

世界旅游城市联合会 编著
Compiled by World Tourism Cities Federation



World Tourism Cities Development Report 2022

World Tourism Cities Development Report

2022



World Tourism Cities Development Report (2022)

World Tourism Cities Federation

PREFACE

Together to Usher in the Revival of World Tourism Cities

In 2022, the COVID-19 pandemic had far-reaching implications on the international landscape. Since its emergence in late 2019, the novel coronavirus has spread rapidly, affecting millions of people worldwide. In face of the COVID-19 pandemic, national efforts, such as vaccination campaigns, antigen testing and public health measures have been made to control its spread. However, new variants and waves of infections still posed a continuing threat to communities and health-care systems. Further, national border restrictions added the difficulties for global tourism industry. Positively, however, the pandemic has stimulated innovation in the tourism industry, with some tourism enterprises adapting to the changing environment by adopting digital technologies, implementing health and safety protocols, and promoting alternative forms of tourism, such as local tourism and sustainable tourism.

The global economy has gradually revived in an obvious manner since 2022. Despite the impact of the recurring pandemic, the global tourism industry has been recovering at a relatively fast pace. Yet it is noteworthy that the revival has not been consistent across all regions and countries. Factors such as local vaccination rates, the effectiveness of containment measures, and travelers' sense of security may account for variations in demand for travel. Initially, domestic tourism and travel in proximity may recover more swiftly, as people prefer shorter trips that are closer to home to be their initial attempts before embarking on an international travel. However, with the rapid recovery of tourism, the trend of international tourism is rising swiftly. At the same time, the global tourism industry as a whole is witnessing new trends such as eco-sustainable tourism, virtual tourism, and the use of digital technology to improve the travel experience. The emergence of these new trends may further affect the recovery progress.















Tourism cities are the main source and destination of world tourism, and 80% of the world's tourism activities are realized through the carrier of tourism cities. Generally, tourism cities serve as important catalysts for the tourism industry in their countries. An iconic tourism city can play an important role in driving the transformation and innovation in the global tourism economy and can be pivotal to sustainable development.

As the world's first international tourism organization with cities as its main body, and for ten years since its founding, the World Tourism Cities Federation (WTCF) has actively promoted cooperation and exchanges between tourism cities, enhanced tourism cities' competitiveness and influence on all fronts and pushed the world tourism toward a better future under its philosophy of "Better City Life through Tourism". WTCF would like to cooperate with world's main tourism cities and organizations to jointly push forward the sustainable development of tourism among world tourism cities through innovation and coordination, so as to build a prosperous tourism industry. The World Tourism City Development Report is an important academic brand launched by WTCF to review and promote the development experiences of member cities, to study and discuss critical issues about world tourism, and to advance the cooperation and exchanges among world tourism cities. Since 2015, it has been published annually and has significantly contributed to the development of world tourism in general and tourism cities in particular.

On the basis of maintaining the general framework of the development report and the continuity of the basic data, the indicators for evaluation in the *World Tourism Cities Development Report (2022)* become more sensible due to the research and adjustment of the indicator system thereof. In the report, 100 sample cities were selected to be observed and analyzed. Based on that, the report presents both a comprehensive index and an individual evaluation of the development of world tourism cities in 2022. It would reflect more comprehensively and vividly the development characteristics of the world's main tourism cities and tourism industry in 2022, and bring a more complete summary of experience and inspiration for the world tourism cities and tourism enterprises, so as to promote sustainable development of the global tourism industry.

We firmly believe that the new chapter of sustainable development of world tourism would be opened in 2023.

WORLD TOURISM CITY DEVELOPMENT RANKING IN 2022

1	New York	United States		11	Sydney	Australia	
2	Tokyo	Japan		12	Toronto	Canada	
3	Los Angeles	United States		13	Moscow	Russia	
4	Seoul	Korea		14	Melbourne	Australia	
5	London	Britain		15	San Francisco	United States	
6	Paris	France		16	Chicago	United States	
7	Beijing	China		17	Washington	United States	
8	Shanghai	China		18	Dubai	UAE	
9	Hong Kong	Hong Kong, China		19	Milan	Italy	
10	Osaka	Japan		20	Istanbul	Turkey	

STRUCTURE OF THE INDEXES FOR EVALUATING THE DEVELOPMENT OF WORLD TOURISM CITIES (2022)

Research Objective

The world today has entered a stage where its development is driven by cities, and cities are becoming the core carrier of the global population, world economy and international communication. Tourism cities are an important part of the world's city system, and more than 80% of global tourism activities are realized through them. The innovative development of tourism cities is of great significance to promote the sustainable development of global tourism.

Since its establishment in 2012, WTCF has organized relevant experts to continuously carry out research on the evaluation system of world tourism cities, and released the *World Tourism Cities Development Report* and the "Rankings of the Development of World Tourism Cities" to the public every year. It gradually established a scientific and effective evaluation methodology through the analysis and research of different development dimensions and models of tourism cities, promptly summarized tourism cities' experience in their successful development, actively advocated the advanced concept of the development of world tourism, and vigorously promoted the cooperation and exchanges among world tourism cities, so as to effectively enhance the strategic value of tourism cities in the development of world tourism, accelerate the convenient and standardized development of world tourism cities with their own characteristics, and continuously give new impetus for the sustainable development of world tourism.

The global economy has gradually revived since 2022. Despite the impact of the recurring pandemic, the global tourism industry has been recovering at a relatively fast pace. Factors of local vaccination rates, the effectiveness of containment measures, and travelers' sense of security may account for variations in demand for travel. However, the number of people in need of travel has not declined, and the suppressed demand for travel is gradually being released. Initially, domestic tourism and travel in close proximity may recover more swiftly. With the liberalization of the travel ban, international travel has also been rapidly resumed. Meanwhile, tourism cities also face multiple challenges. The slowdown in global economic growth has led to a decline in tourism prosperity, thereby affecting the revenue of tourism cities. Furthermore, the instability arising from global politics, geopolitical crises, and natural disasters also affect the safety and stability of tourism cities. These factors have had an impact on the thriving development of tourism cities.

As an organization committed to promoting the sustainable development of world tourism cities, WTCF studies and publishes the annual *World Tourism Cities Development Report*. Its such efforts help in more comprehensively and vividly reflecting the overview development of major tourism cities and tourism industries in the world in 2022, analyzing the main problems existing in the development of world tourism cities, and putting forward corresponding countermeasures and suggestions, so as to provide more experience for the comprehensive recovery of world tourism cities and tourism enterprises, and promote the sustainable development of world tourism cities.

Principles of Developing Indexes for Evaluating the Development of World Tourism Cities in 2022

Highlighting the comprehensive development of tourism cities

World tourism cities are the organic integration of tourism functions and city functions, the symbiotic integration of tourism and leisure functions, and cities shared by locals and tourists. The tourism industry is a comprehensive sector that involves the cooperation and integration of various industries. Therefore, the Comprehensive Rankings of the Development of World Tourism Cities (2022) incorporated more elements into the evaluation system, highlighting the integration of culture and tourism and the integration of tourism and leisure. The index system contains not only traditional tourism elements such as catering, accommodation, transportation, traveling, shopping and entertainment, but also new elements such as cultural and sports facilities, MICE activities, sports and leisure, cultural entertainment, healthcare, information services and financial payments. The main purpose is to comprehensively reflect the latest trends in the development of world tourism cities.



▲ United States Los Angeles

Emphasizing the new changes after the recovery of the economy and the overall tourism market

In 2022, as vaccines were rolled out and travel restrictions were gradually eased, the tourism market experienced a rebound, bringing about new changes in the development landscape of world tourism cities. As the pandemic comes under control and the economy gradually recovers, the tourism market is undergoing significant changes. After the recovery, there have been noticeable alterations in consumer behaviors within the tourism market. Tourists are now placing a greater emphasis on health and safety while choosing a travel destination. Besides, they also show a growing concern for environmental protection and sustainable development. Therefore, tourism practitioners should prioritize providing safe, healthy, environment-friendly and sustainable tourism products and services to meet the evolving demands of consumers. Consequently, the indexes of the rankings of the development of world tourism cities in 2022 highlight the new changes in the development of the tourism industry after the outbreak of the pandemic, focus observation and analysis on the sustainable development research of major cities under the impact of the pandemic, and provide holistic insights into the main trends and characteristics of the recovery and development of world tourism cities and innovation in the post-pandemic era.

Underscoring the intelligence of tourism cities

The level of intelligence reflects a city's capability of using advanced technologies and information-assisted methods to enhance the tourism experience and provide higher-quality services. As technology rapidly develops, digitization and intelligence have become key factors promoting innovation in the tourism industry. Smart tourism cities offer a range of personalized tourist services, including intelligent guides and electronic payments, greatly enhancing the quality of the travel experience. With excellent capabilities for data collection and analysis, smart tourism cities can enable tourism practitioners to conduct more scientific decision-making, better understand tourist needs and optimize resource allocation, thereby achieving sustainable development. Therefore, the development ranking index of world tourism cities in 2022 pays more attention to the intelligence level of world tourism cities in the context of the pandemic, and gives more consideration to the capabilities of tourism cities in terms of information technology and overall intelligence.

Highlighting the consistency of indexes for tourism development

In the process of compiling the Evaluation Index on the Development of World Tourism Cities (2022), the evaluation system and sample cities were basically kept relatively stable, while sub-indexes were slightly and appropriately adjusted according to the trends and characteristics of the development of world tourism cities, so that both the Report and the Index are consistent with the previous ones.

Index System of the Evaluation on the Development of World Tourism Cities in 2022

The index system of the Evaluation Index on the Development of World Tourism Cities (2022) basically inherits the practice of 2021 and before, with an overall framework structure consisting of 1 comprehensive index and 6 sub-indexes (1+6).

The comprehensive index refers to the Comprehensive Index on the Development of World Tourism Cities (2022). The comprehensive index reflects the development and recovery of tourism cities under the impact of the pandemic and the comprehensive development level of world tourism cities in the context of the COVID-19 pandemic.

The 6 sub-indexes include City Popularity Index, Industry Prosperity Index, City Intelligence Index, Tourism Safety Index, Economic Contribution Index and Tourist Satisfaction Index.

City Popularity Index (CPI)

CPI reflects how many people know a tourism city, how much they know about it, and their awareness of the tourism city's image, as well as the city's attractiveness and popularity. A high CPI is a symbol of the charm of the city regarding tourism. This index is measured mainly from aspects including a city's brand influence, popularity of tourism resources, festivals and events with international influence, number of international MICE activities, large-scale international sports events, and well-known cultural and sports facilities. A higher CPI indicates a higher level of popularity, reputation and appeal of the city.

Industry Prosperity Index (IPI)

IPI reflects the overall development status and trend of a city's tourism industry, which mainly indicates its prosperity in a certain period of time. This index is calculated based on fundamental developments of six core tourism industries, including tourism accommodation, commercial services, tourism catering, culture and entertainment, travel services, and tourism transportation.

City Intelligence Index (CII)

City intelligence index is to reflect the degree of digitization of the city's tourism industry as well as the level of digitization of the city's public services, and to measure the level of application of new technologies in the development of the city's tourism industry and public services. This index mainly measures factors, such as information development, digitalization of public services and management, as well as digital applications in city tourism.

Tourism Safety Index

This index reflects the overall level of the urban tourism environmental safety and social security by assessing the construction and management of the city's tourism safety system. A higher index means that tourists can enjoy a higher level of safety and a stable environment during their urban travels, which, in turn, attracts a larger number of tourists. This index is primarily measured based on indicators such as the social security, tourism safety, and public health safety of the city.

Economic Contribution Index (ECI)

ECI reflects the role of a city's tourism industry in driving economic development, including contributions to the city's economy, employment, investment and other related aspects. A higher ECI indicates that the city's tourism industry has played a more active role in propelling social and economic development and generating increased benefits. This index is mainly measured using indicators including the growth rate of domestic and inbound tourism, tourism's contribution to GDP at city level, tourism employment's contribution to the city's social employment, and tourism investment's contribution to the city's overall investment.

Tourist Satisfaction Index (TSI)

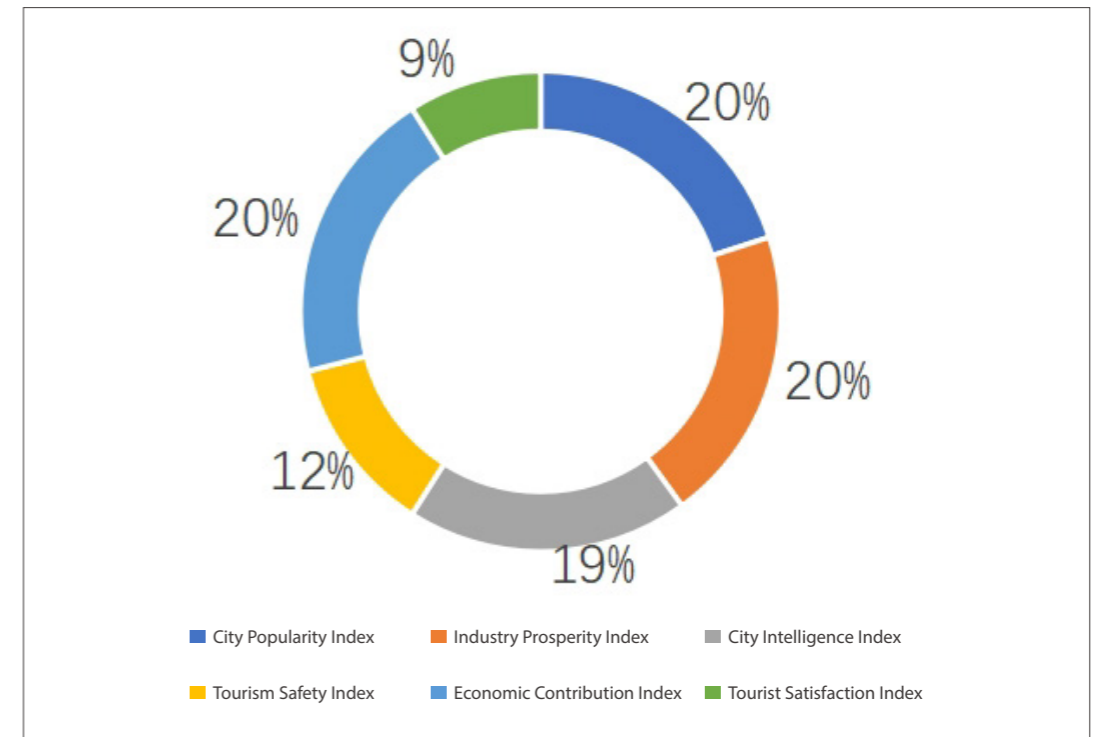
TSI reflects the degree of satisfaction of tourists with the products and services provided by a city, mainly indicating the degree of matching between the services provided by the city and the market demand. This index measures tourist satisfaction by using indicators including the Internet Word of Mouth Marketing (IWOM), tourism complaint rate, and tourist shopping tax refund rate.

Weight of Sub-indexes of the Evaluation on the Development of World Tourism Cities in 2022

The weight of the Comprehensive Index on the Development of World Tourism Cities (2022) is 100%. According to the ratings given by experts of WTCF, and taking account of the functional role of the sub-indexes in the Comprehensive Index, sub-indexes' respective weights are:

City Popularity Index: 20%; Industry Prosperity Index: 20%; City Intelligence Index: 19%;

Tourism Safety Index: 12% ;Economic Contribution Index: 20%; Tourist Satisfaction Index: 9%.



▲ Figure 1 Weight of Sub-indexes in the Comprehensive Index on the Development of World Tourism Cities

Table 1 Index System of the Comprehensive Index on the Development of World Tourism Cities (2022)

Index	Sub-index	Indicator	Reference Weight
Development index of world tourism cities	A.City Popularity Index (weight: 20%)	A1 City brand influence (times of the city being searched on the Internet, the city' activeness on major social media platforms)	4%
		A2 Popularity of tourism resources (number of world heritages, number of well-known attractions)	6%
		A3 Number of festivals and events with international influence	3%
		A4 Number of international MICE activities (number of conferences, exhibitions)	3%
		A5 Number of international sports events (hosted by international sports organizations)	2%
		A6 Well-known cultural and sports facilities including museums (number of well-known libraries, museums, stadiums, theaters)	2%
	B.Industry Prosperity Index (weight: 20%)	B1 Size of the hotel accommodation industry (measured by its contribution to the city's GDP)	5%
		B2 Size of the retail industry (measured by its contribution to the city's GDP)	4%
		B3 Size of the catering industry (measured by its contribution to the city's GDP)	4%
		B4 Size of the leisure and entertainment industry (measured by its contribution to the city's GDP)	2%
		B5 Size of the tourism service industry (measured by its contribution to the city's GDP)	3%
		B6 Size of the tourism transportation industry (measured by its contribution to the city's GDP)	2%
	C.City Intelligence Index (weight: 19%)	C1 Urban information development level (4G/5G coverage, use of smart devices per 10,000 citizens)	2%
		C2 Urban transportation intelligence level (whether the local public transportation system supports mobile payment, whether the city provides Citypass, City Card or other similar services, proportion of online ticketing)	1%
		C3 Online trip bookings (number or usage rate of online trip bookings, total revenue of online travel intermediary businesses, contribution of online travel intermediary businesses to overall travel intermediary businesses)	4%

Index	Sub-index	Indicator	Reference Weight
Development index of world tourism cities	C.City Intelligence Index (weight: 19%)	C4 Digital tourism development level (number of tourism-related APPs, proportion of tickets of tourist attractions booked online)	4%
		C5 Financial payment convenience (mobile payment coverage, credit card payment coverage)	1%
		C6 Exit-entry convenience (e-visa coverage, visa approval time)	3%
		C7 Tourism information services (activeness of official tourism APPs, official websites, and social media accounts.)	4%
	D.Tourism Safety Index (weight: 12%)	D1 Level of public security (number of mass casualty incidents) (the lower the better)	1%
		D2 Crime rate (crime rate per 10,000 citizens) (the lower the better)	4%
		D3 Number of safety accidents (the lower the better)	1%
		D4 Tourism emergency rescue system (number of rescue teams)	4%
		D5 Public medical development level (number of hospital bed per capita, number of medical personnel per capita)	2%
	Economic Contribution Index (weight: 20%)	E1 Growth rate of inbound tourism (inbound tourist arrivals and its annual growth rate, annual growth rate of inbound tourist expenditure per capita, growth rate of total inbound tourist expenditure)	4%
		E2 Growth rate of domestic tourism (domestic tourist arrivals and its annual growth rate, growth rate of domestic tourism revenues)	5%
		E3 City tourism GDP and its contribution to overall city GDP	6%
		E4 Contribution of tourism employment to overall city employment	3%
		E5 Contribution of annual tourism investments to overall city investments	2%
	F. Tourist Satisfaction Index (weight: 9%)	F1 IWOM degree (ratings given by tourists about the city on well-known online tourism websites)	4%
F2 Tourist complaint rate (ratio of complaints per 10,000 tourists)		3%	
F3 Tourist shopping tax refund rate		2%	

Key Data Source of the Evaluation Index on the Development of World Tourism Cities in 2022

The key data of the Evaluation Index on the Development of World Tourism Cities (2022) are mainly the data from Frost & Sullivan in 2022, and some of them are from official authorities such as the United Nations World Tourism Organization.

The Methodology for Calculating the Evaluation Index on the Development of World Tourism Cities (2022)

The Evaluation Index on the Development of World Tourism Cities (2022) is derived mainly by aggregating statistical data and data collected from definitive lists, and the score of the six sub-indexes are weighted according to the proportions of 20%, 20%, 19%, 12%, 20% and 9%. The weights of the six sub-indexes are determined by WTOF engaged experts using the Delphi method. The comprehensive ranking is based on the scores under the six sub-indexes, in descending order.



Spain Barcelona

CITIES SURVEYED FOR DEVELOPING THE EVALUATION INDEX ON THE DEVELOPMENT OF WORLD TOURISM CITIES (2022)

The Evaluation Index on the Development of World Tourism Cities (2021) takes 100 major world tourism cities as its sample, covering 70 countries and regions in the world and five major tourism regions, Europe, Americas, Asia-Pacific, Middle East and Africa. Specifically, 32 cities are from Asia-Pacific, 32 are from Europe, 20 are from Americas, 8 are from the Middle East, and 8 are from African, accounting for a proportion of 32%, 32%, 20%, 8% and 8%, respectively.

Among the cities surveyed for the Evaluation Index on the Development of World Tourism Cities (2022), 64 are member cities of WTOF, and 35 are non-member cities.

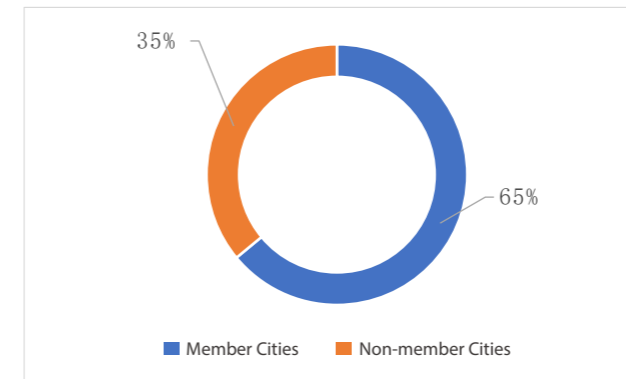


Figure 2 Proportion of Member Cities in the 100 Sample Cities

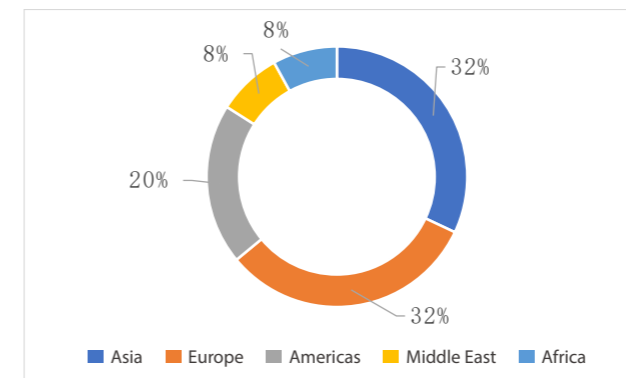


Figure 3 Breakdown of 100 Sample Cities by Region

Table 2 The 100 Cities Surveyed for Developing the Evaluation Index on the Development of World Tourism Cities (2022)

Region	Country	City	Membership
Asia-Pacific (32)	China	Beijing	Yes
		Shanghai	Yes
		Guangzhou	Yes
		Hangzhou	Yes
		Tianjin	Yes
		Chongqing	Yes
		Chengdu	Yes
		Qingdao	Yes
		Kunming	Yes
		Xi'an	Yes
		Hong Kong	Yes
		Macao	Yes
		Taipei	No
		Japan	Tokyo
	Osaka		No
	Sapporo		Yes
	Korea	Seoul	Yes
		Busan	Yes
	Thailand	Bangkok	Yes
	Vietnam	Ho Chi Minh City	No
	Malaysia	Kuala Lumpur	No
	Indonesia	Jakarta	Yes
	Nepal	Kathmandu	Yes
	Australia	Melbourne	Yes
		Sydney	No
		Brisbane	No
	New Zealand	Oakland	No
	India	New Delhi	No
		Mumbai	No
	Tajikistan	Dushanbe	Yes
	Kazakhstan	Almaty	Yes
	Indonesia	Bandung	Yes

Region	Country	City	Membership
Europe (32)	Italy	Milan	Yes
		Rome	Yes
		Florence	Yes
		Venice	No
		Madrid	Yes
	Spain	Seville	Yes
		Barcelona	Yes
		Athens	Yes
	United Kingdom	London	Yes
	Bulgaria	Sofia	Yes
	Austria	Vienna	Yes
	France	Paris Region	Yes
	Hungary	Budapest	Yes
	Sweden	Stockholm	No
	Switzerland	Geneva	Yes
	Czech	Prague	Yes
	Latvia	Riga	Yes
	Poland	Warsaw	No
		Amsterdam	Yes
	Netherlands	Rotterdam	No
	Norway	Oslo	No
	United Kingdom	Edinburgh	Yes
	Germany	Berlin	Yes
		Frankfurt	No
		Munich	No
	Russia	Moscow	Yes
		St. Petersburg	Yes
	Portugal	Lisbon	Yes
	Ireland	Dublin	Yes
	Belarus	Minsk	Yes
	Belgium	Brussels	Yes
	Finland	Helsinki	Yes

Region	Country	City	Membership	
Americas (20)	United States	Miami	No	
		Washington	Yes	
		Chicago	No	
		Los Angeles	Yes	
		Las Vegas	No	
		Hawaii	No	
		New York	No	
		San Francisco	Yes	
		Brazil	São Paulo	No
			Rio de Janeiro	Yes
	Peru	Lima	Yes	
	Argentina	Buenos Aires	Yes	
	Canada	Vancouver	Yes	
		Toronto	Yes	
		Ottawa	Yes	
	Cuba	Havana	No	
	Mexico	Mexico City	No	
	Panama	Panama City	No	
	Uruguay	Montevideo	Yes	
	Colombia	Cartagena	Yes	

Region	Country	City	Membership
Africa (8)	South Africa	Cape Town	No
		Johannesburg	No
	Morocco	Casablanca	Yes
	Egypt	Cairo	Yes
	Senegal	Dakar	Yes
	Tunisia	Tunisia	No
	Kenya	Nairobi	Yes
	Ivory Coast	Abidjan	Yes
Middle East (8)	United Arab Emirates	Abu Dhabi	No
		Dubai	Yes
	Israel	Jaffa Tel Aviv	Yes
	--	Jerusalem	No
	Iran	Tehran	No
	Qatar	Doha	No
	Türkiye	Istanbul	No
	Saudi Arabia	Mecca	No

EVALUATION INDEX ON THE DEVELOPMENT OF WORLD TOURISM CITIES (2022)

Results of the Comprehensive Evaluation on the Development of World Tourism Cities in 2022

List of the comprehensive rankings of the development of world tourism cities in 2022 (Top 20)

Table 3 Rankings of the Development of World Tourism Cities in 2022 (Top 20)

Ranking	City	Country	Region
1	New York	United States	Americas
2	Tokyo	Japan	Asia-Pacific
3	Los Angeles	United States	Americas
4	Seoul	Korea	Asia-Pacific
5	London	United Kingdom	Europe
6	Paris	France	Europe
7	Beijing	Chinese mainland	Asia-Pacific
8	Shanghai	Chinese mainland	Asia-Pacific
9	Hong Kong	Hong Kong, China	Asia-Pacific
10	Osaka	Japan	Asia-Pacific

Ranking	City	Country	Region
11	Sydney	Australia	Asia-Pacific
12	Toronto	Canada	Americas
13	Moscow	Russia	Europe
14	Melbourne	Australia	Asia-Pacific
15	San Francisco	United States	Americas
16	Chicago	United States	Americas
17	Washington	United States	Americas
18	Dubai	United Arab Emirates	Middle East
19	Milan	Italy	Europe
20	Istanbul	Türkiye	Middle East

Table 4 Rankings of the Comprehensive Index on the Development of World Tourism Cities in 2022 (Top 20)

Ranking	City	Comprehensive Index	A City Popularity Index (CPI)	B Industry Prosperity Index (IPI)	C City Intelligence Index (CII)	D Tourism Safety Index	E Economic Contribution Index (ECI)	F Tourist Satisfaction Index (TSI)
1	New York	79.6	0.1750	0.2633	0.2100	0.0800	0.0274	0.0400
2	Tokyo	75.5	0.1900	0.1767	0.1800	0.1200	0.0133	0.0750
3	Los Angeles	66.5	0.1650	0.1473	0.2100	0.0700	0.0226	0.0500
4	Seoul	66.4	0.1700	0.0998	0.1900	0.1200	0.0092	0.0750

Ranking	City	Comprehensive Index	A City Popularity Index (CPI)	B Industry Prosperity Index (IPI)	C City Intelligence Index (CII)	D Tourism Safety Index	E Economic Contribution Index (ECI)	F Tourist Satisfaction Index (TSI)
5	London	66	0.1550	0.1042	0.2100	0.1000	0.0205	0.0700
6	Paris	64.7	0.1900	0.1029	0.1800	0.0850	0.0294	0.0600
7	Beijing	63.9	0.1700	0.0752	0.1800	0.1050	0.0285	0.0800
8	Shanghai	63.6	0.1650	0.0806	0.1800	0.1050	0.0253	0.0800
9	Hong Kong	63.5	0.1700	0.0666	0.2100	0.1050	0.0236	0.0600
10	Osaka	63.2	0.1700	0.0748	0.1800	0.1200	0.0125	0.0750
11	Sydney	60.9	0.1500	0.0409	0.1900	0.1200	0.0284	0.0800
12	Toronto	60.5	0.1600	0.0439	0.2000	0.1000	0.0261	0.0750
13	Moscow	60.3	0.1800	0.0757	0.1600	0.1000	0.0177	0.0700
14	Melbourne	59.4	0.1450	0.0352	0.2000	0.1050	0.0289	0.0800
15	San Francisco	58.4	0.1500	0.0882	0.2100	0.0700	0.0261	0.0400
16	Chicago	57.4	0.1600	0.1003	0.2000	0.0750	0.0240	0.0150
17	Washington	56	0.1250	0.0813	0.2100	0.0800	0.0233	0.0400
18	Dubai	55.4	0.1650	0.0224	0.1600	0.1050	0.0316	0.0700
19	Milan	54.3	0.1250	0.0340	0.1500	0.1050	0.0386	0.0900
20	Istanbul	54.2	0.1600	0.0362	0.1700	0.0850	0.0212	0.0700

Due to varying paces of economic recovery and reopening after the pandemic, there are new changes in the development of world tourism cities. The annual changes in the comprehensive rankings of the top 20 world tourism cities are shown in Table 5 below.

Table 5 Annual Changes in the Comprehensive Rankings of the Development of World Tourism Cities (Top 20)

City	2022	2021	2019
New York	1	5	1
Tokyo	2	26	3
Los Angeles	3	3	14
Seoul	4	14	7
London	5	2	2
Paris	6	1	4
Beijing	7	7	5
Shanghai	8	12	15
Hong Kong	9	46	6
Osaka	10	49	27
Sydney	11	8	19
Toronto	12	21	31
Moscow	13	15	34
Melbourne	14	13	29
San Francisco	15	4	25
Chicago	16	10	24
Washington	17	28	38
Dubai	18	61	8
Milan	19	16	28
Istanbul	20	37	26

Six sub-indexes of the top 20 world tourism cities under the comprehensive development index in 2022 (Top)

According to the previous development reports, world tourism cities can be divided into global hub tourism cities, intercontinental center tourism cities and regional node tourism cities in terms of influence.

Global hub tourism cities are node cities that assume the functions of tourism gateway and tourism distribution in the world tourism city system. According to the “tourism hub - spoke” theory, hub cities can deliver tourists to the secondary tourism cities and provide information services, forming and expanding the secondary tourism markets, helping to relieve tourism cities’ pressure of receiving tourists in peak seasons, and promoting the coordinated development of tourism cities. Such tourism cities have a high reputation worldwide and a highly developed tourism industry, and are major destinations and sources of international tourists worldwide, with a strong influence on the formulation of world tourism rules and the development of tourism markets. At present, the generally recognized global hub tourism cities include Paris, London, Berlin, Milan, New York, Los Angeles, Tokyo, Seoul, Singapore, Hong Kong, Dubai, Beijing, and Shanghai etc.

An intercontinental center tourism city is typically one of the political, economic, cultural, and tourism centers within a country or region of a continent, exerting significant influence on global tourism development, especially within that continent. These cities generally are the main distribution centers of international tourism as they have better tourism resources and infrastructure. They are the backbone supporting the sustainable development of world tourism as they play a top-down linkage role in the development of world tourism. These cities include Chicago, Miami, Rio de Janeiro, Munich, Sydney, Taipei, Melbourne, Moscow, and Barcelona.

Regional node tourism cities are tourist destinations of a country or region with unique characteristics in a certain aspect. Their political, economic, cultural and other comprehensive service functions may not be very strong, but their tourism products are distinctive. These cities have a greater popularity and appeal in aspects including natural scenery, history and culture, commercial services, and entertainment and leisure, have a greater influence on regional tourism and special tourism, and are important nodes for professional and special tourism routes. For example, Nice, Las Vegas, Hawaii, Athens, Cancun, Brisbane, Guilin, Xi’an, and Macao etc. are such cities.

As shown by the six sub-indexes of the top 20 world tourism cities under the comprehensive development index in 2022, the global hub tourism cities have a well-balanced ranking. With high development levels in relevant aspects, they are leading tourism cities across the world. Global hub tourism cities typically achieve a well-balanced development in various areas. Global hub tourism cities boast high-level tourism services

and facilities. They can offer high-quality services such as accommodation, catering, transportation, and tourist activities, thereby attracting a large number of tourists. In addition, these cities make outstanding performance in such areas as economy, culture, education, technology, and transportation, which contributes to their relatively high rankings across multiple indicators. For instance, New York ranks first in both the Industry Prosperity Index and the City Intelligence Index, while also holding the fourth position in the City Popularity Index. Tokyo ranks second in both the City Popularity Index and the Industry Prosperity Index, and secures the first spot in the Tourism Safety Index.

The rankings of the top 20 world tourism cities in 2022 by the six sub-indexes are shown in the table below.

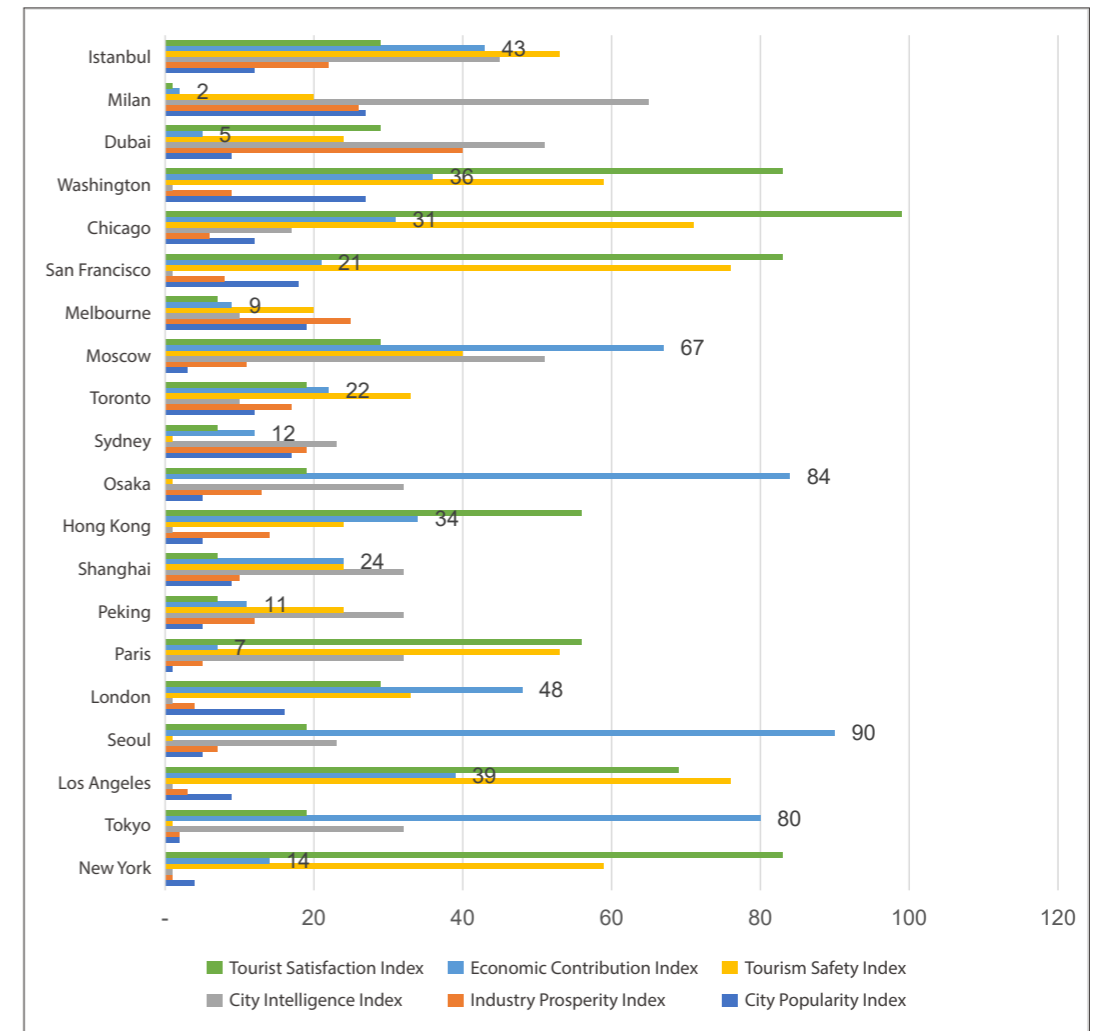


Figure 4 Six Sub-Indexes of the Top 20 World Tourism Cities under the Comprehensive Rankings in 2022

Overall Analysis of Comprehensive Development Index of World Tourism Cities in 2022

The rankings of world tourism cities in 2022 have been comprehensively analyzed, and a comparison has been made between the rankings from 2019 to 2022. The analysis results reveal new features in the development rankings of world tourism cities in 2022, when global economy recovered.

Top Asia-Pacific tourism cities rapidly recover amid the pandemic, with a stable upward trend in their rankings

Six Asia-Pacific tourism cities ranked among the top ten for comprehensive development in 2022, and eight rankings of the top 20 were taken up by Asia-Pacific cities (including two from Oceania). Although Asia-Pacific countries generally relaxed pandemic-related control measures later than those in Europe and America, compared to those in 2021, the rankings of Asia-Pacific tourism cities rebounded swiftly in 2022 as pandemic-related restrictions were lifted throughout the year.

First, Asia-Pacific tourism cities generally adopted stricter pandemic-related control measures in 2021, resulting in a slower recovery and lower developmental baseline for the tourism industry. As a result, these cities experienced a faster growth in 2022 compared to their counterparts in Europe and America. Prior to the pandemic, Asia-Pacific tourism cities registered a rapid development, gave great impetus to the growth of the global tourism market, and continuously improved their competitiveness. Half of the top ten rankings for the comprehensive development of tourism cities were taken up by Asia-Pacific cities (for example, in 2019, there were 5 Asia-Pacific cities, namely Tokyo, Beijing, Hong Kong, Seoul, and Shanghai). Due to the impact of the pandemic in 2021, Asia-Pacific tourism cities experienced varying degrees of decline in their rankings, especially as many Asian countries adopted stricter pandemic-related control measures. Only one Asia-Pacific city, namely Beijing, was listed in the top ten rankings of the development of world tourism cities in 2021. As the pandemic came under control and pandemic-related prevention and control measures were eased, tourists' confidence in travel gradually increased in 2022. This resurgence in confidence has led to a higher influx of tourists for Asia-Pacific tourism cities. For instance, according to data released by the Japan National Tourism Organization (JNTO), Japan received approximately 3.83 million tourists in 2022, more than 15 times as many as the total number of 24,590 in 2021.

Second, with the alleviation of the impact from the pandemic, numerous Asia-Pacific countries and cities implemented recovery policies tailored to the tourism industry, thus contributing to the improvement in the rankings of Asia-Pacific tourism cities. Effective government policies in the Asia-Pacific region have facilitated the recovery of the tourism industry. These policies may include tax exemptions for tourism-related activities, financial support for the tourism industry, as well as promotion of tourism events and

festivals. These policies have facilitated the recovery and development of the tourism industry, rapidly moving up the rankings of Asia-Pacific tourism cities. In the first half of 2022, the Japanese government implemented a regional tourism business support scheme in which all 46 prefectures introduced a national tourism resource plan, including accommodation discounts and coupons for shopping and catering. Each tourist can receive a maximum subsidy of JPY 11,000 per night. These policies have boosted tourism demand and accelerated the rapid recovery of the tourism industry.

In October, the Japanese government fully reopened inbound tourism. The daily reservations of All Nippon Airways (ANA) increased by over five times compared to the previous period, while Japan Airlines saw an increase of over 3 times in reservations. The depreciation of the Japanese yen also contributed to the rapid recovery of Japan's tourism industry, coupled with factors such as increased media coverage and attention to the 2025 World Expo. As a result, Osaka ranked among the top ten for the first time.

Third, the overall development of Asia-Pacific tourism cities is highly unbalanced. Top-tier tourism cities, such as Beijing, Tokyo, and Seoul, serve as global hub cities. They boast well-developed tourism infrastructure, abundant tourism resources, efficient transportation networks, and high-quality service facilities. In addition, these cities have a solid market base for domestic tourism. It enables them to maintain a huge tourism consumption market even under the impact of the pandemic and maintain favorable recovery in the post-pandemic era. However, the overall recovery of the Asia-Pacific region is underperformed by that of Europe and the United States. Many other tourism cities have experienced a relatively slower recovery after the impact of the pandemic. Due to the impact of the pandemic, international tourism has been slow to rebound, leading to a decline in rankings compared to previous years.



▲ Croatia Zagreb

The Americas region shows a higher level of tourism recovery and industry prosperity

In terms of tourism recovery, the Americas region achieves the highest level of tourism recovery among the regional segments. Meanwhile, tourism in North American cities has basically recovered to pre-pandemic levels, surpassing the recovery level of tourism cities in South America. In the Industry Prosperity Rankings of 2022, the top ten cities are mostly from the Americas and the Asia-Pacific regions. There are five cities from the Americas, three from the Asia-Pacific region, and two from Europe. In the top 20 cities, there are nine cities from the Asia-Pacific region, seven from the Americas, three from Europe, and one from the Middle East. Notably, five of the top 20 rankings are taken by cities of the United States, namely New York, Los Angeles, San Francisco, Chicago, and Washington. This is primarily driven by a range of factors, including the early relaxation of local pandemic restrictions in the United States and the implementation of marketing strategies to stimulate tourism.

First, the United States lifted restrictions earlier after the pandemic, leading to a higher level of recovery. As early as April 2020, the White House took the lead in unveiling a plan for resuming activities. The "Opening Up America Again" plan outlined several criteria for restoring social order, including testing, contact tracing, medical resources, and emergency schemes. Over a dozen states promptly responded, leading to the resumption of commercial and economic activities and the relaxation of social life restrictions to some extent. In April 2022, the federal government lifted the "mask mandate" for public places and nearly fully relaxed restrictions on public mobility. Thanks to its early relaxation of restrictions and robust economic foundation, international tourism in American tourism cities has recovered more rapidly. After the full reopening, during the second quarter of 2022, hotel occupancy rates in New York had recovered to 94% of the level during the same period in 2019. Notably, the hotel occupancy in Miami even surpassed that of the same period in 2019, reaching an impressive 128%.

Second, tourism cities in the United States have generally prioritized their tourism economy and employed a variety of marketing strategies to facilitate the recovery of the tourism industry after the pandemic. In order to stimulate tourism consumption, the U.S. government introduced a series of policies, such as allocating emergency funds to the hotel industry, extending loan terms, and actively organizing marketing campaigns. These measures have played a crucial role in revitalizing the tourism market and boosting economic consumption. For instance, NYC & Company, the official tourism destination marketing organization and convention and visitors' bureau for the five boroughs of New York City, launched its largest-ever global tourism marketing and advertising campaign called "It's Time for New York City". This marketing campaign features the welcoming beacon of the Statue of Liberty and its distinctive crown in New York City. The company has expanded its collaborations with airlines, railway companies, and tour operators in both domestic and international markets. The tourism industry recovery initiatives were first launched in June 2021. By the end of 2022, these events had generated over USD 5 billion in tourist spending and more than two million travel bookings for New York City.

Third, tourism cities in North America generally boast a higher level of intelligence. The pandemic has led to an increased reliance on technology. In recent years, tourism cities in North America have made remarkable achievements in smart city development. For example, Los Angeles has planned to build a unified digital payment platform as part of its smart city project, including subway, buses, bicycles, and shuttles. This plan helps tourists travel easily without cars. As payment platforms such as Apple Pay and Google Pay gain popularity in the North American market, the convenience of payment has greatly improved. The high level of intelligence not only offers tourists a more comfortable and convenient experience but also remarkably raised the overall rankings of these cities.

The Middle East develops fast with an obvious rise in city ranking

Driven by factors such as sporting events, cultural activities, and policy support, tourism cities in the Middle East have experienced a notable rise in their rankings. For instance, Dubai's ranking has risen from 61st place in 2021 to 18th place in 2022. Istanbul has risen from the 37th position in 2021 to the 19th position in 2022. Although cities including Tel Aviv-Yafo in the Middle East were not listed, their rankings have risen obviously compared to 2021. The tourism industry in the Middle East has shown robust recovery, particularly with its international tourism recovery topping the list.

First, sports events such as the FIFA World Cup Qatar has contributed to the "tourism boom in the Middle East". The 2022 FIFA World Cup attracted 3.4 million spectators on site, with an overall attendance rate surpassing 96%. In addition to driving local tourism development, the FIFA World Cup has also made significant contributions to the higher rankings of other Middle Eastern tourism cities such as Dubai. The FIFA World Cup Qatar, as an international event, has attracted a large number of football enthusiasts from all over the world. Dubai, a crucial aviation hub connecting the Middle East with the world, often serves as a transit point for tourists en route to Qatar. The brief stay in Dubai has generated additional inflow of tourists, raising Dubai's rankings among all tourism cities.

Second, the Middle East region has hosted a variety of themed cultural and tourism events. Due to the pandemic, the Expo 2020 Dubai was postponed and concluded on March 31, 2022. This edition of the Expo had attracted over 200 participating countries and organizations, garnering approximately 200 million virtual visits and hosting 25 million on-site visitors. The Expo contributed a cumulative value of AED 122.6 billion to UAE's economy and generated 905,000 job opportunities. Besides, the Expo contributed AED 22.7 billion to its GDP during the exhibition period, primarily from tourist spending and on-site operation and maintenance. The top three categories are catering and accommodation, business services, and logistics and transportation. During the post-Expo period (2022-2031), it is projected to generate a total economic growth of AED 62.2 billion and create 53,000 job opportunities annually. In 2022, Türkiye received over

51.4 million tourist arrivals, recovering to approximately 99% the pre-pandemic level of 2019 (when tourist arrivals totaled 51.8 million). The tourism revenue reached a record-breaking USD 46.3 billion, registering a growth of 19% compared to 2019. Türkiye has emerged from the pandemic. The "health-related tourism" and "wedding-themed tourism" have gained popularity among neighboring countries, making it the world's third-largest tourism market.

Third, the recovery pace of international tourism is noteworthy. According to Dubai Economic Agenda "D33", Dubai is positioned to become one of the world's top three international tourism and business destinations. To achieve this goal, Dubai's Department of Economy and Tourism has implemented a series of initiatives and activities to ensure that Dubai remains the first-choice destination for global travelers. These efforts include launching global marketing campaigns, promoting Dubai's culinary scene, expanding the vacation home industry, and enhancing transparency and governance in the short-term rental market. In 2022, Dubai emerged as the fastest-growing city for international tourism among the top 100 sample cities. The data regarding international tourists in Middle-East cities have recovered to around 80% of pre-pandemic levels, making it the region with the fastest recovery rate of international tourism.

Europe recovers relatively fast but the ranking of European tourism cities has dropped significantly

European cities hold four positions among the top ten, and also occupy four spots among the top 20. Cities like Paris, London, and Milan have experienced a decline in their rankings. Traditional tourism cities such as Barcelona and Madrid have dropped from the list, and cities like Amsterdam and Berlin, which were listed in 2019, have been removed from the list for over 2 years. The reasons can be summarized as follows:

First, the European tourism market has suffered an overall decrease in tourism popularity due to the impact of the Russia-Ukraine conflict. The outbreak of the Russia-Ukraine conflict has severely affected the aviation industry. With a vast territory, Russia is strategically located at a crucial intersection of air routes between Asia and Europe. According to data from the Federal Air Transport Agency of the Russian Federation, there were over 300,000 commercial flights crossing Russian airspace annually before the pandemic. Just the overflight fees collected from these flights contributed around USD 300 million to Russia's revenue each year. In 2021, this figure decreased to nearly 195,000 flights. In 2022, the mutual closure of airspace between Russia and EU countries, as well as the United States, seriously disrupted global air routes, resulting in substantial adverse effects on the entire aviation industry in Europe. European airlines such as Lufthansa, Air France-KLM, and Finnair had to either cancel flights or adjust routes, resulting in increased travel time and fuel costs for international journeys. It has further weakened tourists' willingness to travel.

Second, tourists have a considerably weaker sense of safety for travel in Europe with Asian source markets being most affected. China is the world's top tourist source market, and the Asia-Pacific region is a key contributor to inbound tourism in Europe. Moreover, Asia-Pacific tourists often care about tourism safety more than those from other regions. Due to the negative psychological impact of the Russia-Ukraine conflict on tourists traveling to Europe, along with the international travel restrictions caused by the COVID-19 pandemic and the uncertainty of the global political situation, the willingness of tourists to travel in Europe has significantly decreased compared to that of the pre-pandemic period. The ongoing and escalating conflict has, to a certain extent, resulted in a weaker sense of safety across the Europe region, particularly for countries that are directly neighbor Ukraine, such as Poland, Slovakia, and Hungary. Therefore, Europe has a relatively low tourism safety index.

Third, despite the early lifting of travel bans, the energy crisis has led to a sharp increase in travel costs. Compared with the Asia-Pacific region, Europe implemented more relaxed pandemic-related control measures, which contributed to a faster recovery in tourism during 2021. As a result, European tourism cities secured impressively high rankings for comprehensive development in 2021. As of April 2022, Europe had fully lifted travel restrictions, leading to a rapid recovery of international tourism among European tourism cities. However, due to the higher baseline in 2021 compared to other regions, the growth rate was not as high as that in the Asia-Pacific and Middle East. As the Russia-Ukraine conflict has triggered an energy crisis in Europe, the prices of fundamental commodities such as energy and food have sharply increased. European countries have to cope with high-priced essential goods, leading to a continuous rise in the cost of living, severe inflation, and a significant surge in travel expenses. As a result, the tourism prosperity index has declined, causing a noticeable drop in the overall rankings of Europe's leading tourism cities.



▲ Serbia Belgrade

World tourism cities are experiencing recovery in both domestic tourism and international tourism, with international tourism recovering faster than domestic tourism

With the easing of pandemic-related restrictions, international tourism in world tourism cities continues to recover steadily. Among the 100 sample tourism cities, inbound tourism has achieved positive growth. On average, these cities saw an inbound tourism growth rate of 87.0%, surpassing the international visitor spending growth rate of 81.9% as reported by the World Travel and Tourism Council (WTTC). Notably, the tourism cities in the Middle East and Americas regions experienced robust growth. Mainly due to the cancellation of entry quarantine and other control measures, as well as the low-base effect, the recovery pace of international tourism in 2022 has been faster than that of domestic tourism.

First, many tourists temporarily canceled or postponed their international travel plans due to travel restrictions during the pandemic. As travel restrictions are lifted, the suppressed demand for these postponed trips is being rapidly released. As countries gradually eased pandemic-related entry quarantine and other restrictions in 2022, the international tourism market experienced an explosive recovery. For example, Japan began gradually relaxing pandemic-related entry restrictions in early 2022, with a full lifting of all such restrictions occurring in October of the same year. This led to a robust resurgence in demand for hotels and the aviation industry in Japan. Those within the hotel industry have reported that hotel booking volumes from international tourists more than doubled.



▲ Italy Florence

Second, international tourism suffered severe impacts in 2021 due to the pandemic, resulting in a low-base effect in 2022. Based on the statistical analysis of inbound tourist arrivals across 100 tourism cities, the international tourist arrivals in 2022 doubled compared to 2021, registering a faster growth rate than domestic tourist arrivals. This trend can be attributed to the relatively lower base of international tourist arrivals in 2021.

Third, international tourism is growing faster, while domestic tourism is recovering better. In 2022, the international tourist arrivals totaled 900 million globally, recovering to 63.3% of the pre-pandemic level in 2019. In comparison, the domestic tourist arrivals in 2022 totaled 8.67 billion in the world, recovering to 66.4% of the pre-pandemic level in 2019.

The economic contribution of tourism is recovering steadily, but the investment of tourism resources in tourism cities is still insufficient

As the global economy's recovery accelerates and travel restrictions are gradually lifted, the tourism industry's contribution to the economy is steadily rebounding. Based on a statistical analysis of 100 sample cities, the average contribution rate of tourism to a city's GDP is 3.3%, surpassing the level of 1.16% recorded in 2021. This indicates a steady recovery in the economic contribution of tourism. This trend holds significant importance for tourism cities, as the tourism industry serves as a vital economic pillar for many cities. The recovery of the tourism sector not only stimulates local consumption and investment but also generates job opportunities and tax revenue for cities.

Meanwhile, the investment of tourism resources by tourism cities is still insufficient. For instance, in terms of the proportion of annual investment in tourism to the overall investment, most of the top ten tourism cities have a relatively lower ranking by economic contribution index. It can be seen that many highly ranked world-famous tourism cities slowed down their tourism investment in 2022. The slowdown in tourism investment could potentially lead to a decline in the quality of the tourist experience. For example, Venice is a globally renowned tourist destination, but the city is grappling with serious environmental and cultural challenges brought by the influx of a large number of tourists and issues related to over-tourism. Insufficient investment in such areas as maintaining infrastructure and environmental protection has resulted in problems such as rising water levels and the deterioration of buildings. These issues are posing a threat to the sustainability of Venice as a desirable tourist destination.

Even though many comprehensive tourism cities are adopting a cautious approach towards tourism investment, it is essential to increase innovative investments in the tourism sector. Against the backdrop of a sluggish world economy, stimulating economic vitality within the market requires increased creative investments in tourism. The rapid recovery of the tourism economy will also facilitate the economy of these cities.

The safety of world tourism cities has greatly improved compared with 2021, and Asia-Pacific tourism boasts a higher level of safety

Overall, the safety of world tourism cities in 2022 has greatly improved compared to 2021, which indicates some progress in enhancing tourism safety within these cities. In 2022, the average tourism safety index for 100 sample tourism cities reached 74 (compared to 56 in 2021), indicating a notable improvement in overall tourism safety among these cities.

In terms of tourism safety, more than half of the top ten cities are from the Asia-Pacific region. Tokyo and Osaka occupy the first and second positions in the tourism safety ranking, respectively. It means that Asia-Pacific tourism cities place a greater emphasis on the management of urban safety, resulting in a safer and more stable city environment. Asia-Pacific tourism cities have made significant efforts to ensure the safety of tourists. They prioritize strengthening urban safety measures, establishing robust safety management systems, offering high-quality security services, and actively engaging in promotional and training activities to enhance public safety awareness. With a focus on urban safety, these cities can provide tourists with a reassuring and secure travel environment, ensuring their sense of safety. By implementing these measures, Asia-Pacific tourism cities have successfully created comfortable travel experiences for tourists, leading to their impressive performances in the comprehensive rankings.

With the steady improvement of city intelligence, the digital development of tourism in Europe and the United States has been gaining momentum

In the context of the pandemic, world tourism cities generally boosted the application of technologies in the development of city tourism. Technological means was integrated into the tourism development with an unprecedented coverage, the trend of tourism digitalization accelerated, and the level of city intelligence steadily improved. First, in terms of city intelligence, the development levels of tourism information services and digital tourism of the 100 sample cities are outstanding. The two sub-indexes of the 100 sample cities averages 92, which means that tourism cities have a higher degree of application and popularity of tourism information technology. The number of tourism-related APPs owned by the city and the proportion of tickets of tourist attractions booked online is high, and the majority of cities provide information via official tourism APPs, official websites, and social media accounts. In addition, the average exit-entry convenience index of the 100 sample cities is 85, reflecting a significant improvement in e-visa coverage in tourism cities and a gradual reduction in visa approval time.

Especially in regions such as Europe and the Americas, the outbreak of the pandemic has compelled many traditional industries and businesses to change their operational methods and embrace more online services and digital transactions. For example, London further improved its digital urban governance during the pandemic with initiatives including online government services and digital health monitoring. These measures aimed to ensure the safety and convenience of both residents and tourists. This digital transformation not only equips the city with emergency management tools but also creates a more comfortable and travel environment for tourists.

During the pandemic, many people had to avoid brick-and-mortar stores and offline transactions, and showed more preference for electronic and information-based services which offer a higher level of convenience and safety. In response to this growing demand, consumers have become more inclined towards embracing electronic and information-driven services. According to a World Bank report, the account ownership rate among adults in Europe and Central Asia increased by 13 percentage points from 2017 to 2022, reaching an impressive 78%. About three-quarters of adults utilize accounts for digital transactions, such as receiving and making payments, which means the widespread adoption of digital payments. The COVID-19 pandemic has further increased the demand for digital payments among merchants, with around 10% of them adopting this payment method for the first time during the pandemic.



▲ UAE Dubai