employment of Emiratis into the public and private sector in the UAE. Aimed at Emirati students, the programme offers an opportunity to explore varied career options within the Travel & Tourism sector.

Auckland
To help address the growing skills shortages facing New Zealand’s Travel & Tourism sector, Auckland is focusing on encouraging bright young people to consider a career in tourism. Led by Auckland Tourism, Events & Economic Development (ATEED), one of WTTCC’s Destination Partners, the city’s new initiative Go with Tourism, aims to change the perceptions of many young people about having a career in tourism and provides a platform to connect talent with potential employers.
‘Go with Tourism’ is a game-changing new job platform that aims to match young job-seekers with quality employers within the tourism industry. The initiative was launched in the spring of 2019 through cinema advertising, followed by promotional material around the city such as on bus backs and posters. Within a month of its launch, the initiative had already generated significant activity, with more than 300 young people registering their interest and more than 100 employers set up and ready to be matched with job seekers.

10. RE-INVESTMENT IN THE SECTOR

Barcelona
Barcelona introduced smart tourism taxes, a significant proportion of which is reinvested into public projects that benefit both locals and tourists.

Barcelona’s tourism tax is imposed on all individuals staying overnight in the city’s tourist accommodation. Fifty percent of the funds gathered are then invested into local tourism related projects, in turn enabling Barcelona to be a more sustainable and engaging city. To show both tourists and locals how their money is supporting the local economy and benefiting the city, specific badges have been created to highlight which projects, buildings and parks have been funded through tourism taxes. For instance, in 2017, €4.5 million was invested towards remodelling pedestrian areas and other infrastructure upgrades. In addition to investing in local tourism projects, €4.5 million were allocated to the Barcelona Tourism Consortium in 2017 to set up a joint work plan for the city to showcase its sustainable approach.

Dubai
Dubai has focused on how to better raise funds for the promotion of its city and country and continues to drive the growth of its tourism and trade. One effort aligned with this strategy has been the implementation of a tourism tax on all official lodgings in the city to help secure these funds.

‘The Tourism Dirham’, implemented in 2016, is a tax levied on all tourist accommodation. The fee depends on the type of lodging. The maximum is Dhs20 (just over US$5) and the revenues raised continue to support the international promotion of the emirate, fund Expo 2020 projects and help to drive growth of tourism and trade.

Beijing, China

Dubai, UAE

ANNEX 4: EXAMPLES OF CITY TRAVEL & TOURISM INITIATIVES
ACKNOWLEDGEMENTS

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