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World Tourism Cities Federation



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World Tourism Cities Development Report

Compiled by World Tourism Cities Federation

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2021





WORLD TOURISM CITIES DEVELOPMENT REPORT (2021)

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FOREWORD

Working Together for the New Chapter of the Sustainable Development of World Tourism Cities

In 2021, “recovery” was the key word for the world economy, but the continued recurrence of the COVID-19 pandemic became the greatest uncertainty in the process of economic recovery. As a result, the global economic recovery became more uneven, with an increase in debt risks, risky assets prices, house prices and inflationary pressures. This impact also brought about a range of changes, including an increased importance of tourism security, an accelerated development of the digital economy, and a deeper understanding by countries of the importance of sustainable development and a greater emphasis on quality economic development.

After a hard hit, the global tourism industry began to gradually move towards recovery in 2021, but the impact of the COVID-19 pandemic on tourism continued and the pace of recovery remained slow and fragile. The recovery of the global tourism industry was slow due to the repeated recurrence of the pandemic. Different capabilities of countries around the world to respond also highlighted the unevenness in the recovery of the global tourism industry. The situation of employment in tourism industry was still tough due to the sluggish tourism business environment, creating fewer jobs. However welcome changes can also be seen. That is, as domestic tourism gained a strong momentum to recover, international tourism was also slowly recovering. Due to the adjustment of tourism strategies and tourism economic recovery strategies of tourism cities around the globe, some new trends emerged in the development of world tourism cities, including the strengthening trend of the internal circulation of the tourism economy, changes in tourism market demand, the strengthening of response mechanisms of emergency and security management, the enhancement of the development trend of smart tourism, the emergence of virtual tourism economy due to the pandemic, and the obvious trend of industry integration.

Tourism cities are the main source and destination of world tourism, and 80% of global tourism activities are realized through them. Tourism cities play an irreplaceable and important role in tourism recovery, and it is of great significance to promote their recovery, development and iterative renewal, and to discuss the goals and explore paths of sustainable development of world tourism cities in the future, so as to promote the innovation of the global tourism economy and achieve sustainable development.

As the world's first international tourism organization with cities as its main body, and for ten years since its founding, 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”. We are willing to work together with major tourism cities and tourism organizations in the world to unite, collaborate, change and innovate so as to jointly promote the sustainable development of world tourism cities and create a new situation for the prosperous development of world tourism. The World Tourism Cities Development Report is an important academic brand established by WTCF for the purpose of summarizing tourism cities' development experience, studying and discussing major issues related to world tourism, and supporting cooperation and exchanges between world tourism cities. Since 2015, it has been published on an annual basis, and has played an important role in promoting the development of world tourism, especially tourism cities.

Maintaining the basic framework of the development report and consistency in fundamental data, the *World Tourism Cities Development Report (2021)* (hereinafter, the “Report”) studied and adjusted the index system to make the evaluation indexes more reasonable. The Report focuses its observation and analysis on 100 sample cities around the world, and presents both the comprehensive evaluation result based on all indexes on the development of world tourism cities in 2021 and the evaluation result based on sub-index on the development of world tourism cities in 2021, which will more comprehensively and vividly reflect the overall development status of major world tourism cities and tourism industry in 2021, and make a more focused analysis and give more focused suggestions, thus promoting the sustainable development of the global tourism industry.

We are convinced that a new chapter of sustainable development is bound to be ushered in for world tourism.

STRUCTURE OF THE INDEXES FOR EVALUATING THE DEVELOPMENT OF WORLD TOURISM CITIES (2021)

Objectives of the evaluation on the development of world tourism cities in 2021

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, aiming to gradually establish a set of scientific and effective evaluation methodology, promptly summarize tourism cities' experience in their successful development, actively advocate the advanced concept of the development of world tourism, and vigorously promote 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 by analyzing and studying different development dimensions and models of tourism cities.

Since 2020, the COVID-19 pandemic has strongly impacted the world economy, and tourism with population movement as its important carrier has been the most heavily affected. The global tourism industry has been suffering from many challenges in terms of consumer demand, tourism investment, regional landscapes, industry chains, business survival, and employment of personnel. In order to limit the spread of the pandemic, countries took measures including travel restrictions and borders closure, and global tourism achieved a remarkable recovery in 2021 due to the mitigated impact of the pandemic and the widespread vaccination. However, with the now and then recurrence of the pandemic, the course of tourism recovery of all countries in 2021 was full of twists and turns. 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 helped in more comprehensively and vividly reflecting the overview development of major tourism cities and tourism industries in the world in 2021, 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 the tourism industry, and promote the sustainable development of world tourism cities.

Principles of developing indexes for evaluating the development of world tourism cities in 2021

Highlighting the comprehensive development of tourism cities

World tourism cities are neither the simple gathering of tourism industry, nor the repeated accumulation of city functions, but the organic integration of tourism functions and city functions. Tourism is a comprehensive industry integrating several different sectors, and the current integration of tourism with sectors including culture, technology, sports, ecology, entertainment and rehabilitation will further derive new business modes. The *Comprehensive Rankings of the Development of World Tourism Cities (2021)* 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.

Highlighting new changes in post-pandemic development

The COVID-19 pandemic has brought a tremendous impact and many great challenges to the development of global tourism, with a comprehensive change on the way and landscape of development. World tourism cities have been steadily marching forward amid the development and recovery of tourism and the pandemic prevention and control, and the landscape of their development has also shown new changes. The impact of the pandemic on world tourism is reflected in the growth of the tourism economy and the development of the tourism market, and more in the change of people's perception of tourism and the way they travel. Due to the impact of the pandemic, from the national perspective, a lot of countries adjusted their economic development methods; from the personal behavior perspective, people's ways of communication and interaction also changed dramatically; and from the tourism industry perspective, the global tourism industry suffered from many

challenges in terms of consumer demand, tourism investment, regional landscapes, industry chains, business survival, and employment of personnel.

The indexes of the rankings of the development of world tourism cities in 2021 highlight the new situation, new elements and new changes in the development of the tourism industry after the outbreak of the pandemic, focus observation and analysis on the changes in the development of major cities under the impact of the pandemic, and provide insights into the main trends and characteristics of the recovery and development of world tourism cities and innovation in the post-pandemic era.

Highlighting the sustainable development of tourism cities

Tourism is an important driver for the sustainable development of cities. It helps in achieving people-centered development goals, safeguarding the global environmental security, promoting the sustained economic prosperity, fostering social harmony and justice, enhancing partnerships, and facilitating the achievement of sustainable development goals of cities. The COVID-19 pandemic has posed unprecedented challenges and brought about unprecedented opportunities for the sustainable development of world tourism cities. The indexes of the rankings of the development of world tourism cities in 2021 pay more attention to the sustainable development of world tourism cities in the context of the pandemic, give more consideration to the indexes and contents of tourism for the sustainable development of cities' economy, society and culture, and strive to reflect the core values of tourism cities.

Highlighting the consistency of indexes for tourism development

In the process of compiling the Evaluation Index on the Development of World Tourism Cities (2021), the evaluation system and sample cities were basically kept relatively stable, while sub-indexes were 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 2021

The index system of the Evaluation Index on the Development of World Tourism Cities (2021) basically inherits the practice in previous years, with an overall framework structure consisting of 1 comprehensive index and 5 sub-indexes (1+5).

The comprehensive index refers to the Comprehensive Index on the Development of World Tourism Cities (2021). The comprehensive index reflects the recovery of city tourism under the impact of the pandemic and provides an overall picture of the comprehensive development level of city tourism in the context of the pandemic.

The 5 sub-indexes include City Popularity Index, Industry Prosperity Index, City Intelligence Index, Economic Contribution Index and Tourist Satisfaction Index.

City Popularity Index (CPI)

CPI reflects how many people know a tourism city and how much they know, and their awareness of the tourism city's image, i.e., the city's attractiveness, popularity and reputation. 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) CPI highlights the influence of a city's brand on its popularity, and measures the influence of a city's brand using indexes such as the times of the city being searched on the Internet and the city's activeness on major social media platforms.

(b) CPI highlights the influence of the popularity of tourism resources in a city. This indicator is measured using the "number of well-known attractions" and the "number of world heritages".

(c) CPI highlights the importance of the number of well-known cultural and sports facilities in a city. Well-known cultural and sports facilities such as libraries, stadiums and theaters were incorporated in the scope for measuring a city's popularity.

(d) CPI continues to highlight the role of international influence. It reflects how the number of major festivals and events, international MICE activities, and international sports events influence the popularity of tourism cities.

Industry Prosperity Index (IPI)

IPI reflects the overall development trend of a city's tourism industry and indicates its prosperity in a certain period of time. IPI is used to measure the degree of recovery of city tourism and the prosperity of a city's economy after the outbreak of the pandemic. This index is calculated using the growth rate of six core industries related to tourism, including tourism accommodation, commercial services, tourism catering, culture and entertainment, travel services, and tourism transportation.

(a) The number of internationally well-known theme parks, the number of internationally well-known tourism performances (dramas, concerts and performances at theaters), and the revenue of cultural and entertainment enterprises were incorporated into the scope for measuring to evaluate the development of a city's IPI.

(b) The updated IPI highlights the growth rate of indicators to reflect the degree of recovery of the aforementioned industries in tourism cities.

City Intelligence Index (CII)

At present, intelligent tourism has become an important direction of the development of world tourism cities, and an important factor that promotes the innovation of tourism models, increase of operational efficiency, optimization of tourists' experience, and enhancement of comprehensive benefits of tourism. City intelligence is an important sub-index to measure the degree of digitization of a city's tourism industry and the level of application of new technologies in a city's tourism industry and public services. After the changes made in 2021:

(a) This sub-index puts more emphasis on the indicators such as the 4G/5G coverage and use of smart devices per 10,000 citizens to assess a city's level of information infrastructure.

(b) The updated CII emphasizes the digitalization level in a city's public services and management, highlighting the intelligence and informatization level in a city's transportation services, payment services, and exit-entry visa services, including transportation intelligence level, making financial payments via electronic devices, and signing signatures via digital means.

(c) The updated CII emphasizes the innovative application of technologies in the development of city tourism industry, and the digitalization and intelligence level of city tourism. Such indicators include the proportion of online travel bookings, the number of tourism-related APPs that a city has, the proportion of tickets of tourist attractions booked online, and the activeness of a city's official tourism APPs, official websites and social media accounts, etc.

Economic Contribution Index (ECI)

Tourism is an effective means of developing the economy and increasing employment, and has become a strategic pillar industry of the national economy with the greatest potential in the current global development, and an important means of achieving

inclusive development and sustainable economic growth for cities. ECI reflects the role of a city's tourism industry in driving economic development. This sub-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. It mainly includes the following two aspects:

(a) This sub-index highlights the role of tourism investment in promoting the city's social investment.

(b) This sub-index emphasizes the growth rate of indicators. The updated ECI shifted its focus on absolute volume of indicators in previous years to their year-on-year growth rate.

Tourist Satisfaction Index (TSI)

TSI reflects the degree of tourists' satisfaction 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 using indicators including the IWOM, tourist complaint rate, tourist shopping tax refund rate, crime rate, number of public transportation safety accidents, and public medical development level. This sub-index mainly highlights the following aspects:

(a) The tourist-centered principle. Tourist satisfaction is evaluated more from tourists' feelings, evaluations, and word of mouth, and the first-hand direct evaluations from tourists is used as the source of information. It includes two indicators, "tourist complaint rate" and "tourist shopping tax refund rate. Tourism shopping is becoming a core element of the travel process, and affects tourist satisfaction. An increasing number of cities are providing tax refunds for shopping to meet the shopping needs of tourists. The tourist shopping tax refund rate can effectively reflect tourists' satisfaction with a tourism city.

(b) Online channels. The evaluation of tourist satisfaction considers more about the comment and word of mouth about a tourism city made by made by tourists through online channels and platforms. In the digital age, the way tourists travel has changed, relying more and more on various online platforms. And their word of mouth increasingly affects the evaluation of a city's tourism development. The evaluation of IWOM degree can better reflect the status of a city's tourism. This indicator is mainly measured using the ratings of cities given by tourists on well-known online travel websites.

(c) The comments of domestic tourists. In the context of the pandemic, for many tourism cities, the share of domestic tourist arrivals has been increasing, so the updated TSI no longer highlights the satisfaction of domestic tourists.

(d) The safety perception of tourists. For tourism cities, strengthening the efforts in establishing a tourism safety safeguarding system and managing it and creating a safe and harmonious tourism environment are the key for their recovery and development in the new era. To this end, indicators such as “crime rate”, “number of public transportation safety accidents” and “public medical development level” were added. The crime rate mainly reflects the overall social security and stability of a city, the number of safety accidents reflects the occurrence of safety accidents in the field of city tourism, and the public medical development level reflects how developed the city is in terms of public health and medical care, and can be used to judge whether there are sufficient forces that can timely take actions to ensure public health.

Weight of sub-indexes of the evaluation on the development of world tourism cities in 2021

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: 25%; City Intelligence Index: 20%; Economic Contribution Index: 20%; Tourist Satisfaction Index: 15%.

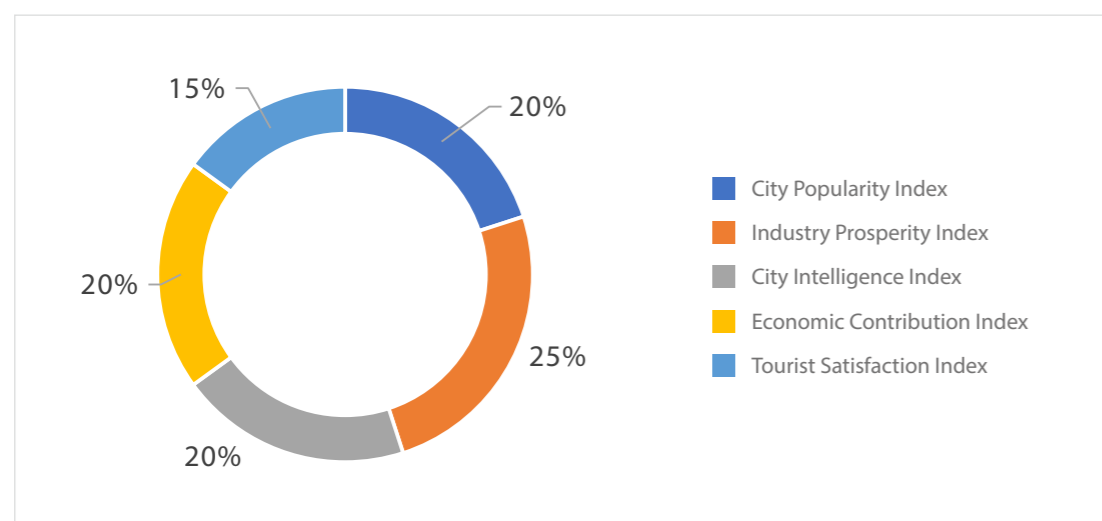


Figure 1 Weight of Sub-indexes in the Comprehensive Index on the Development of World Tourism Cities

Table 1 Index System of the Comprehensive Index on the Development of World Tourism Cities (2021)

Index	Sub-index	Indicator	Reference Weight
Comprehensive Index on the Development 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 Growth rate of tourism accommodation industry (number of hotels, average price of hotel rooms, total revenue of hotel industry) (growth rate against previous years)	5%
		B2 Growth rate of commercial services (number of commercial stations/shopping centers, total commercial retail sales) (growth rate against previous years)	4%
		B3 Growth rate of tourism catering industry (number of catering enterprises, total revenue of catering enterprises, number of Michelin restaurants) (growth rate against previous years)	4%
		B4 Growth rate of leisure and entertainment industry (number of internationally well-known theme parks, number of internationally well-known tourist performances (dramas, concerts and performances at theaters), revenue of cultural and entertainment companies) (growth rate against previous years)	4%
		B5 Growth rate of travel services (number of travel agencies, annual turnover revenue of travel agencies) (growth rate against previous years)	4%
		B6 Growth rate of tourism transportation industry (number of flight routes, number of flights, capacity of transportation vehicles, tourist expenditure on transportation services) (growth rate against previous years)	4%
	C. City Intelligence Index (weight: 20%)	C1 Urban informatization development level (4G/5G coverage, use of smart devices per 10,000 citizens)	3%

Index	Sub-index	Indicator	Reference Weight
Comprehensive Index on the Development of World Tourism Cities	C. City Intelligence Index (weight: 20%)	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)	3%
		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)	3%
		C4 Digital tourism development level (number of tourism-related APPs, proportion of tickets of tourist attractions booked online)	3%
		C5 Financial payment convenience (mobile payment coverage, credit card payment coverage)	3%
		C6 Exit-entry convenience (e-visa coverage, visa approval time)	2%
		C7 Tourism information services (activeness of official tourism APPs, official websites, and social media accounts.)	3%
	D. Economic Contribution Index (weight: 20%)	D1 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%
		D2 Growth rate of domestic tourism (domestic tourist arrivals and its annual growth rate, growth rate of domestic tourism revenues)	4%
		D3 City tourism GDP and its contribution to overall city GDP	5%
		D4 Contribution of tourism employment to overall city employment	4%
		D5 Contribution of annual tourism investments to overall city investments	3%
	E. Tourist Satisfaction Index (TSI) (weight: 15%)	E1 IWOM degree (ratings given by tourists about the city on well-known online tourism websites)	4%
		E2 Tourist complaint rate (ratio of complaints per 10,000 tourists)	3%
		E3 Tourist shopping tax refund rate	2%
		E4 Crime rate (crime rate per 10,000 citizens) (the lower the better)	2%
		E5 Number of safety accidents (the lower the better)	2%
		E6 Public medical development level (number of hospital bed per capita, number of medical personnel per capita)	2%

Data source of the evaluation on the development of world tourism cities in 2021

The data of *the Evaluation Index on the Development of World Tourism Cities (2021)* are mainly the data of Euromonitor International in 2021, and some of them are from official authorities such as the United Nations World Tourism Organization.

The methodology for calculating the Index on the Development of World Tourism Cities (2021)

The Evaluation Index on the Development of World Tourism Cities (2021) was derived mainly by aggregating statistical data and data collected by sample survey, and weighting the scores of the five sub-indexes. The weights of the five sub-indexes were determined by WTCF engaged experts using the Delphi method. The comprehensive rankings of tourism cities were determined based on the score of each tourism city's comprehensive index derived from the scores of the five sub-indexes, and the tourism cities were ranked with their comprehensive scores from high to low.

CITIES SURVEYED FOR DEVELOPING THE EVALUATION INDEX ON THE DEVELOPMENT OF WORLD TOURISM CITIES (2021)

The Evaluation Index on the Development of World Tourism Cities (2021) took 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 were from Asia-Pacific, 32 were from Europe, 20 were from Americas, 8 were from the Middle East, and 8 were 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 (2021)*, 64 were member cities of WTCF, and 36 were non-member cities.

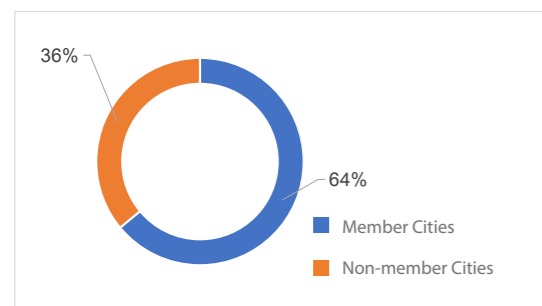


Figure 2 Proportion of Member Cities in the 100 Sample Cities

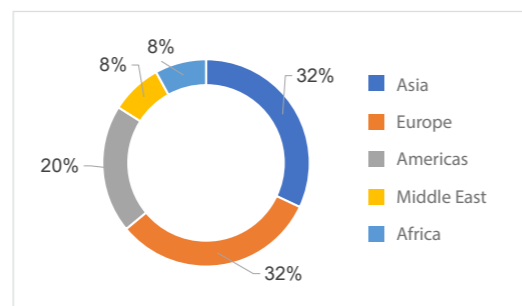


Figure 3 Breakdown of 100 Sample Cities by Region

Table 2 The 100 Cities Surveyed for Developing the Evaluation Index on the Development of World Tourism Cities (2021)

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	No
		Osaka	No
Sapporo		Yes	

Region	Country	City	Membership
Asia-Pacific (32)	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	
Europe (32)	Italy	Milan	Yes
		Rome	Yes
		Florence	Yes
		Venice	No
	Spain	Madrid	Yes
		Seville	Yes
		Barcelona	Yes
	Greece	Athens	Yes
	United Kingdom	London	Yes
	Bulgaria	Sofia	Yes
	Austria	Vienna	Yes
	France	Paris Region	Yes

Region	Country	City	Membership
Europe (32)	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	
Americas (20)	United States	Miami	No
		Washington	Yes
		Chicago	No
		Los Angeles	Yes
		Las Vegas	No
		Hawaii	No
		New York	No
		San Francisco	Yes

Region	Country	City	Membership
Americas (20)	Brazil	São Paulo	No
		Rio de Janeiro	No
	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
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
	Turkey	Istanbul	No
	Saudi Arabia	Mecca	No

EVALUATION INDEX ON THE DEVELOPMENT OF WORLD TOURISM CITIES (2021)

Results of the comprehensive evaluation on the development of world tourism cities in 2021

List of the comprehensive rankings of the development of world tourism cities in 2021 (Top 20)

Table 3 Rankings of the Comprehensive Index on the Development of World Tourism Cities in 2021 (Top 20)

Ranking	City	Comprehensive Index ⁵	A City Popularity Index	B Industry Prosperity Index	C City Intelligence Index	D Economic Contribution Index	E Tourist Satisfaction Index	Country	Region
1	Paris	100.0	0.774	1.000	0.890	0.663	0.664	France	Europe
2	London	93.8	0.693	0.949	0.957	0.418	0.710	United Kingdom	Europe
3	Los Angeles	87.7	0.663	0.783	0.961	0.487	0.717	United States	Americas
4	San Francisco	86.7	0.553	0.780	0.969	0.580	0.711	United States	Americas
5	New York	83.9	0.834	0.574	0.964	0.589	0.617	United States	Americas
6	Miami	77.9	0.597	0.575	0.959	0.556	0.692	United States	Americas
7	Beijing	77.0	0.658	0.475	0.912	0.568	0.857	China	Asia-Pacific
8	Sydney	76.9	0.497	0.639	0.916	0.516	0.766	Australia	Asia-Pacific
9	Las Vegas	75.4	0.558	0.446	0.951	0.690	0.772	United States	Americas
10	Chicago	74.7	0.612	0.563	0.959	0.501	0.589	United States	Americas
11	Taipei	72.4	0.653	0.457	0.897	0.443	0.823	China	Asia-Pacific
12	Shanghai	70.8	0.528	0.518	0.934	0.559	0.589	China	Asia-Pacific
13	Melbourne	70.3	0.481	0.519	0.917	0.533	0.692	Australia	Asia-Pacific
14	Seoul	69.0	0.703	0.382	0.937	0.293	0.832	Korea	Asia-Pacific

5. The city ranked No. 1 by the comprehensive index is assigned a score of 100.

Ranking	City	Comprehensive Index ⁵	A City Popularity Index	B Industry Prosperity Index	C City Intelligence Index	D Economic Contribution Index	E Tourist Satisfaction Index	Country	Region
15	Moscow	68.6	0.613	0.529	0.787	0.324	0.870	Russia	Europe
16	Milan	68.4	0.525	0.499	0.837	0.955	0.265	Italy	Europe
17	Brisbane	68.3	0.399	0.442	0.926	0.524	0.865	Australia	Asia-Pacific
18	Munich	66.3	0.551	0.393	0.944	0.458	0.688	Germany	Europe
19	Hawaii	65.8	0.469	0.228	0.926	0.778	0.828	United States	Americas
20	Barcelona	65.0	0.460	0.396	0.877	0.705	0.603	Spain	Europe

The COVID-19 pandemic has dramatically changed the landscape of global tourism development, and the rankings of world tourism cities has shown new changes. The detailed rankings are shown in Tables 4 and 5 below.

Table 4 Annual Changes in the Comprehensive Rankings of the Development of World Tourism Cities (Top 20)

City	2021	2019	2018
Paris	1	4	2
London	2	3	1
Los Angeles	3	15	21
San Francisco	4	25	22
New York	5	1	3
Miami	6	21	30
Beijing	7	5	5
Sydney	8	19	7
Las Vegas	9	42	17
Chicago	10	24	32

City	2021	2019	2018
Taipei	11	21	23
Shanghai	12	8	13
Melbourne	13	17	20
Seoul	14	9	6
Moscow	15	34	43
Milan	16	28	18
Brisbane	17	59	64
Munich	18	23	40
Hawaii	19	74	Unselected
Barcelona	20	10	15

Rankings of the development of world tourism cities by the sub-indexes in 2021 (Top 10)

The rankings of the top 10 world tourism cities in 2021 (determined according to their comprehensive development) by the five sub-indexes are shown in Figure 4 below.

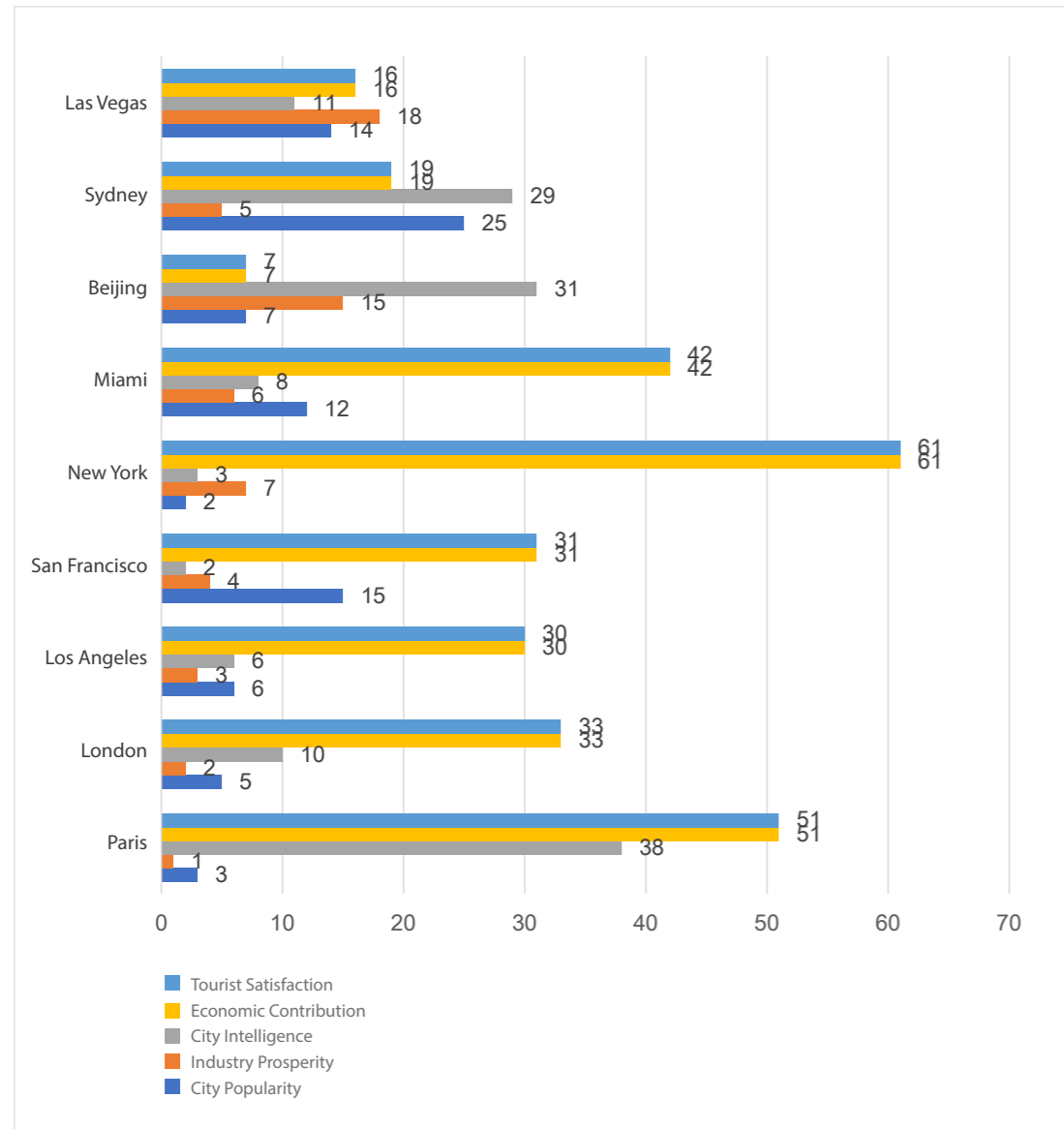


Figure 4 Rankings of the Top 10 World Tourism Cities by the Sub-indexes

Characteristics of the Comprehensive Index on the Development of World Tourism Cities (2021)

After the outbreak of the pandemic, the competitive landscape of world tourist cities has shown new changes.

The tourism industry was recovering in the midst of hardship

The Industry Prosperity Index is low

Affected by the COVID-19 pandemic, world tourism cities got a low IPI in 2021. Tourism cities and tourism industry was impacted by the pandemic and restricted by the pandemic prevention and control. The tourism industry was still in the stage of struggling to recover, and the pressure of easing tourism enterprises' difficulties was still heavy.

In terms of industry prosperity, the average IPI of the 100 world tourism cities in 2021 was only 25.6, which was a low level. In terms of industry breakdown, the travel services industry was the most prosperous, the average growth index of which was 37, leading the tourism market. This was followed by the leisure and entertainment industry and the tourism transportation industry, with an average IPI of 33. Relatively speaking, the average IPIs of the tourism catering industry (24) and commercial service industry (21) were the lowest, indicating that the recovery of catering and business services was more difficult. The pent-up demand for travel and transportation due to the pandemic will see a rebound and be released, but the missed food and beverage consumption can't be made up after the pandemic. In particular, the inbound tourism growth index of tourism cities in 2021 was only 23.5, indicating that international city tourism was still recovering at a slow pace due to the impact of the pandemic.

The economic contribution of tourism declined

Due to the impact of the COVID-19 pandemic, tourism development of world tourism cities took a huge hit and the contribution of tourism to the economy declined. The average ECI of the 100 sample tourism cities in 2021 was only 47, which was at a relatively low level. In addition, the index of the tourism industry's contribution to GDP, the index of the tourism industry's contribution to employment, and the index of the tourism industry's contribution to investment were also at a relatively low level, which were 27, 27 and 36 respectively, and the economic contribution of city tourism industry declined after the outbreak of the pandemic and hadn't recovered to pre-pandemic level.

Contribution of tourism GDP to overall GDP of world tourism cities also declined. Contribution of tourism GDP to overall GDP of the 100 sample cities was only 1.16% on average, much lower than pre-pandemic level (4.85% on average in 2019). Contribution of tourism employment in the 100 sample cities to overall city employment reached 6.42% in 2021, which had recovered to pre-pandemic level in 2019 (6.32%).

For world tourism cities, the recovery of domestic tourism was better than the recovery of international tourism

International tourism in world tourism cities continued to decline due to the lingering pandemic. Among the 100 sample cities, only Vancouver achieved growth, all the others experienced a drop of 59.6% on average, with 54 cities experiencing a drop of 60% or more in inbound tourism, and 12 cities experiencing a drop of 90% or more. In contrast, domestic tourism in these cities began to recover and grow. City tourism markets concentrated in and around the country, and the recovery of domestic tourism was better than international tourism. Among the 100 sample cities, except for Hong Kong and Macao, where the domestic tourist arrivals declined, the other 98 achieved different levels of growth in domestic tourist arrivals, with an average growth rate of 12.7%. The inbound tourism growth index in the 100 sample cities was only 23.5. However, the domestic tourism growth index (83) was much higher than inbound tourism, indicating that among tourism cities, domestic tourism recovered in advance of international tourism and showed a strong momentum of recovery.

A new landscape of regional development

As for the landscape of regional development

The development momentum of tourism cities in Europe and Americas was strong while the development pace of tourism cities in Asia-Pacific slowed down. European and Americas cities not only performed well individually, but also registered an increase in the number of top tourism cities, showing a strong market control capability. The landscape of tourism cities in emerging economies and Asia-Pacific dominating the tourism industry and driving tourism economic growth was broken, with an increase in the contribution of tourism cities in Europe and Americas.

Prior to the pandemic, tourism cities in Asia-Pacific registered a rapid development, their competitiveness continuously improved, and half of the top 10 rankings of the

comprehensive development of tourism cities were taken up by Asia-Pacific cities (for example, in 2019, there were 5 Asia-Pacific cities, Tokyo, Beijing, Hong Kong, Seoul, and Shanghai). The development pace of tourism cities in Asia-Pacific was interrupted, and their rankings declined more or less. Only 2 Asia-Pacific cities, Beijing and Sydney, were listed in the top 10 rankings of comprehensive development of world tourism cities in 2021, most of which were European and Americas cities (6 Americas cities and 2 European cities). The top 20 cities on the rankings of comprehensive development were also dominated by cities from Europe and Americas, with 13 of them coming from Americas (7) and Europe (6), and the other 7 from Asia-Pacific. Asia-Pacific tourism cities such as Tokyo, Hong Kong and Beijing all saw a certain degree of decline in their rankings, with a few cities falling out of the top 10 or even top 20 rankings, showing the degree of the impact brought by the pandemic on tourism development in these cities.

In terms of city popularity

European and Americas cities performed better, with most of the rankings at the top of the list were taken up by them.

In terms of industry prosperity

The average IPI of European and Americas cities (the recovery of their tourism industries was better) was higher than that of Asia-Pacific cities. Generally affected by the lingering pandemic, Asia-Pacific cities showed a poor industry prosperity performance.

In terms of economic contribution

City tourism in Asia had been severely hit by the pandemic and was still struggling to recover. City tourism in Europe and Americas gradually recovered, and their rankings by economic contribution improved significantly.

In terms of city intelligence

The pace of developing intelligent tourism cities in Americas accelerated, and the intelligence level improved significantly after the outbreak of the pandemic.

A new system of city competition

According to the rankings by the sub-indexes and the comprehensive index, we can conclude that a new structural system of competition among world tourism cities formed.

First, the gap between the development of different tourism cities widened, presenting a tiered structure.

The average development index of the top 10% world tourism cities by comprehensive development in 2021 was 84.4, much higher than the average of the 100 sample cities (49.1). The tourism industry in top-ranked cities were more competitive, their market control capabilities were stronger and their performance in tourism development were better. In particular, the gap was more obvious in the CPI and IPI. The average CPI and IPI of the top 10% cities in 2021 were 0.647 and 0.691 respectively, much higher than that of the 100 sample cities (0.397 and 0.249 respectively). Relatively speaking, the gap in the CII, ECI and TSI between cities at different development levels was relatively small.

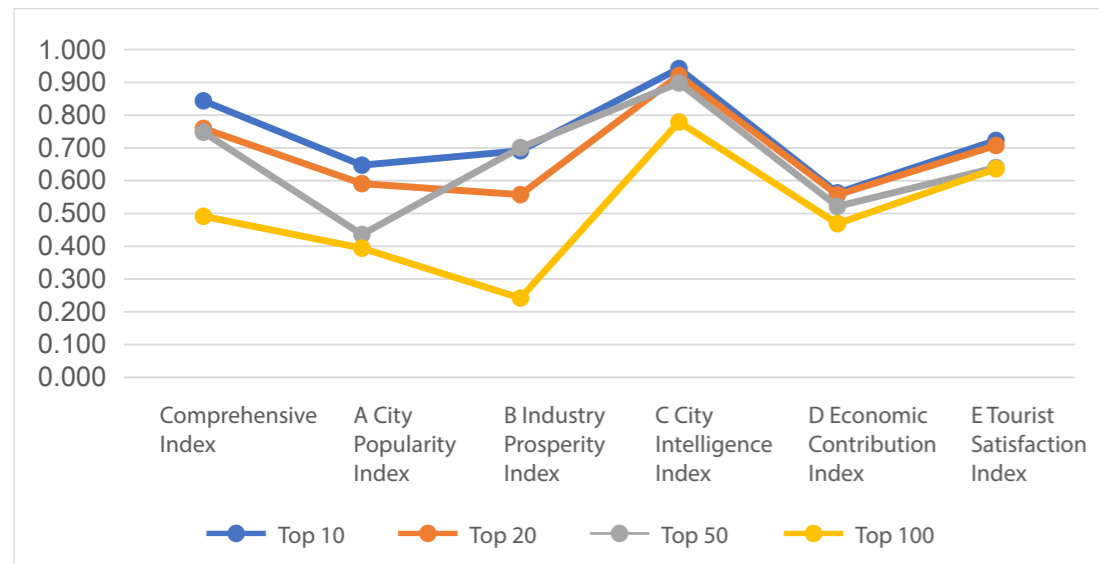


Figure 5 Average Development Index of Cities of Different Ranking Groups

Second, different types of tourism cities showed differentiated development.

According to the city influence levels, world tourism cities can be divided into global hub tourism cities, intercontinental center tourism cities and regional node tourism cities.

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.

Intercontinental center tourism cities in general are the political, economic, cultural and tourism centers of countries or regions of a continent, and have a strong influence on global tourism development, especially the tourism development of the continent they belong to. These cities generally are the main distribution centers of international tourism as they have better tourism resources and infrastructure; are the backbone supporting the sustainable development of world tourism as they play a top-down linkage role in the development of world tourism. This type of cities includes Chicago, Miami, Rio de Janeiro, Munich, Sydney, Taipei, Melbourne, Moscow, and Barcelona etc.

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.

Prior to the outbreak of the pandemic, almost all the top 10 cities in the comprehensive rankings of world tourism cities were global hub tourism cities. By 2021, this landscape had been significantly changed by the pandemic. Global hub tourism cities in 2021 were heavily affected by the pandemic, and some of the intercontinental center tourism cities and regional node tourism cities developed rapidly, with their rankings improving significantly and entering the top 10 and top 20, showing a good development momentum. Among them, 12 intercontinental center tourism cities including Miami and Sydney entered into the top 20, accounting for more than half of the total. In the face of the pandemic, some small-scale and characteristic regional node tourism cities (such as Las Vegas, Hawaii, Brisbane) took flexible measures, adapted to the rapidly changing landscape in a short time, and achieved remarkable performance.

In terms of IPI, intercontinental center and regional node tourism cities' IPI improved faster and showed good industry recovery while that of global hub tourism cities declined. Some global hub tourism cities were hit harder by the pandemic, and tourism in such cities recovered at a slow pace. Benefited from the rapid recovery of domestic tourism market, intercontinental center tourism cities and regional node cities seized the development opportunities and achieved a rapid recovery and growth of tourism industry due to their small size.

As for city intelligence, intercontinental center and regional node cities strengthened their efforts in the development of intelligent cities, leading to a fast improvement of such cities' rankings in terms of city intelligence. The majority of the top 10 tourism cities in the list of rankings of city intelligence in 2021 were intercontinental center tourism cities.

With regards to economic contribution, the rankings of global hub tourism cities by economic contribution decreased, and that of intercontinental center tourism cities rose significantly due to good tourism development, being ranked at the top of the list of rankings by economic contribution. The top 10 tourism cities in the list of rankings by economic contribution in 2021 were dominated by intercontinental center and regional node tourism cities.

In terms of tourist satisfaction, intercontinental center and regional node tourism cities also improved rapidly and rose sharply in the list of rankings. The top 10 cities in the list of rankings by tourist satisfaction in 2021 were mainly intercontinental center tourism cities.

Leapfrog development of intelligent tourism

In the context of the pandemic, world tourism cities generally boosted the application of technologies to the development of city tourism, technological means was integrated into the tourism development with an unprecedented coverage, the digitalization of tourism accelerated, and the level of city intelligence steadily improved. The average CII of world tourism cities in 2021 was the highest (0.942), much higher than the average CPI, IPI, ECI and TSI (0.647, 0.691, 0.563 and 0.723 respectively).

Breaking down the city intelligence, the development levels of tourism information services and digital tourism in 2021 were outstanding. Both the two indexes' averages of the 100 sample cities were 94, which means that tourism cities had a higher degree of application and popularity of tourism information technology, tourism cities had tourism-related APPs, the proportion of tickets of tourist attractions booked online was high, and the majority of cities provided information via official tourism APPs, official websites, and social media accounts. In addition, the average exit-entry convenience index of the 100 sample cities was 83, reflecting a significant improvement in e-visa coverage in tourism cities and a gradual reduction in visa approval time.

Shortcomings in tourism development stood out

In the context of the pandemic, the rankings of tourism cities by different sub-indexes in 2021 differed widely, and different cities had development shortcomings in different areas. The top 10 tourism cities' comprehensive development levels were high, but their rankings in some areas were low. This indicates that under the pandemic, even cities with developed tourism industries may be underdevelopment and have shortcomings in certain areas. For example, Paris was ranked the first by comprehensive development, but it was ranked 51st by both economic contribution and tourist satisfaction, indicating that its tourism industry's economic contribution and tourist satisfaction were not high and need further improvement.

Economic contribution and tourist satisfaction need to be improved

The overall economic contribution and tourist satisfaction in 2021 was not high and need to be further improved. The economic contribution and tourist satisfaction of the top-ranked tourism cities registered a significant decline. All the top 10 tourism cities except for Beijing were ranked below 16th by both economic contribution and tourist satisfaction. The rankings of tourism cities by the sub-index of tourist satisfaction showed unevenness and structural differences. The top 10 ranked cities by tourist satisfaction were ranked low by certain other sub-indexes.

Tourism safety and security need to be improved

In terms of sub-indexes, the public medical development level index was relatively low among the 100 sample tourism cities in 2021. World tourism cities were underdeveloped in public health and medical care, didn't have adequate forces to ensure cities' public health and safety. Ensuring public healthcare was the area where world tourism cities' shortcomings were most concentrated and where improvements are urgently needed. In addition, the crime rate index and public transportation safety accident index were also relatively high, indicating that tourism cities need to further improve their safety management in terms of social security and public safety.

Weak areas still exist in city intelligence

Rankings of world tourism cities by the sub-index of CII showed a characteristic of unevenness. All global hub, intercontinental center and regional node tourism cities had shortcomings and weaknesses in certain areas. In general, most tourism cities need to further strengthen their efforts in areas including city information development level, city transportation intelligence level, online trip booking and financial payment convenience.