

TOURISM POLICY BULLETIN

Department of Tourism

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tourism

Department:
Tourism
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INTRODUCTION

The tourism sector is multidisciplinary in nature and its growth and success is highly dependent on other sectors. This multi-sectoral nature of tourism subjects it to various policy and regulatory frameworks some of which impacts negatively on the development and growth of tourism. The Tourism Policy Bulletin focuses on various policy developments at global, national and local level.

The aim of the Bulletin is to provide an overview of recent policy developments across sectors, with a view to inform tourism stakeholders and encourage proactive responses. Policy developments covered by this issue range from tourism, customs, transport, bills and international agreements.

NATIONAL POLICY DEVELOPMENTS

1. Developments **Tourism** Amendment Bill 2019

The Department of Tourism has embarked on a process of policy consultations. This follows the publication in the government gazette of the Tourism Amendment Bill of 2019 on the 15th of April 2019, which called for public comments. The consultation process is aimed at soliciting inputs from stakeholders including alternative proposals in the event that the proposed provisions are not supported.

The aim of the Bill is to amend the Tourism Act, 2014 so as to provide for certain definitions including the definition of short term rental. The Bill seeks to provide for the determination of thresholds for short-term home rental; provide for the renaming of the South African Tourism Board as South African Tourism; provide for additional competence requirements of tourist guides; and provide for the regulation of safety in relation to tourist guiding and the improvement of the tourist guiding experience.

Furthermore, the Bill seeks to empower the office of the tourism protector, responsible for tourism complaints, to initiate the referral of complaints to the relevant authorities without waiting for the lodging of the complaint. Regarding tourist guiding, the Bill seeks to ensure continuity of service by providing for the appointment of acting personnel in the absence of registrars, ensures safety by empowering the Minister to determine ratios

of a guide-to-tourists and regulations in relation to safety. On the sharing economy aspect, the Bill seeks to provide an enabling environment by providing the Minister with powers to determine thresholds with regard to short-term home rental.



Interested parties and organisations were invited to submit within sixty (60) days from the date of publication of the notice in the gazette, written inputs on the proposed bill. The deadline for the submission of inputs is the 15th of July 2019.

2. Carbon Tax Act 15 of 2019



The President of the Republic of South Africa has signed into law the Carbon Tax Act 15 of 2019, that came into effect on the 01st June 2019. The signing into law of the Carbon Tax

Act marks the formal beginning of South Africa's response to climate change challenges. The Act was gazetted together with the Customs and Excise Amendment Act No 13 of 2019.

Treasury noted that Climate Change represents one of the biggest challenges facing human kind and the primary objective of the carbon tax is to reduce greenhouse gas (GHG) emissions in a sustainable, cost effective and affordable manner. Government therefore, outlined its commitment to play its part in global efforts to mitigate GHG emissions as outlined in the National Climate Change Response Policy¹.

Subsequently, the South African government has set its own domestic target which were further incorporated as the South African commitment in the Paris Agreement (convened by the United Nations Framework Convention on Climate Change, UNFCCC). The carbon tax therefore forms an integral part of ensuring that the country meets these targets. The Carbon Tax Act will give effect to the polluter-pays-principle for large emitters and help to ensure that firms and consumers takes the negative adverse costs (externalities) into account in their future production, consumption and investment decisions. Regarding support, firms will be incentivized towards adopting cleaner technologies over the next decade and beyond.

Treasury indicated that the Carbon Tax will initially apply only to scope 1 emitters in the

first phase, effective from 1 June 2019 to 31 December 2022. The second phase will start from 2023 to 2030. Scope 1 emitters generally refer to direct greenhouse gas emissions occurring from sources that are owned or controlled by the company e.g. emissions from boilers; furnaces; and vehicles².

The published 2019 Customs and Excise Amendment Act and Memorandum on the objects of the 2019 Customs and Excise Amendment Bill, contains provisions related to the administrative arrangements for the collection of carbon tax revenues by the South African Revenue Service (SARS). The Act was split from the Carbon Tax Act as a separate Act for technical legal reasons related to money bills not containing administrative provisions in terms of section 77 of the Constitution. The Acts are available online on the Treasury and SARS websites.

3. Marine Spatial Planning Act



The Marine Spatial Planning Act of 2018 was assented to by the President on the 6th of May 2019 and published in the Government Gazette for general information. The aim of the Marine Spatial Planning Act of 2018 is to

¹ Treasury Media Statement (2019). Publication of the 2019 Carbon Tax Act

² As cited in Treasury Media Statement on Carbon Tax 2019

provide a framework for marine spatial planning in South Africa; to provide for the development of marine spatial plans; and to provide for institutional arrangements for the implementation of marine spatial plans and governance of the use of the ocean by multiple sectors.

In achieving the envisaged Marine Spatial Planning, the Act seeks to³:

- Develop and implement a shared marine spatial planning system to manage a changing environment that can be accessed by all sectors and users of the ocean;
- Facilitate responsible use of the ocean;
- Conserve the ocean for present and future generations;
- Give effect to South Africa's international obligations in South African waters; and
- Promote sustainable economic opportunities which contribute to the development of the South African ocean economy through coordinated and integrated planning.

Furthermore, the Department of Environmental Affairs (DEA) has gazetted, on the 23rd May 2019, the three new South African National Parks (SANParks) Marine Protected Areas (MPAs), with effect from 01 August 2019. The three areas, which all form part of the 20 new national MPAs gazetted by DEA include:

- Addo Elephant National Park MPA in the Eastern Cape

- Robben Island MPA in the Western Cape and to be managed by Table Mountain National Park
- Namaqua National Park MPA in the Northern Cape

SANParks National Marine Coordinator stated that, "The new network of MPAs will increase the conservation footprint of South Africa's oceans from 0,43% to 5%, which will contribute to the conservation of the oceans, island and coastal habitats, protect threatened species such as penguins and rebuild overexploited species such as linefish, abalone and rock lobster"⁴. The MPAs seeks to assist in securing ecosystem services; support recreational, tourism and educational activities as well as subsistence, recreational and commercial fishing; and keep ecosystems resilient in the face of climate change.

The Declaration of the MPAs is the culmination of years of work by the South African National Biodiversity Institute (SANBI), SANParks and Ezemvelo KZN Wildlife and the Department of Environmental Affairs.

³ <http://www.gov.za/documents/marine-spatial-planning-act-16-2018-6-may-2019-0000-0>

⁴ <http://www.tourismupdate.co.za/article/191793/SanParks-announces-three-new-SA-Marine>

4. National Treasury welcomes International Monetary Fund Policy



The National Treasury has welcomed and noted the key risks identified and proposed policy recommendations by the International Monetary Fund (IMF). The discussions took place during the visit by IMF to South Africa from the 27th – 31st May 2019⁵.

The IMF indicated that South Africa's growth outlook is dependent on the pace of implementation of the structural reforms such as strengthening governance, encouraging competition, increasing labour market flexibility and reducing the cost of doing business. IMF also stated that the countries fiscal deficit is set to worsen primarily due to South Africa's poor growth outlook, which will put pressure on debt levels. Weak finances and operations of state owned enterprises such as Eskom were identified as a major risk.

Treasury issued a media statement on the 3rd of June 2019 welcoming and noting the findings and providing update on government action to address some of the challenges thus far. The actions by government include the

⁵http://www.treasury.gov.za/comm_media/press/2018/2018073001%20Media%20statement%20-%20IMF%20Article%20IV.pdf

publishing of the Mining Charter, that assisted in providing regulatory certainty; signing into law of the Competition Amendment Bill which further empower the competition authorities to address the high level of economic concentration and open new opportunities for South Africa to enter and compete on an equal footing in various sectors in the economy; and improving on governance of State Owned Enterprises including restructuring⁶.

Treasury also underlined government's commitment to reducing the deficit and stabilising debt as committed in the 2019 budget. Meanwhile there was also an update on improving the capabilities of South African Revenue Services including ensuring that tax compliance becomes easy.

5. Department of Home Affairs hosts the 5th Annual Meeting of the ID4Africa Movement



The Department of Home Affairs hosted the 5th Annual Meeting of the ID4Africa Movement from the 18th – 20th June 2019. The theme for this year's annual meeting was Identity

⁶http://www.treasury.gov.za/comm_media/press/2019/2019060301%20Media%20statement%20-%20Response%20to%20IMF%20staff%20visit.pdf

Ecosystems for Service Delivery. The ID4Africa Movement Annual Meeting is conceived to give the continent a sustainable voice focused on identity management matters relevant to Africa. The primary objective is to create a platform for governments of African states to jointly explore how national electronic identity can further the economic and social development in their countries.

The ID4Africa Annual Meeting 2019 builds on the achievements of the 4th Annual Meeting in 2018 by defining a context for the adoption and deployment of responsible identity systems, including legal frameworks, institutional arrangements, governance, data protection, privacy and human rights, with special attention to the use of identity in support of service delivery to enhance inclusion and access by all sectors of society. Through its African centres activities, the ID4Africa Movement seeks to support the continent’s quest for the adoption of responsible identity system in various African state.



The 5th Annual Meeting of ID4Africa included the following thematic tracks⁷:

- Identity-linked services
- Migration and borders
- Reports from identity authorities in the African Continent
- Identity solutions and technologies

South Africa ranks amongst the pioneering African countries that has embarked on programmes aimed at modernising and digitising of the identification system. The country has marked positive developments with the new high tech smart ID card and the machine readable passport.

6. DTI Identifies and Amend Special Economic Zones.



The Minister of Trade and Industry issued a notice, in terms of the Special Economic Zones Act No. 16 of 2014 (Gazette No. 39667 of 9 February 2016, Proclamation No. R. 6 of 2016), of Intention to designate the Bojanala Special Economic Zone⁸. According to the notice, a total land area of 1175 ha is intended to be designated as the Bojanala Special Economic Zone, located in Mogwase, in the Moses Kotane Local Municipality, Bojanala District, North West province. The SEZ comprises of three (3) land areas which is an industrial park, a fully serviced land with bulk infrastructure and a greenfield site, bordered on the north by the Main road, to the east by the R105, to the

⁷ <http://www.dha.gov.za/index.php/statements-speeches/1254-home-affairs-department-to-host-5th-annual-meeting-of-id4africa>

⁸ Government Gazette, no 42451. 10 May 2019.

south by Remainder of Portion 1 of Klipfontein No. 60 -JQ and to the west by the Mogwase township.

Meanwhile the Minister of Trade and Industry issued a notice, in terms of the Special Economic Zones Act No. 16 of 2014 (SEZ Act), that the OR Tambo International Airport Industrial Development Zone was declared an industrial Development Zone (IDZ) in Notice No, 152 of 2002 (Government Gazette No. 23084) which was promulgated in terms of Regulation 3 of the Industrial Development Zone Regulations (Government Gazette No. 21803 of 1 December 2000) made in terms of the Manufacturing Development Act No. 187 of 1993⁹.

According to DTI, this therefore means the OR Tambo International Airport Industrial Development Zone is, from the commencement of the SEZ Act, now going to be regarded as a Special Economic Zone. The amendment by DTI also comprised of incorporating some of the land into the OR Tambo SEZ such as Impala Precinct and excluding some of the areas such as the area bounded by R21 Freeway, N12 Freeway South and precinct bounded by Atlas Road to the east and Impala Park to the South and the precinct bounded by Great North Road.

Members of the public were requested to send their comments within 30 days from the date of publication, which was 30 May 2019.

LOCAL POLICY DEVELOPMENTS

1. City of Cape Town Expands its Tourism Experience

In May 2019, the locally crafted Khayelitsha Curated Routes Tours, that was conceptualised by Cape Town Tourism, was launched. The Mayoral Committee Member of Economic Opportunities lauded the initiative which showcases the local offering whilst creating new opportunities for residents.

The new experience seeks to challenge traditional tourism model in townships where tourists are generally transported into the neighbourhood, and often have minimal interaction with locals. This offers an experience as opposed to drive through the township. Most importantly, the experience was crafted in partnership with Small Medium and Micro Enterprises operated by local residents who reside in the area.



⁹ Government Gazette, no 42451. 10 May 2019.

This focuses on a variety of experiences that visitors can sign up for, allowing them to meander through the neighbourhood experiences the areas' diverse activities. This will include interacting with the most inspirational people including artists, baristas and start-up business owners. This offering showcases the importance of bringing into life new products and exciting experiences in areas that were previously marginalised and excluded from tourism landscape.

The experience is influenced by the Tourism Development Framework consisting of five key goals. These include ensuring visitor experience; improving and diversifying products and experiences; and stimulating demand and generating community involvement.

2. Durban expansion projects



The EThekweni Municipality noted significance progress with the beachfront promenade extension, that it intends to launch in time for 2019 festive season. The city indicated that it is on course to meet its target with seven of the ten level-two concrete zones being completed. The early part of the year focused on casting of the remaining three zones with work on the

amphitheatre and pedestrian ramps and bridges commencing as the project is closer to completion.

The next stage will include the planting of dune vegetation and landscaping which softens the concrete structure and its surrounds whilst acting as first line of defence against windblown sand and wave run-ups. The city indicated that the project is part of the R35 billion Point Waterfront Development to be undertaken in three phases over the next five to ten years.

The City has also announced the construction of the R40 million Rivertown Precinct. The precinct will consist of bustling lanes filled with boutique shops, galleries, and art performances. The project, which was initiated by the EThekweni Catalytic Projects Unit, will bridge the space between the city's iconic Inkosi Albert Luthuli Convention Centre and the beachfront.

The City presented the project to business owners, companies and interested parties at the public information session held at the ICC. The project manager announced that a contractor has been appointed to undertake infrastructure work expected to commence towards the end of June 2019.



Rivertown is part of the inner city regeneration project and it is one of the project aimed at stimulating investment and development. The City envisions the generation of the area with a mix between creative and commercial ventures such as private art galleries, small theatres, restaurants and other entertainment venues forging a cultural precinct that would offer local and international tourist a unique Durban and KwaZulu-Natal experience.

3. Joburg Tourism Ambassadors to market the City



The City of Johannesburg's Department of Economic Development: Tourism Directorate launched a Tourism Ambassador Programme at the Joburg Theatre in Braamfontein on the

28th of May 2019¹⁰. This three year programme will deploy ambassadors to tourism sites to sell the City, dispel the notion that Joburg is unsafe and to create much-needed employment among the youth. According to the MMC for Economic Development, the Tourism Ambassador Programme envisages making Johannesburg a safer destination, leading to an increased number of tourists visiting the City for both leisure and business. The Johannesburg Tourism Ambassadors will consist of 60 passionate and visibly excited youth.

REGIONAL POLICY DEVELOPMENTS

1. Update on the African Continental Free Trade Area

The 18th Ordinary Session of the Assembly of Heads of State and Government of the African Union, held in Addis Ababa, Ethiopia in January 2012, adopted a decision to establish a Continental Free Trade Area by an indicative date of 2017. This deadline was, however, not met.



Towards One African Market

¹⁰

<https://www.joburg.org.za/media/Newsroom/Pages/2019%20>

[Newsroom%20Articles/May%202019/Joburg-Tourism-Ambassadors-to-market-the-City.aspx](https://www.joburg.org.za/media/Newsroom/Pages/2019%20Newsroom%20Articles/May%202019/Joburg-Tourism-Ambassadors-to-market-the-City.aspx)

During the 32nd Ordinary Session of the Assembly of the Union in Addis Ababa in February 2019, the AU Assembly adopted the Guidelines for Development of Schedules of Specific Commitments and Regulatory Cooperation Framework for Trade in Services and the new Roadmap for finalization of AfCFTA Negotiations with a new deadline of June 2020.

On 29 April 2019, Sierra Leone and the Saharawi Republic deposited their instruments of ratification with the depositary, making a way for the AfCFTA's to enter into force. Zimbabwe deposited its instrument of ratification on 24 May 2019, becoming the 23rd country to do so. More countries are expected to deposit their ratification instruments before the 12th AU Extraordinary Summit on the AfCFTA in Niamey, Niger on 7 July 2019.

The African Continental Free Trade Area Agreement entered into force on 30 May 2019 for those countries that had deposited their instruments of ratification before this date. According to Article 23 of the Agreement, entry into force occurs 30 days after the 22nd instrument of ratification is deposited with the Chairperson of the African Union Commission.

2. The Second Meeting of the African Union (AU) Specialized Technical Committee on Transport, Transcontinental and Interregional Infrastructure, Energy and Tourism (STC-TTIET).



The Second Ordinary Session of the African Union Specialized Technical Committee on Transport, Transcontinental Infrastructure, Energy and Tourism (STC-TTIET) took place from April 14-18 2019, in Cairo¹¹. The theme was “Developing SMART Infrastructure to Boost Africa’s Continental Transformation and Integration”.

The meeting considered the link between transport, energy and tourism and its relevance for Agenda 2063 and implementing the Program for Infrastructure Development in Africa (PIDA). Taking note of the progress made in establishment of the Single African Air Transport Market (SAATM), the meeting affirmed the need for an overall continental transport policy. Regarding the transcontinental and interregional infrastructure, the meeting recommended member states to increase local employment opportunities through an integrated multi-sectoral corridor approach.

¹¹The African Union. <https://au.int/en/happening>

Concerning tourism, the meeting noted the AU Agenda 2063 ten-year implementation plan and the UN Agenda 2030 for Sustainable Development and the inclusion of tourism; AU Development Agency and NEPAD tourism action plans and the 2014 Seychelles tourism communiqué; the Morocco 2016 African Charter on Sustainable and Responsible Tourism and the Declaration on Tourism and Climate issues in Africa; as well as the challenges facing tourism development in the continent. The AU Commission was requested by the meeting to undertake a feasibility study for the establishment of an African tourism body to speed up tourism development across the continent. The AU Commission was also encouraged to support the strengthening of tourism infrastructure with adequate resources and to effectively link it with the transport and energy sector considerations.

3. Air Seychelles widens codeshare partnership with South African Airways



Air Seychelles expanded its codeshare with South African Airways on the Perth and Windhoek route, effective from 29 May 2019. The two airlines have been in partnership for

over five years now and are planning to contribute to the growth of inbound tourism and business travellers to the continent¹².

As part of the agreement, Air Seychelles is placing its “HM” code on SAA daily services to the ‘land down under’, Australia. The national airline of Seychelles is also placing its code on SAA daily operations between Johannesburg and the capital city of exotic Namibia.

According to the Acting Chief Commercial Officer of SAA, the enhanced codeshare agreement will strengthen the partnership with Air Seychelles and enable seamless travel options and experience for their mutual customers.

GLOBAL POLICY DEVELOPMENTS

1. Sustainability a key aspect of Tourism Policies



The Baseline Report on the Integration of Sustainable Consumption and Production Patterns into Tourism Policies found that countries around the world are integrating

¹² <https://www.airseychelles.com/en/about-us/news/2019/06/air-seychelles-widens-codeshare-partnership-south-african-airways>

sustainability in their tourism policies. The report prepared by the UNWTO in collaboration with UN Environment, with the support of the French Government, is the first global assessment of sustainable consumption and production factors within national tourism policies. According to the UNWTO, a total of 101 Member States participated in the groundbreaking exercise and all tourism policies analysed refer to sustainability as part of their objectives and 55 percent address sustainability as a cross-cutting element. Meanwhile 67 percent of tourism policies include references to resources efficiency and 64 percent connect sustainability with the competitiveness of the sector. The baseline report also found that although tourism policy makers are aware of the importance of sustainable consumption and production, reference to policy instruments aimed at implementation are limited.

The UNWTO Secretary General lauded the report and remarked that sustainability and competitiveness go hand in hand. The Secretary General also indicated that destinations and business can flourish while making a meaningful contribution to sustainability in several ways. This may include efficient use of resources, promoting biodiversity conservation and taking action against climate change. The UNWTO also underlined the significance of advancing sustainable consumption and production if the sector is to contribute effectively to sustainable development and the 2030 Agenda. The UNWTO also launched the

Sustainable Tourism Policy Talks alongside the baseline report, which will feature interviews with Ministers of Tourism on the implementation of natural tourism policies.

2. UNWTO and Basque Culinary Center Introduced Guidelines for the Development of Gastronomy Tourism



The World Tourism Organization (UNWTO) and the Basque Culinary Center (BCC) launched a new set of guidelines to help destinations benefit from the growing interest in gastronomic tourism¹³. The guidelines were presented at the 5th UNWTO World Forum on Gastronomy Tourism in San Sebastian, Spain. According to the UNWTO, as tourists increasingly demand unique and authentic travel experiences, the global gastronomy market has been enjoying significant growth over recent years. The aim of the guidelines from UNWTO and BCC is to help destinations benefit from this trend. Furthermore, this initiative will empower destinations with knowledge and concrete steps they need to design and implement a Gastronomy Tourism Plan.

¹³ <http://www2.unwto.org/press-release/2019-05-13/unwto-and-basque-culinary-center-launch-guidelines-development-gastronomy-t>

The UNWTO noted that the broad spectrum of gastronomy tourism is an ally for job creation and social inclusion. It has a particular potential to economically empower the most vulnerable groups, such as women, youth, indigenous and rural communities. The Guidelines for the Development of Gastronomy Tourism include recommendations on key aspects of planning and management as well as possible interventions and activities for implementation by National Tourism Administrations (NTAs), National Tourism Organizations (NTOs) and Destination Management Organizations (DMOs). The guidelines cover issues such as the promotion of the value chain, education and skills development, competitor analysis, destination image, governance, control and monitoring mechanisms.

3. UNWTO partners with Telefónica to promote tourism sector digitalization

The UNWTO and Telefónica signed the framework agreement to collaborate in the development and implementation of digital entrepreneurship and training initiatives that will allow the tourism sector to increase its competitiveness and strengthen its long-term sustainability. The aim of the agreement is to assist Member States build their tourism innovation ecosystems and create digital tools that facilitate more efficient decision-making. The first phase of the agreement will be in effect until the end of 2020 and it revolves

around four initial lines of action: digital entrepreneurship; application of new technologies in the tourism sector; Digital Education and training; and the development of a specific Digital Agenda for the tourism industry¹⁴.

According to the UNWTO, the application of new technologies such as Big Data and the Internet of Things are already leading to new uses and applications that will revolutionize services in the tourism sector and responses to new customer demands. The UNWTO and Telefónica underlined dedication to promoting innovation and digital entrepreneurship within the tourism sector through the creation of innovation forums, collaboration in open innovation programs with third parties, and public-private collaboration models focused on Open Innovation.

The UNWTO argues that new technologies will have an increasing role in the modernization and growth possibilities of the tourism sector and, therefore, both entities will launch initiatives aimed at the use of Internet of Things (IoT), Artificial Intelligence and Big Data, among others. Furthermore, the UNWTO believes that the analysis of Big Data makes it possible to understand patterns of behavior to better address some of the challenges facing tourism and to draw relevant conclusions that influence decision-making and public policies. The agreement will also focus on Digital Education and Training, both entities will collaborate through the training platforms managed by Telefónica Educación Digital, such as Miríadax, to promote local and international

¹⁴ <http://www2.unwto.org/press-release/2019-04-29/unwto-partners-telefonica-promote-tourism-sector-digitalization>

courses on digital technologies and skills applied to tourism and aimed at different entities in the sector. Finally, both parties will work together in developing a specific Digital Agenda for the tourism sector guided by a set of very concrete objectives: to place new technologies at the service of sustainable growth, foster innovation and promote inclusive economic and social development.

4. Global Cities Readiness for 2030: Global Cities' Readiness for Tourism Growth



The World Travel and Tourism Council and JLL have partnered to launch the first assessment of cities' readiness for tourism growth, through development of a unique methodology to evaluate and deliver on solutions to foster sustainable growth in tourism activity. Destination 2030 is a comprehensive index

based on the evaluation of more than 75 indicators in 50 global markets focusing on the question of what makes a city ready for travel and tourism growth. The WTCC reported that the research assesses the readiness through which it aims to help city governments and tourism bodies to better understand how well cities are positioned for future growth, while identifying gaps and opportunities that should be considered in future tourism strategy planning. The newly-created index brings together a broad spectrum of destination practices and community attributes to determine a level and type of readiness. The levels range from emerging to established market tourism hubs with varying levels of infrastructures. The assessment identifies five typologies defined on the basis of the level of readiness. These are:



Dawning developers	Cities with emerging tourism infrastructure, gradual tourism growth & lower visitor concentration with potential to grow (e.g. Manila, Moscow, & Riyadh)
Emerging performers	Cities with emerging infrastructure, growing tourism momentum & a start of increasing pressure related to tourism growth (e.g. Delhi, Istanbul & Mexico City)
Balanced dynamics	Cities are often financial hubs with lower share of leisure compared to business travel, but have an established tourism infrastructure & potential for travel & tourism growth (e.g. Chicago, Munich & Tokyo)
Mature performers	Cities with strong leisure & business travel dynamics & an established tourism infrastructure, with risk of future strains related to visitor volume, infrastructure / activity that is testing readiness for additional growth (e.g. New York, Berlin, London & Sydney)
Managing momentum	Cities with high growth momentum driven by leisure travel & established tourism infrastructure but these cities face pressure to ensure that volume of travellers is matched with required urban infrastructure & tourism product diversity (e.g. Amsterdam, Barcelona & Prague)
The WTTC & JLL hope that this work will help enable effective decision making which support thriving city destinations providing actionable investment solutions and foster sustainable future tourism activity	