Top 100 City Destinations
2019 Edition

RABIA YASMEEN

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The data included in this document is accurate according to Passport, Euromonitor International's market research database: December 2019

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Introduction

Methodology and Definitions

Euromonitor International's city arrivals research covers over 400 cities. This report highlights the top 100 cities based on 2018 international arrivals. International arrivals by city includes visitors from abroad who arrive at the city under review as their first point of entry, also including visitors to the city who arrived in the country via a different point of entry, but then go on to visit the city in question during their trip.

Arrivals are defined as international tourists, i.e. any person visiting another country for at least 24 hours, for a period not exceeding 12 months, and staying in paid or unpaid, collective or private accommodation. Each arrival is counted separately and includes people travelling more than once a year and people visiting several cities during one trip. Arrivals encompasses all purposes of visit, such as business, leisure and visiting friends and relatives.

Arrivals excludes domestic visitors, same-day visitors, people in transit and cruise passengers as this can distort arrivals figures at important border crossings and cruise destinations, respectively. It also excludes those in paid employment abroad. Students that stay in a country for a period of more than 12 months are excluded and are considered as temporary residents. Military personnel and transportation crew are excluded, along with displaced people because of war or natural disasters. The ranking focuses on city hubs and tends to exclude beach and ski resorts that may enjoy high volumes of international visitors.

The ranking tables in this white paper provide 2017, 2018 and forecast 2019 arrivals data, as well as rank movements. 2013–18 rank movement indicates the change in rank between 2013 and 2018 of each city based on the arrivals in 2013 and 2018. 2018–19 rank movement indicates the change in rank between 2018 and 2019, where 2019 data is an estimated arrivals figure based on part-year data. The cities included in the current Top 100 ranking might not have been or will not be in the ranking in 2013 or 2018.

The Dynamism of Cities

With rapid urbanization, 55% of the world's population lives in cities today, accounting for 78.6% of global consumer expenditure. Cities have become centres of economic wealth in the new era of consumerism as a result.

While many emerging market cities are still industrial or labour-intensive, most economic development in cities is determined by population density. This leads to demand for better infrastructure and service, thus cities have evolved into productivity centres and hubs for investment.

With more than 33 megacities globally — cities with more than 10 million habitants — rapid economic growth will see a further six megacities added by 2030. However, cities no longer merely represent the migration of people from rural to urban areas to live in densely populated areas, striving to make a living. Cities have evolved, becoming more dynamic and complex, driven by changes in demographics, social structures, living spaces and facilities as well as urban mobility which has led to an ever-greater importance of urban planning.

Vision led city developers and planners are now looking at cities as centres of investment and innovation, for which quality and standards of living are changing at a very rapid pace. With an emphasis on healthier living spaces, green environments, cultural conservation, sustainability and integration of technology, smart city initiatives are now at the forefront of governance strategies.

Cities are gateways to economies. The dynamism around city evolution is changing the way travellers interact with and experience cities as well as the kind of travellers drawn to city hubs. City tourism boards are now an important part of the wider city vision, working closely with national and city governments to develop services and products that attract and facilitate visitors.

Where Are the Top 100 City Destinations?
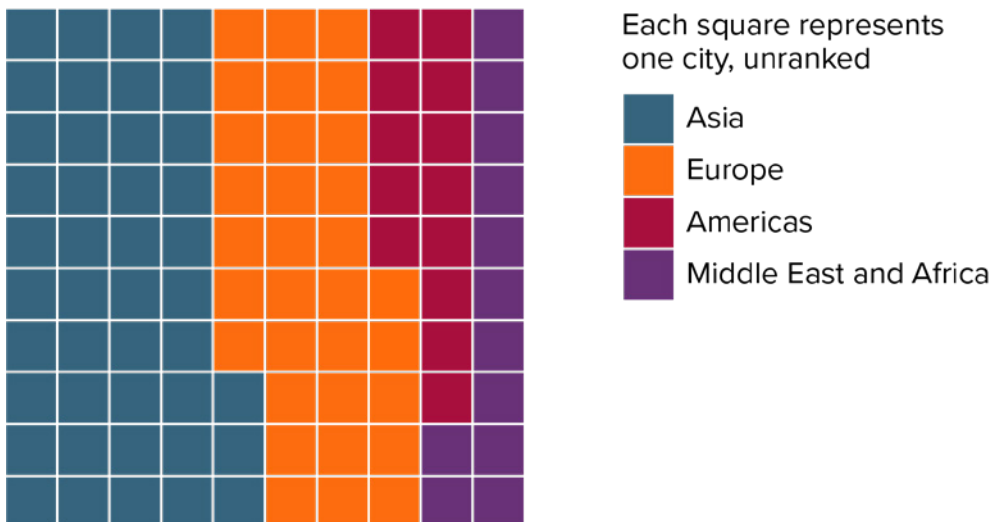
Source: Euromonitor International

Global Performance of City Destinations

Global inbound arrivals are expected to grow by 4.2% to 1.5 billion trips in 2019, with the top 100 cities comprising nearly 47% of global arrivals and growing by 6.2% in 2019.

The top 100 cities continuously outperform the growth in world arrivals as tourism becomes a catalyst for innovation as well as a driver of socio-economic progress. This has led to smart city developments, encouraged by governments' long-term tourism strategies and significantly increased investment in travel and tourism over recent years.

Asia continues to outpace other regions, accounting for 43 of the top 100 cities. This number has steadily increased from 34 cities in 2013. Hong Kong continues to lead the city arrivals globally despite the political unrest and protests which lead to a sharp decline in the number of visitor arrivals in 2019.

With an increasing Chinese outbound market, many countries are targeting travellers through Chinese social media platforms such as WeChat, as well as working closely with local travel intermediaries. Additionally, rising income levels and increased millennial travellers from Asian economies has also increased intra-regional travel in Asia and regions in closer proximity such as the Middle East and Africa.

Europe remains the second key region for travellers with 32 cities in the rankings, the same as last year. However, Brexit uncertainty remained a concern for many travellers, leading to a slight decline in the number of inbound arrivals to London in 2018. Despite this, the city maintained its 3rd place globally in 2018 but is forecast to lose two places to 5th in the ranking in 2019.

Cities in North America continue to perform well, however, most cities lost their rankings owing to increased competitiveness from Asian and European city destinations. Latin America cities face challenges with Mexico City leaving the ranking and only four cities featuring in the Top 100 City Destinations ranking this year — with all four experiencing a decline in their position.

The Middle East and Africa continued to pose stable growth, with leading destinations such as Dubai experiencing flat growth. Saudi Arabia, the second most important market in the region, saw a slowdown in religious tourism and arrivals for the purpose of visiting friends, family and relatives, following the country's efforts to reduce workforce dependency on expats. Egypt made a comeback on account of its tourism reform program, with Hurgada making it into the Top 100 City Destinations ranking for the first time at position 82. Cairo also improved to position 42.

Security concerns remain a challenge for some destinations in Europe due to possible terrorist attacks, increased local crime rates and emerging concerns regarding refugees.

While leading cities have benefited from their own popularity, many destinations are now faced with issues of overcrowding, pollution and transport management. There has been a greater focus on enhancing infrastructure and airport capacities through new terminals and improved passenger facilities. Further, smart city initiatives and integrating digital platforms to facilitate travel services have been a key trend to improve efficiency and reach in the travel sector.

Top 10 City Destinations 2018
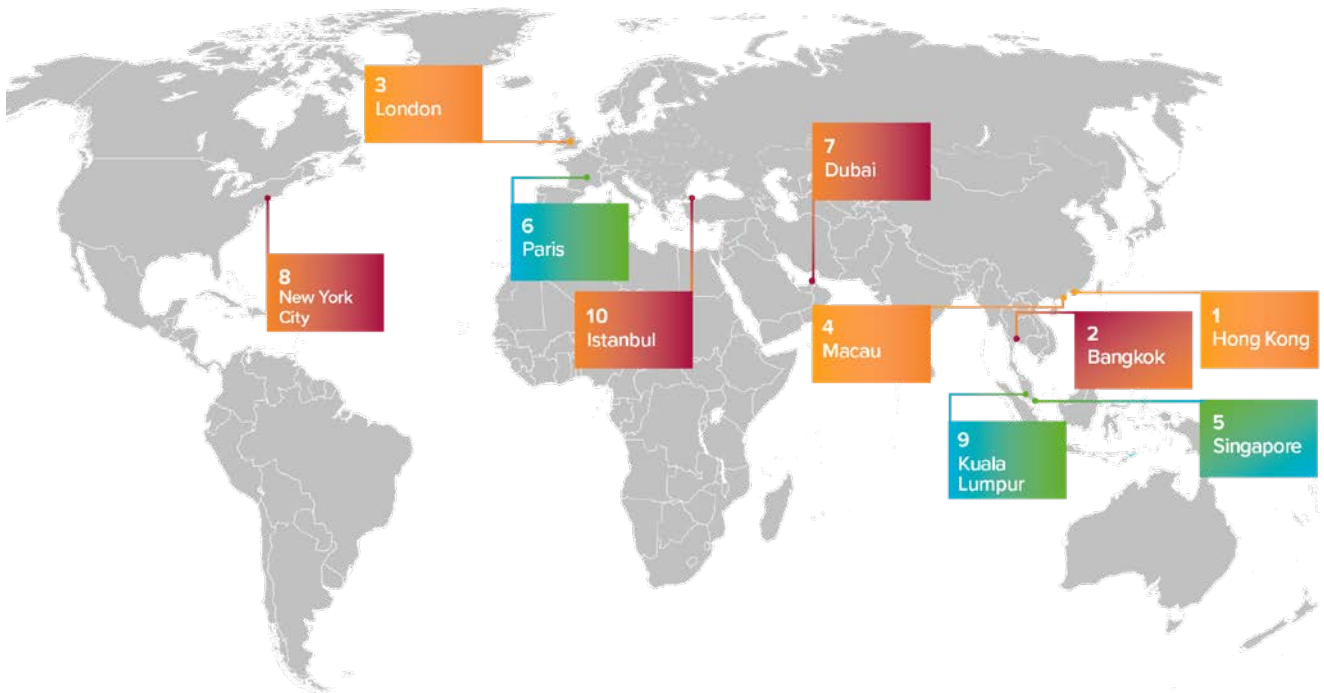
Source: Euromonitor International

With the increased importance of travel and tourism to a country's economy, many regional peers are looking to build alliances to boost regional travel. Such alliances include London and Paris in Europe and Egypt and Saudi Arabia in the Middle East and Africa — resulting in shared resources, destinations and more dynamic travel offerings and packages.

Cities to Watch

Singapore

Despite some challenges, Singapore continues to show steady growth, with a 5.3% increase in visitor arrivals during 2018 on account of increased regional travel and strong growth in the cruise sector. Seven key source markets — China, India, the Philippines, the United Kingdom, the U.S., Vietnam and Germany — continue to show strong arrivals, thanks to Singapore's strong tourism strategy and increased focus on working closely with partners across the travel sector. However, it lost one place in the rankings and now ranks 5th overall, as regional tourism gets competitive.

Singapore is developing stronger partnerships with regional tourism boards, leading travel agencies such as JTB Corp. and Trip.com and technology companies such as Alipay, Spotify, Traveloka and Sentosa to retain its place in the region in the future. Additionally, on account of Singapore's global 'Passion Made Possible' campaign, the city aims to market the authentic local experience to offer authenticity and variety to appeal to the developing visitor preferences.
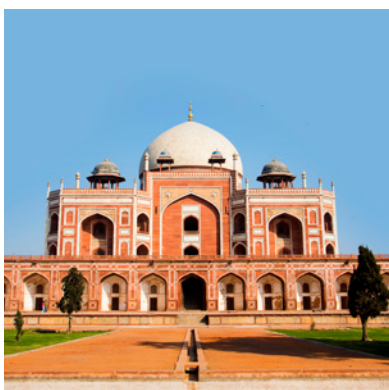
Delhi

Delhi currently ranks 11th and is forecast to increase its ranking up to 8th place in 2019. It is witnessing rapid development in its tourism infrastructure, having a world class airport and is focusing on luxury, medical, sports and cultural tourism. With health and wellness tourism on the rise, India has gained noteworthy attention for its yoga retreats and Ayurveda practices. Delhi's connectivity to important locations across North India has boosted inbound arrivals to the city.

Hurgada

Hurgada made it to the Top 100 City Destinations ranking this year, rising impressively by 45 places to position 82. With infrastructure improvement, such as the renovation of Terminal 2 at Hurgada International Airport and investment in the hotel sector, the city is expected to see a growth of over 41% during 2019, which will further elevate its ranking.

Being popular among European visitors for its water sports, nightlife and entertainment avenues, Hurgada is also considered safer among European visitors, primarily from Russia, Germany and Poland. If the political and security situation remains stable and Egypt's active tourism promotion and development keeps its pace, Hurgada is also expected to benefit from the ongoing development of the Red Sea project. It might even see itself in the top 50 cities in the coming years.

Fukuoka

Making it into the Top 100 City Destinations ranking for the first time, Fukuoka is the 5th largest city in Japan in terms of population and the 5th most visited city, welcoming 2.4 million visitors in 2018.

Fukuoka has a diverse range of offerings and popular local cuisine, with most visitors coming from neighbouring countries such as South Korea, Taiwan and mainland China. It is rich in history, having been chosen by the Mongols as the place to land in the region and has numerous museums, historic and cultural sites.

Some of the popular visitor attractions in the city are Ohori Park, Canal City Hakata and the Nanzoin and Techoji temples. Fukuoka is also appealing to entrepreneurs eager to set up start-ups in Japan, which is further strengthening the business travel to the city. Nearly 200 international conference are held in Fukuoka each year. The city hosted the G20 Finance Ministers and Central Bank Governors meeting in 2019.

Americas

	2018	2019
Number of Cities in the Ranking	13	13
Inbound Arrivals to Americas ('000 Trips)	214,421.9	219,618.7
Growth	3.1%	2.4%
Inbound Tourism Receipts (USD Million)	322,904.4	342,018.8
Growth	4.3%	5.9%
Average Receipt per Arrival (USD)	1,506	1,557
Growth in Average Receipt per Arrival	1.2%	3.4%

Key Source Markets
U.S.
Canada
Mexico
Argentina
U.K.

Source: Euromonitor International

The U.S. and Canada have the most popular city destinations in the Americas, with 9 out of top 10 cities in the regional ranking. Cancun in Mexico is the only other city to make the top 10.

Despite high concern for safety and security among visitors, stringent policies and a travel ban under the Trump Administration, most U.S. destinations performed well during 2018 when compared with the previous year. However, most U.S. cities in the Top 100 City Destinations ranking experienced a decline in rankings due to increased competitiveness from other regions such as Asia and Europe.

While key U.S. cities such as New York and Orlando maintained their rankings during the year, Miami dropped two places, Los Angeles dropped one place and Honolulu dropped six places despite positive growth in arrivals. Las Vegas was the only U.S. city in the Top 100 City Destination rankings which reported a decline in number of arrivals, owing to continued economic gloom and mass shooting event in 2017. The city lost five places in the ranking.

Escalating trade tension between China and U.S. is one of the main concerns for the travel industry and many cities in the U.S. are focusing on marketing activities to welcome Chinese visitors. For example, Washington is offering hotel discounts over Chinese New Year and San Francisco has expanded its social media presence across Chinese apps such as WeChat and Weibo, to attract millennials. Other cities such as Utah and Los Angeles are trying to expand their presence to new source markets with larger and youthful middle-class millennials.

Canada is working towards stronger marketing to build its international brand and offering easier access to international travellers by increasing the number of connections and direct flights to Canada. On the back of its vast natural offerings, cultural diversity and quality infrastructure, Canada wants to be more competitive so that it can welcome visitors from new source markets. Currently the U.S leisure market accounts for 70% of the international visitors to Canada.

Like the U.S., Canada aims to attract the booming Chinese outbound market by increasing marketing activity there. It aims to double its Chinese visitors by 2021. While Canada envisions being among the top 10 most visited countries by 2025, the goal seems ambitious because only two of its cities, Toronto and Vancouver, are expected to represent Canada in the Top 100 City Destinations over the coming years.

To remain competitive, the Americas region needs to tackle the issues related to visitor safety, local crime rates, easier visa policies as well as focusing on sustainable tourism. Mexico City lost its place in the ranking this year and Rio de Janeiro is expected to lose its place in 2019. While Chinese visitors will stay at the centre of the tourism strategy for most American destinations, exploring new source markets with growing millennial travellers will also be important. However, this will require American cities to be more competitive in terms of price and ease of access. Digitization and improvement of travel services is thus expected to play a dynamic role in reaching out to target visitors.

Americas Top 10 City Destinations 2018

CITY	COUNTRY	ARRIVALS ('000)			GROWTH (%)		RANK MOVEMENT			
		2017	2018	2019	2018	2019	2013–18		2018–19	
New York City	US	13,100.0	13,600.0	14,010.0	3.8%	3.0%	▲	1	▼	3
Miami	US	7,798.1	8,121.1	8,336.8	4.1%	2.7%	▼	7	▼	2
Los Angeles	US	7,165.0	7,500.0	7,725.9	4.7%	3.0%	▼	7	▼	4
Las Vegas	US	6,687.8	6,591.3	6,639.3	-1.4%	0.7%	▼	9	▼	4
Cancún	Mexico	6,039.0	6,041.0	6,150.0	0.0%	1.8%	▲	17	▼	4
Orlando	US	5,269.0	5,553.6	5,725.7	5.4%	3.1%	▼	10	▼	1
Toronto	Canada	4,287.4	4,510.3	4,735.8	5.2%	5.0%		0		0
Vancouver	Canada	2,999.1	3,212.1	3,398.4	7.1%	5.8%	▲	13	▲	1
San Francisco	US	2,900.0	2,901.0	2,987.5	0.0%	3.0%	▼	14	▼	6
Honolulu	US	2,685.8	2,737.3	2,853.1	1.9%	4.2%	▼	11	▼	4

Source: Euromonitor International

New York

New York City is still the most popular urban city destination in the U.S., serving as a magnet for leisure and business travellers from all over the world. In fact, tourism is one of the four most important sectors for the city's economic growth and the city aims to attract 67 million annual visitor arrivals by 2021.

Despite the steps taken by President Trump's administration to limit the number of visitor visas granted to international visitors and the anti-immigration policies, inbound arrivals to New York City continue to grow. The adverse impact, initially feared, has been minimal.

China has emerged as one of the most important source markets for arrivals to New York City. However, as trade tensions escalate between the U.S. and China, arrivals from China are expected to decline.

While New York City ranks as the 8th most visited city globally, it requires massive infrastructure improvements and an increased availability of affordable lodging. The number of short-term rentals has been growing rapidly but a proposed law aiming to curb the explosion of short-term rental listings may put off millennials.

John F Kennedy (JFK) airport ranked the sixth busiest airport in the U.S. in terms of enplanements during 2018, handling 62 million passengers. The city is renovating its other major airports, Newark Liberty Airport and LaGuardia, to reduce air traffic congestion towards the city and offer travellers better airport services.

With its digital roadmap, New York City aims to be the smartest smart city by facilitating innovations that make living and moving around the city easier. For example, LinkNYC is a communication network that replaces 7,500 pay phones with links that provide faster public Wifi, device charging and a tablet to access the city services and maps for information on the go.

Cancun

Cancun is Mexico's most visited city, the most visited city in Latin America and the 40th most visited city internationally.

The city has long been a beach destination and is well known for its vivid nightlife. Its offer is now expanding to include top rated water activities, outdoor adventures and professional sporting events. Beyond recreation, Cancun's hotels and resorts are an ideal setting for weddings and conventions. Due to its proximity, the U.S. is the leading source market for arrivals to Cancun, followed by Canada. Beyond North America, visitors travel from around the globe, primarily from Latin America and Europe.

The number of international arrivals visiting the city has been decreasing, owing partly to an ongoing war on drug cartels in the Cancun area disturbing the city's safe environment. Travel advisories have been issued by the U.S. and U.K. governments, warning visitors against travelling to certain regions in Mexico, including Cancun.

Furthermore, the Mexican Board of Tourism was dismantled in December 2018 leaving the country without a tourism budget and a clear promotion strategy. Cities like Cancun are facing difficulties in maintaining inbound tourism flows. The lodging sector is one of the most impacted, with a significant increase in the number of rooms available in the market and a decrease in demand.

Asia

	2018	2019
Number of Cities in the Ranking	43	42
Inbound Arrivals to Asia ('000 Trips)	363,031.3	386,598.7
Growth	7.5%	6.5%
Inbound Tourism Receipts (USD Million)	488,355.5	532,708.8
Growth	14.9%	9.1%
Average Receipt per Arrival (USD)	743	1,378
Growth in Average Receipt per Arrival	-6.4%	85.4%

Key Source Markets
China
Hong Kong, China
South Korea
Singapore
Taiwan, China

Source: Euromonitor International

Asia continues to be the leading region, with 43 cities in the Top 100 City Destination ranking. The region also posted the fastest growth in the number of international arrivals globally.

With the diversity of experiences available in the region, national level policies for the improvement of tourism services have gained strong ground. Many countries have embraced digitization of travel services with offering e-visas a key highlight. Massive infrastructure developments and improvement of air connectivity are also high on the agenda of many Asian cities.

Strong income growth, leading to an expansion of the middle-class sector, has also increased outbound travel from the region as more people aspire to travel abroad. These developments have directly improved the availability of travel related services.

Further, Asia's growing economic base and lower cost of travel have positively impacted the business travel market in the region, with massive improvement in the development of the MICE (Meetings, Incentives, Conferences, and Exhibitions) segment. While intra-regional travel has increased there is also heightened competitiveness within the region to attract a greater number of international visitors.

Hong Kong and Bangkok continue to be the top two city destinations globally, while Macau, Singapore and Kuala Lumpur continue to feature in the global top 10. Shenzhen is a major absentee at the top of the international ranking this year, as it dropped from 10th in the ranking last year to 13th this year. It was replaced by the boost of visitors to Istanbul and Antalya in Turkey. Shenzhen, however, is expected to benefit from the political unrest continuing in Hong Kong, having proximity to Hong Kong.

India is one of the strongest emerging destinations in Asia due to its strong cultural resources, diversity of experiences and price competitiveness, with 7 of its cities making it to the Top 100 City Destinations ranking this year. Impressively, all 7 cities have improved their rankings during the year. Cities like Chennai and Bangalore averaged a growth rate around 25%, with Delhi having an average annual growth of over 25%. Bangalore made it to the Top 100 City Destinations ranking for the first time at position 100.

Mumbai was another key performer from India, increasing its ranking from 21st last year to 14th in 2018. With world class airport facilities, it's profile as the Bollywood capital and a growing financial sector, tourism in Mumbai is set to further expand over the next five years.

As shorter regional trips and travel blogging become a key trend in the region, central Asian countries such as Azerbaijan and Iran also stay popular.

Asia Top 10 City Destinations

CITY	COUNTRY	ARRIVALS ('000)			GROWTH (%)		RANK MOVEMENT	
		2017	2018	2019	2018	2019	2013–18	2018–19
Hong Kong	Hong Kong, China	27,880.3	29,262.7	26,716.8	5.0%	-8.7%	0	0
Bangkok	Thailand	22,453.9	24,177.5	25,847.8	7.7%	6.9%	0	0
Macau	Macau, China	17,337.2	18,931.4	20,637.1	9.2%	9.0%	▲ 2	▲ 1
Singapore	Singapore	17,618.8	18,551.2	19,760.8	5.3%	6.5%	▼ 1	▲ 1
Kuala Lumpur	Malaysia	12,843.5	13,434.3	14,072.4	4.6%	4.8%	▲ 1	▼ 1
Delhi	India	10,157.0	12,645.3	15,196.5	24.5%	20.2%	▲ 30	▲ 3
Shenzhen	China	12,075.1	12,202.1	12,324.1	1.1%	1.0%	▼ 5	▼ 1
Mumbai	India	8,984.9	10,590.1	12,442.4	17.9%	17.5%	▲ 28	▲ 1
Phuket	Thailand	10,109.4	10,550.7	10,965.2	4.4%	3.9%	0	0
Tokyo	Japan	9,549.4	9,985.1	10,443.1	4.6%	4.6%	▲ 15	▲ 1

Source: Euromonitor International

Hong Kong, China

Hong Kong continues to lead as the top city destination globally in 2018, given its proximity to China, vibrant shopping scene and strong cultural heritage. The city is expected to maintain its leading position in 2019, despite anti-government protests during the second half of the year negatively impacting inbound arrivals.

More than 50% of all visitors to Hong Kong come from mainland China. Recent infrastructure development such as the completion of the Hong Kong-Zhuhai-Macau bridge, as well as the commissioning of the high-speed rail link connecting Hong Kong to Shenzhen and Guangzhou have led to consistent growth in arrivals from China over 2017–2018. While the congestion at Hong Kong International Airport is a key challenge, regional airports are expected to compete for air space and establish major travel hubs, especially Shenzhen. Shenzhen is close to Hong Kong and has good transport connectivity with an international airport and a high-speed rail.

While the city has been traditionally popular for its shopping centres, Hong Kong is now focusing on highlighting its natural terrain and cultural heritage. Guided tours, cycling routes and hiking trails are increasing its appeal to millennial travellers who are seeking authentic and local experiences.

Bangkok

Bangkok has been a key contender for the leading city destination globally for a number of years. Like Hong Kong it has benefitted from regional travellers, with over 73% of its inbound arrivals coming from Asia Pacific.

The city's key source markets are China, South Korea, Laos, Japan, India and Russia. As a popular budget weekend getaway destination for the growing number of Asian middle-class millennial travellers, Bangkok saw the fastest growth in arrivals from Hong Kong, Nepal and India in 2018, averaging over 25%.

The city is maintaining its global positioning through strategic tourism plans and increased investment. It is aiming to increase its competitiveness against regional peers through the establishment of luxury retail avenues, such as Iconsaim Mall, to attract high spending Chinese visitors. Additionally, the city

is diversifying its tourism offer to medical and wellness tourism and promoting local experiences and community-based tourism with the 'Amazing Thailand Go Local' campaign. This campaign promotes tourism offerings beyond Bangkok to Chiang Mai, Phuket and other Thai islands, increasing the appeal to wider audiences and benefiting Bangkok indirectly.

"One Bangkok" is the country's largest integrated smart city project. It is set to transform Bangkok city-centre into a global landmark destination. The project is driven by the Internet of Things (IOT) and built on people-centric principles with a focus on environmental sustainability, with more green spaces and a cleaner and safer environment for residents and visitors.

In order to attract a greater number of international visitors, the government temporarily waived the visa on arrival fee for visitors from 21 countries for 60 days in December 2018. Both international airports, Suvarnabhumi Airport (BKK) and Don Mueang Airport (DMK) Bangkok, are undergoing expansion to manage increased arrivals. In addition, there are new train lines which will enhance the mobility within the city.

Europe

	2018	2019
Number of Cities in the Ranking	32	32
Inbound Arrivals to Europe ('000 Trips)	701,801.0	721,854.4
Growth	5.6%	2.9%
Inbound Tourism Receipts (USD Million)	552,958.3	577,026.9
Growth	5.6%	4.4%
Average Receipt per Arrival (USD)	788	799
Growth in Average Receipt per Arrival	0.0%	1.5%

Key Source Markets

Germany

U.K.

France

U.S.

Russia

Source: Euromonitor International

Europe is the second fastest growing regional destination after Asia and has the largest number of inbound arrivals globally. Intra-regional travel remains the largest source of tourism, with nearly 80% of the travellers from the region. This is due to a strong regulatory framework and travel policies favouring free travel within the European Union and the Schengen Area, comprising 26 European states. The travel and transport infrastructure in Europe is one of the strongest globally. There are 853 airports in the region. Additionally, quality and extensive rail and road networks within Europe further facilitates intra-regional tourism.

While travel from within Europe remained steady, arrivals from Asian source markets such as China and Japan outpaced growth of visitors from within the region.

London retained its 3rd place in the Top 100 City Destinations ranking, despite a decline in the number of arrivals as Brexit uncertainty continues. However, the future of the travel market in the United Kingdom remains uncertain, particularly if visa restrictions become tighter, with the U.K. expected to receive fewer EU visitors. London is expected to lose its place among the top 3 cities in 2019, being overtaken by Macau and Singapore. Paris is expected to benefit from any shift of European visitors from the United Kingdom, for both business and leisure.

Key cities in Turkey moved up the Top 100 City Destinations rankings on account of improved security in the country and a decrease in the value of the Turkish lira, making Turkey appealing as a budget friendly European destination.

While traditional locations such as Milan, Berlin and Vienna have declined in the ranking, due to lower appeal among visitors and shifts of visitors towards Egypt, Turkey and Asian destinations, upcoming destinations such as Croatia, Slovenia and Sweden have moved up. They are proving popular as travellers seek newer, more localized experiences and less crowded locations. The popularity and increased number of low-cost carriers to these destinations has also favoured growth of previously less explored destinations.

Europe Top 10 City Destinations 2018

CITY	COUNTRY	ARRIVALS ('000)			GROWTH (%)		RANK MOVEMENT			
		2017	2018	2019	2018	2019	2013–18		2018–19	
London	United Kingdom	19,828.0	19,233.0	19,559.9	-3.0%	1.7%		0	▼	2
Paris	France	15,834.2	17,560.2	19,087.9	10.9%	8.7%	▼ 1			0
Istanbul	Turkey	10,730.3	13,433.0	14,715.9	25.2%	9.6%	▲ 2		▲	1
Antalya	Turkey	9,482.4	12,438.8	13,332.1	31.2%	7.2%	▼ 1			0
Rome	Italy	9,531.6	10,065.4	10,317.0	5.6%	2.5%	▼ 3		▼	1
Prague	Czech Republic	8,806.7	8,948.6	9,150.9	1.6%	2.3%	▼ 3			0
Amsterdam	Netherlands	7,848.0	8,354.2	8,835.4	6.5%	5.8%	▲ 3		▼	1
Barcelona	Spain	6,288.9	6,714.5	7,016.6	6.8%	4.5%	▼ 6		▼	3
Milan	Italy	6,347.9	6,481.3	6,604.4	2.1%	1.9%	▼ 9		▼	5
Vienna	Austria	6,186.4	6,410.3	6,634.7	3.6%	3.5%	▼ 8		▼	2

Source: Euromonitor International

Paris

Paris retained its 6th place in the ranking with continued strong growth in visitor arrivals. Improved security protocols and successful marketing campaigns, such as #ParisWeLoveYou, have brought back visitor confidence. While London has been the leading city in Europe for international visitors for many years, Paris aims to capitalize on the emerging opportunity Brexit creates, not only in terms of leisure tourism but also business travel. Its financial services sector is growing as multi-national companies seek regional locations to re-locate to from London.

While the city's key source markets remain neighbouring countries, Paris and London are working together on joint marketing campaigns to encourage American millennials to enjoy both cities in one trip. They both want to take advantage of the considerable growth of arrivals from the U.S. over recent years to each city.

In addition to improving infrastructure as part of the Paris smart city initiatives, Paris is showing off its Parisian culinary skills by opening a museum in 2019 and promoting its giant food market in Rungis, the Cité de la Gastronomie.

Because Paris has one of the highest hotel room rates in Europe, demand for affordable accommodation has increased. There has been an exponential increase in short term rentals and Paris is the number one destination on Airbnb.

With the Yellow Vest protests greatly impacting arrivals and continued Brexit uncertainty impacting U.K. arrivals in 2019, France has pushed back its goals of hosting 100 million international visitors in 2020. The city is looking at its longer-term goals in run up to the Paris Olympics in 2024.

Istanbul

Istanbul made a comeback in the Top 100 City Destinations ranking, with impressive growth in inbound arrivals continuing for the second consecutive year, after political and security issues hampered tourism performance in 2016.

Owing to the improved security situation and the drop in the value of Turkish lira, international visitors were lured back to Turkey. Three Turkish cities, Istanbul, Antalya and Mugla, reported the fastest growth in inbound arrivals globally.

With its proximity to Europe, 70% of the visitors to Turkey travel from Europe, with Eastern Europe the largest source market for arrivals to Istanbul. However, Turkish cities are also a growing destination for Arabian travellers because the tourism board is capitalizing on its proximity to the Middle East.

A visit to Istanbul is as much about shopping as visiting attractions such as the Ottoman era Topkapı Palace or the Byzantine era Hagia Sophia for many visitors. The Grand Bazaar is a world-renowned attraction for this. It is the world's first "shopping mall", a maze of over 4,000 small businesses selling an experience as much as Turkish crafts.

Istanbul Airport, which opened in 2018, has a strategic geographic position connecting Asia, Europe and Middle East and Africa. The airport launches flights to a total of 146 destinations, connecting over 120 countries within 3 hours. It already competes with the capacity of Dubai International Airport, which welcomed 89 million passengers in 2018, and aims to cater for up to 200 million passengers over the next two years. This would make the airport the world's largest single roof and greenfield airport.

Middle East and Africa

	2018	2019
Number of Cities in the Ranking	12	13
Inbound Arrivals to MENA ('000 Trips)	134,362.6	146,044.7
Growth	5.5%	8.7%
Inbound Tourism Receipts (USD Million)	137,879.1	150,357.2
Growth	5.1%	9.1%
Average Receipt per Arrival (USD)	1,026	1,030
Growth in Average Receipt per Arrival	-0.3%	0.3%

Key Source Markets

Saudi Arabia

India

France

U.K.

Germany

Source: Euromonitor International

Leading visitor destinations in the Middle East and Africa remain concentrated within the Gulf region, with 7 of the 12 cities in the ranking from the Gulf. Visitor arrivals in the Gulf countries slowed in 2018 compared to the previous year as dampened economic growth and regional geo-political tensions continued to impact both business and leisure arrivals. Both Oman and Qatar reported a decline in their number of arrivals.

Dubai continues to lead the region in terms of numbers of arrivals, despite a flat growth rate during 2018. A free transit visa for two days for Dubai and Abu Dhabi helped to sustain arrival numbers. Key cities in Saudi Arabia also posted a sluggish performance due to economic factors and revisions in its visa fees, whereas the United Arab Emirates has seen a positive impact of diversifying visitor experiences to cities beyond Dubai, notably Ras Al Khaimah.

There has been increased focus on enhancing tourism offerings from the Middle East and African continent, and countries are working to market natural terrains and open new locations to keep the region competitive. Leading cities with good infrastructure, such as Dubai and Riyadh, are investing in greater entertainment avenues such as theme parks, concerts, health and wellness and medical tourism.

There is greater investment in the tourism sector, with governments focusing on developing regional alliances and offering flexible visa policies. Saudi Arabia opened the country to international visitors for leisure during 2019 and Saudi Arabia and Egypt collectively launched the Red Sea project. Saudi Arabia and the United Arab Emirates also plan to introduce a joint visa for both countries. In Africa, the Single

African Transport Market Initiative, signed by 23 African Union member states, aims to improve aviation and transport within the region and uplift the tourism industry through shared benefits.

In North Africa, Egypt remains the leading destination following an active tourism reform strategy. Sharm-el-Sheikh, Hurgada, Cairo, Alexandria and Luxor have all seen strong growth, with the return of visitors from the U.K. and Russia. Additionally, many Sub-Saharan African countries are capitalizing on local experiences and offering customized travel experiences targeting both luxury and family travellers.

Johannesburg retains its place among the top 50 cities on account of continued business travel to South Africa. Key tourism destinations such as Seychelles remain popular among regional travellers. The Seychelles saw an increase in visitors on account of arrivals from countries with visa free travel and gained wider popularity as a go-to wedding destination.

Mauritius has always been popular among leisure visitors for its beaches. However, as the government improves investment on other economic fronts to improve employment and enhance infrastructure, business travel to Mauritius is forecast to grow.

Middle East and Africa Top 10 City Destinations 2018

CITY	COUNTRY	ARRIVALS ('000)			GROWTH (%)		RANK MOVEMENT			
		2017	2018	2019	2018	2019	2013–18		2018–19	
Dubai	United Arab Emirates	15,790.0	15,920.7	16,328.3	0.8%	2.6%		0		0
Mecca	Saudi Arabia	9,800.0	9,565.2	9,833.0	-2.4%	2.8%	▲ 1		▼ 1	
Medina	Saudi Arabia	8,757.0	8,547.2	8,820.7	-2.4%	3.2%	▲ 1		▼ 4	
Cairo	Egypt	4,388.6	5,754.5	6,808.3	31.1%	18.3%	▲ 18		▲ 5	
Riyadh	Saudi Arabia	5,396.8	5,267.5	5,451.9	-2.4%	3.5%	▼ 9		▼ 1	
Johannesburg	South Africa	4,066.3	4,120.8	4,211.0	1.3%	2.2%	▼ 10		▼ 5	
Jerusalem	Israel	3,522.0	3,930.0	4,467.2	11.6%	13.7%	▼ 9		▲ 6	
Dammam	Saudi Arabia	3,584.8	3,498.9	3,588.5	-2.4%	2.6%	▼ 14		▼ 2	
Marrakech	Morocco	2,669.9	2,838.1	3,023.4	6.3%	6.5%	▲ 2		▼ 2	
Tel Aviv	Israel	2,573.5	2,777.0	2,978.1	7.9%	7.2%	▼ 8		▼ 1	

Source: Euromonitor International

Riyadh

Riyadh saw a decline in the number of arrivals in 2018 on account of slower economic growth and the exodus of expats, as the oil and energy sector dampened and a Saudization scheme led to increased focus on employing Saudi citizens across a range of economic sectors. Visits to friends and relatives, which is one of the key reasons for visits to Riyadh, was impacted as expats left or sent their families back to home countries. Escalating tension with Turkey over the suspected consulate killing of a journalist also impacted the country's image over the short term. Additionally, an increase in visa fees for various countries impacted the number of pilgrims to Mecca and Medina.

To boost arrivals and reduce its dependence on oil, Saudi Arabia's new visa scheme is opening the country to international leisure visitors and creating new avenues for entertainment. Foreigners can obtain a visa online as well as on arrival and multiple visits are allowed within a year. Riyadh Season is one of 11 entertainment seasons planned in Saudi Arabia, featuring a wide range of art, sports, culture, concert and theatre activities. Riyadh also hosted the country's first WWE wrestling match as it aims to shake off its image as a conservative country.

Cairo

Egypt posted an impressive turnaround in 2018 to reclaim its position in the region's tourism landscape. Wider economic reforms attracted foreign investment in travel and tourism and the liberalization of the exchange rate positively impacted arrivals and receipts. Egypt's tourism strategy has been rethought with a focus on new source markets; regaining the confidence of lost markets by negotiating to remove travel bans; and facilitating investment in human resources, lodging and transport fleet capacity.

As a result, Cairo improved its ranking by 8 places to position 42 in the ranking, also becoming the 4th most visited city in the Middle East and Africa region. Attractive marketing campaigns and the use of social media was one of the key success factors. The city has seen strong investment in infrastructure and the restoration of historic sites.

Additionally, there has been increased emphasis on improving airport infrastructure. The New Cairo International Airport will improve the city's ability to welcome passengers and connect the city to the Luxor and Red Sea resorts. The new metro station in Cairo is also expected to be the Middle East's biggest metro station.

With the historic Cairo Palace re-opening in 2019 after restoration and the success of the African Cup of Nations, Cairo is expected to improve its ranking in 2019. Furthermore, with the opening of the Grand Egyptian Museum in 2020 and a link from Cairo to the Great Pyramids, the city is set to see greater interest from art and culture enthusiasts globally.

Ranking and Notes

	CITY	COUNTRY	ARRIVALS ('000)			GROWTH (%)		RANK MOVEMENT	
			2017	2018	2019	2018	2019	2013–18	2018–19
1	Hong Kong	Hong Kong, China	27,880.3	29,262.7	26,716.8	5.0%	-8.7%	0	0
2	Bangkok	Thailand	22,453.9	24,177.5	25,847.8	7.7%	6.9%	0	0
3	London	United Kingdom	19,828.0	19,233.0	19,559.9	-3.0%	1.7%	0	▼ 2
4	Macau	Macau, China	17,337.2	18,931.4	20,637.1	9.2%	9.0%	▲ 2	▲ 1
5	Singapore	Singapore	17,618.8	18,551.2	19,760.8	5.3%	6.5%	▼ 1	▲ 1
6	Paris	France	15,834.2	17,560.2	19,087.9	10.9%	8.7%	▼ 1	0
7	Dubai	United Arab Emirates	15,790.0	15,920.7	16,328.3	0.8%	2.6%	0	0
8	New York City	US	13,100.0	13,600.0	14,010.0	3.8%	3.0%	▲ 1	▼ 3
9	Kuala Lumpur	Malaysia	12,843.5	13,434.3	14,072.4	4.6%	4.8%	▲ 1	▼ 1
10	Istanbul	Turkey	10,730.3	13,433.0	14,715.9	25.2%	9.6%	▲ 2	▲ 1
11	Delhi	India	10,157.0	12,645.3	15,196.5	24.5%	20.2%	▲ 30	▲ 3
12	Antalya	Turkey	9,482.4	12,438.8	13,332.1	31.2%	7.2%	▼ 1	0
13	Shenzhen	China	12,075.1	12,202.1	12,324.1	1.1%	1.0%	▼ 5	▼ 1
14	Mumbai	India	8,984.9	10,590.1	12,442.4	17.9%	17.5%	▲ 28	▲ 1
15	Phuket	Thailand	10,109.4	10,550.7	10,965.2	4.4%	3.9%	0	0
16	Rome	Italy	9,531.6	10,065.4	10,317.0	5.6%	2.5%	▼ 3	▼ 1

Current ranking is based on 2018 international arrivals data. 2013-18 rank movement indicates the change in rank between 2013 and 2018 of each city. 2018-19 rank movement indicates the change in rank between 2018 and 2019, where 2019 data is an estimated arrivals figure based on part-year data.

Euromonitor International includes over 400 cities in its research. Therefore, the cities included in the current top 100 ranking might not have been, or will not be in the ranking in 2013 or 2019.

| RANK | CITY | COUNTRY | ARRIVALS ('000) | | | GROWTH (%) | | RANK MOVEMENT | |
			2017	2018	2019	2018	2019	2013–18	2018–19
17	Tokyo	Japan	9,549.4	9,985.1	10,443.1	4.6%	4.6%	▲ 15	▲ 1
18	Pattaya	Thailand	9,137.0	9,606.4	9,951.9	5.1%	3.6%	▼ 1	▼ 2
19	Taipei	Taiwan, China	9,273.3	9,597.8	9,981.7	3.5%	4.0%	▼ 1	0
20	Mecca	Saudi Arabia	9,800.0	9,565.2	9,833.0	-2.4%	2.8%	▲ 1	▼ 1
21	Guangzhou	China	9,004.8	9,004.8	9,006.3	0.0%	0.0%	▼ 5	▼ 3
22	Prague	Czech Republic	8,806.7	8,948.6	9,150.9	1.6%	2.3%	▼ 3	0
23	Medina	Saudi Arabia	8,757.0	8,547.2	8,820.7	-2.4%	3.2%	▲ 1	▼ 4
24	Seoul	South Korea	7,659.1	8,431.4	9,105.9	10.1%	8.0%	▼ 10	▲ 1
25	Amsterdam	Netherlands	7,848.0	8,354.2	8,835.4	6.5%	5.8%	▲ 3	▼ 1
26	Agra	India	6,644.4	8,138.2	10,127.4	22.5%	24.4%	▲ 38	▲ 8
27	Miami	US	7,798.1	8,121.3	8,336.8	4.1%	2.7%	▼ 7	▼ 2
28	Osaka	Japan	6,605.9	7,861.5	8,998.9	19.0%	14.5%	▲ 69	▲ 3
29	Los Angeles	US	7,165.0	7,500.0	7,725.9	4.7%	3.0%	▼ 7	▼ 4
30	Shanghai	China	7,193.3	7,483.5	7,745.5	4.0%	3.5%	▼ 7	▼ 2
31	Ho Chi Minh City	Vietnam	6,240.0	7,200.0	8,208.0	15.4%	14.0%	▲ 6	▲ 1
32	Denpasar	Indonesia	6,238.3	7,185.6	8,582.8	15.2%	19.4%	▲ 13	▲ 4
33	Barcelona	Spain	6,288.9	6,714.5	7,016.6	6.8%	4.5%	▼ 6	▼ 3
34	Las Vegas	US	6,687.8	6,591.3	6,639.3	-1.4%	0.7%	▼ 9	▼ 4
35	Milan	Italy	6,347.9	6,481.3	6,604.4	2.1%	1.9%	▼ 9	▼ 5
36	Chennai	India	5,086.3	6,422.8	7,930.1	26.3%	23.5%	▲ 7	▲ 5
37	Vienna	Austria	6,186.4	6,410.3	6,634.7	3.6%	3.5%	▼ 8	▼ 2

Source: Euromonitor International

			ARRIVALS ('000)			GROWTH (%)		RANK MOVEMENT	
RANK	CITY	COUNTRY	2017	2018	2019	2018	2019	2013-18	2018-19
38	Johor Bahru	Malaysia	5,571.4	6,396.0	7,227.4	14.8%	13.0%	▲ 8	▲ 3
39	Jaipur	India	5,288.6	6,383.4	7,562.9	20.7%	18.5%	▲ 29	▲ 5
40	Cancun	Mexico	6,039.0	6,041.0	6,150.0	0.0%	1.8%	▲ 17	▼ 4
41	Berlin	Germany	5,627.4	5,959.4	6,195.8	5.9%	4.0%	▼ 10	▼ 2
42	Cairo	Egypt	4,388.6	5,754.5	6,808.3	31.1%	18.3%	▲ 18	▲ 5
43	Athens	Greece	4,797.4	5,728.4	6,301.3	19.4%	10.0%	▲ 18	▲ 2
44	Orlando	US	5,269.0	5,553.6	5,725.7	5.4%	3.1%	▼ 10	▼ 2
45	Moscow	Russia	4,800.0	5,510.0	5,969.0	14.8%	8.3%	▼ 10	0
46	Venice	Italy	5,316.4	5,502.5	5,590.5	3.5%	1.6%	▼ 16	▼ 2
47	Madrid	Spain	5,273.1	5,440.1	5,597.8	3.2%	2.9%	▼ 8	0
48	Ha Long	Vietnam	4,340.0	5,294.8	6,247.9	22.0%	18.0%	▲ 14	▲ 6
49	Riyadh	Saudi Arabia	5,396.8	5,267.5	5,451.9	-2.4%	3.5%	▼ 9	▼ 1
50	Dublin	Ireland	4,986.5	5,213.4	5,462.1	4.6%	4.8%	▼ 12	▲ 1
51	Florence	Italy	4,941.3	5,059.9	5,125.7	2.4%	1.3%	▼ 15	▼ 1
52	Ha Noi	Vietnam	4,300.0	4,687.0	5,132.3	9.0%	9.5%	▲ 21	▲ 1
53	Toronto	Canada	4,287.4	4,510.3	4,735.8	5.2%	5.0%	0	0
54	Johannesburg	South Africa	4,066.3	4,120.8	4,211.0	1.3%	2.2%	▼ 10	▼ 5
55	Sydney	Australia	3,964.6	4,090.6	4,442.5	3.2%	8.6%	▲ 1	▼ 2
56	Munich	Germany	3,829.2	4,066.6	4,205.5	6.2%	3.4%	▼ 7	▼ 4
57	Jakarta	Indonesia	3,587.5	4,033.0	4,703.0	12.4%	16.6%	▲ 17	▲ 3
58	Beijing	China	3,923.4	4,002.4	4,070.4	2.0%	1.7%	▼ 25	▼ 3

Source: Euromonitor International

RANK	CITY	COUNTRY	ARRIVALS ('000)			GROWTH (%)		RANK MOVEMENT	
			2017	2018	2019	2018	2019	2013–18	2018–19
59	St. Petersburg	Russia	3,600.0	3,996.0	4,457.2	11.0%	11.5%	▼ 11	▲ 3
60	Brussels	Belgium	3,430.0	3,942.0	4,276.0	14.9%	8.5%	▼ 13	▲ 2
61	Jerusalem	Israel	3,522.0	3,930.0	4,467.2	11.6%	13.7%	▼ 9	▲ 6
62	Budapest	Hungary	3,654.0	3,822.8	4,025.4	4.6%	5.3%	▼ 7	0
63	Lisbon	Portugal	3,522.8	3,539.4	3,639.9	0.5%	2.8%	▲ 9	▼ 2
64	Dammam	Saudi Arabia	3,584.8	3,498.9	3,588.5	-2.4%	2.6%	▼ 14	▼ 2
65	Penang Island	Malaysia	3,194.4	3,437.1	3,705.2	7.6%	7.8%	▼ 2	▲ 1
66	Heraklion	Greece	3,147.8	3,371.8	3,034.6	7.1%	-10.0%	▼ 1	▼ 10
67	Kyoto	Japan	3,199.0	3,294.2	3,339.2	3.0%	1.4%	▲ 58	▼ 2
68	Zhuhai	China	3,183.3	3,259.7	3,324.9	2.4%	2.0%	▼ 9	▼ 2
69	Vancouver	Canada	2,999.1	3,212.1	3,398.4	7.1%	5.8%	▲ 13	▲ 1
70	Chiang Mai	Thailand	3,129.0	3,196.0	3,257.5	2.1%	1.9%	▲ 6	▼ 2
71	Copenhagen	Denmark	2,963.7	3,069.7	3,185.6	3.6%	3.8%	▲ 8	▼ 2
72	San Francisco	US	2,900.0	2,901.0	2,987.5	0.0%	3.0%	▼ 14	▼ 6
73	Melbourne	Australia	2,730.5	2,889.0	3,300.0	5.8%	14.2%	▲ 12	▲ 2
74	Krakow	Poland	2,800.0	2,850.0	2,910.0	1.8%	2.1%	▼ 8	▼ 9
75	Marrakech	Morocco	2,669.9	2,838.1	3,023.4	6.3%	6.5%	▲ 2	▼ 2
76	Kolkatta	India	2,560.4	2,826.5	3,131.2	10.4%	10.8%	▲ 14	▲ 2
77	Cebu	Philippines	2,245.2	2,805.1	3,539.6	24.9%	26.2%	▲ 51	▲ 10
78	Auckland	New Zealand	2,665.4	2,798.9	2,926.2	5.0%	4.5%	▲ 6	▼ 3
79	Tel Aviv	Israel	2,573.5	2,777.0	2,978.1	7.9%	7.2%	▼ 8	▼ 1

Source: Euromonitor International

RANK	CITY	COUNTRY	ARRIVALS ('000)			GROWTH (%)		RANK MOVEMENT	
			2017	2018	2019	2018	2019	2013–18	2018–19
80	Guilin	China	2,489.0	2,747.0	2,980.5	10.4%	8.5%	▲ 29	▲ 1
81	Honolulu	US	2,685.8	2,737.3	2,853.1	1.9%	4.2%	▼ 11	▼ -4
82	Hurgada	Egypt	1,863.7	2,735.7	3,866.1	46.8%	41.3%	▲ 45	▲ 19
83	Warsaw	Poland	2,630.0	2,732.0	2,827.0	3.9%	3.5%	▼ 16	▼ 4
84	Mugla	Turkey	1,982.8	2,723.8	2,920.8	37.4%	7.2%	▼ 33	▲ 2
85	Buenos Aires City	Argentina	2,553.2	2,685.7	2,767.4	5.2%	3.0%	▼ 31	▼ 4
86	Chiba	Japan	2,431.9	2,683.9	2,777.5	10.4%	3.5%	▲106	▼ 2
87	Frankfurt	Germany	2,496.0	2,636.0	2,728.1	5.6%	3.5%	▼ 7	▼ 4
88	Stockholm	Sweden	2,473.5	2,604.6	2,721.9	5.3%	4.5%	0	▼ 4
89	Lima	Peru	2,348.5	2,535.4	2,764.0	8.0%	9.0%	▼ 11	▼ 1
90	Da Nang	Vietnam	2,004.0	2,505.0	2,880.8	25.0%	15.0%	▲ 72	▲ 6
91	Batam	Indonesia	2,227.5	2,492.6	2,850.8	11.9%	14.4%	▲ 20	▲ 5
92	Nice	France	2,327.2	2,466.8	2,582.7	6.0%	4.7%	▼ 17	▼ 2
93	Fukuoka	Japan	2,025.2	2,436.9	2,525.7	20.3%	3.6%	▲104	▼ 3
94	Abu Dhabi	United Arab Emirates	2,244.5	2,402.8	2,565.2	7.1%	6.8%	▲ 12	▼ 1
95	Jeju	South Korea	2,429.4	2,349.2	2,278.8	-3.3%	-3.0%	▼ 8	▼ 12
96	Porto	Portugal	2,232.5	2,341.3	2,491.7	4.9%	6.4%	▲ 22	▼ 1
97	Rhodes	Greece	2,178.7	2,337.7	2,414.8	7.3%	3.3%	▼ 11	▼ 2
98	Rio de Janeiro	Brazil	2,251.3	2,278.3	2,330.7	1.2%	2.3%	▼ 7	▼ 6
99	Krabi	Thailand	2,118.6	2,255.3	2,386.2	6.5%	5.8%	▼ 5	▼ 1
100	Bangalore	India	1,782.1	2,239.2	2,676.1	25.7%	19.5%	▲ 83	▲ 7

Source: Euromonitor International

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