



MasterCard Asia Pacific Destinations Index 2015

Tracking the growth of tourism in Asia Pacific

INTRODUCTION

In recent years, Asia Pacific cities have increasingly dominated the fastest growing and most visited destinations in the world according to the MasterCard Global Destination Cities Index.

The first MasterCard Asia Pacific Destinations Index, an offshoot of the annual Global Destination Cities Index, takes a more in-depth, focused look at these tourism trends, ranking 167 destinations, including island resorts as well as towns and cities across the region, in terms of the total number of international

overnight arrivals; cross-border spending; and the total number of nights spent at each destination.

The destinations are drawn from 22 countries in Asia Pacific, representing 90 percent of all international overnight arrivals.

The numbers for 2015 may be different between the Global Destination Cities Index 2015 and the Asia Pacific Destinations Index as the former is published earlier in the year and does not have the benefit of using more updated data from 2015 than does the Asia Pacific Destinations Index.

THE DESTINATIONS
ARE DRAWN FROM

22

COUNTRIES IN
ASIA PACIFIC,
REPRESENTING

90.1%

OF ALL
INTERNATIONAL
OVERNIGHT
ARRIVALS.



CHART 1: TRAVEL AND TOURISM TOTAL CONTRIBUTION TO GDP (US\$ BN)

Tourism made up 9.3 percent of Asia Pacific's GDP and its total employment in 2015¹. In absolute terms this translates to US\$2.27 trillion and 153.7 million jobs in 2015, making Asia Pacific's tourism industry the largest in the world by GDP contribution and employment.

¹ "Travel and Tourism Economic Impact 2014 – Asia Pacific", World Tourism and Travel Council 2015

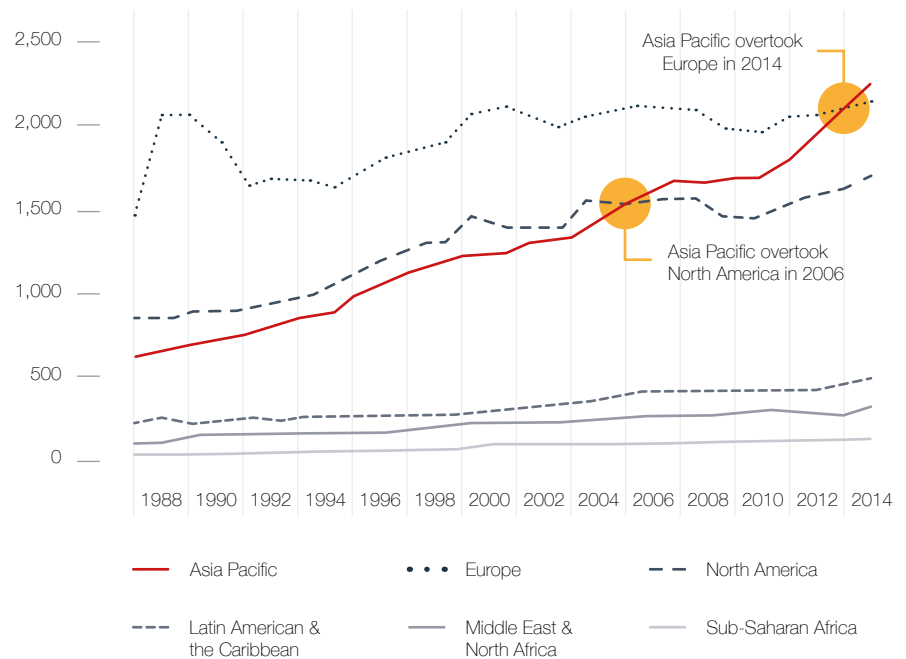
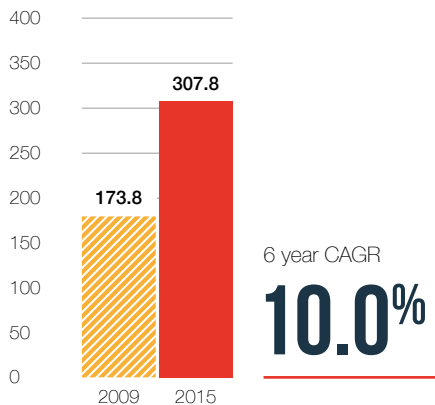
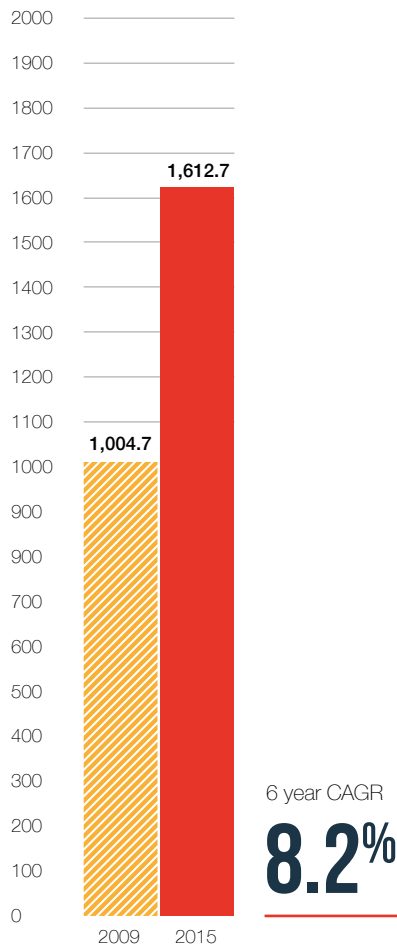


CHART 2: GROWTH OF TOURISM IN ASIA PACIFIC

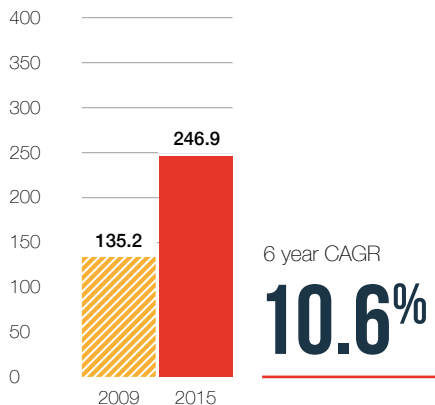
Overnight Arrivals (mn)



Nights (mn)



Expenditure (US\$ bn)



**ASIA PACIFIC MADE UP
23%
OF THE WORLD'S
INTERNATIONAL
OVERNIGHT ARRIVALS
IN 2014**

In 2014, the Asia Pacific region made up 23 percent of the world's international overnight arrivals and 30 percent of its international tourism receipts. It has been the fastest growing region for international tourism since 2005, with South Asia and Southeast Asia the two fastest growing sub-regions at 8.6 percent and 7.9 percent respectively.²

² UNWTO Tourism Highlights, 2015 Edition.

TOP 20 ASIA PACIFIC DESTINATIONS IN 2015

The Top 20 Destinations of Asia Pacific represent about 50.0 percent of all International Overnight Arrivals to the 167 destinations covered.

On a sub-regional basis there is close balance between North and Southeast Asia with 10 and eight destinations each in the top 20. The remaining two are from South Asia. Although no Oceanic destinations make the top 20, Sydney sits at the cusp at number 21.

CHART 3: INTERNATIONAL OVERNIGHT ARRIVALS TO ASIA PACIFIC'S SUB-REGIONS

Eight of the top 20 are capital cities within their respective countries. Bangkok, Singapore, Tokyo, Kuala Lumpur, and Seoul are in the top six.

At the country level, China has three destinations in the top 20 – Shanghai (#12), Beijing (#18) and Guangdong province (#19, excludes Guangzhou, Shenzhen & Zhuhai). Thailand has three destinations in the top 20 – Bangkok (#1), Phuket (#5) and the coastal city of Pattaya (#8) – while Japan has four with Tokyo (#3), Osaka (#10) Hokkaido (#14) and Chiba (#17). India (Mumbai #15 and Chennai #16) and Cambodia (Siem Reap #13 and Phnom Penh #20) have two destinations each.

Northeast Asia - 76 Destinations

134.5	mn arrivals	43.7%	of total
553.4	mn nights	34.3%	of total
\$103.8	US\$ bn exp	42.0%	of total

Oceania - 19 Destinations

20.6	mn arrivals	6.7%	of total
300.8	mn nights	18.7%	of total
\$25.3	US\$ bn exp	10.2%	of total

Southeast Asia - 52 Destinations

127.1	mn arrivals	41.3%	of total
626.3	mn nights	38.8%	of total
\$95.2	US\$ bn exp	38.6%	of total

South Asia - 20 Destinations

25.7	mn arrivals	8.3%	of total
132.2	mn nights	8.2%	of total
\$22.7	US\$ bn exp	9.2%	of total



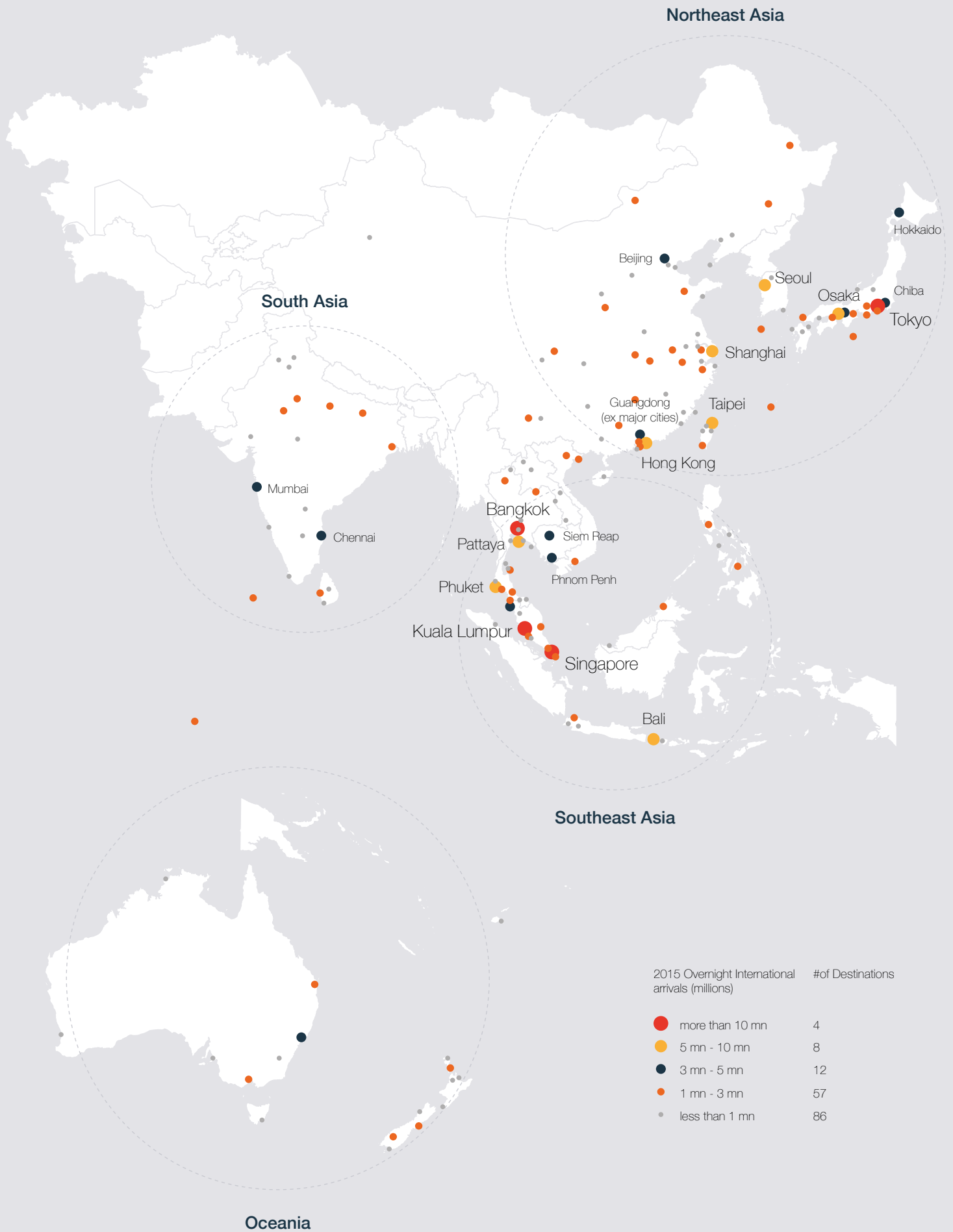


CHART 4: ASIA PACIFIC TOP 20 DESTINATIONS BY INTERNATIONAL OVERNIGHT ARRIVALS

Seven of the top 20 saw over 10 percent growth in international overnight arrivals between 2014 and 2015 – Chiba (56.6 percent), Osaka (54.0 percent), Tokyo (53.2 percent), Hokkaido (50.3 percent), Bangkok (28.6 percent), Phuket (15.5 percent) and Pattaya (10.0 percent). Mainland Chinese tourists contributed the bulk of growth in these seven destinations (more than 70 percent of the growth for all three Thai destinations and more than 45 percent of the growth for all four Japanese destinations).



Rank by Arrivals	Destination	Arrivals (mns)
1	Bangkok	21.9
2	Singapore	11.8
3	Tokyo	11.8
4	Kuala Lumpur	11.3
5	Phuket	9.3
6	Seoul	9.2
7	Hong Kong	8.3
8	Pattaya	8.1
9	Bali	7.2
10	Osaka	6.5
11	Taipei	6.4
12	Shanghai	5.5
13	Siem Reap	4.8
14	Hokkaido	4.7
15	Mumbai	4.6
16	Chennai	4.5
17	Chiba	4.2
18	Beijing	4.0
19	Guangdong (excl. major cities)	3.9
20	Phnom Penh	3.7

There are no ties in rank as all apparent ties are due to 1 decimal rounding.

CHART 5: ASIA PACIFIC TOP 20 DESTINATIONS BY TOTAL NIGHTS STAYED BY INTERNATIONAL TOURISTS

From the perspective of total nights the ranking changes dramatically with Sydney, ranked 21st place in terms of arrivals moving up to second place in terms of overall nights spent due

to the fact that the average number of nights spent in Sydney is at a very high 23.7 nights per overnight arrival. This characteristic of high average nights is shared by all the Australian destinations covered and results in a boost to overall nights and total spend that is in great contrast to their arrivals rank.

As a result Brisbane, Melbourne and Perth move from 29th, 31st and 97th place respectively in terms of arrivals to ninth, eighth and 13th place by total nights leaving Australia with three of the top 20 destinations. As many tourists will have further to travel to get to Australia it is likely they decide to stay for longer to make the journey worthwhile.

Bangkok, ranked number one by overnight arrivals, is also number one for total nights stayed by international tourists, while Kuala Lumpur takes the third spot, followed by Tokyo at number four. Bali ranked ninth for arrivals is at number five in terms of total nights. Bali has the highest average nights per tourist in the top 20 at 9.1 nights.

Rank by Nights	Destination	Nights (mns)
1	Bangkok	107.0
2	Sydney	83.0
3	Kuala Lumpur	68.5
4	Tokyo	67.8
5	Bali	65.2
6	Seoul	55.6
7	Singapore	55.3
8	Melbourne	53.3
9	Brisbane	52.3
10	Taipei	42.3
11	Phuket	40.8
12	Osaka	31.2
13	Perth	30.2
14	Hong Kong	27.8
15	Pattaya	27.2
16	Mumbai	25.5
17	Chennai	22.7
18	Penang	21.4
19	Auckland	20.1
20	Hokkaido	18.9

CHART 6: ASIA PACIFIC TOP 20 DESTINATIONS BY TOTAL EXPENDITURE BY INTERNATIONAL TOURISTS

Bangkok also ranked number one in total expenditure at US\$15.2 billion, with Seoul (US\$14.4 billion) coming in second place, followed by Singapore (US\$14.1 billion), Tokyo (US\$11.9 billion) and Kuala Lumpur (US\$10.5 billion). Tourists to Seoul (US\$258 per day) spend about the same as those visiting Singapore (US\$255 per day) on a per day basis, however they stay an average of 6.0 days compared to 4.7 for those visiting Singapore.

Of the top 20 by total expenditure, five of the destinations command more than US\$200 per day expenditure – Shanghai (US\$269 per day), Beijing (US\$262 per day), Seoul (US\$258 per day), Singapore (US\$255 per day) Hong Kong (US\$240 per day), and Taipei (US\$224 per day).

Rank by Expenditure	Destination	Exp (US\$ bn)
1	Bangkok	15.2
2	Seoul	14.4
3	Singapore	14.1
4	Tokyo	11.9
5	Kuala Lumpur	10.5
6	Bali	10.3
7	Taipei	9.5
8	Phuket	8.0
9	Hong Kong	6.7
10	Sydney	6.0
11	Shanghai	4.9
12	Beijing	4.4
13	Melbourne	4.2
14	Mumbai	4.0
15	Chennai	3.9
16	Osaka	3.7
17	Brisbane	3.6
18	Pattaya	3.1
19	Jeju	3.0
20	Johor	3.0

There are no ties in rank as all apparent ties are due to 1 decimal rounding.

BANGKOK

THE TOP RANKED DESTINATION BY ARRIVALS
& BY TOTAL NIGHTS STAYED, IS ALSO NUMBER
ONE IN TOTAL EXPENDITURE



Singapore

APPENDIX

The 167 destinations in the Index are:

China:

Anhui (excl. major cities), Beijing, Chengdu, Chongqing, Dalian, Fujian (excl. major cities), Fuzhou, Guangdong (excl. major cities), Guangxi (excl. major cities), Guangzhou, Guilin, Guizhou, Hainan, Hangzhou, Hebei, Heilongjiang, Henan, Huangshan, Hubei (excl. major cities), Hunan, Inner Mongolia, Jiangsu (excl. major cities), Jiangxi, Jilin, Liaoning (excl. major cities), Kunming, Nanjing, Ningbo, Qingdao, Shandong (excl. major cities), Shaanxi (excl. major cities), Shanghai, Shanxi, Shenyang, Shenzhen, Sichuan (excl. major cities), Suzhou, Tianjin, Wuhan, Wuxi, Xiamen, Xi An, Xinjiang, Yunnan (excl. major cities), Zhejiang (excl. major cities), Zhuhai

Korea:

Busan, Gangwon, Jeju, Seoul

Taiwan:

Hsinchu, Hualien, Kaohsiung, Taipei, Tai Chung

Hong Kong

Macau

Japan:

Aichi, Chiba, Fukuoka, Gifu, Hiroshima, Hokkaido, Hyogo, Ishikawa, Kanagawa, Kumamoto, Kyoto, Nagano, Nagasaki, Oita, Okinawa, Osaka, Shizuoka, Tokyo, Yamanashi

Singapore

Thailand:

Ayutthaya, Bangkok, Chiang Mai, Chiang Rai, Hat Yai, Hua Hin, Koh Chang, Koh Pha Ngan, Koh Samui, Koh Tao, Krabi, Narathiwat, Pattaya, Phang Nga, Phuket, Rayong, Samut Prakan, Yala

Indonesia:

Bali, Bandung, Banten, Batam, Jakarta, Lombok, Medan

Malaysia:

Alor Star/ Langkawi, Johor, Kuala Lumpur, Kuantan/ Highlands, Malacca, Negri Sembilang, Penang, Perak, Sabah, Sarawak

The Philippines:

Boracay, Caramines Sur, Cebu, Manila

Vietnam:

Ha Long, Hanoi, Ho Chi Minh City

Myanmar:

Yangon

Cambodia:

Phnom Penh, Siem Reap

Laos:

Champassak, Khammoune, Luang Namtha, Luang Prabang, Savannakhet, Vientiane

Fiji

Guam

Australia:

Adelaide, Brisbane, Canberra, Darwin, Hobart, Melbourne, Perth, Sydney

New Zealand:

Auckland, Christchurch, Northland, Queenstown, Southland, Tauranga, Waikato, Wellington, West Coast,

Maldives

India:

Ahmedabad, Bengaluru, Bhopal, Chandigarh, Chennai, Delhi, Goa, Hyderabad, Jaipur, Kolkata, Ludhiana, Lucknow, Mumbai, Patna, Simla, Thiruvananthapuram

Sri Lanka:

Colombo, Galle, Kandy

METHODOLOGY

The 167 destinations represent about 308 million overnight arrivals and constitute 90 percent of all overnight arrivals to the 22 countries. Other notable exclusions to Asia Pacific coverage are destinations in Pakistan, Bangladesh, Bhutan, Nepal, Mongolia and several Oceania island nations. In total these excluded nations would have contributed under 3.5 million overnight arrivals and would represent about 1 percent of the destinations covered. There are several destinations in Vietnam – representing about 12.5 million or 4 percent of the 22 countries in Asia Pacific – that are not covered in this report due to a lack of usable data in apportioning this number among Vietnamese destinations outside of Ho Chi Minh, Ha Long and Hanoi. Finally, within the 22 markets, destinations with less than 175 international thousand overnight tourists in 2015 have been excluded from coverage.

The underlying data has been sourced primarily from National Tourism Boards. 2014 estimates in the absence of official data and 2015 forecasts were made by the analyst using data at the national level, which is more timely than data at the local destination level. While many of the destinations are at the city or metropolis level, in other cases the coverage is at the state/province or regional level largely following the way that the official statistics are presented. A special case is China where data

is available at the province level and at the level of the major cities. In cases where the major cities of a province have low levels of overnight arrivals (less than one million) or are not presented, we default to the province level. In cases where the major cities of a province have high levels of overnight arrivals (more than one million) we present both the cities and the province data (excluding said cities) so as to avoid a double count.

For most of the destinations, coverage includes all overnight international arrivals (those staying at paid and unpaid accommodations). However, in the case of destinations in China, Vietnam, Philippines, Malaysia and Indonesia, only arrivals at paid-for accommodation are included as there is insufficient data to estimate total overnight arrivals. This would imply an underestimation of up to around 15 percent of total arrivals in these five markets. This underestimation can be much higher in specific destinations (e.g. Singapore and Johor) with high incidences of shared land borders where overseas visitors may enter the border frequently to stay the night in residences that they own (e.g. live in Johor but work in Singapore). While many of these cases may not be considered strictly tourists, they are sometimes counted as such by national tourism boards.

Some origin country – destination pairs have been specifically excluded from the total for this reason, including:

- Malaysian citizen arrivals to Singapore by land (as the Singapore Tourism Board specifically excludes coverage of this)
- Brunei arrivals by land to Sarawak in East Malaysia (the geographic nature of Brunei forces some parts of the population to cross over into Sarawak to get to other parts of Brunei)
- China arrivals to Hong Kong and Macau and vice versa (Macau to Hong Kong and China; Hong Kong to China and Macau) as these flows are not strictly international