

A black and white photograph of a man from behind, wearing glasses and a backpack, looking at a large digital flight information board. The board displays numerous flight details. A solid orange rectangular overlay covers the middle portion of the image, containing the text.

# TOP 100 CITY DESTINATIONS RANKING

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Euromonitor International is pleased to release its annual Top City Destinations Ranking, covering 100 of the world's leading cities in terms of international tourist arrivals.

In 2014, international arrivals were heavily affected by geopolitical tensions, while successful marketing campaigns proved to be an effective tool to boost visits.

Despite the ups-and-downs in the ranking, arrivals continued to grow in global urban centres in 2014, illustrating the continued economic importance of tourism to the world's cities.

The increasingly positive performance of many economies, as well as visa relaxations, are expected to ensure continued growth of city arrivals for the coming years.

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Travel Analyst

Euromonitor International



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# Top 100 City Destinations Ranking – 1 to 20

Rank	City	Country	2013	2014	% Increase 2013/2014
1	Hong Kong	Hong Kong, China	25,661.1	27,770.0	8.2
2	London	United Kingdom	16,784.0	17,383.9	3.6
3	Singapore	Singapore	17,146.7	17,086.2	-0.4
4	Bangkok	Thailand	17,467.8	16,245.0	-7.0
5	Paris	France	15,271.9	14,981.7	-1.9
6	Macau	Macau	13,935.3	14,966.5	7.4
7	Dubai*	United Arab Emirates	12,180.0	13,200.0	8.4
8	Shenzhen	China	12,148.9	13,120.8	8.0
9	New York City	USA	11,850.4	12,230.0	3.2
10	Istanbul	Turkey	10,486.3	11,871.2	13.2
11	Kuala Lumpur	Malaysia	11,182.3	11,629.6	4.0
12	Antalya	Turkey	11,120.7	11,498.5	3.4
13	Seoul	South Korea	8,619.0	9,389.6	8.9
14	Rome	Italy	8,608.3	8,780.5	2.0
15	Taipei	Taiwan	7,004.1	8,615.0	23.0
16	Guangzhou	China	7,682.0	8,199.0	6.7
17	Phuket	Thailand	8,035.0	8,115.3	1.0
18	Miami	USA	6,275.1	7,260.0	15.7
19	Pattaya	Thailand	6,986.2	6,427.3	-8.0
20	Shanghai	China	6,140.9	6,398.8	4.2

\*: See Research Methodology (page 35)

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# Top 100 City Destinations Ranking – 21 to 40

Rank	City	Country	2013	2014	% Increase 2013/2014
21	Prague	Czech Republic	6,208.5	6,346.1	2.2
22	Las Vegas	USA	6,046.9	6,133.4	1.4
23	Mecca	Saudi Arabia	5,762.2	6,120.6	6.2
24	Milan	Italy	5,873.9	6,050.1	3.0
25	Tokyo	Japan	4,651.5	5,993.3	28.8
26	Barcelona	Spain	5,699.3	5,972.8	4.8
27	Amsterdam	Netherlands	5,204.1	5,714.1	9.8
28	Vienna	Austria	5,187.6	5,422.1	4.5
29	Los Angeles	USA	5,154.0	5,272.6	2.3
30	Venice	Italy	5,159.6	5,237.0	1.5
31	Moscow	Russia	5,560.0	4,976.2	-10.5
32	Johannesburg	South Africa	4,512.2	4,772.1	5.8
33	Delhi	India	3,672.2	4,698.8	28.0
34	Orlando	USA	4,483.8	4,677.1	4.3
35	Berlin	Germany	4,346.5	4,674.6	7.5
36	Mumbai	India	3,643.9	4,575.1	25.6
37	Budapest	Hungary	4,222.0	4,452.0	5.4
38	Ho Chi Minh City	Vietnam	4,197.7	4,400.0	4.8
39	Beijing	China	4,501.3	4,335.3	-3.7
40	Florence	Italy	4,186.1	4,278.2	2.2

# Top 100 City Destinations Ranking – 41 to 60

Rank	City	Country	2013	2014	% Increase 2013/2014
41	Madrid	Spain	4,033.1	4,178.3	3.6
42	Riyadh	Saudi Arabia	3,928.7	4,172.7	6.2
43	Warsaw	Poland	3,978.7	4,157.8	4.5
44	Cancún	Mexico	2,816.1	4,002.5	42.1
45	Lima	Peru	4,944.0	3,947.9	-20.1
46	Nairobi	Kenya	3,687.0	3,913.5	6.1
47	Chennai	India	3,581.2	3,857.9	7.7
48	Johor Bahru	Malaysia	3,026.4	3,631.7	20.0
49	Dublin	Ireland	3,398.3	3,571.6	5.1
50	Denpasar	Indonesia	3,241.9	3,566.1	10.0
51	Athens	Greece	2,618.0	3,388.3	29.4
52	San Francisco	USA	3,252.7	3,327.5	2.3
53	Agra	India	2,483.2	3,264.4	31.5
54	Hangzhou	China	3,160.1	3,230.7	2.2
55	Toronto	Canada	3,010.7	3,218.4	6.9
56	Mugla	Turkey	3,062.7	3,151.9	2.9
57	Sydney	Australia	2,953.0	3,148.5	6.6
58	Brussels	Belgium	2,990.0	3,100.0	3.7
59	Jerusalem	Israel	3,057.1	3,094.7	1.2
60	Edirne	Turkey	2,840.5	3,090.9	8.8

# Top 100 City Destinations Ranking – 61 to 80

Rank	City	Country	2013	2014	% Increase 2013/2014
61	Munich	Germany	2,889.9	3,026.8	4.7
62	Hanoi	Vietnam	2,309.1	3,000.0	29.9
63	Jaipur	India	2,403.0	2,967.6	23.5
64	Zhuhai	China	2,632.3	2,919.2	10.9
65	Punta Cana	Dominican Republic	2,591.2	2,886.0	11.4
66	Cairo	Egypt	2,625.0	2,772.0	5.6
67	Buenos Aires	Argentina	2,693.1	2,752.5	2.2
68	Sofia	Bulgaria	2,534.0	2,690.7	6.2
69	St Petersburg	Russia	3,105.9	2,671.1	-14.0
70	Chiang Mai	Thailand	2,127.0	2,658.7	25.0
71	Lisbon	Portugal	2,329.0	2,626.5	12.8
72	Heraklion	Greece	2,472.0	2,606.0	5.4
73	Halong	Vietnam	2,604.0	2,600.0	-0.2
74	Pulau Pinang	Malaysia	2,372.4	2,593.0	9.3
75	Mexico City	Mexico	2,378.7	2,588.5	8.8
76	Siem Reap	Cambodia	2,424.4	2,584.4	6.6
77	Jerba	Tunisia	2,538.4	2,550.0	0.5
78	Cracow	Poland	2,450.0	2,500.0	2.0
79	Jakarta	Indonesia	2,305.7	2,478.7	7.5
80	Rio de Janeiro	Brazil	1,667.3	2,444.5	46.6

# Top 100 City Destinations Ranking – 81 to 100

Rank	City	Country	2013	2014	% Increase 2013/2014
81	Honolulu	USA	2,369.7	2,431.5	2.6
82	Manama	Bahrain	2,349.0	2,421.2	3.1
83	Andorra la Vella	Andorra	2,328.1	2,397.9	3.0
84	Zurich	Switzerland	2,259.1	2,372.1	5.0
85	Tel Aviv	Israel	2,341.1	2,369.9	1.2
86	Marrakech	Morocco	2,119.1	2,230.5	5.3
87	Nice	France	2,263.8	2,184.6	-3.5
88	Vancouver	Canada	2,018.1	2,175.5	7.8
89	Sharm el Sheikh	Egypt	2,046.0	2,160.6	5.6
90	Melbourne	Australia	1,929.0	2,128.1	10.3
91	Guilin	China	1,940.0	2,030.0	4.6
92	Frankfurt	Germany	1,965.0	2,016.7	2.6
93	Amman	Jordan	1,872.5	1,977.4	5.6
94	Jeju	South Korea	1,779.2	1,940.7	9.1
95	Rhodes	Greece	1,785.0	1,931.0	8.2
96	Marne-La-Vallée	France	2,001.4	1,929.4	-3.6
97	Samui	Thailand	1,614.1	1,856.2	15.0
98	Kolkatta	India	1,671.7	1,854.8	11.0
99	Taichung	Taiwan	1,411.9	1,835.5	30.0
100	Artvin	Turkey	1,732.7	1,827.1	5.4

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# 1. HONG KONG



# Hong Kong

- Hong Kong remains the number one city destination in the world, with a total of 27.8 million international visitors.
- Chinese tourists account for 67% of all visitors, as Hong Kong functions as a main hub between China and the rest of the world.
- With the appetite for international travel exploding in China, Hong Kong benefitted, registering growth of 8.2% between 2013 and 2014 in international arrivals.

<b>Hong Kong Tourism Credentials - SWOT</b>	
<b>Strengths</b>	<b>Weaknesses</b>
<ul style="list-style-type: none"> <li>• Gateway from and to China.</li> <li>• Popular amongst multinationals to set up headquarters in Asia, with low taxation and a Western legislative system.</li> </ul>	<ul style="list-style-type: none"> <li>• Heavily reliant on Chinese tourists – however, Chinese travellers are starting to look further afield.</li> <li>• Commercial use trumps cultural heritage for redevelopment, resulting in loss of tourist attractions.</li> </ul>
<b>Opportunities</b>	<b>Threats</b>
<ul style="list-style-type: none"> <li>• The building of a third runway for Hong Kong's international airport was approved in 2015 and is scheduled for completion in 2023, increasing connectivity and capacity.</li> </ul>	<ul style="list-style-type: none"> <li>• Increased affluence in China results in tourists travelling to Western destinations for their luxury shopping, rather than considering Hong Kong. Protests against Chinese travellers are exacerbating this situation.</li> </ul>

## Political Developments Might Stem Future Growth

- Recent developments in the largest destinations for Chinese tourists, Hong Kong and Macau, have resulted in changing travel behaviour, which is a positive development for destinations further removed from China.
- Recent protests from Hong Kong locals, demanding more autonomy from the Chinese government and against Chinese shoppers emptying the shelves of local shops to benefit from VAT discounts, resulted in a **slump in Chinese tourist visits to Hong Kong in the early part of 2015**.
- According to the China National Tourism Administration, the number of Chinese trips to Hong Kong rose strongly in the first part of 2015, but many visitors were just transferring rather than staying overnight.
- Data from tour agencies suggest a decline of 20% in hotel stays in Hong Kong, while countries like Japan, South Korea, Italy, France, Germany and Switzerland benefited from increased Chinese tourism numbers.

# 2. LONDON



# London

- London rises to the second spot in the top 100, buoyed by a decline in visitors to Bangkok, last year's number 2.
- London is a global hub and a leading city for both leisure and business travel.
- The US and Europe are the most important source markets, although much effort is being made to attract Chinese visitors through the nationwide China Welcome Campaign.

London Tourism Credentials - SWOT	
Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• London is one of the most iconic cities in the world.</li> <li>• The resounding success of the London Olympics in 2012 has boosted visibility and popularity even further.</li> </ul>	<ul style="list-style-type: none"> <li>• With London airports nearing capacity, the capital risks losing out to European rivals.</li> <li>• London is perceived by many as an expensive destination, especially for accommodation and travel.</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>• London's cultural and sporting credentials hold it in good stead for attracting tourists, with an ever-changing array of musical, theatre, art, dance and sport exhibitions. Especially the Chinese outbound market offers opportunities.</li> </ul>	<ul style="list-style-type: none"> <li>• With the UK terrorism alert remaining on the second highest level since August 2014, the possibility of a terror attack in London remains high.</li> </ul>

## Airport Expansion Woes Could Impact Growth

- London's leading airport Heathrow is currently operating at near maximum capacity. It is predicted that by 2030, Gatwick, Luton and London City will also be at capacity.
- On-going debates centre around the best way forward. Heathrow Airport has put a plan forward which sees the creation of a new runway, which would cost £13-18 billion, with the demolition of 1,500 houses, 30 of which are listed buildings. It would also increase the noise impact on local residents, and faces opposition from environmental groups.
- To remain competitive connectivity and innovation are key.
- The only credible alternative is the creation of a further runway at Gatwick airport. This would cost £10-13 billion, with no loss of greenbelt land, although 200 houses would have to be demolished. Local residents would also face increased noise impact caused by a new runway. Politicians have postponed making the final decision several times, as it will be seen as a key deciding factor for electorates.
- A number of alternative proposals were put forward for creating new airports in either Kent or the Thames estuary, but these have since then been rejected by the Independent Airports Commission.

# 3. SINGAPORE



# Singapore

- Singapore takes third spot with 17 million international arrivals. Tourist arrivals to Singapore witnessed a decline in 2014 for the first time since the global financial crisis in 2009.
- Singapore saw fewer tourists from key source markets such as China and Indonesia, as a result of China's austerity campaign, depreciation in the Indonesian rupiah and a spate of aviation incidents within the region in 2014.

Singapore Tourism Credentials - SWOT	
Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Political stability , low crime rates and English as main language are draws for Western visitors.</li> <li>• Strong focus of government on tourism.</li> </ul>	<ul style="list-style-type: none"> <li>• High reliance on China, Malaysia and Indonesia. Anti-graft regulations in China stopped officials from travelling abroad, impacting Singapore arrivals.</li> <li>• Land scarcity stops expansion of manmade attractions and accommodation.</li> <li>• Limited natural attractions.</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>• Singapore is a popular destination for cruises and medical tourism in the region.</li> <li>• Singapore Airlines is expanding strongly.</li> </ul>	<ul style="list-style-type: none"> <li>• Regional low-cost destinations, particularly Thailand, cause pressure to remain relevant.</li> <li>• Perceived as a business – rather than leisure – destination.</li> </ul>

# Singapore Airlines Expansion Will Provide Opportunities

## Current situation

- Partnerships are allowing Singapore Airlines to increase their revenue pool in specifics regional destinations where the company has not established a foothold. At the same time these collaborations facilitate passenger flows which in turn boost yields.
- At present, its partnership with Virgin Australia is the most significant deal, which has allowed the airline to expand in Asia Pacific, and Lufthansa is SIA's largest European partner.
- A new deal with Shenzhen Airlines only covers flights between Singapore and Shenzhen and potentially extends to code shares on domestic flights.
- Singapore Airlines is falling behind in Europe, Africa and the Middle East.

## New developments

- In 2015, Singapore Airlines established a partnership with the US low cost airline: JetBlue. Specifically, passengers on both of the carriers will be able to earn mileages which can then be redeemed for a seating upgrade or free trips with the two carriers.

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# 9. ISTANBUL



## Istanbul

Istanbul registered strong growth of 13.2% to move up two places in the ranking and take up the 9<sup>th</sup> spot. 2014 saw the return of relative calm, after political unrest and protests

in 2013 against Recep Tayyip Erdoan, the president of Turkey's republic. However, with terrorist attacks and the conflict in neighbouring Syria, the city – and country – found itself in turbulent waters again in 2015, which will likely impact arrivals.

### Opportunities

- As Arabs see themselves increasingly frowned upon in Western cities, they are enjoying holidays in nearby destinations which share their culture.
- This is an important target group because they are high spenders and spend extended periods of time at their holiday destinations.
- Business travel will also bring much welcomed growth and help boost revenues significantly in light of this segment's financial size.

### Challenges

- Turkey is currently at the centre of a crisis caused by the rise of ISIS in the region. This may lead to fears of travelling to Istanbul.
- Increased competition from other GCC destinations, notably Dubai and Abu Dhabi is a challenge, while more "authentic" destinations, like Oman's Muscat, may also begin to take away tourists from Istanbul. Morocco is also gaining ground as a leading destination in the Arab world.

# 25. TOKYO



## Tokyo

After a strong backlash following the 2011 earthquake and tsunami, international arrivals to Tokyo have recovered and the city maintains its leading position as the most visited destination in Japan. The city has seen a particularly strong rise in Chinese arrivals in 2014.

### Monocle's “number 1” rating

- Monocle used 22 metrics to rate cities based on Quality of Life. Thanks to a strong and affordable transport system, first rate and good value food, friendliness of the residents, safety of the city, peace and quiet Tokyo ranked first.
- Tokyo is also a vibrant city with much to offer in its nightlife, a busy and very much alive destination. It is seen by Monocle as “a delightful anomaly”.

### TripAdvisor's “most satisfying” city

- Tokyo was voted the world's most satisfying tourist city for 2013, according to a poll by online travel site TripAdvisor.
- Tokyo came in first of 37 major world cities based on reviews by thousands of travellers.
- Tokyo ranked first in terms of friendliness, taxi services, cleanliness, transport and overall satisfaction.
- However, Tokyo had a lower ranking for cultural attractions and sightseeing activities.

# 33. DELHI



## Delhi

Indian cities experienced strong growth in arrivals for 2014, with the combined efforts of a **successful promotion campaign** (Incredible India) and a **weak rupee**. The introduction of a new **visa on arrival** process for 46 countries, including the US, Germany and Australia, has helped encourage visitors to India.

Delhi benefits from a number of strengths which are expected to drive healthy growth in the next five years:

1. Being the administrative capital of India, the city houses several **government bodies and embassies** of various countries which attract significant flows of travellers.
2. The city is one of the largest commercial centres in the country and its **airport is a major hub** for international and domestic flights.
3. There has been continuous **improvement in the infrastructure of the city**, including several flyovers, arterial roads and the metro.

One major concern the city needs to address is the **poor air quality**, which has already contributed to declines in arrivals to cities like Beijing.



# 80. RIO DE JANEIRO



## Rio de Janeiro

- Rio de Janeiro registered **the strongest growth** in the top 100 at 46.6% in 2014. This is mainly due to the FIFA World Cup in Brazil. With the Olympic Games set to take place in the city in 2016, further growth is expected.
- Significant investments undertaken in preparation for the **2014 FIFA World Cup** and the **2016 Olympic Games** are helping improve the urban development and landscape in the city. A number of projects (Porto Maravilha, Morar Carioca, and Barrio Maravilha) have focused on improving facilities and promoting the definitive urban and social inclusion of the city's favelas.
- **Investments in the sporting area** include the construction of a brand new Olympic Park, new sports venues and the remodelling of the city's flagship football stadium, the "Maracanã". However, the high cost of sports infrastructure - which as of January 2014 recorded a 25% overrun to total US\$2.9 billion – combined with Brazil's decelerating economic growth, has resulted in numerous protests.

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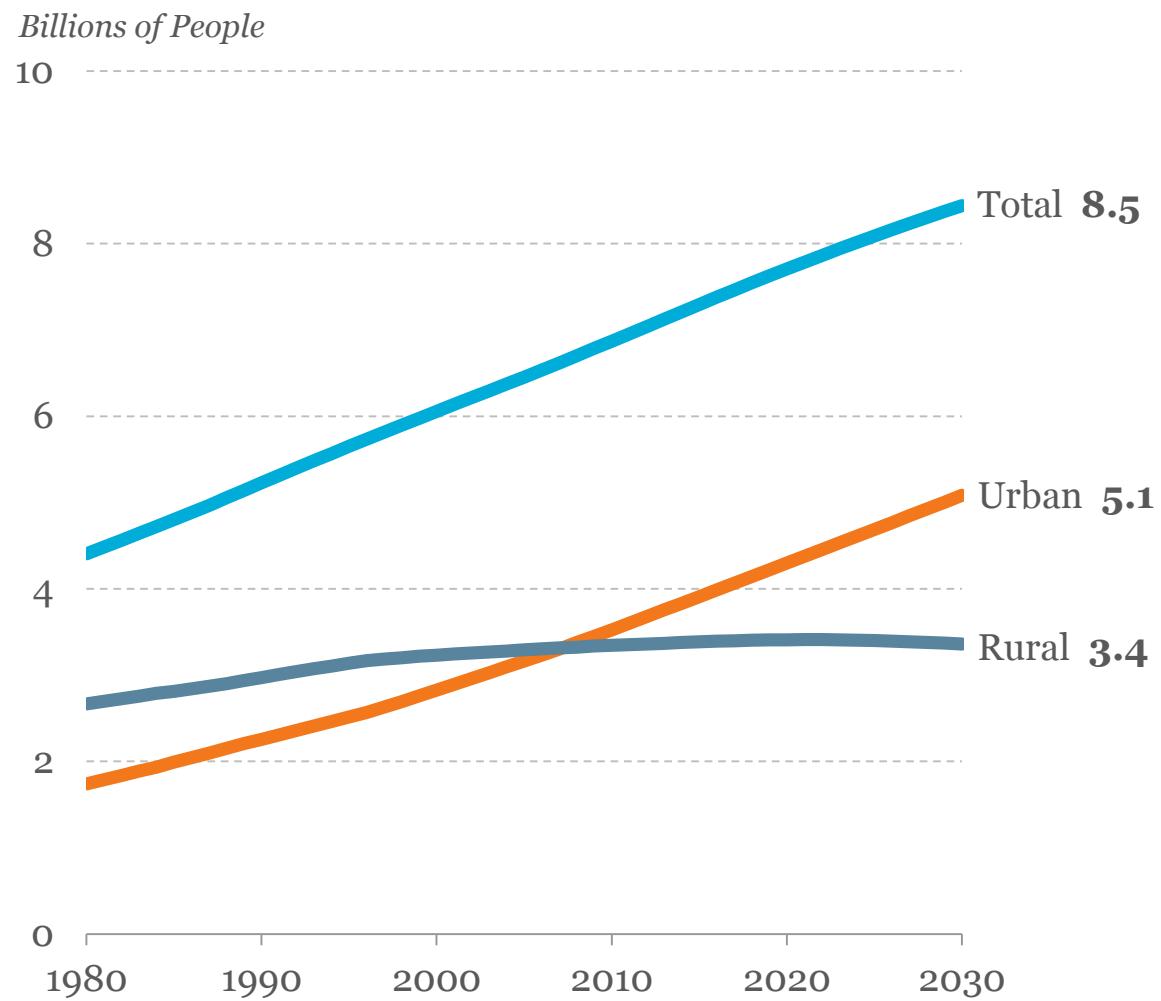
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## Growing Number of Urbanites

- In 1950, less than 30% of the global population lived in urban areas.
- By 2008, half of the world was urban.
- It is expected that rural population will peak in 2021, after which it starts declining.
- Urban population, in contrast, will continue to rise. By 2030, there will be an additional 1.2 billion people living in urban areas. This is the equivalent of adding an extra India to today's population.



## Cities as Global Leaders

- Cities have become economic powerhouses in their own right. By 2030, 15 of the top 45 economies in the world will be cities, half of these in Asia.
- New York will be the leading city in terms of GDP, with an economy bigger than Spain by 2030. China's cities will be significant players, with Guangzhou and Shenzhen expected to have GDPs over US\$1 trillion in 2030.
- Increasingly politicians and businesses are looking to these city states, which are often wealthier and more diverse than their “parent nation”. As a result, many businesses are developing city level market entry and growth strategies.



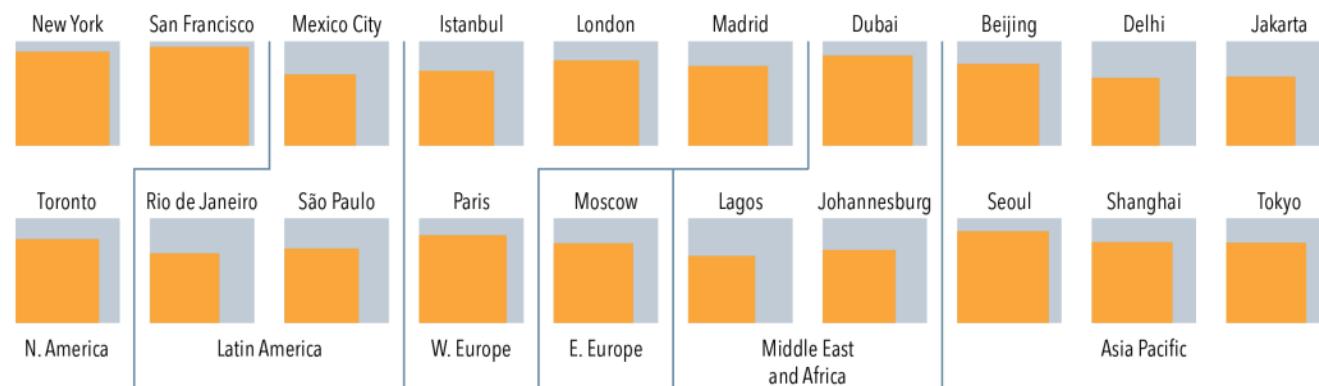
**15/45 largest economies will be cities**

## Technological Disruption

- Smartphone penetration is high in cities across the globe, both in mature and emerging markets with the latter seeing new infrastructure being installed on a clean slate. Travel consumers are using their devices for bookings on the go, with expectations of travel brands providing customer service 24/7.
- Big Data is facilitating personalisation with targeted marketing increasing conversion and therefore revenues. Travel companies have an opportunity to own more of their customer journey.

Smartphone % Penetration

2014



## Sharing Economy – An Urban Phenomenon

- The sharing economy is naturally suited to the urban environment, where space and resources are increasingly challenged.
- Many cities across the globe have struggled with sharing companies such as Airbnb, invoking legislation out of a belief that doing so will protect tax income and existing business issues. While this may help traditional revenue streams in the short term, looking further down the line consumers are increasingly likely to opt to stay in cities where they have **greater flexibility and choice**, such as those embracing Airbnb and its competitors.
- With growing numbers of people living and visiting cities, the sharing economy can **fill gaps which exist in the traditional offering** of transportation and accommodation. Officials are expected to become more open to collaboration with sharing brands to improve facilities in their city.
- The sharing economy is forcing the **travel industry to adapt and evolve**, in a similar fashion to how the retailing industry adapted to online shopping. **Successful brands will be those that embrace the new business model.**

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## Research Methodology

Euromonitor International's Top City Destinations Ranking (2014 edition) was built from the results of the global travel research programme conducted in 57 core countries by in-country analysts, which follows Euromonitor International's methodology and definitions for travel and tourism.

City arrivals data were sourced directly from national statistics offices, airport arrivals, hotel/accommodation stays or other methods for all 57 core countries and 93 market insight countries under review.

Main secondary sources included: governmental, inter-governmental and other official sources; national and international specialist trade press and trade associations; industry study groups and other semi-official sources; and reports published by major operators, travel retailers, online databases and the financial, business and mainstream press. Trade interviews were conducted with national tourist offices, trade associations and travel operators to fill gaps in secondary research.

## Research Methodology (cont'd)

Country data was then cross-checked on a regional basis by the regional research teams based in London, Vilnius, Chicago and Singapore. Examples of regional sources reviewed included TourMis and European Cities Marketing for Europe. Further top-down checks were conducted by the in-house global research team. Where irregularities were found between editions, supplementary research was conducted to confirm or amend those findings. Euromonitor International is satisfied that the results of the in-country research, coupled with the top-down global perspective, ensure that the Top City Destinations Ranking is robust with a high level of data validation.

It is important to note that the Top City Destinations Ranking is not an exhaustive list and that its purpose is to highlight leading cities gleaned from the findings of Euromonitor International's annual research programme, with the emphasis on cities, rather than popular holiday resorts.

\*: In previous years, Dubai used to only track international overnight visitors staying in paid accommodation; this year Dubai Tourism and Commerce Marketing and Euromonitor Euromonitor have improved this data to include overnight visitors who stay with friends and family. The data has been revised in accordance with this (March 2016).

# Research Methodology

## Chinese arrival inclusions

Overnight visitors from mainland China are included in the Hong Kong arrivals data. Overnight visitors from mainland China and Hong Kong are included in the Macau arrivals data. Overnight visitors from Hong Kong, Macau and Taiwan are included in the Beijing arrivals data.

## Footnotes

All countries / cities - excludes day trippers and domestic visitors.

- Singapore - includes Malaysian citizens arriving by land, but excludes same-day visitors which were previously counted.
- Saudi Arabia - official data are for provinces only

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Data Research Method	City
Airport Arrivals	Agra, Chennai, Delhi, Jaipur, Kolkatta, Moscow, Mumbai, Punta Cana, Taichung, Taipei
Airport Arrivals and Hotel / Accommodation	Buenos Aires, Cairo, Sharm el-Sheikh
Hotel / Accommodation	Amsterdam, Berlin, Cancún, Kuala Lumpur, Lima, Marrakech, Mexico City, Milan, Paris, Prague, Rome, Vienna, Zurich
National Statistics Office	Amman, Andorra la Vella, Athens, Bangkok, Barcelona, Beijing, Brussels, Budapest, Chiang Mai, Denpasar, Dubai, Dublin, Florence, Frankfurt, Guangzhou, Guilin, Hangzhou, Hanoi, Halong, Heraklion, Ho Chi Minh, Hong Kong, Honolulu, Jakarta, Jeju, Jerusalem, Johor Bahru, Krakow, Las Vegas, Lisbon, London, Los Angeles, Macau, Madrid, Manila, Mecca, Melbourne, Miami, Munich, New York City, Nice, Orlando, Pattaya, Phuket, Rhodes, Rio De Janeiro, Riyadh, San Francisco, Seoul, Shanghai, Shenzhen, Siem Reap, Singapore, Sydney, Tel Aviv, Tokyo, Toronto, Vancouver, Venice, Zhuhai
Other method	Artvin, Antalya, Edirne, Istanbul, Johannesburg, Marne-La-Vallée, Mugla, Nairobi, Pulau Pinang, Sofia, St Petersburg, Warsaw

## Definitions

**International arrivals** by city includes visitors from abroad who arrive at the city under review as their first point of entry, and also includes those 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** refers to international tourists, ie any person visiting another country for at least 24 hours, for a period not exceeding 12 months, and staying in collective or private accommodation. Each arrival is counted separately and includes people travelling more than once a year and people visiting several countries during one holiday. Domestic visitors are excluded. This encompasses all purposes of visit, such as business, leisure and visiting friends and relatives.

Euromonitor International's arrivals figures **exclude** same-day visitors, people in transit and cruise passengers as this can distort arrival 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 **capital city hubs** and tends to exclude beach and ski resorts that may enjoy high volumes of international visitors.

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