MasterCard

Global Destination Cities Index

MasterCard Worldwide Insights
2Q 2013

Top 20 Global Destination Cities in 2013[1]

The top destination city by international visitor arrivals in 2013 is Bangkok, which managed to surpass London by a very slim margin. This is the first time an Asian city is in the top rank since the Index was launched in 2010. London is now followed by Paris, Singapore, New York, Istanbul, Dubai and others as shown in Chart 1. Paris remains third, but is the only destination city among the top 20 that shows a decline in the estimated number of international visitor arrivals, by -0.7 percent in 2013. In contrast, Istanbul and Dubai show the strongest growth (along with Bangkok) in increasing their arrival numbers by 9.5 percent and 10.9, percent respectively. With the exception of Bangkok overtaking London to be in the top rank in the world, the lineup of the global top 20 in 2013 is the same as in 2012.

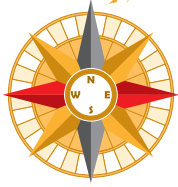**CHART 1** **Global Top 20 Top Destination Cities by International Overnight Visitors**
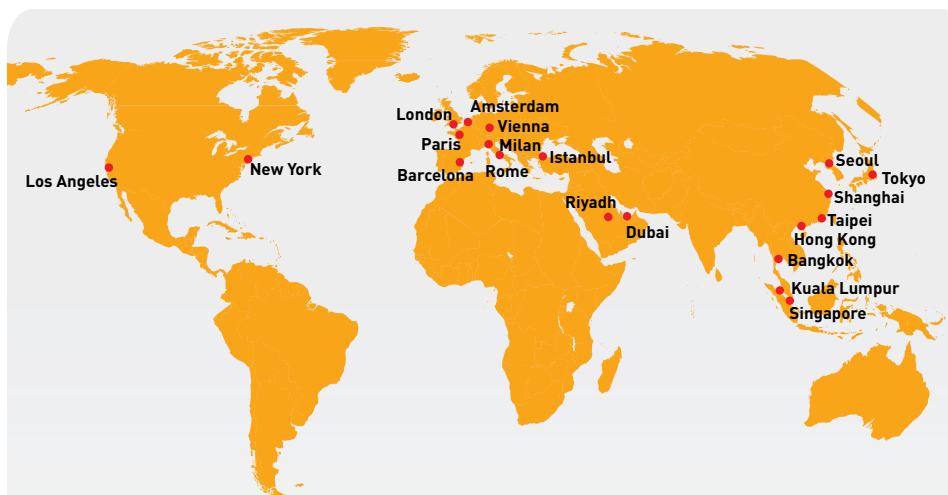
Rank	City	Visitors	Rank	City	Visitors
1	Bangkok	15.98 mil	11	Seoul	8.19 mil
2	London	15.96 mil	12	Milan	6.83 mil
3	Paris	13.92 mil	13	Rome	6.71 mil
4	Singapore	11.75 mil	14	Shanghai	6.50 mil
5	New York	11.52 mil	15	Amsterdam	6.35 mil
6	Istanbul	10.37 mil	16	Tokyo	5.80 mil
7	Dubai	9.89 mil	17	Vienna	5.37 mil
8	Kuala Lumpur	9.20 mil	18	Taipei	5.19 mil
9	Hong Kong	8.72 mil	19	Riyadh	5.05 mil
10	Barcelona	8.41 mil	20	Los Angeles	4.84 mil
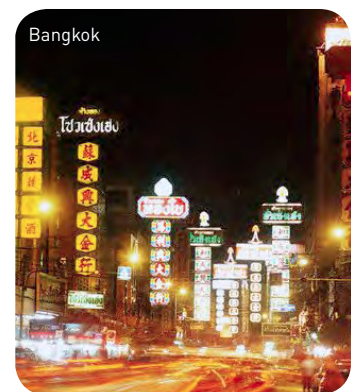
This is the first time an **Asian city [Bangkok]** is in the top rank since the Index was launched in 2010.

[1] Please see Appendix B for details of the research methodology for estimating the numbers of international visitor arrivals and their cross-border spending.

Key Findings

THE RISE OF THE GLOBAL SOUTH

Moscow
Istanbul
Dubai
Abu Dhabi
Seoul
Tokyo
Shanghai
Taipei
Hong Kong
Bangkok
Kuala Lumpur
Singapore

Of the 12 destination cities showing the fastest increase in air travel connectivity, all are located east and south of Istanbul with the exception of Moscow.

Bangkok is the top 2013 destination city by international visitor arrivals. While surpassing 2012 leader London by the slim margin, Bangkok demonstrated growth rates of better than **18 percent** in 2011 and 2012, with a further **9.8 percent** growth in 2013.

Dubai shows the strongest growth (along with Bangkok) in increasing their arrival numbers by **10.9 percent**.

The destination cities in emerging markets expanding the fastest in air connectivity lie in **the Middle East and Asia**.
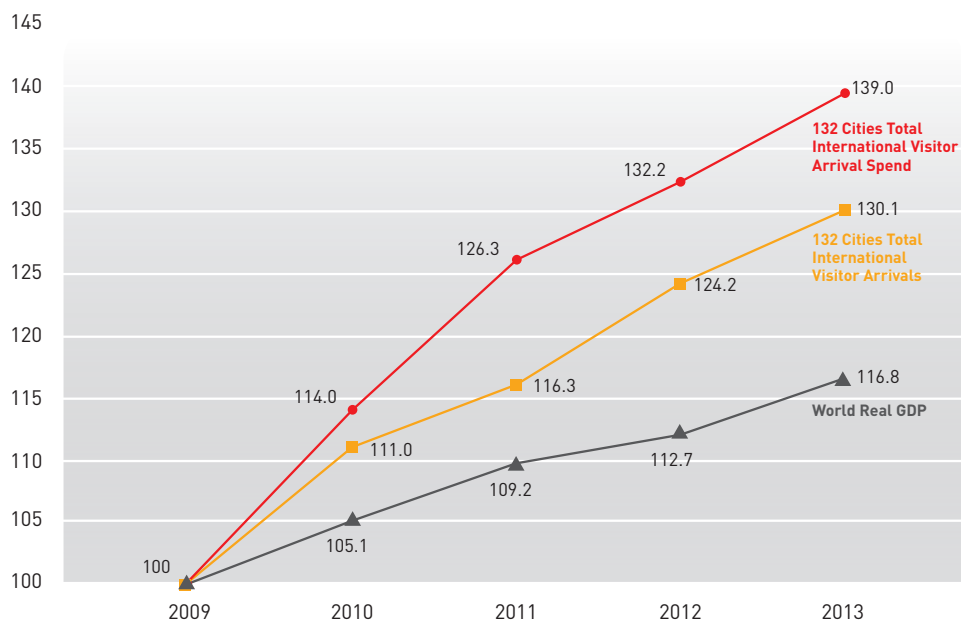
Global Travel Trending Up Despite Economic Challenges

It has been more than four years since the global financial crisis erupted in 2008. The recovery has been slow to say the least, and the global economic outlook continues to be clouded by uncertainty. Against this background, international travel and cross-border spending have shown to be very resilient as evidenced by data from the 132 cities covered by MasterCard's Global Destination Cities Index.[2] Chart 2 compares the growth between world real GDP, international visitor arrivals in the 132 cities and their cross-border spending over the 2009 and 2013 period. International visitor arrivals grew almost twice as fast as world real GDP, and their cross-border spending grew over 2.3 times faster. So despite the persistent weakness of constrained demand in the global economy, international travel is growing strongly, and the 132 of the world's most important destination cities are benefiting from this powerful trend.

International visitor arrivals grew **almost twice as fast** as world real GDP, and their cross-border spending grew by **over 2.3 times faster**.

CHART 2 **World GDP Growth Versus the Growth of International Visitor Arrivals and Cross-Border Spending by the 132 Destinations**

132 Cities Total International Visitor Arrival Spend: 100, 114.0, 126.3, 132.2, 139.0

132 Cities Total International Visitor Arrivals: 100, 111.0, 116.3, 124.2, 130.1

World Real GDP: 100, 105.1, 109.2, 112.7, 116.8

[2] Please see Appendix C for the list of 132 destination cities.

Not all 132 destination cities perform equally well, however. Indeed, a closer look at the change in air travel connectivity of the 132 destination cities over the 2009 and 2013 period shows a decidedly geographic pattern in growth. The level of air travel connectivity for a destination city can be measured in terms of both the scope of the city's connections with other cities by air travel, as well as the frequency within each connection.[3] Estimates of how air travel connectivity has changed from 2009 to 2013 are summarized in Table 1. Of the 12 destination cities showing the fastest increase in air travel connectivity, all are located east and south of Istanbul with the exception of Moscow. The city with the fastest-growing air travel connectivity in North America is Toronto, which ranks 13. The fastest-growing city in Western Europe in air travel connectivity is Berlin, which ranks 17. The African city with the fastest-growing air connectivity is Cairo, which ranks 19, and in Latin America it is Bogotá, which ranks 22.

Toronto

The city with the fastest-growing air travel connectivity in North America is Toronto.

TABLE 1 Air Travel Connectivity: Changes from 2009 to 2013

|	City	Increase in Index Value of Air Travel Connectivity from 2009 to 2013
1	Istanbul	15.0
2	Dubai	13.3
3	Singapore	11.2
4	Seoul	9.5
5	Bangkok	9.0
6	Kuala Lumpur	8.4
7	Hong Kong	8.1
8	Moscow	7.8
9	Taipei	6.2
10	Shanghai	5.8
11	Tokyo	5.3
12	Abu Dhabi	5.2
Top North American City	Toronto (13)	5.2
Top Western European City	Berlin (17)	4.0
Top African City	Cairo (19)	3.7
Top Latin American City	Bogotá (22)	3.5

This geographical pattern clearly suggests that destination cities in emerging markets in the Middle East and Asia are expanding the fastest in being connected to the rest of the world through having more flights to more cities, and more frequent flights to cities where they are already connected. This will strongly drive the growth of their visitor arrivals and cross-border spending in the coming years.

[3] Please see Appendix A for details of how the value of air connectivity is calculated.

Chart 3 shows more detail on the growth rates of the global top five destination cities from 2010 to 2013. Bangkok enjoyed growth rates of over 18 percent in 2011 and 2012, and it follows with a further 9.8 percent growth in 2013, which clearly helped propel it to the world's number-one rank. In contrast, the growth rates for Singapore dropped significantly over this time period; and, as mentioned above, the growth rate of Paris dips into the negative in 2013.

CHART 3 **Global Top 5 by Overnight Visitors**
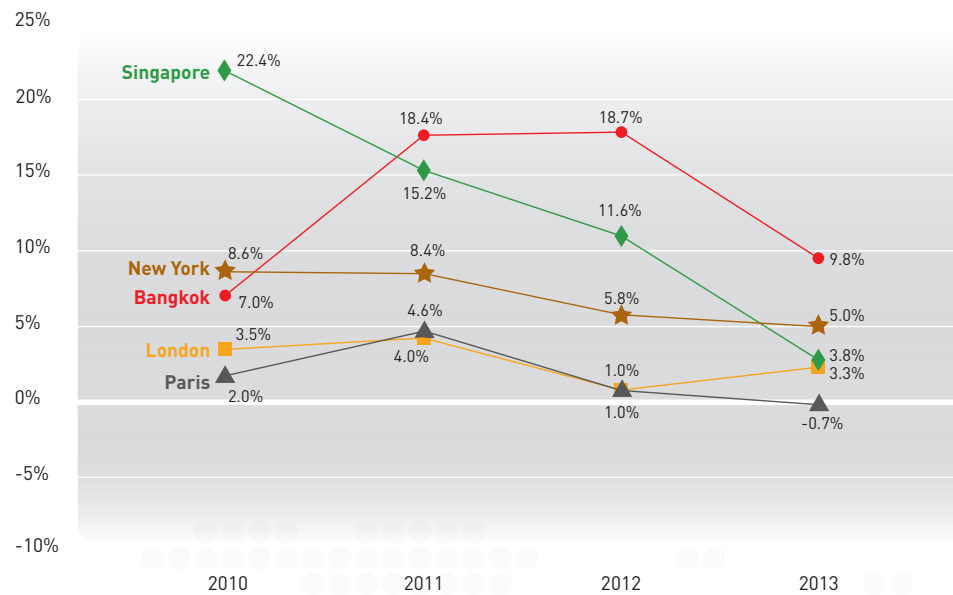
If all top 10 destination cities maintain their current rates of growth in the next few years, then by 2016 Istanbul will surpass Singapore, New York and Paris in terms of international visitor arrivals; and Dubai will similarly surpass Singapore and New York in 2016 and Paris in 2017.

In terms of cross-border spending, New York has retained its top rank in the world in 2013 with an estimated US$18.59 billion, followed by London with US$16.32 billion. They are followed by Paris, Bangkok, Singapore, Tokyo, and others as shown in Chart 4. Though ranked first in the world by arrival numbers, Bangkok is ranked fourth in terms of visitor cross-border spending estimated at US$14.28 billion.

CHART 4 **Global Top 20 Top Destination Cities by International Overnight Visitor Spend**

New York

1	New York	$18.6 bil	11	Istanbul	$8.6 bil
2	London	$16.3 bil	12	Taipei	$8.1 bil
3	Paris	$14.6 bil	13	Kuala Lumpur	$7.8 bil
4	Bangkok	$14.3 bil	14	Los Angeles	$7.8 bil
5	Singapore	$13.5 bil	15	Shanghai	$6.9 bil
6	Tokyo	$12.7 bil	16	Milan	$6.6 bil
7	Seoul	$10.8 bil	17	Vancouver	$6.5 bil
8	Dubai	$10.4 bil	18	Rome	$6.4 bil
9	Sydney	$10.4 bil	19	Amsterdam	$6.3 bil
10	Barcelona	$8.9 bil	20	Miami	$6.3 bil

New York has retained its **top rank in the world** in 2013 with an estimated US $18.59 billion.

The cross-border spending growth rates from 2010 to 2013 of the global top five are illustrated in Chart 5. Bangkok shows highest growth rates overall, rising from close to 20 percent in 2011 to 36 percent in 2012, before settling down to 11.4 percent in 2013. Growth rates in Paris had been very volatile, recovered somewhat in 2013 to -0.7% from a severe decline of -9.2% in 2012. Growth rates in Singapore were in continuous decline in this period, while they were relatively stable for New York and London.

CHART 5 **Global Top 5 by Overnight Visitor Spend**
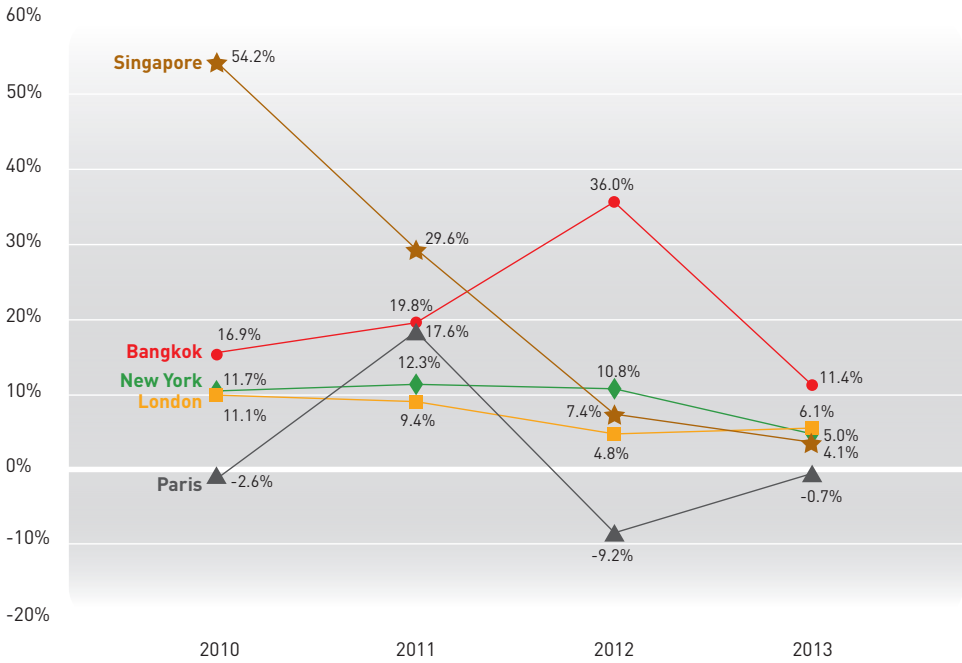
Bangkok

Asia/Pacific Top 10 Destination Cities

The top 10 in Asia/Pacific are shown in Chart 6. Bangkok, being top ranked in the world, is also the top ranked in Asia. It is followed by Singapore, Kuala Lumpur, Hong Kong, Seoul, Shanghai, Tokyo, Taipei, Beijing, and Guangzhou. Significantly, five of the top 10 in 2013 are in the Greater China region.

CHART 6 Asia/Pacific Top 10 Destination Cities by International Overnight Visitors

1	Bangkok	15.98 mil
2	Singapore	11.7 mil
3	Kuala Lumpur	9.2 mil
4	Hong Kong	8.7 mil
5	Seoul	8.2 mil
6	Shanghai	6.5 mil
7	Tokyo	5.8 mil
8	Taipei	5.2 mil
9	Beijing	4.8 mil
10	Guangzhou	4.7 mil

The growth rates of international visitor arrivals from 2010 to 2013 are presented in Chart 7 for the top five in Asia/Pacific. The curves representing Bangkok and Singapore have already been seen in Chart 3 for the global top five. Hong Kong, Seoul and Kuala Lumpur all show lower growth rates in 2013 compared with 2010.

CHART 7 Asia/Pacific Top 5 Destination Cities by International Overnight Visitors
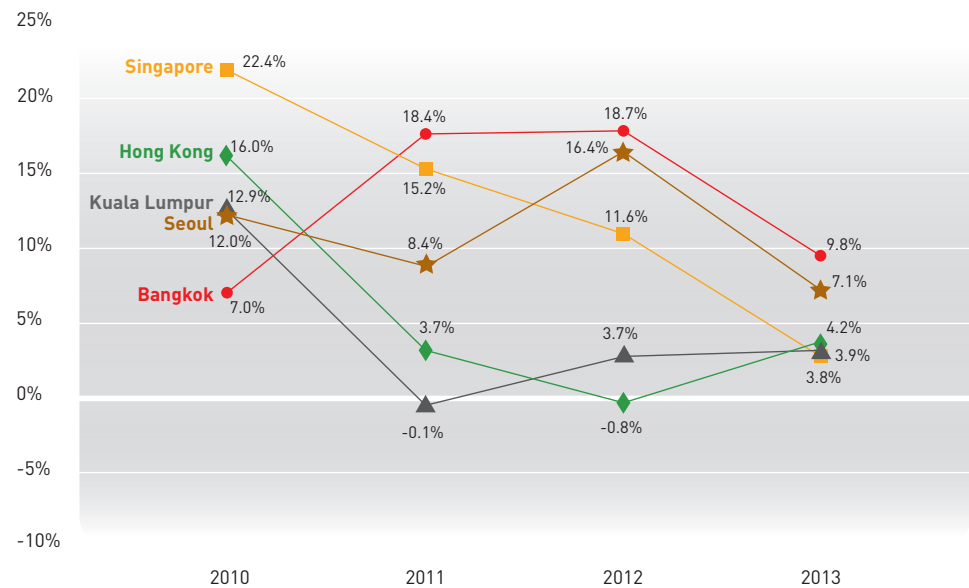
Chart 8 lists the top 10 in Asia/Pacific in international visitors' cross-border spending. Bangkok and Singapore are again in the first and second rank. Tokyo, however, moves up from the seventh rank in arrivals to the third rank in spending, reflecting the higher costs of living in Tokyo. Two Australian cities, Sydney and Melbourne, appear in the top 10 in spending—ranking fifth and 10th, respectively—even though they are not in the top 10 in arrivals (Sydney ranks 15th and Melbourne 25th in Asia/Pacific in arrivals). Like Tokyo, this is a reflection of the higher costs of living in these two cities as well as the tendency to stay longer when foreigners visit these two cities. In contrast, three cities have ranks in spending that are lower than their ranks in arrivals, Kuala Lumpur (seventh versus third rank), Shanghai (eighth versus sixth rank), and Hong Kong (ninth versus fourth rank), suggesting that their arrivals either stay for a shorter period or spend less, or both.

Tokyo

CHART 8 **Asia/Pacific Top 10 Destination Cities by International Overnight Visitor Spend**

1	Bangkok	$14.3 bil
2	Singapore	$13.5 bil
3	Tokyo	$12.7 bil
4	Seoul	$10.8 bil
5	Sydney	$10.4 bil
6	Taipei	$8.1 bil
7	Kuala Lumpur	$7.8 bil
8	Shanghai	$6.9 bil
9	Hong Kong	$6.3 bil
10	Melbourne	$5.9 bil

Tokyo, however, moves up from the seventh rank in arrivals to **the third rank in spending,** reflecting higher costs of living in Tokyo.

The growth rates of the Asia/Pacific top five destination cities in spending from 2010 to 2013 are detailed in Chart 9. The curves representing Bangkok and Singapore have been shown in Chart 5 in the global top five. Tokyo shows a strong recovery in 2012, bouncing back to 20 percent from a severe contraction of 20 percent in 2011 as a result of the earthquake, tsunami and Fukushima nuclear disasters. In 2013, its growth is lower than 2012, at around 6.5%. Sydney and Seoul converge similarly to 5.9% and 6.7%, respectively, in 2013.

CHART 9 **Asia/Pacific Top 5 Destination Cities by International Overnight Visitor Spend**

Bangkok
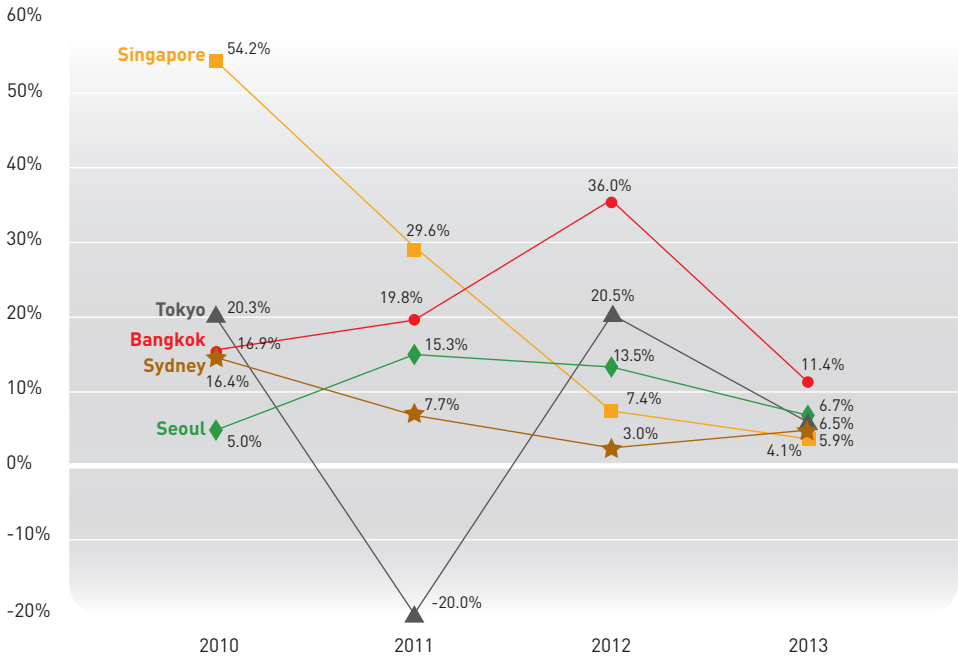
Europe Top 10 Destination Cities

London ranks first in Europe in international visitor arrivals, followed by Paris, Istanbul, Barcelona, and Milan. In fact, the lineup of the top 10 in Europe, shown in Chart 10, is unchanged this year from 2012.

CHART 10 **Europe Top 10 Destination Cities by International Overnight Visitors**

1	London	15.96 mil
2	Paris	13.9 mil
3	Istanbul	10.4 mil
4	Barcelona	8.4 mil
5	Milan	6.8 mil
6	Rome	6.7 mil
7	Amsterdam	6.3 mil
8	Vienna	5.4 mil
9	Madrid	4.7 mil
10	Prague	4.4 mil

The growth rates of the top five in Europe over the 2010 and 2013 period are presented in Chart 11. What stands out are the astonishing growth rates of Istanbul, which rebounded vigorously from a contraction in 2010 to exceed 25 percent in 2012, then moderated to 9.5 percent in 2013. If Istanbul continues to grow and Paris continues to decline at their current rates, Istanbul will surpass Paris in numbers of international visitor arrivals by 2016.

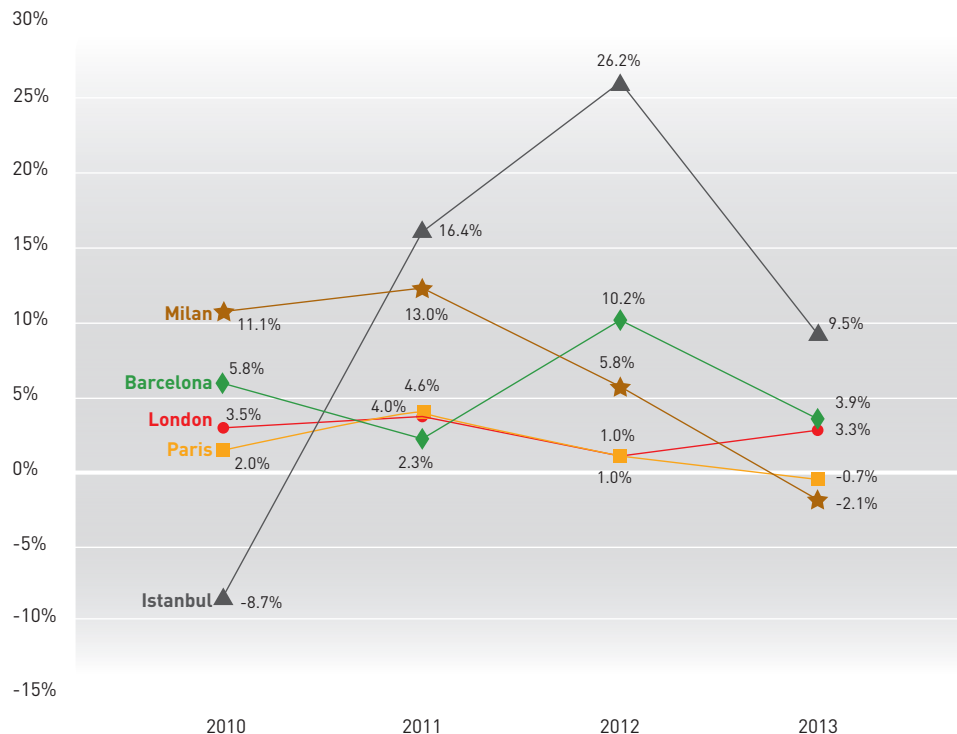**CHART 11** **Europe Top 5 Destination Cities by International Overnight Visitors**

Chart 12 shows the top 10 in Europe in terms of cross-border spending by international visitors. London ranks first, as in previous years. Three out of the top 10, however, are showing negative growth in visitor spending: Paris, Milan and Rome. In contrast, the destination cities showing the strongest growth rates among the top 10 are London at 6.1 percent, Vienna at 6.6 percent and Istanbul at 5.5.

CHART 12 **Europe Top 10 Destination Cities by International Overnight Visitor Spend**

1	London	$16.3 bil
2	Paris	$14.6 bil
3	Barcelona	$8.9 bil
4	Istanbul	$8.6 bil
5	Milan	$6.6 bil
6	Rome	$6.4 bil
7	Amsterdam	$6.3 bil
8	Madrid	$5.1 bil
9	Vienna	$4.8 bil
10	Munich	$4.6 bil

Chart 13 shows the growth rates over the 2010 to 2013 period for Europe's top 5 in visitor spending. Barcelona has recovered from a contraction in 2012, rising to an estimated growth rate of 4.7 percent 2013. Paris's growth rate is still negative in 2013, though much less than the -10 percent in 2012. In contrast, Istanbul's growth in 2012 exceeded 25 percent, before settling down to 5.5 percent in 2013.

CHART 13 **Europe Top 5 Destination Cities by International Overnight Visitor Spend**
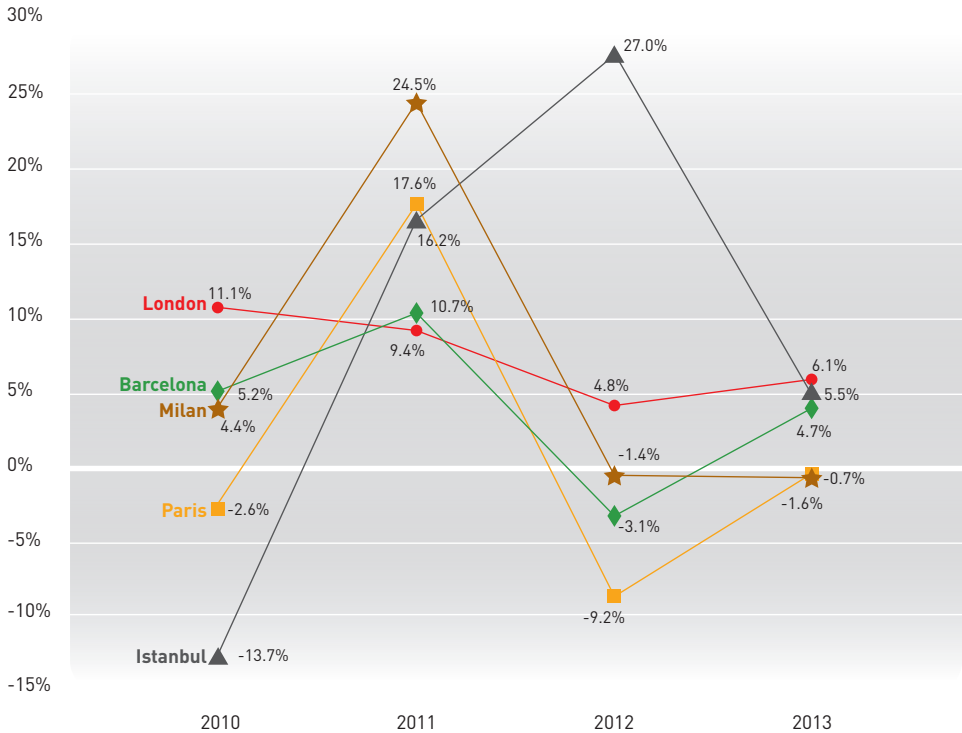
Latin America Top 10 Destination Cities

Mexico City is the top ranked destination city in Latin America, with 3.1 million international visitor arrivals estimated for 2013. It is followed by Buenos Aires, Sao Paulo, Lima, San Jose, and others, as shown in Chart 14. The lineup of top 10 in Latin America in 2013 is unchanged from 2012. This apparent stability, however, masks rapidly changing growth dynamics.

CHART 14 **Latin America Top 10 Destination Cities by International Overnight Visitors**

1	Mexico City	3.1 mil
2	Buenos Aires	2.6 mil
3	Sao Paulo	2.4 mil
4	Lima	1.8 mil
5	San Jose	1.4 mil
6	Rio de Janeiro	1.4 mil
7	Bogotá	0.9 mil
8	Montevideo	0.7 mil
9	Quito	0.6 mil
10	Caracas	0.5 mil

Mexico City

Mexico City is the top ranked destination city in Latin America with 3.1 million international visitor arrivals estimated for 2013.

The very different growth dynamics in international visitor arrivals among the top five destination cities in Latin America are illustrated in Chart 15. In 2011 and 2012, Lima grew strongly, while Mexico City suffered a contraction in 2011 and Buenos Aries in 2012. Meantime, San Jose's growth rates basically mirrors those of Mexico City, while Sao Paulo's growth rates managed a steady increase from 2011 to 2013. Even though their growth rates seem to converge in 2013, Lima remains the fastest-growing at 12.7 percent, followed by Sao Paulo at 10.7 percent. If these growth rates are maintained, then Sao Paulo could surpass Mexico City and Buenos Aires in 2017, and Lima overtaking Buenos Aires in 2018.

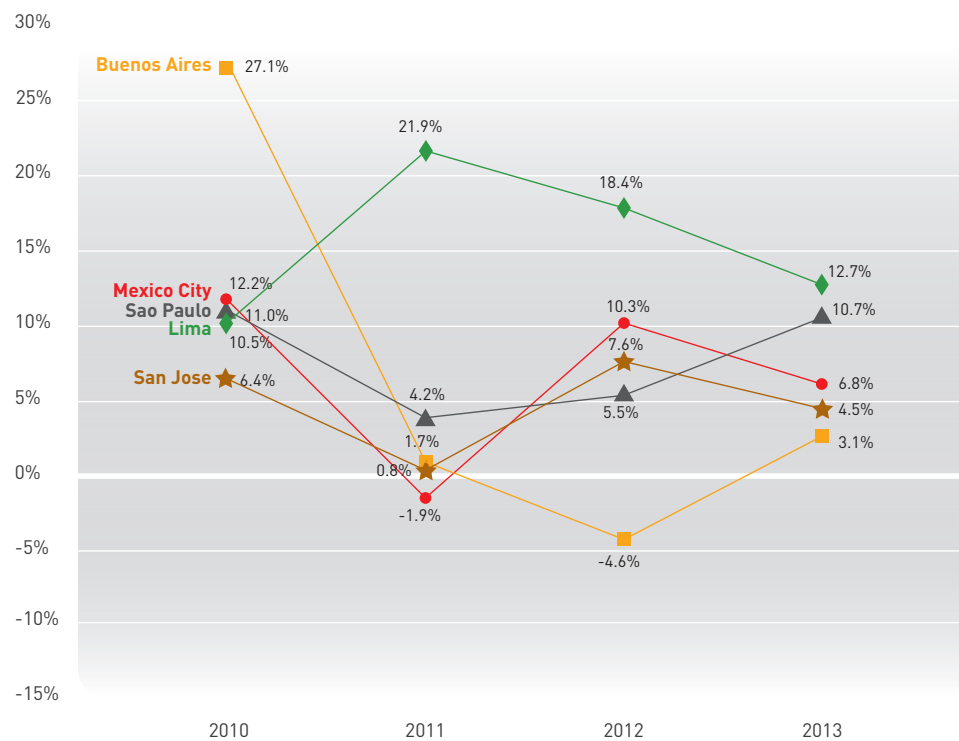**CHART 15** Latin America Top 5 Destination Cities by International Overnight Visitors

Chart 16 lists the top 10 destination cities in visitor cross-border spending in Latin America. Sao Paulo is in the first rank (third rank in arrivals), followed by Buenos Aires, then Mexico City, Rio de Janeiro and Lima in the top third. While the list of the top 10 in 2013 is the same as in 2012, Bogotá climbed from eighth rank in 2012 to seventh rank in 2013; while Caracas fell from seventh to eighth rank.

CHART 16 **Latin America Top 10 Destination Cities by International Overnight Visitor Spend**

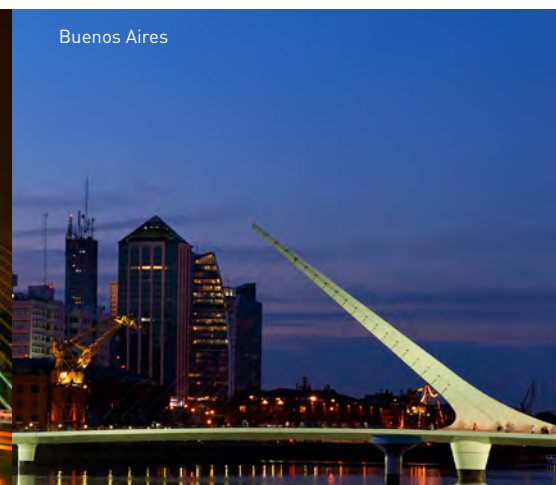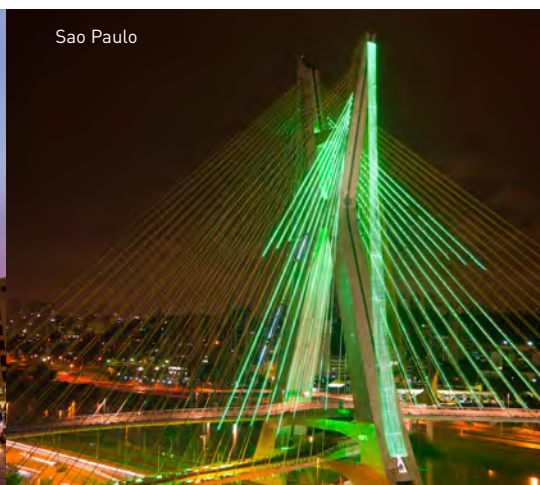|		
1	Sao Paulo	$2.9 bil
2	Buenos Aires	$2.7 bil
3	Mexico City	$2.2 bil
4	Rio de Janeiro	$1.7 bil
5	Lima	$1.4 bil
6	San Jose	$1.3 bil
7	Bogotá	$0.8 bil
8	Caracas	$0.7 bil
9	Montevideo	$0.6 bil
10	Quito	$0.4 bil

Lima

Sao Paulo

Buenos Aires

Chart 17 shows that the growth rates of visitor spending diverged widely over the 2010 to 2012 period, before converging in 2013. Lima is the fastest-growing in 2013 with 13.2 percent, followed by Rio de Janeiro at 12.1 percent, Mexico City at 11.6 percent, Sao Paulo at 11.0 percent, and Buenos Aires at 6.0 percent. But the fastest-growing among the top 10 is Bogotá, in the seventh rank at 14.2 percent (not shown in the chart). In contrast, Caracas which is in the eighth rank (also not shown in the chart), is estimated to contract by 13.3 percent this year.

CHART 17 **Latin America Top 5 Destination Cities by International Overnight Visitor Spend**
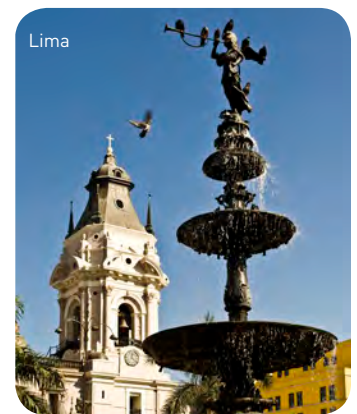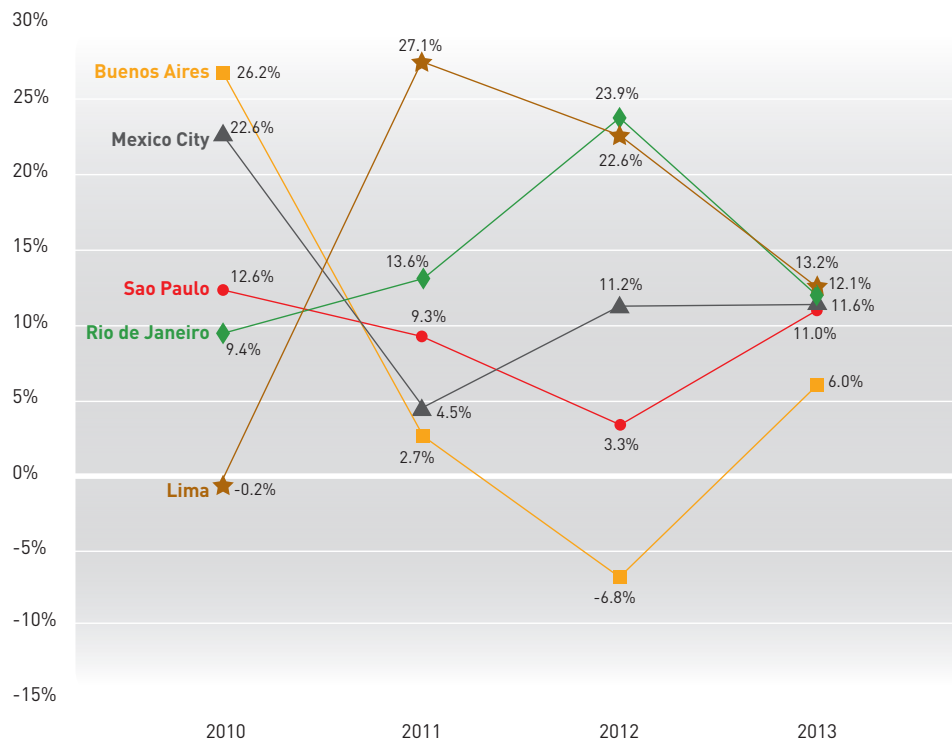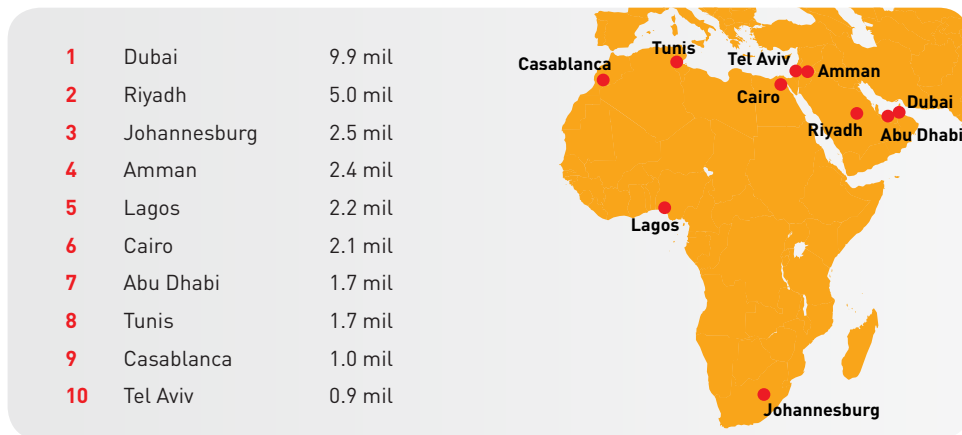

Lima

Lima is the **fastest-growing** Latin American city in 2013.

Middle East and Africa
Top 10 Destination Cities

The top 10 destination cities in international visitor arrivals in the Middle East and Africa region are listed in Chart 18. Dubai has retained the number one rank in the region. The lineup of the top in 2013 is exactly the same as in 2012. One striking feature in the top 10 is how far ahead Dubai is from the rest. Its international arrival number is almost twice that of Riyadh in second rank, and about four times as high as the third-ranked Johannesburg.

CHART 18 **Middle East and Africa Top 10 Destination Cities by International Overnight Visitors**

1	Dubai	9.9 mil
2	Riyadh	5.0 mil
3	Johannesburg	2.5 mil
4	Amman	2.4 mil
5	Lagos	2.2 mil
6	Cairo	2.1 mil
7	Abu Dhabi	1.7 mil
8	Tunis	1.7 mil
9	Casablanca	1.0 mil
10	Tel Aviv	0.9 mil

Dubai

One striking feature in the top 10 is **how far ahead Dubai is from the rest.**

The growth rates of international visitor arrivals of the top five destination cities in the region are shown in Chart 19. Apart from Riyadh, which pulled away from the rest and grew strongly in 2011, all top five converged in growth rates in 2012 and 2013. During 2010 and 2011, however, Lagos suffered a severe contraction, with visitor numbers declining by about 20 percent each year, before recovering to around 6.9 percent growth in 2012. Growth rates of Amman and Johannesburg in 2011 also stalled before returning to positive growth in 2012 and 2013.

But the destination city with the strongest growth rate among the top 10 is Abu Dhabi (not shown in the chart), in seventh rank, with its growth in arrivals in 2013 estimated at 16.1 percent. If the same growth rates are maintained in the coming years, Abu Dhabi will overtake Lagos in 2016 and match Johannesburg in 2017.

CHART 19 **Middle East and Africa Top 5 Destination Cities by International Overnight Visitors**
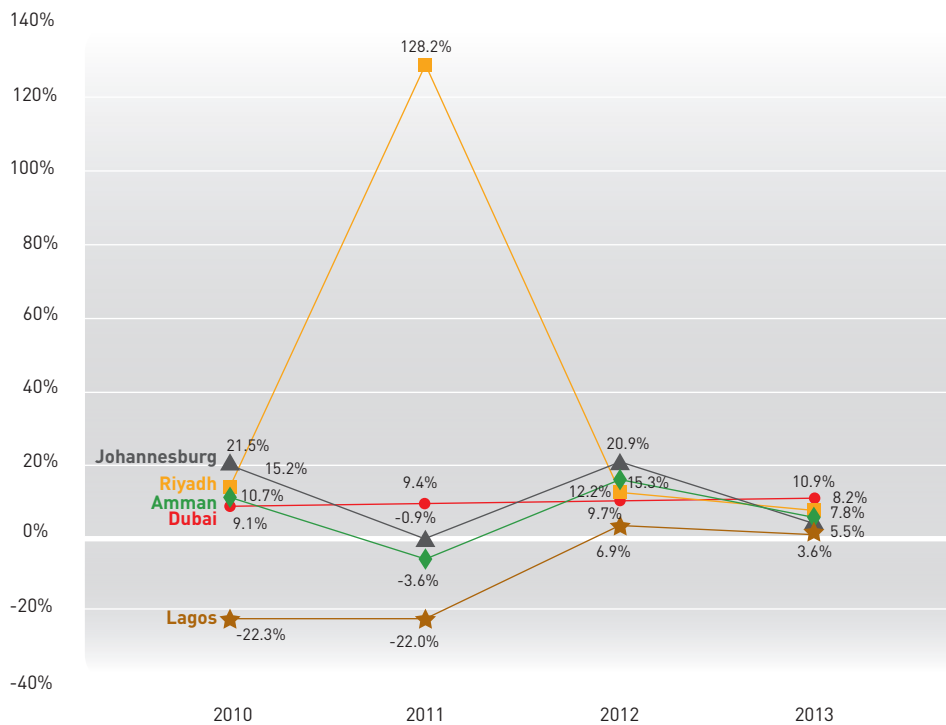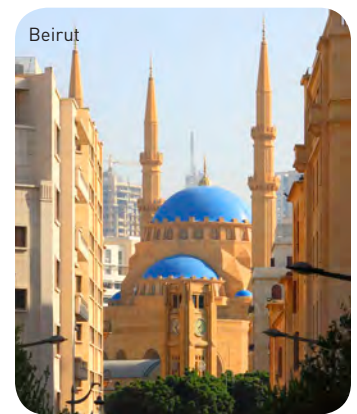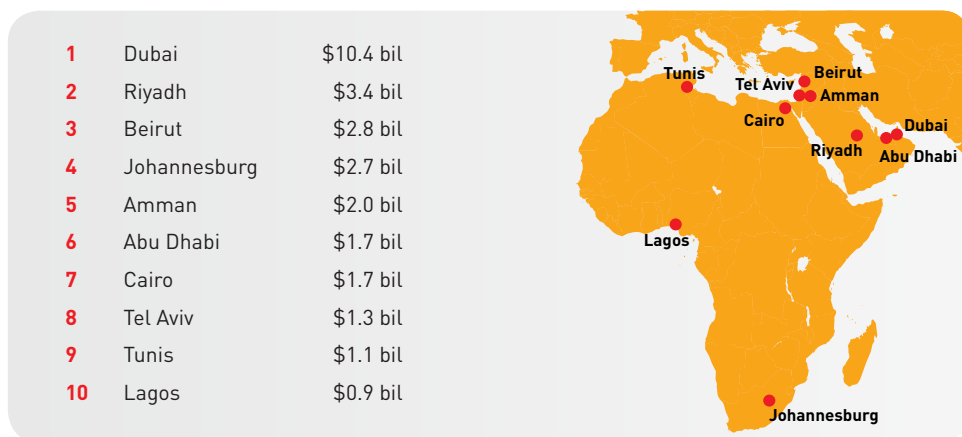
Chart 20 shows the top 10 destination cities in the Middle East and Africa region in terms of visitor cross-border spending. Beirut is in the third rank even though it is not among the top 10 in visitor arrivals, a testimony to its ability to attract visitors that are big spenders. Dubai is in first rank, and just as in the numbers of visitor arrivals, it is striking to see how far ahead of the rest Dubai is. Cross-border spending by international visitors in Dubai is estimated to be over three times higher than the second-ranked Riyadh, 3.7 times higher than the third-ranked Beirut, almost four times higher than the fourth-ranked Johannesburg, and is over six times higher than the sixth-ranked Abu Dhabi.

CHART 20 **Middle East and Africa Top 10 Destination Cities by International Overnight Visitor Spend**

1	Dubai	$10.4 bil
2	Riyadh	$3.4 bil
3	Beirut	$2.8 bil
4	Johannesburg	$2.7 bil
5	Amman	$2.0 bil
6	Abu Dhabi	$1.7 bil
7	Cairo	$1.7 bil
8	Tel Aviv	$1.3 bil
9	Tunis	$1.1 bil
10	Lagos	$0.9 bil

Beirut

Beirut is in the third rank even though it is not among the top 10 in visitor arrivals, a testimony to its **ability to attract visitors that are big spenders.**

The growth rates of visitor cross-border spending over the 2011 and 2013 period for the top five in Middle East and Africa are seen in Chart 21. Widely divergent patterns can be observed between the top five destination cities. Beirut suffered from a severe contraction in 2011 and 2012, with visitor spending declining by 14.5 and 8.4 percent, respectively, before recovering to 3.4 percent growth in 2013. 2011 was also a year of contraction for Johannesburg and Amman. In contrast, visitor spending in Riyadh grew astonishingly at over 90 percent in 2011, before dropping back to around 20 percent in 2012 and 12 percent in 2013.

CHART 21 **Middle East and Africa Top 5 Destination Cities by International Overnight Visitor Spend**
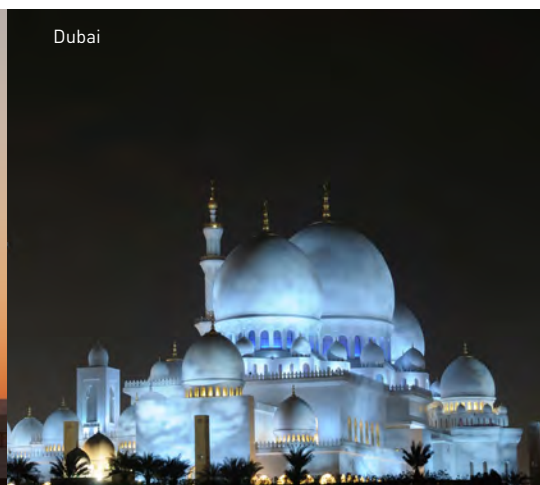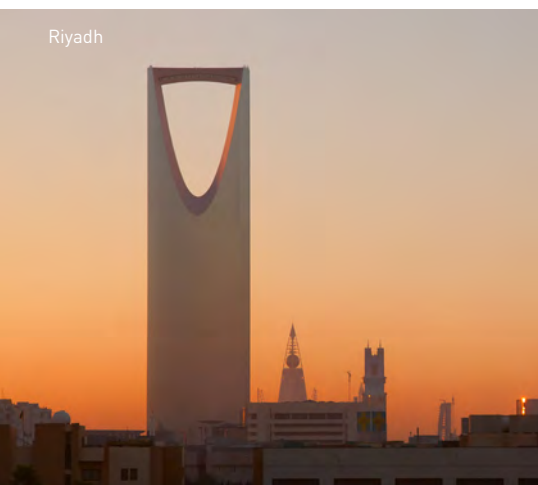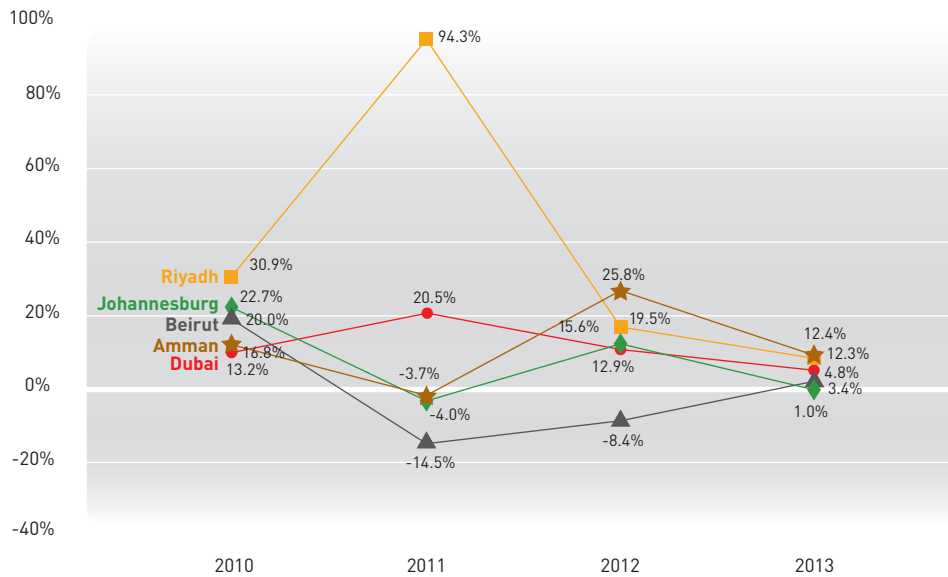
North America Top 10 Destination Cities

Chart 22 shows the top 10 destination cities in North America by international visitor arrivals. New York is the top ranked destination city in the region, followed by Los Angeles and Miami. The Canadian city Toronto is in the 4th rank, ahead of another Canadian city, Vancouver, which is in 5th rank. They are then followed by San Francisco, Washington D.C., Chicago, Montreal, and Boston. The lineup of these top 10 in North America in 2013 is unchanged from 2012.

CHART 22 North America Top 10 Destination Cities by International Overnight Visitors

1	New York	11.5 mil
2	Los Angeles	4.8 mil
3	Miami	3.9 mil
4	Toronto	3.4 mil
5	Vancouver	3.4 mil
6	San Francisco	3.0 mil
7	Washington	2.3 mil
8	Chicago	2.2 mil
9	Montreal	2.0 mil
10	Boston	1.6 mil

The lineup of these top 10 in North America in 2013 is **unchanged** from 2012.

Chart 23 provides the growth rates of the North American top five in international visitor arrivals from 2010 to 2013. New York and Vancouver both show moderate growth over this period. Los Angeles, however, declined from close to 30 percent growth in 2010 to less than five percent in 2013. Miami suffered a contraction of five percent in 2011, but has rebounded vigorously to an eight percent gain in 2012, and then close to 11 percent in 2013. Vancouver also contracted slightly in 2011, recovering in 2012, but slid back to a very anemic 0.2 percent growth in 2013.

CHART 23 North America Top 5 Destination Cities by International Overnight Visitors
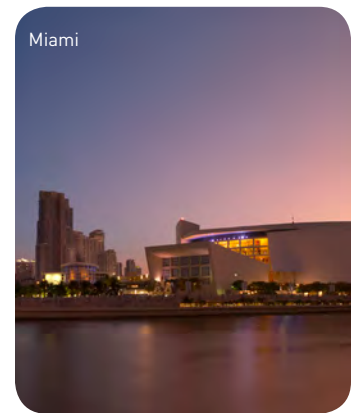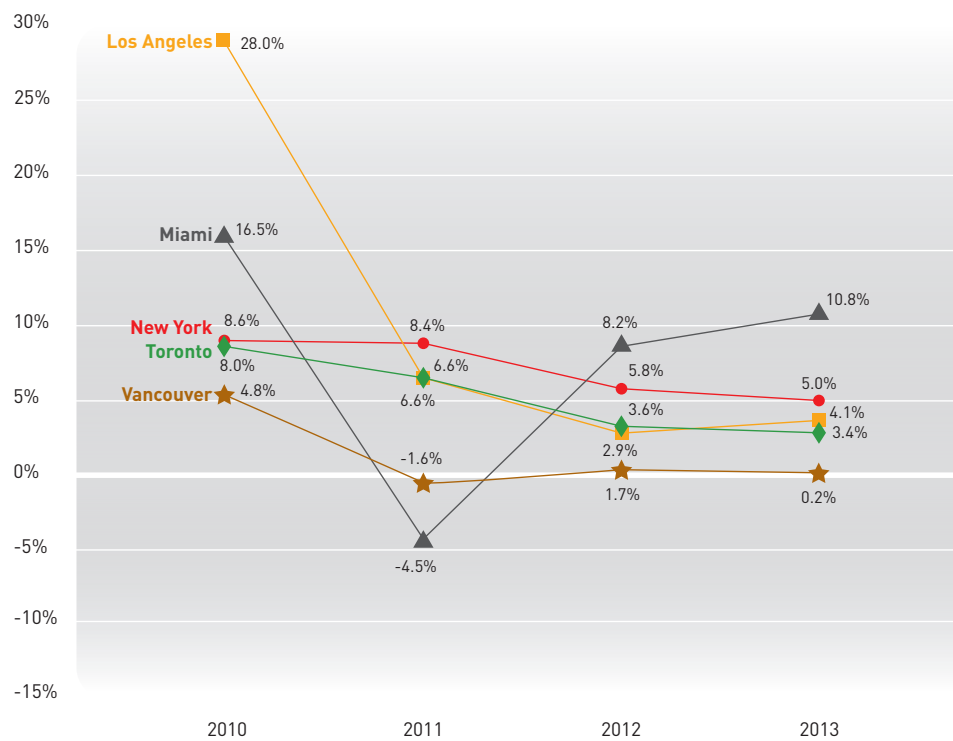
Miami

Miami has **rebounded vigorously** over the last two years.

Chart 24 shows the top 10 destination cities in North America by international visitor cross-border spending in 2013. New York is again the top ranked destination city in the region in 2013, followed by Los Angeles in second rank. Vancouver, however, is in third rank despite being in fifth rank in arrivals, beating Toronto and Miami.

CHART 24 **North America Top 10 Destination Cities by International Overnight Visitor Spend**

1	New York	$18.6 bil
2	Los Angeles	$7.8 bil
3	Vancouver	$6.5 bil
4	Miami	$6.3 bil
5	San Francisco	$4.8 bil
6	Toronto	$4.2 bil
7	Washington	$3.7 bil
8	Chicago	$3.5 bil
9	Boston	$2.6 bil
10	Montreal	$2.2 bil

The growth rates in visitor spending for the North American top five are illustrated in Chart 25. Both New York, the top-ranked destination city, and San Francisco in the fifth rank show a pattern of moderate growth from 2010 to 2013. In contrast, Los Angles, the second ranked city, shows a very sharp decline in growth over this period. Vancouver also shows a sharp decline, dipping into negative territory in 2012, but recovering to 1.5 percent growth in 2013. Miami shows a totally distinct feature of a sharp decline in 2011, followed by strong recovery in 2012, and then moderate growth in 2013.

CHART 25 **North America Top 5 Destination Cities by International Overnight Visitor Spend**
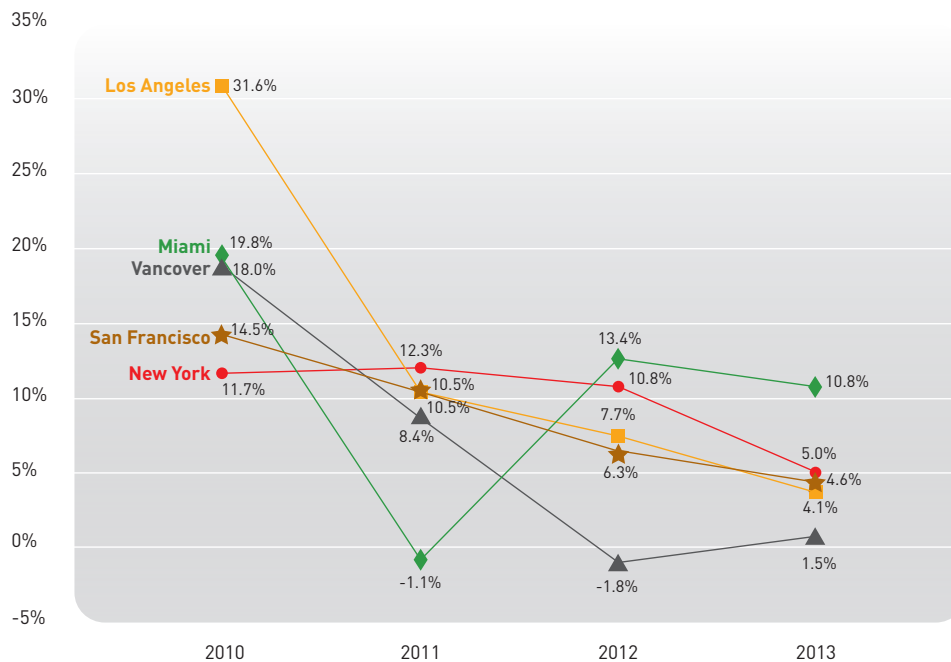
Origin/Feeder Cities

The rise and fall of the divergent growth patterns of destination cities has a lot to do with their respective origin/feeder cities. These are cities where their international visitors come from. Destination cities that are strongly connected to origin/feeder cities with growing economies, rising household disposable incomes, and residents with a healthy appetite for international travel. Destination cities whose traditional origin/feeder cities are suffering from poor economies and stagnant household incomes will decline unless they can tap into new and fast-growing origin/feeder cities—especially those with an expanding and increasingly prosperous middle class—to attract new visitors. This is an ever-changing dynamic picture. To illustrate this dimension of the global destination cities, the five most important origin/feeder cities for each of the global top 10 destination cities are shown in this section.

Chart 26 shows the top five origin/feeder cities for the global top ranked destination city, Bangkok. All five origin/feeder cities of Bangkok are in Asia: Singapore, Tokyo, Hong Kong, Kuala Lumpur, and Seoul. Singapore is the biggest origin/feeder city for Bangkok, but the number of visitors from Singapore to Bangkok is estimated to decline by three percent in 2013, whereas visitors to Bangkok from Kuala Lumpur is expected to growth strongly by 15 percent, followed by Hong Kong at 9.5 percent, Tokyo at 7.5 percent and Seoul at 4.4 percent.

CHART 26 Bangkok's Top 5 Origin/Feeder Cities

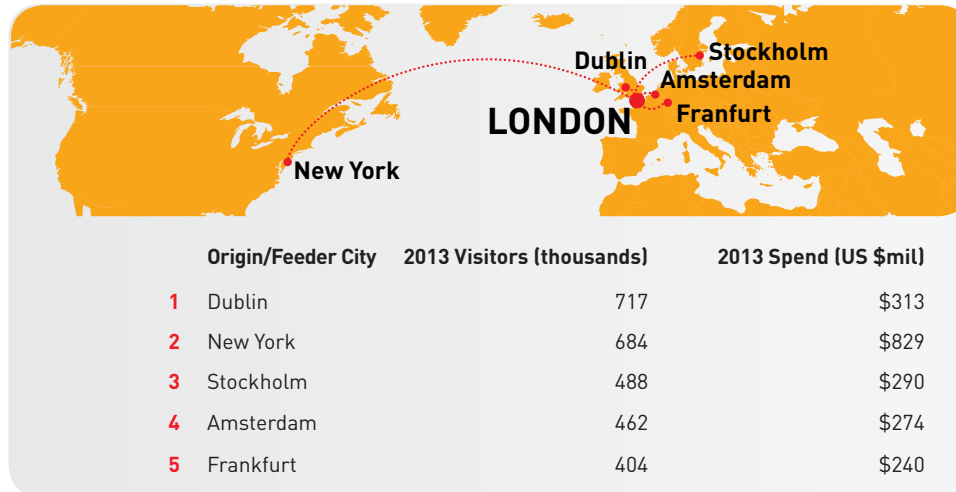|	Origin/Feeder City	2013 Visitors (thousands)	2013 Spend (US $mil)
1	Singapore	1,112	$751
2	Tokyo	973	$1,094
3	Hong Kong	860	$792
4	Kuala Lumpur	744	$380
5	Seoul	732	$637

Destination cities that are strongly connected to origin/feeder cities with **growing economies, rising household disposable incomes, and where residents have a healthy appetite for international travel** will therefore thrive.

London's five most important origin/feeder cities are shown in Chart 27, and with the exception of New York, the other four are in Europe – Dublin, Stockholm, Amsterdam, and Frankfurt. The number of visitors from New York is expected to grow the fastest in 2013 at 9.5 percent, followed by Dublin at 7.3 percent, Stockholm at 5.6 percent. Growth of visitors from Frankfurt is expected to be flat in 2013, whereas visitors from Amsterdam are expected to contract by 3.4 percent.

CHART 27 **London's Top 5 Origin/Feeder Cities**

	Origin/Feeder City	2013 Visitors (thousands)	2013 Spend (US $mil)
1	Dublin	717	$313
2	New York	684	$829
3	Stockholm	488	$290
4	Amsterdam	462	$274
5	Frankfurt	404	$240

The five most important origin/feeder cities for Paris are seen in Chart 28, and they are London, New York, Tokyo, Rome, and Frankfurt. As mentioned earlier, total international visitor arrivals in Paris is expected to decline slightly in 2013. This is an average that masks different developments. It turns out that the number of visitors from Tokyo to Paris is expected to grow strongly at 15 percent, while those from Rome and Frankfurt are expected to decline by 6.8 percent and 7.3 percent, respectively.

CHART 28 **Paris's Top 5 Origin/Feeder Cities**

	Origin/Feeder City	2013 Visitors (thousands)	2013 Spend (US $mil)
1	London	572	$426
2	New York	510	$591
3	Tokyo	464	$502
4	Rome	429	$535
5	Frankfurt	380	$436

Singapore's top five origin/feeder cities are all in Asia: Jakarta, Kuala Lumpur, Tokyo, Manila, and Shanghai, as seen in Chart 29. It's a mixed bag in terms of growth rates of visitors from these cities. Visitors from Kuala Lumpur, Tokyo and Shanghai are expected to grow at 11.7 percent, 7.2 percent and 4.3 percent, respectively, in 2013–a healthy outlook. But visitors from Manila are set to contract slightly by 0.9 percent, and there is virtually no growth in visitors from Jakarta.

CHART 29 Singapore's Top 5 Origin/Feeder Cities

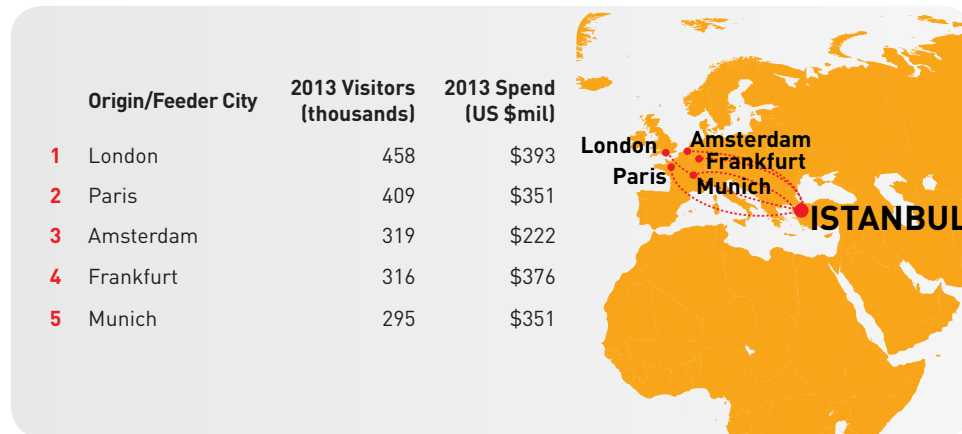|	Origin/Feeder City	2013 Visitors (thousands)	2013 Spend (US $mil)
1	Jakarta	878	$1,334
2	Kuala Lumpur	793	$530
3	Tokyo	522	$664
4	Manila	483	$515
5	Shanghai	434	$499

New York's top five origin/feeder cities, as listed in Chart 30, represent a diverse mix. They are London, Toronto, Sao Paulo, Paris, and Buenos Aires. Visitors from all these five cities are expected to grow at a robust pace. The number of Sao Paulo visitors to New York is set to increase the fastest among the five at 13.3 percent, followed by Toronto visitors at 12.7 percent, Buenos Aires visitors at 10.2 percent, London visitors at eight percent, and Paris visitors at 6.1 percent.

CHART 30 New York's Top 5 Origin/Feeder Cities

	Origin/Feeder City	2013 Visitors (thousands)	2013 Spend (US $mil)
1	London	1,079	$1,403
2	Toronto	745	$289
3	Sao Paulo	733	$1,613
4	Paris	632	$1,109
5	Buenos Aires	393	$821

Istanbul's top five origin/feeder cities are shown in Chart 31, and they are all European cities: London, Paris, Amsterdam, Frankfurt, and Munich. Paris visitors to Istanbul are expected to increase by 10.9 percent in 2013, followed by Munich at 3.7 percent, Amsterdam at 3.4 percent and London at two percent. But visitors from Frankfurt will decline by 5.3 percent.

CHART 31 Istanbul's Top 5 Origin/Feeder Cities

	Origin/Feeder City	2013 Visitors (thousands)	2013 Spend (US $mil)
1	London	458	$393
2	Paris	409	$351
3	Amsterdam	319	$222
4	Frankfurt	316	$376
5	Munich	295	$351

Dubai's top five origin/feeder cities are a mix of European and Middle Eastern cities, as seen in Chart 32. All are expected to grow strongly in visitor numbers to Dubai. London visitors to Dubai are expected to increase by an impressive 26.3 percent in 2013, followed by visitors from Paris at 16.9 percent, from Kuwait at 12.4 percent, from Doha at 9.5 percent and from Frankfurt at 9.4 percent.

CHART 32 Dubai's Top 5 Origin/Feeder Cities

	Origin/Feeder City	2013 Visitors (thousands)	2013 Spend (US $mil)
1	London	841	$1,139
2	Kuwait	399	$373
3	Paris	361	$338
4	Frankfurt	335	$314
5	Doha	295	$276

Chart 33 shows Kuala Lumpur's five most important origin/feeder cities: Singapore, Jakarta, Bangkok, Melbourne, and Manila. Visitors from Manila are expected to increase by an impressive 21.6 percent in 2013. This is followed by Bangkok visitors, with an increase of 8.8 percent. Visitors from Jakarta, Melbourne, and Singapore are expected to grow only moderately at 3.9 percent, 3.3 percent, and 1.5 percent, respectively.

CHART 33 Kuala Lumpur's Top 5 Origin/Feeder Cities

	Origin/Feeder City	2013 Visitors (thousands)	2013 Spend (US $mil)
1	Singapore	1,793	$975
2	Jakarta	777	$640
3	Bangkok	377	$222
4	Melbourne	288	$300
5	Manila	263	$230

Hong Kong's top five origin/feeder cities are seen in Chart 34, which are Seoul, Taipei, Singapore, Tokyo, and Manila. Visitor numbers from all five are expected to grow: led by Taipei at 10.5 percent, followed by Manila at 5.3 percent, Tokyo at 4.1 percent, Singapore at 3.7 percent, and Seoul at 1.4 percent.

CHART 34 Hong Kong's Top 5 Origin/Feeder Cities

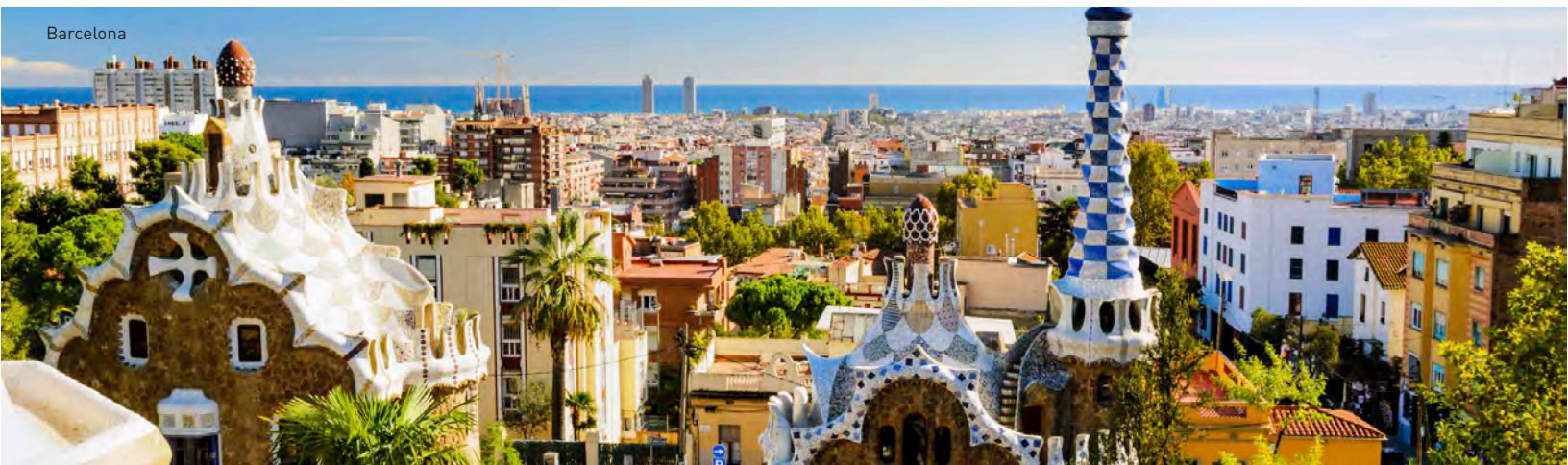|	Origin/Feeder City	2013 Visitors (thousands)	2013 Spend (US $mil)
1	Seoul	657	$371
2	Taipei	634	$400
3	Singapore	550	$390
4	Tokyo	496	$314
5	Manila	483	$249

Barcelona, the destination city in the 10th rank in the world, has London, Paris, Amsterdam, Frankfurt, and Munich as its five most important origin/feeder cities. The outlooks for these five are very different, however. Visitors from Frankfurt are expected to increase strongly by 27 percent in 2013. At the other end of the spectrum, visitors from Amsterdam are expected to decline by 6.7 percent, followed by Paris with a decline of 3.8 percent. In between are visitors from Munich, that are set to increase by 7.7 percent, and from London by 6 percent.

CHART 35 **Barcelona's Top 5 Origin/Feeder Cities**

	Origin/Feeder City	2013 Visitors (thousands)	2013 Spend (US $mil)
1	London	955	$661
2	Paris	727	$587
3	Amsterdam	493	$343
4	Frankfurt	380	$566
5	Munich	357	$532

Barcelona

Conclusions

International tourism is becoming a vital and resilient export for the leading destination cities in the world and its economic and social benefits are far-reaching. It is well established that the hospitality industry, the transport industry and food and beverage catering industry, among others, are the primary and direct beneficiaries of the demand created by international visitors. Employment in these industries also tends to be labor intensive, which makes tourist spending a potent driver of employment creation in a destination city.

International visitors to a destination city also seek new and rewarding experiences, especially in the arts, popular culture and entertainment, as well as historical and heritage sites unique to the city. These visitors and their spending are therefore powerful catalysts for nurturing and driving the growth of creative industries and urban cultures, while preserving the past in ways that uniquely contribute to the attractiveness of the city in question. So the benefits of international tourism frequently exceed what can be computed in dollar and cents, but affect the very quality and dynamism of urban culture itself.

To the extent that the destination cities succeed in attracting more international visitors, there is the inevitable pressure on improving public infrastructure and facilities. With the right policy responses, a virtuous circle can be set in motion; more international visitors leading to more and better investment to improve the cityscape and the overall urban environment, which in turn makes the destination city more attractive to more international visitors. Businesses are then encouraged to invest in the city, further improving employment and income. Thus, in a slower-growing global economy, destination cities could play a much larger role in sustaining global service trade while supporting their respective national economies through stronger growth in employment and income in their urban economies. Destination cities have always been important, but they are set to become even more so in the future.

Apart from the global top 20 and the regional top 10 destination cities described above, we also need to pay attention to some of the smaller destination cities which are also the fastest-growing in the world. Table 2 presents the global top 20 in terms of their growth rates in international visitor arrivals from 2009 to 2013, ranked from the set of destination cities that have a minimum of one million international visitor arrivals in 2013.[4] Bangkok and Singapore, from the global top 20 are among them. But many are neither in the global top 20 nor in the regional top 10. However, they are the destination cities to watch for the future.

TABLE 2 **Global Top 20 in Growth Rates of International Visitor Arrivals, 2009 to 2013**

Growth Rank 2009–2013	Rank in 2013 by Arrivals	Destination City	2009–2013 Growth
1	60	Chengdu	285.0%
2	19	Riyadh	219.4%
3	76	Colombo	122.9%
4	29	Mumbai	113.3%
5	56	Nanjing	97.1%
6	61	Abu Dhabi	96.8%
7	77	Jakarta	94.1%
8	18	Taipei	82.7%
9	57	Lima	79.7%
10	53	Manila	72.9%
11	22	Guangzhou	70.6%
12	1	Bangkok	65.2%
13	4	Singapore	63.5%
14	67	Xiamen	63.0%
15	36	Shenzhen	60.9%
16	71	Rio de Janeiro	59.6%
17	64	Kiev	58.8%
18	41	Ho Chi Minh City	57.2%
19	66	Chennai	56.1%
20	42	Johannesburg	53.6%

[4] This is to exclude the really small destination cities with only a few hundreds of thousands of visitors each year, which despite their fast rates of growth, would not be able to realistically challenge the position of the current leading destination cities with annual arrivals in the tens of millions.

Appendix A:
Assessing Air Travel Connectivity

This is a measure that seeks to gauge the breadth of a city's international connectivity in air travel in terms of established flights linking the city with others in the rest of the world, as well as the strength of each connection in terms of flight frequencies.

Using Amsterdam as an example, and each city paired with Amsterdam as the departure node, we calculate the connectivity score for the city pair as:

100 x {Weekly Flight Frequency} X {Intra/Inter Regional Multiplier}

/ {City Pair with Max Weekly Flight Frequencies}

where Weekly Flight Frequency is the number of flights per week departing from Amsterdam to a particular city. This is the main driver of the connectivity score and it is sourced from OAG Flight Schedules Data. Airlines will also provide their flight schedules for one year ahead, which is how we obtained the weekly flight frequencies for 2013. While the number of cities that Amsterdam is connected to determines Amsterdam's raw connectivity, the strength of each connection is measured by the weekly flight frequency and weighted by whether or not the connection is inter-regional or intra-regional.

Inter/Intra-Regional Multiplier: International Destinations from Amsterdam that are Inter-regional (i.e. outside of Western Europe, in the case of Amsterdam) are weighted at twice (i.e. x 2) that of International Destinations within the same region as Amsterdam (i.e. intra-regional, within Western Europe).

City Pair with Max Weekly Flight Frequencies: This number is used to normalize the raw connectivity scores. It has absolutely no effect on the relative scores between cities and is used only for ease of presentation when viewing the data.

Every Amsterdam ABC city pair is thus given its own connectivity value. We add them up to get a connectivity value for Amsterdam itself. We now do this for every one of the 132 cities. Once we have the connectivity scores for all 132 cities, we perform a final normalization so that the scores can be presented out of a maximum of 100 (Index format). The divisor for this is the highest raw 2009 score (in this case London's connectivity score).

Appendix B:
Methodology for Estimating Arrivals and Cross-border Spending

Estimates of Overnight Visitors to a Destination City

"Arrivals" in each of the destination cities is defined as international arrivals that actually stayed in the destination city for at least one night. The sources for city-level overnight arrivals by foreign visitors are typically the National Statistics Boards of the relevant countries or their Tourism Boards. The indicators for 117 out of the 132 cities were directly sourced for or estimated from official data. The other 15 cities where such data are not available were estimated using the Airflow model, and we sourced for the following official data in order of preference:

- Foreign overnight arrivals by air at the city level or foreign overnight arrivals at paid accommodations at the city level

- Foreign number of nights stayed at paid accommodations at the city level

In cases where official data or estimates derived from official data do not cover 2012 but do cover some earlier year (2009,2010 or 2011), we have projected from the years where data was available using the growth rates from the Airflow model. For all cases, forecasts for 2013 are projected using growth rates from the Airflow model.

The Airflow Model

Every month the OAG collects the airline flight schedules for the next 12 months on a global basis. Where previously we only used the data from key months (and the associated 12 month schedule forecasts arising for those months) as the basis of our one-year projections, we now use the full 12 months of flight schedule data to construct our forecasts. Using only non-stop flights we extract for each city to city pair the number of:

- Weekly flight frequencies
- Passenger capacity

On any airline flight route, the average percentage of seats filled (called the "load factor") varies. This information is extremely sensitive for competitive reasons and airlines will only release this data with a one-year lag. Nevertheless, by using the historical load factors on most city-to-city flight routes, we can estimate a proxy for the current and forecasted load factor. We used a weighted average of the historical load factors with heavier emphasis on the most recent years and it ranges between 30 to 100 percent, but airlines will try to maintain a load factor of between 70 to 80 percent by changing the number of weekly flights or by changing the aircraft type to increase or decrease passenger capacity. As such, for determining the years for which we do not have load factor numbers, we apply an increasing improvement of 5 percent per year on the historical average, starting at 70 percent and improving to 85 percent over time.

Using the data above we can now gain a first estimate of the number of passengers departing from one city to another using:

Estimated Travelers =

Load Factor * Passenger Capacity

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

Departure Country A to Arrival Country B Ratio =

Annual Number of Residents from Country A going to Country B /

{Annual Number of Residents from Country A going to Country B +

Annual Number of Residents from Country B going to Country A}

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

Estimated Venezuelan Resident Travelers from Caracas to Miami =

Estimated Travelers * Ratio of Venezuelan Resident Travelers
to Total Travelers {US & Venezuela}

Where UNWTO data was not available for a country pair (data was available for 76 percent of the country pairs), data was sourced at the national level where available (2 percent of city pairs), or we used the ratio of the International Monetary Fund Balance of Payments travel debit accounts to construct a secondary proxy ratio. In this release, we have focused on key border regions around the world where the UNWTO cross-country visitor data may give less accurate ratios. In all cases, the general idea was to use overnight visitors (where data was available) instead of overall visitors to construct

more accurate departure-arrival ratios of air travelers. This has resulted in some shifts to the flow of travel between these areas (and therefore overall expenditure as well). The border regions include the Mexican-US border, EU countries which share a border, the Singapore-Malaysia border, and the Ukraine-Russia border.

In this release, out of the 132 cities, 15 of them were estimated using the airflow model, as we were unable to source for official statistics. They are:

⋮⋮ **Eastern Europe:** The 5 Russian cities (Moscow, St. Petersburg, Vladivostok, Novosibirsk, and Yekaterinburg: Kiev, Minsk, Almaty)

⋮⋮ **Asia:** Dhaka, Osaka, Tehran

⋮⋮ **Africa:** Dakar, Lagos, Accra

⋮⋮ **Latin America:** San Jose (Costa Rica)

For all 132 cities, the Airflow Model was used to make projections for 2013.

As explained previously, on any given flight there are departing residents from the departure country, returning visitors and a third group of residuals. The residuals group can be a low proportion of the passengers for typically non-hub cities, and very high for hub cities. To estimate the proportion of this group, we use two main groups:

⋮⋮ **Non-residents** (of either the origin or destination country) who from the origin city are visiting the destination city

⋮⋮ **Residents of the origin country AND non-residents** (of either the origin or destination country) who will be *transiting* through the destination city without visiting it

We are interested in Type A but in order to separate the residuals into its 2 components we use a relative connectivity ratio "RCR" that is based on the International Air Connectivity Index (IACI) scores previously created where:

> **RCRo-a:** the Relative Connectivity Ratio of the Origin City relative to the Destination City
>
> **IACIo:** the International Air Connectivity Index of the Origin City
>
> **IACId:** the International Air Connectivity Index of the Destination City

We then separate out Type A adding:

A {Non-residents (of either the departing or arrival country) who from the departure city are visiting the arrival city} to the number of residents visiting the arrival country {calculated earlier} to obtain the estimated number of travelers who will visit the destination city.

> **Visitors =** Origin Country Residents + Non-Residents from other Countries

Estimating Visitor Spend in Destination Countries

In a few cases the estimated visitor spend was directly sourced from official statistics as in the case of London, Bangkok, Hanoi, and Ho Chi Minh.

For the rest of the cities we looked at country-to-country data to estimate the average expenditure of outbound travelers. City-to-city expenditure data is difficult to obtain, as partial figures do exist but these are not publicly available. For this we use the United Nations' Trade in Services database (travel component), which does not include transport, i.e. airfares at the paired country level. For country pairs where this data is not available, we default to using the average expenditure per traveler in destination countries using IMF Balance of Payments Travel Credit data and the total number of visitors to the country.

The formula is as follows:

Average Expenditure of Visitors =

Total Amount Spent on Travel in the destination country by residents of the origin country (ex Air Tickets) /Total Number of origin country residents traveling to the destination country

Based on the latest year available for average expenditure per traveler, we then project the average expenditure per traveler using the nominal growth rate of GDP per Capita provided by the IMF WEO forecast database. Using the estimated number of residents flying from each departure city to each destination city, we can then calculate the estimated expenditure by multiplying in the average expenditure to obtain city-to-city expenditure estimates.

Based on the latest year available for average expenditure per traveler we then project the average expenditure per traveler using the nominal growth rate of GDP per Capita provided by the IMF WEO forecast database. Using the estimated number of residents flying from each departure city to each destination city, we can then calculate the estimated expenditure by multiplying in the average expenditure to obtain city-to-city expenditure estimates. That is for each city pair:

Estimated Visitor Spend =

Number of Visitors x Average Expenditure in the Destination country

Glossary

Visitor: A person who is traveling on a non-stop direct flight to their destination and is not a resident of the destination country. A visitor may make more than one trip, and each trip counts as a new visit. That is, a person who makes two trips to a destination, as described above, counts as two visitors to that destination. A person on the return leg home does not count as a visitor.

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

Origin City: The city from which passengers embark on their flight to the destination city. Passengers who count as visitors may be residents of the origin city/country or may be non-residents from other countries (but not the destination city/country).

Destination City: The city where passengers disembark (leave the airport) and are counted as visitors (which only includes non-residents of the destination city/country).

City/Country: Sometimes visitors and visitor spend is described at the country or city level interchangeably. For example, visitors from Frankfurt to London are described as non-residents and residents of the origin country visiting the destination country via London. By residents of the origin country, we mean German residents inclusive of residents of Frankfurt. This is because residents from other parts of Germany may have domestically flown or driven to Frankfurt to take their flight to London together with residents of the Frankfurt urban area. Non-residents of the origin country include, for example, Singaporeans on their way to London who have either visited Frankfurt before going to London or who are simply transiting through Frankfurt on their way to London. The point is, the origin city is the most recent place from which travelers embarked before arriving at their destination, which is a constraint of using only non-stop flights. Finally, visiting the destination country via London implies that visitors may disembark in London to visit the city, but they could also from there visit other parts of the country via a domestic flight.

Appendix C:
Coverage of the Global Destination Cities Index

132 cities are covered by the Global Destination Cities Index.

Asia/Pacific (42 cities):
Ahmedabad, Almaty, Bangkok, Beijing, Bengaluru, Chengdu, Chennai, Coimbatore, Colombo, Dalian, Delhi, Dhaka, Guangzhou, Hangzhou, Hanoi, Harbin, Ho Chi Minh City, Hong Kong, Hyderabad, Islamabad, Jakarta, Karachi, Kolkata, Kuala Lumpur, Lahore, Manila, Melbourne, Mumbai, Nanjing, Osaka, Pune, Qingdao, Seoul, Shanghai, Shenzhen, Singapore, Sydney, Taipei, Tianjin, Tokyo, Xi an, Xiamen

Europe (36 cities):
Amsterdam, Ankara Athens Barcelona Berlin Brussels, Bucharest, Budapest, Copenhagen, Dublin, Dusseldorf, Edinburgh, Frankfurt, Geneva, Hamburg, Istanbul, Kiev, Lisbon, London, Madrid, Milan, Minsk, Moscow, Munich, Novosibirsk, Paris, Prague, Rome, Sofia, St Petersburg, Stockholm, Vienna, Vladivostok, Warsaw, Yekaterinburg, Zurich

Latin America (19 cities)
Belo Horizonte, Bogotá, Brasilia, Buenos Aires, Caracas, Cordoba, Curitiba, Lima, Medellin, Mexico City, Monterrey, Montevideo, Quito, Recife, Rio de Janeiro, San Jose, Santiago, Santo Domingo, Sao Paulo

Middle East and Africa (21 cities)
Abu Dhabi, Accra, Amman, Beira, Beirut, Cairo, Cape Town, Casablanca, Dakar, Damascus, Dubai, Durban, Kampala, Johannesburg, Lagos, Maputo, Nairobi, Riyadh, Tehran, Tel Aviv, Tunis

North America (14 cities)
Atlanta, Boston, Chicago, Dallas, Houston, Los Angeles, Miami, Montreal, New York, Philadelphia, San Francisco, Toronto, Vancouver, Washington

About the Author

Yuwa Hedrick-Wong

Yuwa Hedrick-Wong is currently HSBC Distinguished Professor of International Business at the University of British Columbia, Canada; and Global Economic Advisor at MasterCard Worldwide.

Yuwa is an economist and business strategist with 25 years of experience gained in over thirty countries. He is a Canadian who grew up in Vancouver, British Columbia, and spent the last 20 years working in Europe, Sub-Sahara Africa, the Indian Sub-continent, and Asia/ Pacific. He has served as strategy advisor to over thirty leading multinational companies.

In 2010, Yuwa was appointed as Global Economic Advisor to MasterCard Worldwide. Prior to this role, he was Economic Advisor to MasterCard in Asia/ Pacific, a position he held since 2001. His other appointments are: Advisor at Southern Capital Group, a private equity fund (since 2007); member of the Investment Council of ICICI, India's largest private bank (since 2008); and Advisor at New Harbor Capital Partners, a hedge fund (Since 2011).

Yuwa is a frequent speaker at international conferences and a regular commentator in the broadcast and print media on economic, policy and business issues. He is a published author on consumer markets, economic development, trade, and international relations. He was voted "Communicator of the Year" in Asia by the Asia/Pacific Association of Public Relations Professionals. He wrote a regular column in Forbes Asia called "Asian Angles" in 2005 and 2006.and guest lecturer at the Graduate School of Business, University of Chicago from 2004 - 06.

As a student of philosophy, political science, and economics, Yuwa studied at Trent University and pursued post-graduate training at the University of British Columbia and Simon Fraser University in Canada. He also received post-doctoral training in energy and resource economics and scenario forecast and planning.

He lives with his wife and their cat on Salt Spring Island, off the west coast of Canada, and is an eager apprentice in the fine art of gardening.