



## KEY HIGHLIGHTS – ECONOMIC IMPACT OF CITIES 2019<sup>1</sup>

The World Travel & Tourism Council's (WTTC) annual City Travel & Tourism Economic Impact Report quantifies the economic contribution of Travel & Tourism in 73 cities around the world. This year's edition also highlights successful initiatives, strategies and policies that have been implemented by cities.

Over half (55%) of the world's population lives in urban areas. Cities have become global economic hubs, driving growth and innovation, while attracting more and more people who come to live, do business and discover them. Not surprisingly, therefore, nearly half of global international travel takes place in cities.

### Key report highlights:

1. **For certain cities, the share of Travel & Tourism within the economy is often higher than the sector's share 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.
2. **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.
3. **Cities are more reliant on international travel demand than wider economies.** In 2018, international visitor spending accounted for 45% of tourism spending across the 73 cities, compared to 29% globally.
4. **Hong Kong recorded the highest international visitor spending in 2018 (US\$ 44 bn),** followed by Macau (US\$ 36 bn) and Dubai (US\$ 28 bn).
5. **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.
6. **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%).**
7. **Six of the top ten largest cities for Travel & Tourism in terms of the size are in Asia-Pacific.** Shanghai, Paris and Beijing have the largest Travel & Tourism economies of the cities in the study.
8. **Travel and 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 research.
9. **In cities where leisure travel is the dominant segment** (i.e. cities where at least 80% of travel spending is from leisure visitors), Macau and Cancún had the largest share of GDP from Travel & Tourism in 2018, with around half of the city economies directly supported by the sector. Marrakech and Las Vegas are also strongly reliant on Travel & Tourism, with 31% and 27% of city GDP directly generated by the sector.
10. **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% (161,000 jobs) and Macau in third place with 32.3% (125,000 jobs).
11. **Las Vegas, Orlando, Cancún, Marrakech and Miami** were the top 5 cities with a greater reliance on Travel & Tourism than their respective countries.
12. **Direct Travel & Tourism GDP across 73 cities grew by 3.6% in 2018, above the overall city economy growth of 3.0%.** The two fastest growing cities were both in Turkey, namely Antalya and Istanbul, which grew by 15.7% and 15.5% respectively. Moscow placed third for year-on-year growth at 13.7%.
13. **Seven of the ten 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.

<sup>1</sup> Mainland Chinese visitors to Macau SAR, China and Hong Kong SAR, China are treated as 'international' visitors for the purpose of this research.

# TOP 10

## Top 10 largest cities (Direct T&T GDP contribution 2018 US\$ billion)

1	Shanghai	35.9
2	Paris	35.6
3	Beijing	33.2
4	Macau	27.4
5	Orlando	26.3
6	New York	26.0
7	Bangkok	25.1
8	Mexico City	24.6
9	Tokyo	23.1
10	Shenzhen	20.6

## Top 10 largest cities (Direct T&T contribution to city GDP, 2018, %)

1	Macau	50.3%
2	Cancún	46.8%
3	Marrakech	30.6%
4	Las Vegas	27.4%
5	Orlando	19.8%
6	Dubrovnik	17.8%
7	Dubai	11.5%
8	Bangkok	10.6%
9	Antalya	10.1%
10	Miami	9.2%

## Top 10 largest cities (International visitor spending 2018 US\$ billion)

1	Hong Kong	43.9
2	Macau	36.1
3	Dubai	27.9
4	Bangkok	23.4
5	Tokyo	21.7
6	New York	21.0
7	Singapore	19.9
8	Shenzhen	19.5
9	London	17.5
10	Miami	17.0

## Top 10 fastest growing cities (2017-2018 % growth in direct T&T GDP)

1	Antalya	15.7%
2	Istanbul	15.5%
3	Moscow	13.7%
4	Macau	12.7%
5	Jakarta	11.3%
6	Marrakech	10.8%
7	Cairo	9.9%
8	Brasilia	9.9%
9	Ho Chi Minh City	9.8%
10	Budapest	8.5%

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