

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



世界旅游城市 发展报告

2024-2025

World Tourism Cities Development Report

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Preface

Since 2024, the global tourism industry has achieved a milestone recovery. According to data from the UN Tourism, the number of international tourists reached 1.4 billion in 2024, matching the pre-pandemic level of 2019 and increasing by 11% compared to 2023. This signifies that the global tourism industry has fully emerged from the recession. In the first quarter of 2025, the number of international tourists exceeded 300 million, representing an increase of approximately 14 million (or a year-on-year growth of 5%) compared to the same period in 2024 and standing 3% higher than the same period in 2019. The Asia-Pacific market is leading global growth, and China rises as the world's largest spender on tourism, with its outbound travel expenditure growing by 30%. The Americas, the Middle East, Africa, and Europe have also shown strong growth momentum, with related industries such as aviation and hotels returning to their peaks. This story of resilient recovery in world tourism is injecting powerful momentum into the global economy.

During this recovery process, multiple key factors have worked in synergy. Large tourist source markets globally have shown robust performance, tourist destinations in the Asia-Pacific region have continued to rebound, air connectivity has steadily improved, and visa facilitation policies have been implemented. These positive changes have driven a full rebound in international tourist arrivals across major regions such as the Asia-Pacific region, the Americas, the Middle East, Africa, and Europe. The international aviation and hospitality industries have fully recovered to their 2019 levels, while upstream and downstream sectors related to tourism have achieved synchronized growth. This has driven comprehensive vitality across multiple areas such as employment, taxation, and investment. The robust rebound in global tourism not only highlights humanity's enduring passion for travel and exchange but also showcases the industry's remarkable resilience and adaptability in responding to change and embracing new trends.

Tourism cities are the primary source markets and destinations for world tourism, with 80% of global tourism activities being realized through them. 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.



Jointly Advancing Toward a New Era of Prosperity for World Tourism Cities

As the world's first international tourism organization with cities as its main body, 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". Since its establishment 13 years ago, WTCF's membership has grown from 58 founding members to the current 257 covering 87 countries and regions worldwide. This includes 168 city members, 89 institutional and partner members, as well as 357 members among 6 branches. WTCF's appeal, leadership, and influence within the international tourism industry have grown year by year. It was honored with the "World Travel Leaders Award" at the World Travel Market and has been hailed as the fastest-growing international tourism organization. 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 Cities 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 2014, 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 previous development reports and the continuity of the basic data, the *World Tourism Cities Development Report (2024-2025)* more comprehensively and vividly reflects the development characteristics of major world tourism cities and the tourism industry since 2024. It aims to provide a more complete summary of experience and inspirations for tourism cities and tourism enterprises worldwide, thereby promoting the sustainable development of the global tourism industry.



Comprehensive Rankings of the Development of World Tourism Cities (2024-2025)





Contents

Preface

Jointly Advancing Toward a New Era of Prosperity for World Tourism Cities	2
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Part I

Overview on the Development of World Tourism Cities (2024-2025)

Profile of the Global Tourism Economy (2024-2025)	8
Characteristics of Tourism Development of World Tourism Cities (2024)	10
New Trends in the Global Tourism Consumption Market	18
	27

Part II

Comprehensive Rankings of the Development of World Tourism Cities (2024-2025) 32

Structure of the Indexes for Evaluating the Development of World Tourism Cities (2024-2025) 34

Cities Surveyed for Developing the Evaluation Index on the Development of World Tourism Cities (2024-2025) 41

Evaluation Index on the Development of World Tourism Cities (2024-2025) 44

Part III

Sub-indexes of Evaluation on the Development of World Tourism Cities (2024-2025) 58

City Population Evaluation Index 60

Industry Prosperity Evaluation Index 67

City Intelligence Evaluation Index 74

Tourism Safety Evaluation Index 83

Economic Contribution Evaluation Index 87

Tourist Satisfaction Evaluation Index 94

Countermeasures and Suggestions for Promoting the Comprehensive Development of World Tourism Cities 100

Part I

Overview on the Development of World Tourism Cities (2024-2025)



Profile of the Global Tourism Economy (2024-2025)

Global Economic Development Environment and Overall Performance

Profile of the Global Economy

After the better-than-expected resilience of the global economy in 2023, 2024 saw the world economy continue its slow adjustment under multiple pressures, resulting in an overall pattern of "low-speed growth and structural divergence". Despite facing persistent shocks and challenges in 2024, the global economy demonstrated considerable resilience. As noted in the UN *World Economic Situation and Prospects 2025*, the world economy is at a critical juncture. Escalating trade tensions, coupled with rising policy uncertainty, have significantly weakened



📍 Dresden Germany

the momentum of global economic recovery in 2025 and exacerbated the fragility of global supply chains. Global economic growth is projected to slow to 2.4% in 2025, down from 2.9% in 2024. In its *World Economic Outlook* published in April 2025, the International Monetary Fund (IMF) revised down its global growth forecasts for 2025 and 2026 from 3.3% (projected at the start of the year) to 2.8% and 3.0%, respectively.

Debt remains a significant concern for the global economy in 2025. According to data from the Institute of International Finance (IIF), global debt hit a record high of USD 324 trillion in the first quarter of 2025, accounting for 325% of GDP. The debt-to-GDP ratio in emerging markets reached 245%, and in some low-income countries, interest payments account for as much as 13% of fiscal revenue, posing severe challenges to fiscal sustainability.

Global inflation has broadly eased, while monetary policy shows divergence. Global inflation is projected to decline from 5.9% in 2024 to 4.3% in 2025, though core inflation is declining more slowly. Regarding contributing factors, heightened volatility in commodity prices, divergent trends in energy and food prices, and geopolitical conflicts in the Middle East coupled with the Red Sea shipping crisis are likely to increase supply chain costs and thus present upside risks to global inflation. In terms of monetary policy, a clear divergence is emerging globally. The US Federal Reserve initiated rate cuts in the second half of 2024 and is expected to slow the pace of cuts in 2025 to alleviate exchange rate pressure on emerging markets. In contrast, the European Central Bank (ECB) has adopted a more accommodative stance than the US. Despite the overall decline in inflation, central banks worldwide are exercising caution in loosening policy, with benchmark interest rates projected to remain above the pre-2020 levels in the long term.

The growth of global trade and investment remains sluggish amid persistent financial market volatility. The World Trade Organization (WTO) forecasts that the volume of global trade in goods will decline by 0.2% in 2025, largely impacted by US tariff policies and geopolitical conflicts. Asian exports have maintained a resilient growth rate of 5.2%, while Europe has seen a 2.3% decline due to the energy crisis and high interest rates. Foreign Direct Investment (FDI) showed a nominal increase of 4% (USD 1.5 trillion), but after adjusting for financial fluctuations, it actually fell by 11%. Investment in manufacturing decreased, while the digital economy (such as AI and green technology) has emerged as a new growth driver. The US Dollar Index has fluctuated widely on expectations of a policy shift by the Federal Reserve, falling nearly 1.2% in the first half of the year. However, currencies in emerging markets remain under pressure. Divergence in global stock markets has intensified. The boom in the AI industry has propelled the Nasdaq index to new highs. For instance, Nvidia's market capitalization surpassed USD 5 trillion, while commodity-dependent markets underperformed.

General Characteristics of Global Economic Development

The divergence in the global economic recovery has intensified, with downside risks emerging amidst its resilience. In 2025, the global economy continued its slow recovery momentum from 2024, but the gap between advanced economies and emerging markets has continued to widen. According to IMF projections, the US economy is expected to perform relatively strongly in 2025, with an anticipated growth rate of 2.7%, primarily driven by consumer resilience and tech investment. In contrast, the Eurozone's growth is sluggish at only 1.0%, as core economies such as Germany and France are dragged down by the weak manufacturing sector. Emerging markets and developing economies are expected to maintain a stable overall growth rate of 4.2%, but with significant internal differences. The Asia-Pacific region is projected to grow by 4.7%, China by 4.8%, and Latin America by 2.0%, while growth in the Middle East is weak due to regional conflicts.

The restructuring of global industrial chains has entered a new phase amid the transfer driven by emerging technologies. Since 2024, global industrial chains have been undergoing profound restructuring. On one hand, developed countries continue to promote the reshoring and localization of manufacturing while incentivizing enterprises to relocate domestically through legislation and subsidies. On the other hand, emerging technologies such as artificial intelligence, new energy, and new materials are constantly reshaping the investment logic of multinational corporations. Global supply chains have shifted from an "efficiency-first" approach to a "security-first" paradigm: the US is advancing "Friendshoring" by relocating key industries (such as semiconductors and new energy) to allied nations; the EU, via its Chips Act, aims to increase its share of global semiconductor production to 20% by 2030; and China has put forward the "dual circulation" strategy to strengthen the resilience of its domestic industrial chains. According to data from the World Bank, nearly 40% of global FDI in 2024 were directed to "geopolitically aligned countries", making regionalized production a mainstream trend. The trend of prioritizing "security over efficiency" has led to growing fragmentation in the global division of labor. Geopolitical restructuring has intensified in industrial chain investments. Factors such as industrial policy, supply security, and talent-technology synergy are gradually replacing traditional cost-oriented advantages as core considerations during the decision-making of global enterprises. This is especially true in strategic sectors including chips, new energy, and energy storage, where global capital flows are becoming more concentrated in the core technology clusters of the US, China, and Europe.

Structural transformation is accelerating, and new growth drivers are beginning to emerge. Despite severe short-term challenges, the global economy is fostering new growth momentum in 2025. The digital economy (AI and cloud computing) and the green transition (renewable energy and electric vehicles) are emerging as key growth drivers. The four US tech giants plan to significantly scale up investments in AI during 2025. China's "Three New" economy (new industries, new business formats and new business models) has generated an added value of over RMB 28 trillion. Global new photovoltaic installed capacity is projected to reach 560-596 GW, with China accounting for approximately 44.5% (265 GW). The share of emerging markets and economies in the global economy has risen to 45%, with China, India, and Southeast Asia contributing over 65% to global growth.

Global aging and sluggish productivity have become prominent challenges. Despite technological innovation serving as a growth highlight, most countries have made limited progress in boosting labor productivity and stim-

ulating effective demand. Advanced economies face intensifying labor shortages due to demographic shifts, while some developing economies confront the dual challenge of industrial upgrading and employment pressures. The global population is entering an era of low fertility, with the momentum of population growth significantly weakening. In 1950, the global total fertility rate was 5, far exceeding the 2.1 level required for long-term population stability. By 2024, it had fallen to 2.24, and the UN projects it will drop below 2.1 by 2050. It implies that the global population will peak around the mid-to-late 21st century before gradually declining. From 2000 to 2025, fertility rates declined across all UN regions and income groups. Over the next 25 years, more than 38 countries with populations exceeding one million are expected to experience negative population growth, with the most significant declines occurring in China, South Korea, Japan, Russia, and Italy. Meanwhile, the proportion of the elderly population will continue to rise, posing long-term pressure on healthcare, pension, and public service systems. A tightening labor supply will also persistently drive up labor costs and dampen economic vitality.



Beijing China

Global Tourism Economy: A Full Recovery

Overview of Overall Recovery

Against the backdrop of the global economy's continued slow adjustment, global tourism has demonstrated a robust momentum of recovery and emerged as a key growth driver for the global market. According to the *World Tourism Barometer* released by UN Tourism, international tourism revenue reached USD 1.6 trillion in 2024, up 4% from 2019 (adjusted for inflation). Remaining the world's most popular tourist destination, Europe received 747 million arrivals, up 1% from 2019. The Middle East has shown strong performance, with tourist arrivals growing by 32% compared to 2019. The Asia-Pacific region has recovered to 87% of its pre-2020 levels, with notable growth in China, Japan, and Southeast Asian countries. UN Tourism Secretary-General Zurab Pololikashvili noted that the growth in tourism revenue has made a remarkable contribution to the global economic recovery. Research by the World Travel & Tourism Council (WTTC) revealed that the global economic contribution of the travel & tourism sector reached USD 11.1 trillion in 2024, which recorded a historic high. The sector accounted for 10% of global GDP and supported 348 million jobs. The WTTC also forecasts that the global economic contribution of the sector will increase to USD 16 trillion and make up 11.4% of the global economy by 2034. The report highlights that the tourism performance of 142 countries and regions has already surpassed the pre-2020 levels, with the US, China, Germany, Japan, and the UK being the largest contributors. In addition, international tourist spending reached USD 1.89 trillion and domestic tourist spending hit USD 5.4 trillion, both setting new records. According to the International Air Transport Association (IATA), global airline passenger traffic recovered to 99% of the pre-2020 levels in 2024, with international routes rebounding particularly rapidly. The aviation market in the Asia-Pacific region showed the most significant growth, as China, Japan and Southeast Asian countries recorded substantial year-on-year increases in airline passenger traffic. The IATA noted that improved air connectivity is a key driver of global tourism recovery, though capacity in some regions remains constrained by labor shortages and supply chain issues. The *Report on World Tourism Economy Trends (2025)* released by WTTC reveals that global tourist arrivals reached 14.20 billion in 2024, a year-on-year increase of 13.8%. Global tourism revenue reached USD 6.1 trillion, equivalent to 104.1% of the 2019 level and accounting for 5.7% of the global GDP. Specifically, international tourism revenue grew by 6.3%, while domestic tourism revenue increased by 2.5%. In 2024, the growth rate of total tourist arrivals in the Asia-Pacific region significantly surpassed that of other regions. Global total tourist arrivals are projected to reach 14.489 billion in 2025, and global total tourism revenue is expected to reach USD 6.31 trillion, an increase of 7.9% compared to 2019. According to the *Travel & Tourism Development Index (TTDI) 2024* published by the World Economic Forum (WEF), the global tourism industry had recovered to the pre-2020 levels in 2024, with the number of international tourists and the sector's contribution to global GDP both reaching or surpassing the 2019 figures. The report analyzed tourism development across 119 countries, ranking the US, Spain, Japan, France, and Australia as the top five economies in terms of contribution to tourism growth. However, the recovery process shows notable differences. High-income economies, particularly those

in Europe and the Asia-Pacific region, have demonstrated stronger performance, while some developing countries continue to face challenges related to inadequate infrastructure and investment. The report underscores that despite overall global recovery, labor shortages, inflationary pressures, and geopolitical risks remain primary constraints on the sector's growth.

In 2024, the global tourism economy experienced a strong recovery. Research from various institutions indicates that the number of international tourists, tourism revenue, and airline passenger traffic have all approached or surpassed the 2019 levels. At the same time, the recovery process has been uneven. High-income economies perform better while some developing countries continue to face challenges. In the future, the growth of the tourism industry will depend on the sustained recovery of the Asia-Pacific market, the advancement of visa facilitation policies, and the development of sustainable tourism.



Barcelona Spain

Development Characteristics of the Global Tourism Economy

International aviation is growing faster than domestic aviation, which lays the foundation for the rapid recovery of international tourism. As pointed out by the IATA, global total airline passenger traffic (measured in revenue passenger kilometers or RPKs) in 2024 increased by 10.4% compared to 2023, marking the full recovery of the aviation industry and its surpassing of the pre-2020 levels. In 2024, international passenger traffic grew by 13.6% year-on-year, slightly exceeding the 2019 levels (+0.5%), while domestic passenger traffic increased by 5.7% year-on-year.

Developed economies are recovering steadily, while emerging economies show strong momentum. According to authoritative data from the *Report on World Tourism Economy Trends (2025)*, the growth momentum of the tourism economy in emerging economies continues to surpass that of developed economies in 2024 and 2025. Although emerging economies are more deeply affected by multiple factors and have recovered later, their growth rate in 2024 has already significantly surpassed that of developed economies, and this trend is further strengthened in 2025. In 2024, total tourism revenue in developed economies reached USD 3.52 trillion, a year-on-year increase of 2.3%, surpassing the 2019 level for the first time. Meanwhile, total tourism revenue in emerging economies amounted to USD 2.56 trillion, growing by 5.6% year-on-year and exceeding the 2019 levels for the second consecutive year. The growth rate of total tourism revenue in emerging economies outpaced that of developed economies by 3.3 percentage points. From a long-term perspective and over the past 20 years, the average annual growth rate of total tourism revenue in emerging economies has been 4.5 percentage points higher than that in developed economies. In 2025, total tourist arrivals in emerging economies and developed economies are expected to reach 11.22 billion and 3.86 billion respectively, with year-on-year growth rates of 6.5% and 5.2% respectively.

Regional recovery shows clear divergence, with the Asia-Pacific region leading growth. In 2024, the global tourism market exhibited notable regional differences. According to the *World Tourism Barometer*, the Middle East experienced remarkable growth, with the number of international tourists increasing by 32% compared to 2019, primarily driven by strong performances in destinations such as Saudi Arabia (+69%) and Qatar (+137%). Although the Asia-Pacific region only recovered to 87% of the 2019 levels, it boasted the highest growth rate (+33%), with significant contributions from the Chinese, Japanese, and Southeast Asian markets. In terms of the proportion of total tourist arrivals, the Asia-Pacific region still ranked first in 2024, followed by the Americas, Europe, the Middle East, and Africa. Considering the uncertainty of the geopolitical situation in the Middle East, the growth rate may decline to 1.1% in 2025. Europe and the Americas will experience stable growth of 1.6% and 1.9% respectively. Africa's tourism economy will accelerate rapidly, with a growth rate of 6.1%. The growth rate of total tourism revenue in the Asia-Pacific region may exceed 10%, making it a growth pole for tourism growth.

Tourism consumption is upgrading, with a growing demand for high-value-added services. In 2024, global tourism consumption showed an obvious upgrading trend, with a rapid increase in demand for high-value-added services. According to the latest hospitality report from KPMG, the luxury hotel market has performed exceptionally well. In 2024, Dubai's hotel occupancy rate reached 77.7%, with the average room rate rising to AED 666 (approximately USD 181). The business travel market experienced a strong recovery, with global spending

expected to reach USD 1.48 trillion, of which the Chinese market contributed approximately 30% (USD 406.2 billion). In terms of culture and tourism innovation, the opening of the China-Laos Railway significantly boosted cross-border tourism, with over 70,000 outbound tourist arrivals from China, a year-on-year increase of over 100%, and nearly 60% of them being seniors aged 60 and above. Sustainable tourism is booming. The EU is actively promoting policies for sustainable aviation fuels, and Nordic countries continue to lead in the low-carbon hotel sector. The medical tourism market continues to expand, with a global scale expected to reach USD 84.92 billion in 2024, and countries such as Thailand and Singapore in Asia emerge as major destinations. This series of data indicates that the global tourism market in 2024-2025 is rapidly evolving towards high-end, personalized, and sustainable models.



Toronto Canada

Characteristics of Tourism Development of World Tourism Cities (2024)

Review of Development of World Tourism Cities

In 2024, the global tourism industry entered a new growth cycle. Amidst comprehensive recovery, it has undergone profound strategic transformation and innovative breakthroughs. Policy adjustments and market evolution have become deeply intertwined. With the full lifting of international travel restrictions, major tourism cities worldwide have been actively refining their development strategies. Through a three-dimensional strategy of "policy openness, technology empowerment, and experience reconstruction", they aim to adapt to changing tourist demands, deepen digital transformation, and meet the urgent need for sustainable development.

The outlook for tourism recovery in 2025 is optimistic. However, various challenges persist, including labor shortages, geopolitical tensions, and the risk of economic recession. Furthermore, cities may continue to raise tourism taxes or leverage generative AI technologies to address growing local concerns about overtourism. Against this backdrop, the development of world tourism cities in 2025 exhibits the following characteristics:

Europe leads the global tourism landscape by balancing livability and tourism appeal. European cities remain highly popular. In 2024, travelers to Europe accounted for about half of all international travelers worldwide. Paris, for instance, welcomed over 70 million tourist arrivals annually. However, overtourism has emerged as a core challenge. Popular cities including Amsterdam and Barcelona have implemented measures such as tourism taxes, restricted opening hours for attractions, and bans on self-check-in to manage visitor flows. However, the expansion of the hotel industry has exacerbated congestion in central areas. Strategically, European tourism cities are advancing green infrastructure and low-carbon transition to ensure regional sustainability. They focus on revitalizing cultural spaces and innovating experiences to enhance the appeal of tourism. By promoting dispersed tourism and fostering community collaboration, these cities are developing a "rural-urban dual-core" tourism model to create a multi-centered destination landscape. In 2024, European countries continued to pursue dual innovation in both policy and technology for the purpose of policy synergy and technological empowerment. The EU has simplified its electronic travel authorization and expanded the list of visa-free countries for short-term stays. Some cities have introduced the refund-upon-purchase policy for departure tax refunds to stimulate consumer conversion. Smart technologies are being used to mitigate the challenges of overtourism, and the economic resources of festivals and exhibitions are being fully leveraged to boost long-term benefits. European tourism cities are shifting from a "battle for visitor numbers" to an "art of balance". Through means such as green infrastructure, cultural revitalization and policy regulation, they are reshaping an ecosystem that balances livability and tourism appeal.

Asia-Pacific cities have significantly enhanced their competitiveness by creating a paradigm of "high growth and premium experience". Overall, the Asia-Pacific region leads the world in tourism economic growth, with total tourist arrivals far exceeding the global average. In terms of development strategy, visa facilitation has driven a surge in tourist numbers. Southeast Asian countries have successively implemented visa-free policies for Chinese tourists, leading to continuous growth in tourist numbers. Regional collaboration has deepened. For example, the Thailand-led "Six Countries, One Destination" initiative connects cruise and self-driving routes tailored to high-end tourists across countries such as Singapore, Malaysia, Thailand, and Vietnam. Furthermore, smart tourism and green tourism are continuously upgrading. Some countries, represented by Singapore, are persistently promoting sustainable tourism. Target markets are gradually becoming more segmented, and visitor experiences are continuously innovating, with a focus on high-end healing-through-movement economy and cultural festival-related IPs. On the demand side, regional synergy has become a new development feature of the Asia-Pacific region in 2024. The proportion of tourists choosing destinations within the region has increased by 5%, but the duration of stay has shortened to around 9 days. This has reflected the growing demand for "short-distance, in-depth travel". In summary, "attracting visitors through convenient visa application and regional cooperation, enhancing experience efficiency with technological infrastructure, and converting consumption through cultural interpretation and market segmentation" has become the new development path for tourism cities in the Asia-Pacific region. The Asia-Pacific region is upgrading from a "cost-effective destination" to a global laboratory for tourism innovation. Its strategies of technology empowerment, ecological industrialization, and precision marketing provide a new paradigm of "high growth and premium experience" for global cities.

Cities in the Americas continue to develop, presenting a pattern of "the north outperforming the south". Overall, tourism development in the Americas is dominated by North America, where major international hub cities such as New York, Los Angeles, and Toronto remain popular destinations for travelers. Cities in Latin America, including Mexico City and Buenos Aires, have also seen notable growth. Mexico City received 450,000 international tourist arrivals in 2024, a year-on-year increase of 7.4%, making it a growth engine for Latin America. In terms of development strategy, cities in the Americas are continuously enhancing safety and convenience. Governments are upgrading security facilities and leveraging technology to improve the safety of tourists. Several popular cities are implementing measures to disperse tourists and promote in-depth experiential destinations to address issues such as urban congestion. At the same time, they are delving deeper into local festival culture and continuously enhancing the appeal of cultural IPs and the festival & MICE economy to tourists. Furthermore, cities in the Americas are committed to the industrialization of ecological tourism by setting benchmarks for all-inclusive vacation. They utilize digital marketing to attract tourists and implement the refund-upon-purchase policy to overcome international payment barriers. In summary, tourism cities in the Americas have achieved relatively better development by rebuilding trust through safety upgrades, alleviating overtourism via dispersion strategies, and converting cultural IPs into consumption. However, some cities in Latin America still face multiple challenges, including inadequate infrastructure and social conflicts.

Tourism cities in the Middle East are undergoing structural adjustments amid slowing growth. As one of the first regions globally to achieve a full rebound in the tourism sector, the Middle East has entered a new phase of slower growth and structural adjustments after two years of explosive growth. Factors such as the high base effect, lack of large-scale international events, and geopolitical issues have all become key variables affecting the region's tourism appeal. First, the rapid expansion over the past two years has led the Middle East to face a

"quantitative limit". Driven by post-pandemic policy relaxations and major events such as the FIFA Qatar World Cup, the number of tourists in the Middle East surged by 123% and 37% year-on-year in 2022 and 2023, respectively. However, in 2024, growth slowed to just 1% on a high base, due to multiple pressures such as saturated reception capacity and intense competition among destinations. Although 2024 saw international events like the World Snooker Tour and the UAE F1, their influence was clearly not as significant as the FIFA Qatar World Cup and Dubai Expo in the previous two years, leading to a weakened overall driving force. Second, the tourism landscape of the Middle East is evolving from a "single-core driven" model to "multi-polar competition". Dubai's traditional model, which focuses on luxury experiences, is facing challenges due to changing tourist aesthetics and rising cultural demands. In contrast, Turkey has delivered a standout performance. The country received 62.27 million international visitors throughout the year, a year-on-year increase of 9.8%, surpassing 2019 levels and initial expectations. Istanbul, Turkey's cultural and transportation hub, has driven significant growth in its tourism economy through abundant cultural resources, a rising proportion of long-stay tourists, and enhanced air transit functions. In 2024, Turkish museums welcomed nearly 14 million visitors. Turkish Airlines launched 9 new routes to the Americas, leading to a more than 50% increase in North American visitors, with the average spending per person approaching USD 1,000. Lastly, geopolitical uncertainties continue to affect the tourism appeal of the Middle East. The outbreak of the Israel-Palestine conflict in October 2023 quickly impacted Israel and its neighboring countries, thereby weakening tourists' willingness to travel to the region. Countries such as Lebanon, Jordan, and Egypt, which rely heavily on tourism for foreign exchange earnings (with tourism revenue accounting for 12% to 26% of their total foreign exchange earnings), were particularly affected. Safety concerns also influence the decision-making of long-distance tourists, including Chinese tourists who previously favored destinations like Egypt and Iran, which have seen a noticeable decline in popularity in recent years.

Africa's tourism industry is rapidly recovering, amid both opportunities and challenges. In 2024, the number of inbound tourists to Africa recovered to 96% of pre-2019 levels, with South Africa, Morocco, and Tanzania performing exceptionally well. South Africa received 8.9 million international tourist arrivals and generated 91.6 billion rand (approximately RMB 36.75 billion) in revenue, with tourism contributing 8.8% to its GDP. Morocco recorded 17.4 million tourist arrivals, ranking first in Africa. The country attracted global visitors by leveraging its cultural heritage and sustainable luxury tourism. Tanzania saw its tourist arrivals reach a new high of 5.36 million. However, the development of tourism cities in Africa shows significant regional divergence. North Africa (Morocco and Tunisia) and South Africa (Cape Town) are leading the way, while some sub-Saharan African countries still rely on regional tourist sources. In terms of development strategy, Africa is committed to deepening its engagement with the Chinese market, continuously optimizing visa policies, and transforming destinations toward in-depth experiences to meet the needs of Chinese tourists. Adhering to the industrialization of ecological tourism, they strive to upgrade forest reserves while integrating environmental considerations into the development of large-scale projects. At the innovation level, a community benefit-sharing model has been developed. For example, the China-aided Ngorongoro Lengai Geopark project in Tanzania enables local communities to better showcase their cultural heritage. Meanwhile, digital marketing is used to strengthen cultural branding, and high-profile events and exhibitions are held to enhance the stickiness of high-end clients. In summary, African tourism cities are reshaping the global tourism landscape with "ecological resources as the foundation, the Chinese market as the engine, and community empowerment as the driver of innovation". However, their core development challenge lies in balancing foreign investment with local revenue distribution. Sustainable growth can only be achieved if tourism dividends genuinely "remain in Africa".

Characteristics of Tourism Development of World Tourism Cities

WTCF classifies world tourism cities into three categories based on their influence levels: global hub tourism cities, intercontinental central tourism cities, and regional node tourism cities.

Global hub tourism cities refer to node cities within the global tourism city system that serve as tourism gateways and distribution hubs. They 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, 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, 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, Macao etc. are such cities.

Overall Development Trends of Different Types of Tourism Cities

Since 2024, global hub tourism cities have exhibited a trend towards high-end development and multi-format integration. Global hub tourism cities represented by Paris, New York, and Tokyo have further consolidated their core global positions. Beijing, leveraging its "240-hour visa-free transit policy" and measures to facilitate foreign payments, has successfully created an "inbound consumption-friendly" business district. In 2024, Beijing's ports saw over 18 million inbound and outbound trips and handled more than 110,000 inbound and outbound flights, with year-over-year increases of 90% and 76%, respectively. Moreover, the total number of inbound and outbound trips made by foreign tourists reached 4.84 million, increasing by approximately 125% year-on-year. A total of 920,000 visa-free entries for foreigners were processed. In addition, 144-hour and 240-hour temporary entry permits were issued to 64,000 eligible foreign travelers, which were 4.9 times and 2.2 times that of the same

period in 2023 respectively. This has demonstrated strong attractiveness of the city to international tourists. This trend indicates that global hub cities continue to attract high-spending tourists through high-end consumption scenarios and large-scale international events and thus drive the tourism economy toward high-quality and diversified development. Singapore, leveraging medical tourism and the MICE (Meetings, Incentives, Conventions, and Exhibitions) economy, has achieved remarkable growth and further consolidated its position in the high-end tourism market. According to a reported released by the IATA, international passenger traffic in the Middle East grew by 9.4% year-on-year in 2024. Global hub cities have played a remarkable role in facilitating tourist distribution and boosting regional tourism.

Intercontinental central tourism cities show trends of optimizing transit functions and developing characteristic industries. Intercontinental central tourism cities represented by Bangkok, Abu Dhabi, and Urumqi have fully leveraged their regional transit advantages in 2024, while enhancing their appeal through visa facilitation and characteristic industry strategies. Bangkok, with 32.4 million international tourist arrivals, has become the city with the highest number of global inbound tourists. Its core competitive edges lie in its visa-free policy and low-cost airline network. In 2024, Abu Dhabi welcomed 3.2 million international overnight tourists, a year-on-year increase of 28%, driven significantly by its global airline route network. For example, Etihad Airways partnered with Abu Dhabi's Department of Culture and Tourism to launch the "Abu Dhabi Stopover" program in May 2025. This program aims to invite transit passengers to stay free of charge for one to two nights, thereby encouraging extended stays and in-city tourism during stopovers. Due to the impact of the Russia-Ukraine conflict, many emerging cities have become new international air hubs. Urumqi, China, with its geographical advantage of being close to Central Asia and Europe, has emerged as a new intercontinental center city. In 2024, Urumqi Tianshan International Airport opened 22 international passenger and cargo routes to 16 countries and regions, thus connecting the city with regions such as Central Asia, the Middle East and Europe. This has created convenient travel conditions for both domestic and international tourists, continuously boosting the city's tourism popularity. In 2024, Urumqi received a total of 121 million tourist arrivals, a year-on-year increase of 14.03%. With the support of the "Silk Road in the Air", it has emerged as a new popular tourism city.

Regional node cities are undergoing smart transformation while pursuing sustainable management. In 2024, regional node cities such as Venice, Amsterdam, and Xiamen faced pressures from overtourism and thus adopted various measures to optimize tourist management. Venice implemented an entry fee system for one-day visitors, while Amsterdam restricted the number of cruise ship dockings to alleviate pressure on infrastructure. Changsha, an "internet celebrity city" in China, has diverted tourists through its multimodal transport hub of "high-speed rail and aviation". Its T3 Terminal featured a Ground Transportation Center (GTC) design to achieve "5-minute seamless transfers", and various technologies such as AI security checks and self-service boarding were adopted to enhance operational efficiency. Xiamen, benefiting from the 240-hour visa-free transit policy for foreigners, received 2.3 million inbound overnight visits in 2024, a year-on-year increase of 200%. The city also developed products featuring "transit and city tour" to attract tourists from Southeast Asia and Oceania. As shown by these cases, regional node cities are balancing tourist growth with residents' living needs through policy regulation and intelligent management, thereby driving the tourism industry towards high-quality development.

Emerging tourism cities show trends of being driven by supportive policies and major events. In 2024, emerging tourism cities such as Riyadh in Saudi Arabia, Da Nang in Vietnam, and Kigali in Rwanda rapidly rose to prom-

inence thanks to policy support and major events, Saudi Arabia's tourism revenue grew by approximately 40% year-on-year, driven by the hosting of the Formula 1 Grand Prix and the construction of the "NEOM (New Future City)" project, propelling Riyadh into an emerging MICE hub. In Vietnam, Da Nang capitalized on the recovery of the Southeast Asian tourism market, with international tourist arrivals increasing by 32% year-over-year, driven significantly by the expansion of airline routes. In Africa, Kigali leveraged ecological tourism and high-end conference economy to boost foreign tourism revenue by 28%. In China, Chengdu sought to enhance its image as a garden and happy city through the integration of "culture, commerce, tourism and sports". For the summer of 2025, tourism bookings surged by 38% year-over-year, and the facilitation of cross-border payments using digital yuan further optimized the experience for international visitors. Emerging markets are accelerating their integration into the global tourism system through policy innovation and major events.



● Bangkok Thailand

Comprehensive Integration of Technology in the Development of Tourism Cities

With the widespread adoption of generative AI technology, world tourism cities have entered a new phase of "AI-driven full-chain experience reconstruction" since 2024. Technology companies have deeply embedded generative AI into scenarios such as itinerary planning and transportation optimization, thus triggering an efficiency revolution in the industry. The tourism sector is now experiencing an accelerated phase of full-chain digitalization. Research by travel tech companies like Amadeus reveals that nearly half of major travel service providers worldwide have identified AI applications as a key investment priority for the next 18 months. For instance, Tripadvisor's AI-powered itinerary design feature can rapidly generate personalized routes, transportation transfers, and comprehensive recommendations based on attraction reviews. Byway, using AI algorithms, has developed "flight-free travel" route planning. By optimizing the efficiency and visualizing experiences for Europe's complex railway system, the company seeks to make its products more accessible to users. International tourism cities are adopting the dual strategy of "smart infrastructure and precise operations" to tackle persistent challenges such as payment barriers, cultural differences, and energy management, enhancing the overall tourist experience.

Beijing uses technology to empower the ancient capital with new charm and build an international hub for smart cultural tourism. In terms of upgrading smart services and facilitating international experiences, Beijing has further refined its "dual-hub" international airline network and improved the efficiency of customs clearance for inbound tourists. Dedicated zones for processing "temporary entry permits" are set up to provide one-stop issuance services. It has also offered an "inbound tourist-friendly" payment service system featuring "large transactions via card swiping, small transactions via QR code scanning, and cash payment as a backup". Beijing has pioneered inbound payment products, "Travel Pass" and "CUBe Card", which integrate bank cards and telecom cards to resolve the difficulties inbound tourists face with internet access and payments. At key international consumption areas such as Wangfujing, Sanlitun, and SKP, the refund-upon-purchase policy for departure tax refunds is provided for overseas visitors. This, in conjunction with the 240-hour visa-free transit policy, has encouraged key business districts, time-honored brands, and characteristic hutong businesses to widely adopt multi-currency POS machines and accept payments via foreign bank cards. These measures have remarkably enhanced payment convenience.

In terms of smart city construction, Beijing has aimed to create a digital space operating system for the city. By the end of 2024, Beijing had developed the world's largest "city code" system to realize the vision of "One Map, One Code" in the smart city. This system covers over 6 million urban entity codes across more than 30 categories, including buildings and transportation facilities, and serves 56 government departments and 240 business systems, with a coverage rate of over 95% and approximately 291 million visits annually.

In terms of combining culture with technology and telling Beijing's story well, the city has developed the "Digital Central Axis - Microverse" technology project with the aid of Tencent Games. This is the world's first immersive digital experience product designed to showcase super-large urban historical landscape. It employs gaming technologies such as high-definition photogrammetry, game engines, cloud gaming, and procedural content generation (PCG) to construct an ultra-large map spanning 200km×200km, which can meticulously restore the 7.8-kilometer core heritage area of Beijing's Central Axis.

In terms of conducting precise customer operations and stimulating diverse consumption, Beijing has launched the "2025 Western Beijing E-sports Festival" featuring four sections: "Game Experience & Exhibition Area", the "E-sports Competition Area", the "Cultural Peripheral Products Market Area", and the "Food Market Area". It integrates professional events, equipment trials, IP derivative product exhibitions, and local specialty catering services. Through scenario-based planning, Beijing constructs a multi-functional experience space of "gaming, culture and life" to attract young tourists. As Pop Mart's IPs gain global popularity, the world's only Pop Land has become a must-visit destination for trendy toy fans. It has also attracted numerous young tourists from overseas.

Tokyo is innovating tourist experiences and urban management by building a city-wide smart tourism infrastructure. Since the launch of the "Tokyo Ubiquitous Technology Project" in 2007, Tokyo has deployed tens of thousands of sensors in areas including Ginza and Shinjuku, aiming to achieve city-wide IoT coverage. Tourists can use handheld devices to gain information such as real-time multilingual guides, store discounts, and traffic routes, effectively addressing the problem of information fragmentation. By 2024, this service has been further upgraded to be AI-driven. Akihabara has introduced a "multilingual AI concierge" service supporting natural conversations in 21 languages. Visitors can simply scan a QR code to engage in instant interactions without downloading apps. The backend system automatically responds to various inquiries using localized trusted data.

In terms of low-carbon environmental protection, the University of Tokyo launched the "Green Plan" which utilizes sensor networks to dynamically adjust lighting and air conditioning systems. Under the model of "turn off equipment when no one is present", this plan has reduced energy consumption by 40%. This technological model has been further applied to urban infrastructure. For example, the Takanawa Gateway City project has deployed 50 logistics robots for unmanned cross-floor delivery, while the rooftop of the building features a 2,000-tsubo botanical garden. This has provided an innovative model for combining ecology with technology.

Bangkok is promoting the facilitation and upgrading of social services through policy adjustments and innovations in digital infrastructure. As a consumption-driven tourism destination, Bangkok continues to develop boutique projects and modernize the reinterpretation of cultural IPs. The city has, for instance, transformed a traditional market into a "food metaverse" where tourists can capture virtual seafood via an app and redeem it for real dishes. Besides attracting younger demographics, it also promotes the industrialization of local festivals by upgrading the Songkran Festival from a folk activity to an economic engine. In 2024, the event drew 800,000 visitors, generating total consumption of THB 2.88 billion and indirectly creating THB 1.935 billion in economic value. Especially after China and Thailand reached a permanent mutual visa exemption agreement in 2024, Chinese tourists became the mainstay of Thailand's tourism market, with 6.73 million Chinese tourists visiting Thailand throughout the year. Meanwhile, UnionPay has covered 75% of merchants in Bangkok and the refund-upon-purchase policy has further enhanced shopping convenience.

Bangkok integrates traditional Thai healing with modern technology to create physical and mental restoration scenarios. Some wellness centers combine cutting-edge technologies, such as AI-powered pulse diagnosis devices that generate holographic meridian projections, hyperbaric oxygen chambers that activate cellular repair, and 3D printing of herbal formulas, to transform ancient recipes into customized capsules. The shopping mall, One Bangkok, features 8,000 vertical green plants that release negative oxygen ions, along with an origami-inspired corridor blending Nordic minimalism and Thai silk craftsmanship, to deliver the special experience of "shopping

and forest breathing". This has also achieved a unique blend of nature and urban living and boosted wellness tourism revenue to grow by 35%, with Chinese tourists accounting for over 30% of the market. By leveraging traditional tourism resources and innovating through holistic resource integration, Bangkok has achieved the transitions "from sightseeing to wellness, from fleeting visits to extended stays, and from single-point marketing to ecological synergy". Through precise market segmentation, immersive scenario reconstruction, and cross-border cultural integration, Bangkok not only widely attracts global tourists but also achieves a win-win situation for economic and social value. As a result, the city has provided a development model for global cities.

Shanghai is setting a new benchmark for international consumption center cities by fostering a "full-dimensional inbound tourism service ecosystem". In terms of service innovation, Shanghai has launched the one-stop platform, "Easy Go", which integrates functions such as English navigation and foreign card payments. The departure tax refund policy now covers 13 core business districts, and when combined with the latest 240-hour visa-free transit policy, it significantly enhances convenience. The English version of Amap covers 90% of transportation nodes, and Meituan's "Must-Eat List" helps foreign tourists make dining decisions 50% faster.

In terms of customer operations, Shanghai targets Gen Z with IP cooperation events with *League of Legends*, thus increasing the proportion of young tourists to 43%. For high-end visitors, exclusive packages combining Shanghai Masters with luxury experiences were designed, with per capita spending during the 2024 tournament exceeding RMB 5,000.

In terms of cultural communication, Songjiang District innovatively produced multilingual short videos for cultural tourism while inviting international bloggers to promote specialty products such as "Underground Hotel Exploration" and "Millennium Leaning Tower Mystery Solving". These efforts have resulted in a 100% increase in overseas bookings for Le Meridien She Shan Shanghai. The Huangpu-Songjiang joint ticket, featuring a "One River, One Lake and One Mountain" themed route, has extended the average stay for international tourists to 2.3 days.

In terms of IP creation, Shanghai leverages the influence of the Shanghai International Film Festival. The "ticket economy" model is adopted to convert movie tickets into city consumption vouchers, which links dining, retail, and tourism scenarios to drive urban consumption. The world's largest LEGOLAND Park has opened in Jinshan. By blending traditional Jiangnan elements with mythological themes and debuting a "Monkie Kid" themed area, it has become a new landmark for family-friendly cultural tourism. Shanghai Disneyland has bundled limited-edition IP-themed events with culinary experiences and extended its evening operating hours to 10 PM in summer. Through the four-dimensional synergy of strategic guidance, spatial optimization, service upgrades, and ecosystem building, Shanghai has not only achieved a value leap from "traffic" to "retention" and then to "growth", but has also provided global cities with a transformation paradigm of "policy innovation, scenario creation and refined operation".

New Trends in the Global Tourism Consumption Market

Deepening Experiences: Nighttime Economy and Cultural Consumption Reshape the Tourism Value Chain

The rise of nighttime tourism has become a new variable in determining urban appeal. Tourists' interest in unique nighttime experiences continues to grow, extending from traditional "night markets and nightscapes" to multidimensional elements such as "astronomical experiences, light art, immersive performances and late-night cultural venues". Particularly against the backdrop of increasing global interest in aurora observation, bookings for aurora tours in Arctic Circle countries have seen a year-on-year increase of over 40%. Regions such as Finnish Lapland, Norway's Lofoten Islands, Iceland, and Svalbard have become key beneficiaries of the "2024-2025 Aurora Season" as solar activity enters a new peak period. Furthermore, an increasing number of cities are extending the opening hours of museums and art galleries and establishing late-night markets and all-night cultural festivals. These initiatives aim to stimulate the city's "second economic layer" and, in turn, drive the synergistic development of nighttime transportation, dining, accommodation, and retail resources. The path of "nighttime cultural revival", exemplified by cities such as Tokyo, Osaka, Bangkok, and Paris, also provides valuable models for other developing cities. In East Asia, culturally themed nighttime tourism projects are becoming increasingly diverse, such as Kyoto's nighttime temple meditation experiences, Seoul's "River Floating Cinema", and Guangzhou's "Pearl River Night Reading Cruise". All these initiatives demonstrate strong potential for social communication and IP commercialization. Nighttime tourism is no longer merely an extension of operating hours but is gradually evolving into a crucial gateway for urban cultural experiences.

Cultural souvenirs are regaining attention, marking a phase where tourism is about taking tangible memories home. Driven by the rise of cultural consumption and evolving aesthetic preferences among new-generation travelers, the trend of transforming tourism souvenirs from "buying a local specialty" to "taking home a piece of memory" has become increasingly evident. A survey by American Express shows that 82% of Millennial and Gen Z travelers prefer locally crafted, handmade items that carry cultural symbols and are willing to research before their trip, visit internet-famous spots during their journey, and share "items with stories" on social media. Many destinations have capitalized on this trend by launching projects such as "cultural markets", "intangible cultural heritage collaborations", and "limited-edition co-branded products" to emphasize the idea of "travel for collection". For example, Moroccan spice boxes, Scottish hand-knitted wool, Japanese regional pottery and woodcrafts, and Yunnan Bai ethnic group tie-dye products have become popular due to their "local authenticity and non-replacability". Some Chinese cities have also begun to integrate urban art museums, cultural derivative product stores, and landmark markets while transforming souvenirs from "auxiliary consumption" to a "core experience".

The consumption patterns of international tourists have changed, with "in-depth travel" gradually replacing

"check-in travel". First, international tourists generally stay longer and spend more on average. The average duration of cross-border stays globally has increased by one day compared to pre-pandemic levels, with the Middle East, Africa, and Europe regions experiencing a significant increase of 2.9 days. Longer stays directly boost tourists' per-trip spending, becoming a key growth driver for economic recovery in the destination. In the Asia-Pacific region, tourists are more inclined to prioritize dining, nature exploration, and wellness during their travels, besides seeking in-depth experiences rather than traditional sightseeing. Second, in terms of experience upgrades, smart tourism and green tourism are driving progress in tandem. Countries like Singapore are actively promoting sustainable development and enhancing service quality by introducing innovative measures such as AI-powered guides and carbon-neutral scenic spots. They also focus on distinctive areas such as high-end healing-through-movement and cultural festival IPs to foster differentiated competitive advantages.

The consumption structure of outbound tourism is undergoing a profound shift from material consumption to experience consumption. According to the *Cross-Border Tourism Consumption Trends Report 2023-2024* released by the World Tourism Alliance, the proportion of the shopping expenditure of cross-border tourism has dropped from 58% to 50%, while the proportion of catering expenditure has risen from 18% to 28%. This reflects a shift in tourist preferences from "material consumption" to "experience consumption". Travelers are increasingly prioritizing immediate emotional value and a sense of cultural participation during their trips. They also hope to seek deeper emotional connections by savoring authentic local cuisine and immersing themselves in daily local life. Especially among young groups, consumption scenarios that are "shareable and memorable", such as photo spots, food experiences, and special activities in small groups, are rapidly replacing traditional high-spending shopping as new options for travel budgets.



Prague Czech Republic

Generational Shift: Gen Z Leads Niche and Interest-Driven Tourism

Young people have become the main force in tourism consumption. Tencent's research report indicates a younger demographic among overseas travelers. The proportion of individuals under 35 in the outbound tourism market has sharply risen from 32% in 2019 to 70% in 2024. In China, for example, young tourists aged between 18 and 35 account for 75% of travel-related searches, making them the core driving force in the tourism market. Due to the impact of social media and internet culture, platforms such as Douyin and Xiaohongshu have become the main channels for young people to obtain travel guides and inspiration. Young people are more inclined towards relaxed travel styles such as "light travel (traveling with minimal luggage)" and "staycation" in pursuit of freedom, casualness, and personalization. Significant changes have also occurred in their travel motivations, from traditional scenic spot check-ins to interest-driven, personalized trips. Cultural events such as concerts, music festivals, and anime exhibitions have become key triggers for spontaneous travel decisions. The "Taylornomics" has gained traction—her concerts have boosted destinations such as Tokyo and Singapore, and many young people now view attending a trendy star's concert as a new travel theme. In terms of travel timing, young people exhibit more flexible patterns. On one hand, the demand for short-distance weekend getaways is robust, with stable search peaks every Friday to Sunday evening. On the other hand, off-peak travel is increasingly popular, as young people opt for rational, less crowded travel periods.

The selection of tourist destinations is showing a new trend toward "niche" destinations. While traditional tourism cities remain popular, an increasing number of travelers are turning their attention to niche destinations. Some travel agencies have launched "niche cultural exploration tours". By immerse themselves in local communities, experiencing traditional handicrafts and participate in local customs, they can truly integrate into the local culture. These locations often boast unique natural landscapes, rich cultural heritage, or a tranquil atmosphere. For example, Shuozhou City in Shanxi Province, which gained popularity as a filming location for the phenomenal game *Black Myth: Wukong*, saw a significant surge in accommodation bookings during China's National Day holiday in 2024. Matera, Italy, known as the "Thousand-year-old City of Stones", is famous for its cave dwellings listed as a UNESCO World Heritage site. Following its rise to fame as a filming location for *No Time to Die*, the city developed a "spy-themed hiking route" that connects underground churches and secret waterways, making it a new popular tourist attraction. Beijing has also introduced a series of niche rural tourism routes. For example, Liuliqu Village in Mentougou District, a living heritage site for the national intangible cultural heritage (ICH) of "Firing Technique of Glaze", offers a unique rural tourism experience that integrates cultural inheritance, ICH handicraft, leisure and holiday recreation, agricultural picking, farming, and study tours. Another example is the Zhoukoudian Site in Fangshan District, which collaborates with some homestays in Huangshandian Village to offer experiences of "archaeological study tours and rural slow life". This project allows visitors to explore ancient human civilization while enjoying the leisurely pleasures of rural life.

Industry Upgrade: Green Wellness and Sustainable Development Reshape Competitive Advantages

Wellness tourism is rapidly emerging as a new hotspot globally. According to the wellness trend index released by the Mastercard Economics Institute, Thailand performs remarkably in healing and relaxation experiences. Its immersive eco-lodges and meditation retreats are highly popular among tourists, making it a top choice for wellness tourism. In China, wellness tourism is also booming and has become a key growth driver of residents' consumption. The "senior tourism" demographic accounts for 20% of China's total tourist population, making it a vital force driving tourism consumption. The Beijing Administration of Traditional Chinese Medicine and the Beijing Municipal Bureau of Culture and Tourism have jointly developed a series of "TCM Wellness Culture Tours", in cooperation with 15 top-tier (Grade 3, Class A) TCM hospitals and 10 TCM cultural experience centers. This initiative has become a benchmark project for wellness tourism in Beijing. Furthermore, wellness tourism also exhibits a trend of deep integration with multiple industries such as healthcare, elderly care, sports, and real estate.

The concept of sustainability is emerging as a new trend in tourism consumption. A growing number of tourists are concerned about the environmental and social impact of travel and thus are embracing green methods such as low-carbon travel and eco-friendly accommodation. Tourists are more inclined to use public transportation or cycling instead of driving private cars. They also prioritize bookings at accommodations that use renewable energy and reduce single-use items, and participate in various ecological conservation projects. According to Trip.com's *Sustainable Travel Consumer Report 2024*, 92% of global respondents are willing to consider sustainable travel and this travel mode is gradually shifting from niche attempts to mainstream choices. Some travel platforms have taken the lead in introducing carbon footprint labels to quantify carbon emissions from users' flight, accommodation, and transportation choices, while also offering greener alternatives. Certain platforms even allow users to automatically purchase "carbon offsets" for their trip's carbon emissions and establish mechanisms for "carbon-neutral travel". More travelers are actively avoiding products with multiple transfers and high energy consumption when booking, and opting for transportation methods like trains and buses. Small local accommodations and eco-friendly homestays are becoming popular search options. At the corporate level, groups such as TUI, Accor, and Expedia have also set targets such as "net-zero travel by 2030" or "priority procurement from green supply chains". Meanwhile, technology is empowering upgrades in the tourism industry. AI is being used to recommend itineraries and optimize management processes, while big data helps accurately analyze tourist behavior and market trends.



Peru Machu Picchu

Part II

Comprehensive Rankings of the Development of World Tourism Cities (2024-2025)



Structure of the Indexes for Evaluating the Development of World Tourism Cities (2024-2025)

Research Objective

Since 2014, WTCF has released the annual *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 co-operation 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 provide intellectual support for the sustainable development of world tourism.

From 2024 to 2025, the global tourism industry continues its recovery momentum, with both tourist numbers and tourism revenue growing across multiple regions. The tourism landscape is being reshaped at an accelerated pace, driven primarily by policy support, major events, and surging consumer enthusiasm. However, amid this strong rebound, tourism cities are also confronting a series of new challenges. The global geopolitical situation remains complex, with tense security conditions in some regions disrupting travel confidence. In addition, trends such as frequent extreme weather events, overloaded airports and popular attractions, and the shift from "revenge travel" to more rational consumption are becoming apparent. In the face of these new uncertainties, tourism cities must not only boost international visitor numbers but also strengthen the resilience of their infrastructure and service capabilities to achieve more sustainable and high-quality development.

As an organization dedicated to promoting the sustainable development of world tourism cities, WTCF studies and publishes annual reports to comprehensively and deeply reflect the current development status of major tourism cities and the global tourism industry from 2024 to 2025. These reports aim to analyze key challenges faced by tourism cities and propose corresponding countermeasures and recommendations. We hope that these analyses and suggestions will provide valuable insights for the full recovery of tourism cities and tourism enterprises worldwide and help to promote the sustainable development of world tourism cities.

In the process of constructing the Evaluation Index on the Development of World Tourism Cities, we pay special attention to the stability and continuity of the evaluation system. This stability is mainly reflected in the selection of the evaluation system and sample cities to ensure the comparability of evaluation results. With the aim to more accurately reflect the development dynamics of world tourism cities, individual indicators have been appropriately adjusted and optimized based on the latest trends and characteristics. This helps to capture the latest developments in various aspects of tourism cities and makes the evaluation index more flexible in responding to changes in the global tourism industry. Through this approach, the evaluation index can better adapt to the continuous evolution of the tourism industry while maintaining its core values and evaluation standards. Furthermore, the continuity of the evaluation system is reflected in its emphasis on historical data. By comparing data from different years, we can observe the development changes of tourism cities over time, thus providing policymakers, tourism enterprises, and researchers with deeper insights. This continuity not only helps to assess the current performance of tourism cities but also aids in predicting their future development trends.



■ Boston USA

Index System of the Evaluation on the Development of World Tourism Cities (2024-2025)

The overall framework of the Evaluation Index on the Development of World Tourism Cities (2024-2025) consists of 1 comprehensive index and 6 sub-indexes (1+6), forming the Comprehensive Index on the Development of World Tourism Cities (2024-2025).

The six 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)

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. CPI reflects how many people know a tourism city and how much they know about it.

Industry Prosperity Index (IPI)

This index is calculated based on fundamental developments of six core tourism industries related to tourism, including tourism accommodation, commercial services, tourism catering, culture and entertainment, travel services, and tourism transportation. IPI reflects the overall development status and trend of a city's tourism industry.

City Intelligence Index (CII)

This index evaluates the level of intelligence and convenience of public services provided by a city based on indicators such as the level of smart city construction, entry-exit convenience, payment convenience, and the degree of urban digitalization and informatization.

Tourism Safety Index (TSI)

This index assesses the overall level of tourism safety and social security in a city based on indicators such as social security, the rate of safety incidents, and the emergency response system. It examines the construction and management of the city's tourism safety assurance system.

Economic Contribution Index (ECI)

This index reflects the role of a city's tourism industry in driving economic development based on indicators such as the growth rate of domestic tourism, the growth rate of inbound tourism, tourism's proportion to GDP, tourism's proportion to employment, and tourism's proportion to investment. It also includes contributions in other aspects such as economy, employment, and investment.

Tourist Satisfaction Index (TSI)

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

Weight of Sub-Indexes of the Evaluation on the Development of World Tourism Cities (2024-2025)

The weight of the Comprehensive Index on the Development of World Tourism Cities (2024-2025) 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: 20%;

Tourism Safety Index: 13%; Economic Contribution Index: 20%; Tourist Satisfaction Index: 7%.

Table 1 Indicator System of the Comprehensive Index on the Development of World Tourism Cities (2024-2025)

Index	Sub-index	Indicator	Reference Weight
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 internationally 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 and 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: 20%)	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
Index on the Development of World Tourism Cities	C. City Intelligence Index (weight: 20%)	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)	2%
		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: 13%)	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	2%
		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%
	E. 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: 7%)	F1 IWOM degree (ratings given by tourists about the city on well-known online tourism websites)	3%
		F2 Tourist complaint rate (ratio of complaints per 10,000 tourists)	2%
		F3 Tourist shopping tax refund rate	2%

Key Data Source of the Evaluation Index on the Development of World Tourism Cities (2024-2025)

The Evaluation Index on the Development of World Tourism Cities (2024-2025) primarily uses business data from Frost & Sullivan for the years 2024-2025 as its foundation, while also incorporating data from official authorities such as the UN Tourism.

Methodology for Calculating the Evaluation Index on the Development of World Tourism Cities (2024-2025)

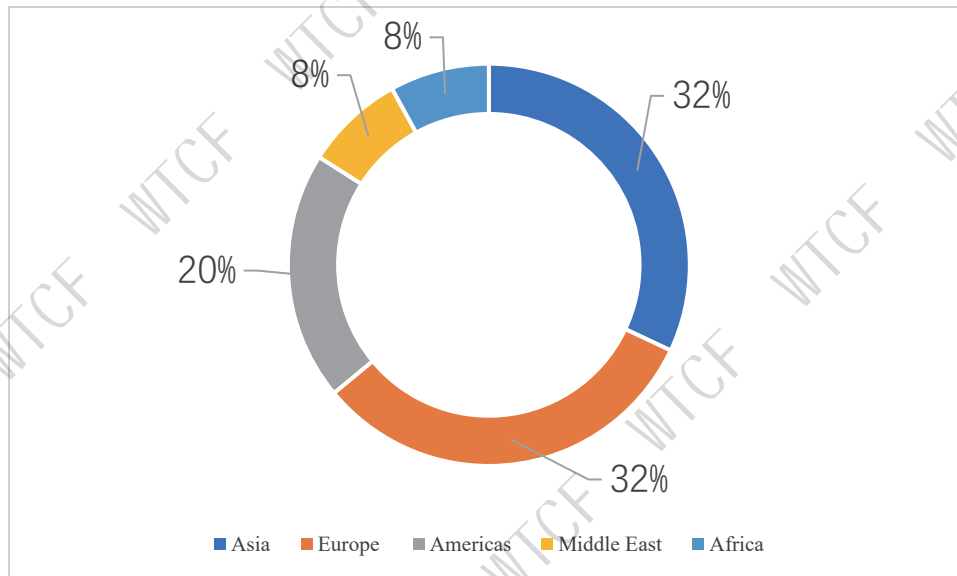
The Evaluation Index on the Development of World Tourism Cities is derived mainly by aggregating statistical data and data collected from definitive lists, and the scores of the six sub-indexes are weighted according to the proportions of 20%, 20%, 120%, 13%, 20% and 7%. The weights of the six sub-indexes are determined by WTCF engaged experts using the Delphi method. The comprehensive rankings are based on the scores under the six sub-indexes, in descending order.



▶ Panama Panama City

Cities Surveyed for Developing the Evaluation Index on the Development of World Tourism Cities (2024-2025)

The report continuously tracks 100 representative major tourism cities and uses them as typical samples to provide a development overview of world tourism cities. These 100 sample cities are drawn from 70 countries and regions worldwide, covering five major tourism regions, namely Europe, the Americas, the Asia-Pacific region, the 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 Africa, accounting for a proportion of 32%, 32%, 20%, 8% and 8% respectively. Among the 100 sample cities, 67 are member cities of WTCF, and 33 are non-member cities.



Proportion of Member Cities in the 100 Sample Cities

Table 2 The 100 Cities Surveyed for Developing the Evaluation Index on the Development of World Tourism Cities (2024-2025)

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
	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
	Dushanbe	Almaty	Yes
	Yes	Bandung	Yes

Region	Country	City	Membership
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
		Edinburgh	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
	Netherlands	Amsterdam	Yes
		Rotterdam	No
	Norway	Oslo	No
	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	Yes
	Panama	Panama City	Yes
	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
	United Arab Emirates	Abu Dhabi	No
		Dubai	Yes
Middle East (8)	Israel	Tel Aviv, Jaffa	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 (2024-2025)

Results of the Comprehensive Evaluation on the Development of World Tourism Cities (2024-2025)

List of the Comprehensive Rankings of the Development of World Tourism Cities (2024-2025) (Top 20)

Table 3 Rankings of the Comprehensive Index on the Development of World Tourism Cities (2024-2025) (Top 20)

Ranking	City	Country	Sector
1	New York	United States	Americas
2	Tokyo	Japan	Asia-Pacific
3	Paris	France	Europe
4	San Francisco	United States	Americas
5	Sydney	Australia	Asia-Pacific
6	London	United Kingdom	Europe
7	Beijing	Chinese mainland	Asia-Pacific
8	Toronto	Canada	Americas
9	Shanghai	Chinese mainland	Asia-Pacific
10	Melbourne	Australia	Asia-Pacific

Ranking	City	Country	Sector
11	Hong Kong	Hong Kong, China	Asia-Pacific
12	Los Angeles	United States	Americas
13	Osaka	Japan	Asia-Pacific
14	Milan	Italy	Europe
15	Miami	United States	Americas
16	Rome	Italy	Europe
17	Amsterdam	Netherlands	Europe
18	Seoul	Korea	Asia-Pacific
19	Istanbul	Turkey	Middle East
20	Dubai	United Arab Emirates	Middle East

Table 4 Rankings of the Comprehensive Index on the Development of World Tourism Cities (2024-2025) (Top 20)

Ranking	City	Compre- hensive Index	A City Popularity Index	B Industry Prosperity Index	C City Intelligence Index	D Tourism Safety Index	E Economic Contribution Index	F Tourist Satisfaction Index
1	New York	83.2	0.1720	0.2000	0.1688	0.0821	0.1483	0.0607
2	Tokyo	82.9	0.1639	0.1986	0.1449	0.1164	0.1302	0.0749
3	Paris	82.3	0.1950	0.1915	0.1220	0.1040	0.1514	0.0592
4	San Francisco	79.9	0.1700	0.1852	0.1477	0.0954	0.1404	0.0600
5	Sydney	79.6	0.1565	0.1678	0.1307	0.1352	0.1375	0.0686

Ranking	City	Compre- hensive Index	A City Popularity Index	B Industry Prosperity Index	C City Intelligence Index	D Tourism Safety Index	E Economic Contribution Index	F Tourist Satisfaction Index
6	London	79.4	0.1635	0.1917	0.1331	0.1060	0.1336	0.0659
7	Beijing	78.7	0.1595	0.1570	0.1505	0.1402	0.1101	0.0699
8	Toronto	78.7	0.1523	0.1649	0.1488	0.1073	0.1569	0.0567
9	Shanghai	78.4	0.1651	0.1760	0.1524	0.1111	0.1169	0.0628
10	Melbourne	76.8	0.1575	0.1613	0.1251	0.1184	0.1426	0.0627
11	Hong Kong	76.6	0.1634	0.1762	0.1647	0.1093	0.1074	0.0449
12	Los Angeles	71.7	0.1572	0.1947	0.1400	0.0751	0.1070	0.0435
13	Osaka	71.4	0.1546	0.1852	0.1128	0.1452	0.0455	0.0706
14	Milan	69.3	0.1277	0.1541	0.0927	0.0848	0.1647	0.0691
15	Miami	69.3	0.1602	0.1766	0.1363	0.0370	0.1406	0.0423
16	Rome	68.4	0.1519	0.1116	0.1100	0.0864	0.1482	0.0754
17	Amsterdam	67.8	0.1091	0.1442	0.1272	0.1142	0.1011	0.0823
18	Seoul	67.7	0.1583	0.1491	0.1201	0.1265	0.0566	0.0668
19	Istanbul	67.2	0.1496	0.1526	0.1427	0.0493	0.1034	0.0740
20	Dubai	66.8	0.1634	0.1201	0.1184	0.0708	0.1286	0.0672

The annual changes in the comprehensive rankings of the top 20

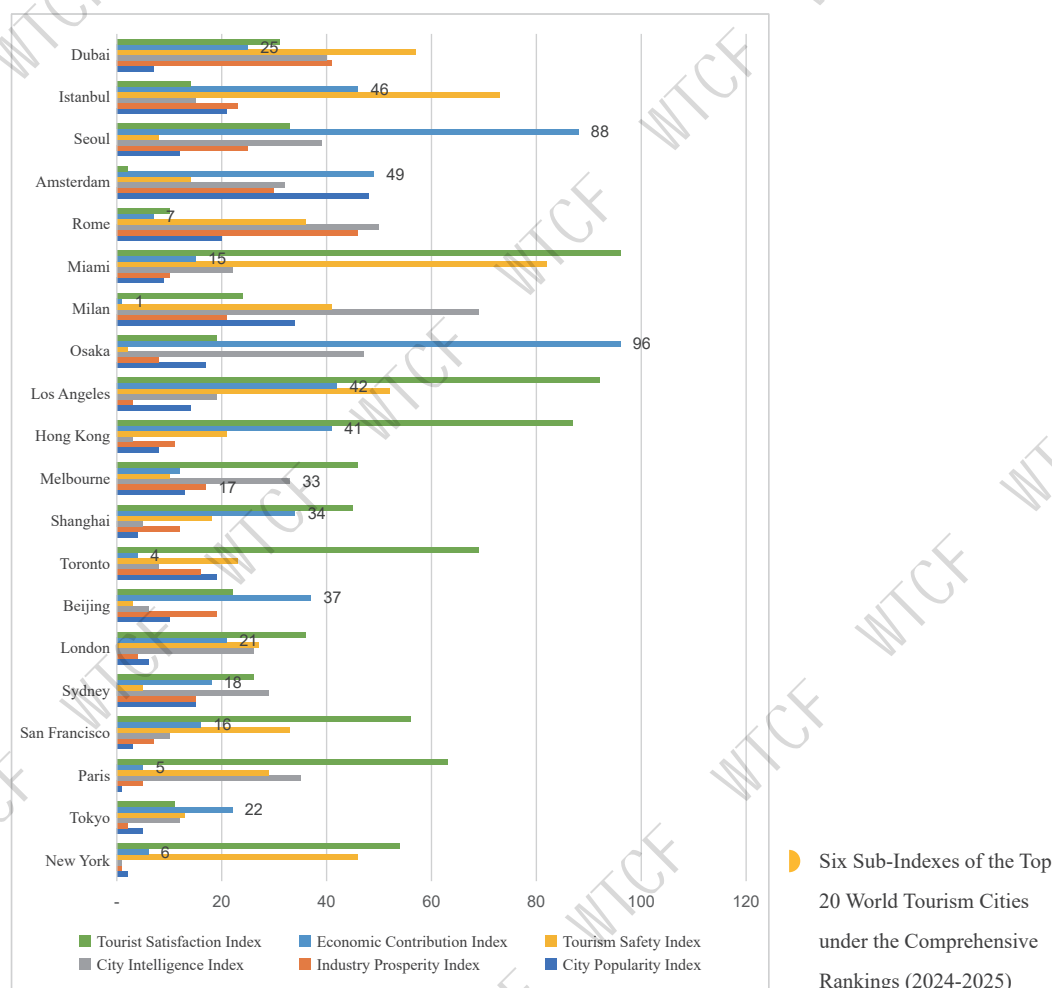
Table 5 Annual Changes in the Comprehensive Rankings of the Development of World Tourism Cities (Top 20)

City	2023	2022	2021	2019
New York	1	1	5	1
Tokyo	2	2	26	3
Paris	3	6	1	4
San Francisco	5	15	4	25
Sydney	4	11	8	19
London	9	5	2	2
Beijing	8	7	7	5
Toronto	7	12	21	31
Shanghai	10	8	12	15
Melbourne	6	14	13	29
Hong Kong	11	9	46	6
Los Angeles	16	3	3	14
Osaka	19	10	49	27
Milan	13	19	16	28
Miami	12	22	6	21
Rome	15	38	25	20
Amsterdam	18	21	38	12
Seoul	17	4	14	7
Istanbul	25	20	37	26
Dubai	14	18	61	8

Six Sub-indexes of the Top 20 World Tourism Cities Under the Comprehensive Development Index (2024-2025) (Top 20)

As shown by the *Comprehensive Index on the Development of World Tourism Cities (2024-2025)* report, the top 20 cities on the list exhibit a more balanced overall development trend. Notably, the Tourist Satisfaction Index has become a common shortcoming. Popular tourism cities such as Los Angeles and New York perform particularly poorly on this indicator, mainly due to challenges such as tourism overload and safety concerns. These findings highlight that enhancing visitor experience remains a common and pressing challenge for world tourism cities.

The rankings of the top 20 world tourism cities in 2024-2025 by the six sub-indexes are shown in the table below.



Overall Analysis of Comprehensive Development Index of World Tourism Cities (2024-2025)

The comprehensive rankings of world tourism cities in 2024-2025 and the changes in the top 20 cities vividly and deeply reflect some new characteristics in the development of world tourism cities.

Asian Tourism Cities Lead the Growth Rate of Inbound Tourist Arrivals, with a Steady Rise in Comprehensive Rankings

The Asia-Pacific region surpassed the Americas to become the region with the most cities ranked among the top 20 from 2024 to 2025. Specifically, there are 8 cities from the Asia-Pacific region, 5 from the Americas, 5 from Europe, and 2 from the Middle East. Tourism cities in the Asia-Pacific region continue to recover, with overall performance showing steady improvement. The region holds 8 positions within the top 20, highlighting its strong development resilience. In terms of tourist numbers and international influence, Asia has become the fastest-growing region in global tourism in the global tourism sector.

First, the Japanese market maintained its top ranking due to multiple factors including the continued weakness of the JPY and the influx of tourists from the Chinese mainland. Specifically, Tokyo has ranked second for the third consecutive year, thanks to its international reputation and high-quality tourism infrastructure. Osaka also performed excellently, with its comprehensive ranking rising from 19th in 2023 to 13th in 2024, which indicates a dual improvement in tourist numbers and urban governance. The significant return of tourists from Chinese mainland, which totaled 6.981 million and increased by nearly 188% year-on-year, has become a major driver of consumption growth. The total spending by tourists in Japan exceeded JPY 8 trillion for the year, with Chinese tourists contributing the most. The favorable exchange rate has significantly enhanced Japan's cost performance advantage among international tourists, thereby driving an increase in both visitor numbers and consumption in key cities like Tokyo and Osaka. This further solidifies their leading position in the rankings among world tourism cities.

Second, China has continued to optimize its entry policies and accelerate the recovery of inbound tourism. Through measures such as expanding visa-free access and extending permitted durations of stay, core cities including Beijing and Shanghai saw significant increases in inbound tourists. Beijing and Shanghai rose to 7th and 9th place respectively, which reflects ongoing improvements in tourism attractiveness, service quality, and international connectivity. In order to optimize international tourists' experiences, both cities have taken the lead in exploring multilingual service platforms and developing payment facilitation systems as well as actively promoting convenience in key aspects such as travel, payment, and communication. As a key gateway for inbound tourism, Beijing has launched pilot programs to create "Inbound Consumer-Friendly Business District" focused on improving visitor experiences. Further efforts are made to set up a demonstration zone of payment service at the Beijing Capital International Airport, enable foreign bank cards for access to urban rail transit, and simplify communication services. These measures aim to improve overall reception capabilities. In

terms of product supply, Beijing continues to expand cultural and tourism integration scenarios. In 2024, the city launched over 100 premium tourist routes themed "Beijing City Walk" by integrating intangible cultural heritage, traditional arts, technology and sports, and performing arts. Beijing has unveiled ten themed routes for inbound tourism under the "Discover the New Beijing" series, including "Central Axis - Local Flavors Tour", "Ancient Trails - Intangible Heritage Tour", "Future Traditions - Urban Renewal Tour" and "Mountain Discovery - Stargazing Hike Tour". These initiatives continuously enrich tourism offerings with more distinctive and experiential products, such as world heritage tours, characteristic hutong explorations, Central Axis cycling tours, and urban nightlife experiences, thus allowing visitors to immerse themselves in the city's vibrant local atmosphere. In addition, tailored "Airport Area Tour" service packages are offered to short-term inbound and visa-free transit travelers. These include a variety of half-day and full-day tour options covering cultural heritage sites, theme parks, adorable animals, food and shopping, art, and fashion. Besides, China's implementation of temporary unilateral visa-free policies for countries including South Korea has also delivered positive results. Since November 2024, holders of ordinary South Korean passports have been allowed to enter China visa-free for up to 15 days, which has significantly boosted the popularity of travel to China among South Korean tourists. Data from multiple travel platforms show that related bookings increased by more than 150% year-on-year, with cities such as Shanghai, Qingdao, and Beijing emerging as the most attractive destinations.

Third, the major tourism cities in Australia have shown stable overall performance, but the pace of recovery has been relatively slow. Sydney and Melbourne experienced varying degrees of decline in the comprehensive rankings, with Sydney dropping from 4th to 5th place and Melbourne falling from 6th to 10th place. This reflects the pressure these cities are facing in terms of competitiveness in the international tourism market. Although both cities maintain strong attractiveness among European and American tourists, their recovery in the Asian market, particularly regarding the return of Chinese tourists, has lagged behind. They are also facing fierce competition from Southeast Asian countries that offer more flexible visa-free policies and lower travel costs. During traditional peak travel periods like the Chinese New Year, the number of tourists visiting Australia and their spending have not returned to pre-pandemic levels, thus affecting overall market performance. Moreover, persistently high inflation in Australia has further driven up tourism costs, making it an important constraint on the recovery of inbound tourism. Since 2021, Australian inflation has remained high, which hovered around 4.1% in 2024, well above the RBA's target range of 2%-3%. The combination of price increases and exchange rate fluctuations makes traveling to Australia less competitive in terms of cost performance compared to other destinations. In the future, the continued efforts of Australian core cities in the Asian market and the optimization of service experiences will be key.

Tourism Growth in Europe Remains Strong, Driven by Regional Demand and Major Events

Among the top 20, European tourism cities accounted for five spots, down by one from 2023. Overall, international tourist arrivals in Europe in 2024 increased by approximately 1% compared to 2019 levels and rose about 5% compared to 2023. Major sports events and the Olympics have injected powerful momentum into tourism growth.

First, major international sporting events have become the core driver of European tourism. In 2024, Europe built upon its recovery to pre-pandemic levels and achieved strong growth through sporting events. Germany's hosting of UEFA Euro 2024 led to a 4.5% year-on-year increase in overnight stays in July. France hosted the Paris Olympics, attracting over 100 million international visitors and generating record-high tourism revenue of EUR 71 billion. During the Olympics, American tourists became the largest overseas source market for Paris, accounting for 13.5% of international tourists. Fueled by the event-driven momentum, Europe's key destinations gained global attention for their cultural heritage, historical significance, and commitment to sustainable tourism. These events also encouraged tourists to extend their trips, further unleashing region's tourism potential.

Second, regional tourism demand continues to support the recovery and growth of the European tourism market. In 2024, European tourism maintained stable performance throughout the year, with particularly strong growth observed during the transition period between the off-peak and peak seasons (September–October) and in winter. Travelers increasingly adopted off-peak travel patterns, leading to a notable rise in tourist numbers during autumn and winter. In Southern Europe, Italy was an outstanding performer, with the number of tourist arrivals in the fourth quarter increasing by 5.9% year-on-year and overnight stays rising by 10% compared to 2019. In contrast, Portugal, Serbia, Greece, and Montenegro showed significantly slower growth in the fourth quarter after their summer peaks, with Montenegro being the only country to record lower visitor numbers than in 2023. Nordic destinations bucked the trend. Driven by the aurora tourism boom, Iceland's international tourist numbers in the fourth quarter of 2024 increased by 14% compared to 2019, making it one of the fastest-growing markets in Europe for that quarter.

Third, travelers from the US have become a key pillar of the European tourism market. In 2024, the outbound travel from the US to Europe continued to rise, strongly driving the European market's recovery. With an average annual household income of approximately USD 170,000, American tourists have strong financial capacity for high-spending travel in Europe. According to data released by Bloomberg, American tourists spent a total of USD 41 billion on leisure travel in Europe in 2023 (excluding airfare), equivalent to about USD 2,000 per person. Factoring in increased tourist numbers and inflation in 2024, this spending is expected to exceed USD 45 billion. The continuously strengthening US dollar exchange rate significantly enhanced the real purchasing power of American tourists in Europe, making everything from dining to high-end accommodation and tax-free shopping high cost performance. In 2024, Europe recorded a tourism surplus of USD 27 billion from the US market, and the growing "tourism trade deficit" has become a major highlight supporting the European tourism economy.

Fourth, Chinese tourists have become an important growth segment for European tourism. In 2025, due to escalating geopolitical tensions and the ongoing US tariff disputes, airfares from the US to Europe surged to

their highest level in five years. At the same time, hotel prices across European countries rose sharply. According to statistics from the American Express Global Business Travel, these price increases directly affected the travel decisions of American tourists, while interest in European summer travel also declined among tourists from other countries such as Brazil, Canada, and Japan. In contrast, a report released by the European Travel Commission in June 2025 revealed a surge in interest from Chinese tourists in European summer travel, with 72% of Chinese respondents expressing their intention to take a holiday in Europe, an increase of 10 percentage points compared to the same period last year. This trend is closely tied to China's growing disposable income and favorable tourism policies, as Europe has long been a popular destination for Chinese travelers.

The Tourism Growth in the Middle East Slows, with Increasing Divergence Among Destinations

Among the top 20, Middle Eastern tourism cities only accounted for two spots. In 2024, the Middle East received approximately 95 million international tourist arrivals, marking a 32% increase compared to 2019 but only a 1% rise from 2023. While the region's overall recovery remains strong and it is the only region globally to surpass pre-pandemic levels as early as 2023, its year-over-year growth rate in 2024 ranked the lowest among the five regions.

First, the high base effect has slowed down the tourism growth of the Middle East. Thanks to post-pandemic policy relaxation and major events, the Middle East experienced rapid growth in international tourist arrivals in 2022 and 2023. According to data from the UN Tourism, international tourist arrivals in the Middle East increased by 123% year-on-year in 2022. In 2023, the figure continued to grow by 37% and reached a total of 93.4 million. This made the region the first globally to fully surpass its visitor numbers in 2019. In 2024, the region welcomed 95 million international tourist arrivals, with growth slowing to just 1%. After two consecutive years of rapid expansion, its reception capacity is gradually approaching saturation. Some popular destinations have entered a period of adjustment, leading to a slower pace of growth. Despite the slowdown, the overall visitor volume remains substantial. The tourism market of the Middle East is gradually transitioning from high-speed growth to high-quality development. In 2024, the region still hosted international events such as the World Snooker Tour and the UAE Grand Prix. However, their overall impact was less significant than the impact of global events such as the 2022 FIFA Qatar World Cup and the 2021 Dubai Expo, resulting in a relatively limited boost to tourist growth.

Second, competition for tourism resources within the region has intensified, with a clear trend toward divergence. The Middle Eastern tourism market is undergoing a structural shift from a "single-point-driven" model to "multi-polar development". Traditional powerhouse Dubai has seen a decline in its comprehensive ranking in 2024. Known for shopping, luxury hotels, and large-scale events, the city is under pressure to transform its tourism models. As travelers increasingly prioritize cultural depth and cost-effectiveness, emerging destinations such as Istanbul have shown strong performance and emerged as new growth engines. In 2024,

Turkey received a total of 62.27 million international tourist arrivals, up 9.8% year-on-year, surpassing the 2019 level by 20.3% and hitting a new record high. Key factors driving Istanbul's rise include the appeal of its UNESCO World Heritage sites, a significant rise in average duration of stay and spending levels, and the sustained enhancement of its Eurasian transit capabilities. Last year, Turkish Airlines launched multiple new routes to North America, driving a 53% year-on-year increase in visitors from the region. The average duration of stay for transit tourists in Istanbul extended from 0.8 days in 2019 to 2.3 days, with per capita spending reaching USD 972. Meanwhile, Istanbul is accelerating its sustainable tourism initiatives. By restoring historical sites and converting them into public cultural spaces, the city succeeds in enhancing the overall travel experience. For example, the newly opened ancient Gülhane Cistern has become a new highlight of cultural and tourism integration.

Third, geopolitical and security situations bring uncertainty, suppressing tourists' willingness to travel.

Despite ongoing efforts by multiple Middle Eastern countries to diversify their tourism sectors, regional instability remains a critical factor hindering recovery, particularly for long-haul markets. The outbreak of the Israeli-Palestinian conflict in October 2023 dealt a severe blow to tourism confidence across the Middle East. Beyond paralyzing Israel's international tourism, the conflict disrupted neighboring countries and abruptly halted the region's tourism boom. Tourism-dependent economies, such as Lebanon, Jordan and Egypt, were stricken the hardest. In these economies, tourism contributes between 12% and 26% of foreign exchange earnings, amplifying the conflict's ripple effects. As tourism safety becomes a top priority for global tourists, many governments have issued travel warnings for parts of the Middle East. This has prompted more cautious travel behavior, suppressing the demand for long-haul trips. Even geographically distant Middle Eastern destinations have struggled to remain immune. Destinations previously favored by Chinese tourists, such as Egypt and Iran, have also seen a significant decline in their popularity in recent years.



■ Istanbul Turkey

Tourism in the Americas sees strong domestic demand, but the return of international visitors remains weak

Five of the top 20 cities in comprehensive rankings are from the Americas. The strong domestic demand in the US is a main driving force.

First, the tourism market of the US has deepened its reliance on domestic demand, and the spillover effect is driving overall growth in the Americas. Despite the sluggish return of international tourists, the US remains the world's largest tourism market, and its strong domestic demand has supported the steady growth of tourism across the Americas. In 2024, domestic tourism consumption in the US accounted for nearly 90% of the total, hitting a new record high. Frequent holiday travel by Americans has driven the recovery of related industries such as hotels, transportation, and retail in states across the country, and has also had a further spillover effect on Latin American countries. Thanks to geographic proximity and convenient air routes, destinations like Mexico and the Caribbean region have become popular outbound destinations for American families. This trend has supported a resurgence in visitor arrivals for parts of Central and South America. Although international inbound tourism spending in the US decreased year-on-year, the outbound travel of American tourists has provided crucial support for neighboring regions and injected resilience into the broader Americas market.

Second, the US faces sharply declining visitor numbers from key source markets, which has put pressure on its international appeal and recovery momentum. As the most important tourism destination in the Americas, the US welcomed 72.39 million international tourist arrivals in 2024, marking a year-on-year increase of 9.1% and yet still recovering to just 91.1% of the 2019 level. Structurally, most traditional core markets showed disappointing performance, with slow or even reversed recovery. According to data from the US Department of Commerce, tourist arrivals from key source markets such as the UK, Germany, and South Korea declined by nearly 15%, 28%, and 15% year-on-year in 2024, respectively. Moreover, tourist arrivals from several Latin American and European markets, including Spain, Colombia, Ireland, Ecuador, and the Dominican Republic, also saw double-digit declines of 24% to 33%. This implies systemic challenges to the international tourism appeal of the US.

Third, delayed policy responses and lack of systematic international promotion are hindering the recovery of inbound tourism. Unlike countries such as the UAE, Singapore, and China, which have actively expanded into international markets and continuously improved entry experiences, the US lacks a unified national strategy and clear "welcome" signals at the federal level. The WTTC pointed out that the US is the only one among the world's 184 major tourism economies where international visitor spending is projected to continue declining in 2025. Projections indicate a further drop from USD 169 billion in 2024, with a loss of up to USD 12.5 billion. This trend will also impact local finance, employment, and the ecosystem for small and medium-sized enterprises. According to the latest data from the US Department of Commerce's International Trade Administration (ITA), overseas tourist arrivals to the US declined by 11.6% year-on-year in March 2025. The numbers of visitors from Western Europe, Asia, and South America, which account for 80% of its international visitors, all saw declines of varying degrees. Visitors from Western Europe fell by 17.2%, while those from Asia and South America decreased by 3.4% and 10.4%, respectively.

Fourth, the US tourism sector confronts structural challenges in safety concern and destination appeal.

Due to events such as the US government initiating trade wars and incidents of tourists being detained upon entering the US, the willingness of tourists from many countries to travel to the US has declined. Concerns about public safety, which are frequently highlighted on social media, have eroded the confidence of international tourists. In addition, negative perceptions regarding visa facilitation and entry efficiency in the US have also weakened its competitiveness as a global "destination brand". The uncertainty of the tourism environment, coupled with a lack of effective image management, has caused the US to gradually lose the initiative in the fierce competition of the global tourism market. As noted in a report released by the New York City Tourism + Conventions in May 2025, New York City is projected to see international visitor numbers drop to 12.1 million in 2025, a decline of 17%, due to President Trump's tariffs and immigration policies. The steepest fall is projected among Canadian travelers, who have begun boycotting trips to the US after Trump threatened to turn Canada into the 51st state. A report by a tourism economics company under Oxford Economics predicted that the decrease in inbound visitors would cost the US tourism industry approximately USD 64 billion in 2025.



Washington USA

International Tourism Recovery Accelerates, and Travel Methods and Preferences Continue to Evolve

The global tourism market continues its recovery trajectory, with international tourism performing excellently. According to data from the WTTC, global international tourist spending reached USD 1.9 trillion in 2024, a year-on-year increase of 11.6%, with its recovery pace surpassing that of the domestic market. Although domestic tourist spending still stood at USD 5.3 trillion and increased by 5.4% year-on-year, the faster revival of cross-border travel has become the key engine of world tourism growth.

As demand rebounds, the travel methods and consumption preferences of international tourists are also continuously evolving. The trend of "fewer trips, longer stays and deeper experiences" is gradually replacing pre-pandemic high-frequency, short-distance travel. According to data from the World Tourism Alliance, the global average duration of stay for cross-border trips in 2024 was extended by one day compared to before the pandemic, and leisure travel stays in the Asia-Pacific region increased from 6.1 days to 7.4 days. Sightseeing checklists have lost appeal, and tourists increasingly opt for extended, immersive stays in a single destination.

This trend is driving the continued rise in popularity of high value-added tourism products such as cultural exploration, ecological outdoor activities, wellness retreats, and gastronomic study tours. Experiences have become a core factor in travel decision-making. A McKinsey report highlights that over 90% of tourists in 2024 took "unique experiences" as a key consideration in destination selection, while 52% of Gen Z travelers say they would rather cut budgets for transport or shopping than compromise on experiences.

At the same time, the widespread adoption of digital technology and the expansion of remote work models have also further extended tourists' length of stay. "Small-group, in-depth tours" and "customized itineraries" have become mainstream, and the popularity of "sojourns" and "Workcations" (work + vacation) has not diminished. In countries such as Portugal, Mexico, Thailand, and Indonesia, visa policies and living service systems catered to digital nomads are being rapidly improved. This has accelerated the development of new tourism ecosystems that blend extended stays with multi-scenario consumption. International tourism is entering a more diverse, sustainable, and high-quality development stage.



Belgrade Serbia

Part III

Sub-indexes of Evaluation on the Development of World Tourism Cities (2024-2025)



City Population Evaluation Index

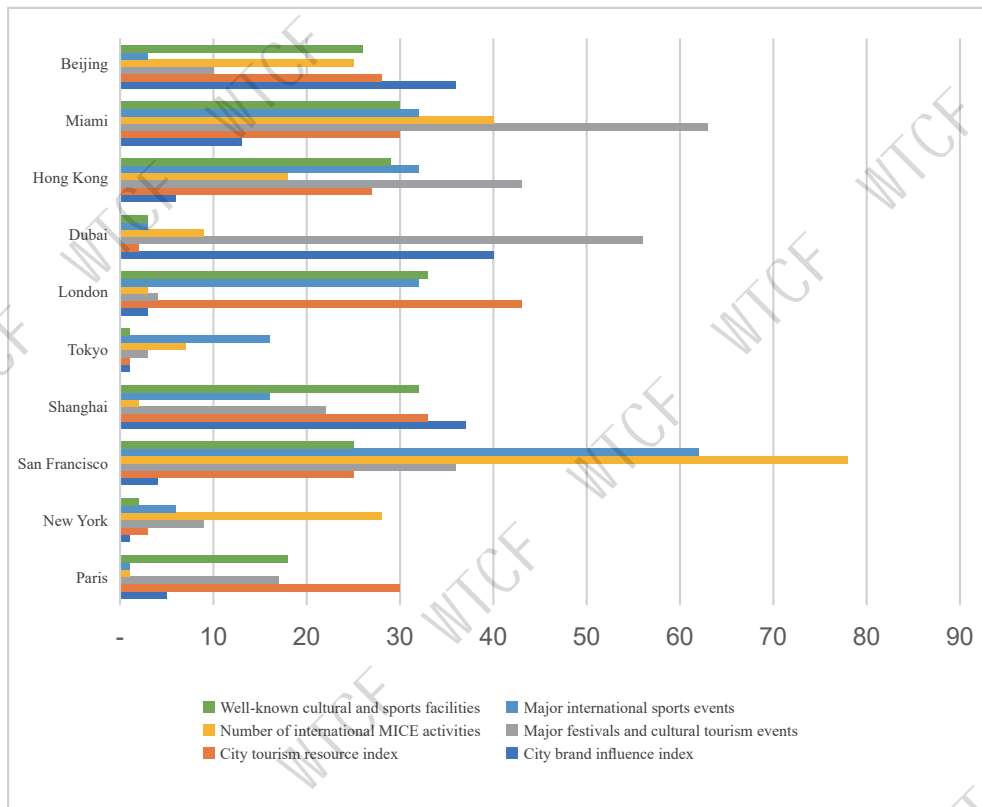
Rankings by City Popularity (2024-2025) (Top 20)

Among the top 20 tourism cities in terms of city popularity from 2024 to 2025, the Asia-Pacific region led with eight cities (40%), followed by the Americas with seven (35%). Europe and the Middle East account for four and one, respectively. The US had five spots on the list, followed by China with three (Shanghai, Hong Kong and Beijing) and Japan with two (Tokyo and Osaka). Among the top 10, the Asia-Pacific region had four spots, Europe had two, the Middle East had one, and the Americas had three. The bottom 10 were mainly comprised of cities in the Asia-Pacific region and the Americas. No African city made it into the ranking list.

Table 6 Rankings by City Popularity (2024) (Top 20)

Ranking	City	Country	Sector	Ranking	City	Country	Sector
1	Paris	France	Europe	11	Moscow	Russia	Europe
2	New York	United States	Americas	12	Seoul	Korea	Asia-Pacific
3	San Francisco	United States	Americas	13	Melbourne	Australia	Asia-Pacific
4	Shanghai	Chinese mainland	Asia-Pacific	14	Los Angeles	United States	Americas
5	Tokyo	Japan	Asia-Pacific	15	Sydney	Australia	Asia-Pacific
6	London	United Kingdom	Europe	16	Chicago	United States	Americas
7	Dubai	United Arab Emirates	Middle East	17	Osaka	Japan	Asia-Pacific
8	Hong Kong	Hong Kong, China	Asia-Pacific	18	Mexico City	Mexico	Americas
9	Miami	United States	Americas	19	Toronto	Canada	Americas
10	Beijing	Chinese mainland	Asia-Pacific	20	Rome	Italy	Europe

Sub-index Rankings of City Popularity (2024-2025) (Top 10)



Sub-index Rankings of City Popularity (2024-2025) (Top 10)

Changes in the Annual Rankings by City Popularity (2024-2025) (Top 10)

Table 7 Changes in the Annual Rankings by City Popularity (2024-2025) (Top 10)

City	Paris	New York	San Francisco	Shanghai	Tokyo	London	Dubai	Hong Kong	Miami	Beijing
2024-2025	1	2	3	4	5	6	7	8	9	10
2023	1	4	12	3	2	17	5	10	37	25

Analysis of Characteristics of Rankings by City Popularity (2024-2025)

Cultural Communication and International Events Intensify the Competition for Popularity Among Top Cities

Among the top 10 in terms of city popularity, Tokyo dropped from 2nd place in 2023 to 5th in 2024. New York rose from 4th to 2nd. Paris's ranking remained unchanged. San Francisco jumped from 12th in 2023 into the top 3, thus shattering the previous equilibrium. This reflects its growing influence in dimensions such as cultural communication and international events. Overall, the top 10 rankings remained stable, with only minor adjustments, showcasing a dynamic competition pattern for popularity among leading cities.

From the perspective of proportions, leading cities differ significantly in terms of resource concentration in well-known cultural and sports facilities, city tourism resource index, number of international MICE activities, major international sports events, and major festivals and cultural tourism activities. International MICE activities and major festivals and cultural tourism events account for the same proportion (9.5%), reflecting the clustering effect of leading cities as platforms for cultural exchange and display. Major international sports events account for 7.5%, while well-known cultural and sports facilities and city tourism resources comprise a lower proportion of 5.5% and 5.6%, respectively. In terms of resource concentration, international MICE activities are on par with major festivals, followed by major international sports events, then city tourism resources, and finally cultural and sports facilities. High-profile cities leverage this differentiated resource layout to build their influence.

Table 8 Concentration of Uneven Distribution of City Popularity Index

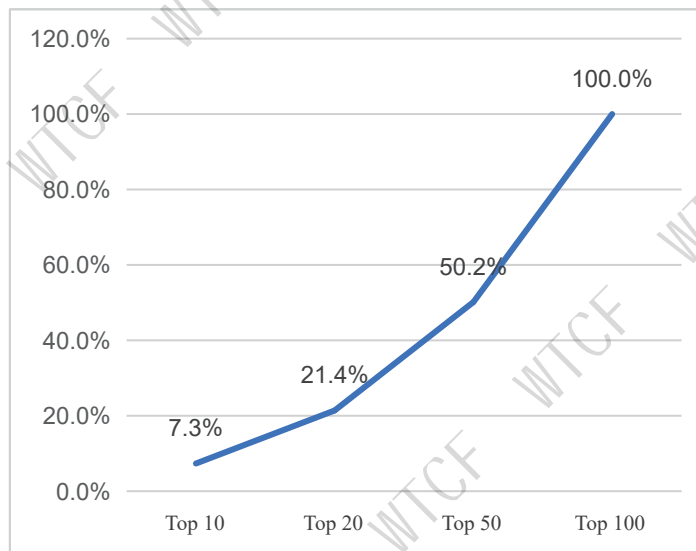
City	Proportion of city popularity index	City brand influence	Popularity of tourism resources	Number of international festivals	Number of international conferences	Number of major international sports events	Number of well-known cultural and sports facilities
CR4	5%	5%	5%	4%	7%	4%	5%
CR10	9%	9%	7%	11%	15%	9%	9%
CR20	21%	22%	21%	22%	25%	21%	21%
CR50	51%	51%	50%	52%	57%	61%	50%

Table 9 Concentration of Resources and Activities in the Top 10 Tourism Cities

City/Indicator	City tourism resource index	Number of major festivals and cultural tourism events	Number of international MICE activities	Number of major international sports events	Number of well-known cultural and sports facilities
Top 10 Cities	9397	367	506	12	10504
All Sample Cities	167874	3862	5346	161	190331
Percentage	5.6%	9.5%	9.5%	7.5%	5.5%

The City Tourism Resource Index Significantly Influences the Rankings of City Popularity with Gradient Characteristics

Data show that the share of the tourism resource index rises steadily as the ranking band widens: 7.3% for the top 10, 21.4% for the top 20, and 50.2% for the top 50. This indicates that cities with richer tourism resources are more likely to secure higher positions in the rankings of city popularity. As the ranking scope expands, the cumulative proportion of the tourism resource index continues to rise. This pattern underscores the foundational role that tourism resources play in building city popularity. High-profile cities often leverage their high-quality tourism resources to attract visitors, promote their city image, and improve their rankings.

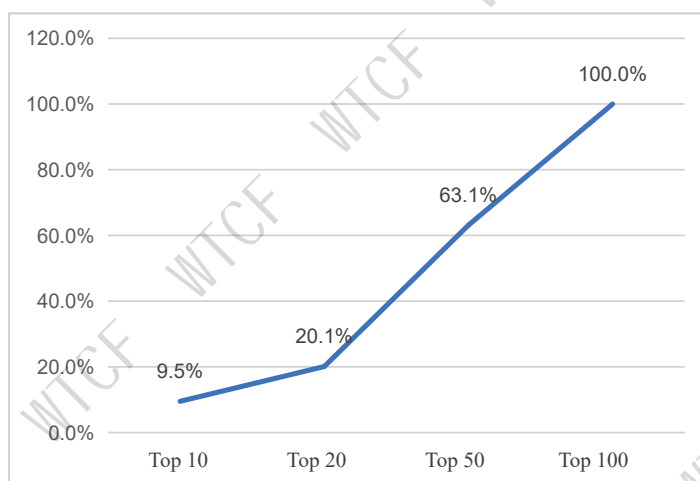


Impact of the City Tourism Resource Index on City Popularity Rankings

Well-Known Tourism Facilities and Cultural & Sports Facilities Play an Important Part in Enhancing City Popularity

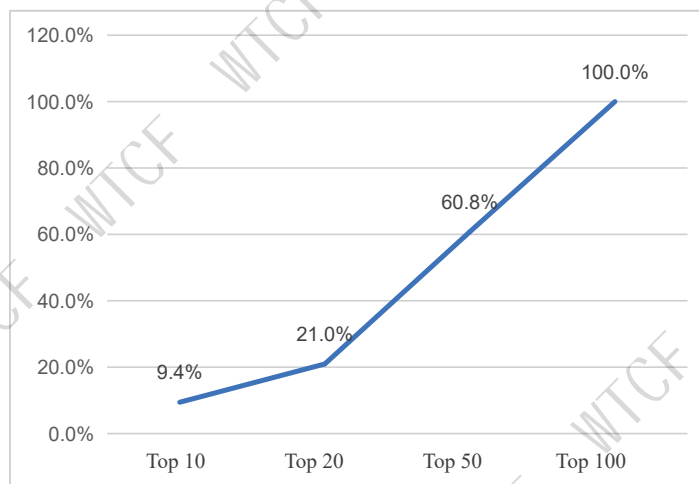
Paris maintained its position as the global leader in popularity due to international events such as the 2024 Olympics and Paralympics. New York improved its ranking by two positions in 2024 compared to 2023, thanks to events such as the US Open and the inaugural FIFA Club World Cup. In terms of major festivals and cultural tourism events, Shanghai still ranked among the top 10. The Shanghai Municipal Bureau of Culture and Tourism has set a goal to systematically upgrade cultural and tourism facilities, with cumulative investments of RMB 2 billion planned from 2024 to 2027.

First, hosting influential festivals and events can effectively boost a city's visibility. As shown by the rankings of city popularity, the top 10 cities account for 9.5% of the related resources, a figure that rises to 20.1% for the top 20 and jumps to 63.1% for the top 50. This shows that as the ranking scope expands, the resource concentration effect for major festivals and cultural tourism events is significantly enhanced. High-profile cities can continuously enhance their competitiveness in the rankings by creating distinctive festivals and events and enriching cultural tourism experiences. This will also realize the transition from "attracting visitors" to "building reputation".



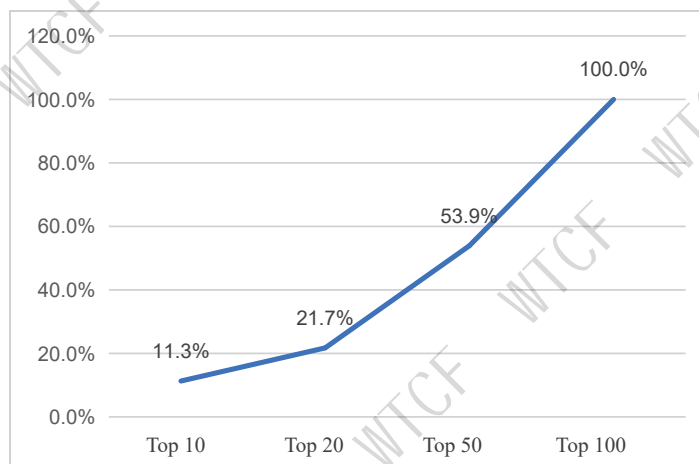
Impact of Well-known Festival Activities on City Popularity Ranking

Second, hosting top-tier international sports events is an effective way to enhance a city's global influence. These events not only attract significant attention from global tourists and media agencies but also considerably accelerate a city's internationalization process. The top 10 cities account for 9.4% of the related resources, a figure that rises to 21% for the top 20 and jumps to 60.8% for the top 50. This shows that cities hosting more major international sports events are more likely to gain an advantage in popularity rankings. These events help cities improve their popularity rankings by attracting global attention and strengthening the city's sports identity. As the ranking scope expands, the clustering effect of event resources becomes increasingly significant, making them a key driver for enhancing city popularity.



Impact of Major International Sports Events on City Popularity Ranking

Third, international MICE activities show a trend of being concentrated in leading tourism cities. As shown by city popularity rankings, the frequency of hosting high-end business events correlates with a city's international status. The number of international MICE activities has a significant impact on the city popularity ranking. The corresponding shares for the top 10, 20, and 50 cities are 11.3%, 21.7%, and 53.9%, respectively, with the share continuously increasing as the ranking scope expands. This reflects the concentration of international MICE resources in high-profile cities. By attracting visitor flows and promoting the city's image, these events help cities enhance their popularity and ranking, making them a key factor in building city influence.



Impact of Major International MICE Activities on City Popularity Rankings

Cultural Resources Play a Pivotal Role in Enhancing City Popularity

Global destination rankings show that cities with deep cultural heritage dominate the popularity index. The proportion of related facilities among the top 10, 20, and 50 cities gradually increases, with 8.7% for the top 10 cities, 20.6% for the top 20, and 50% for the top 50. These facilities are a concrete manifestation of a city's cultural and sports strength. Relevant examples include Beijing's "Dual Olympic" venues and Paris's iconic cultural and sports buildings. By hosting sports events and cultural performances, these cities can attract global attention, promote their image, and thus enhance their popularity rankings. Moreover, a higher ranking means that the city has a stronger ability to gather high-quality facility resources. This creates a positive cycle of "facility empowerment, traffic aggregation and popularity enhancement", making it a key force in shaping the city's ranking advantage.



Madrid Spain

Industry Prosperity Evaluation Index

Sub-index Rankings of Industry Prosperity (2024-2025)

Rankings by Industry Prosperity (2024-2025) (Top 20)

According to the rankings by industry prosperity in 2024-2025, the top 10 cities are mostly from the Americas, Europe and the Asia-Pacific region, with six cities from the Americas, two from the Asia-Pacific region, and two from Europe. Among the top 20 cities, there are nine from the Asia-Pacific region, eight from the Americas, and three from Europe.

Table 10 Rankings by Industry Prosperity of World Tourism Cities (2024) (Top 20)

Ranking	City	Country	Sector	Ranking	City	Country	Sector
1	New York	United States	Americas	11	Hong Kong	Hong Kong, China	Asia-Pacific
2	Tokyo	Japan	Asia-Pacific	12	Shanghai	Chinese mainland	Asia-Pacific
3	Los Angeles	United States	Americas	13	Moscow	Russia	Europe
4	London	United Kingdom	Europe	14	Jakarta	Indonesia	Asia-Pacific
5	Paris	France	Europe	15	Sydney	Australia	Asia-Pacific
6	Chicago	United States	Americas	16	Toronto	Canada	Americas
7	San Francisco	United States	Americas	17	Melbourne	Australia	Asia-Pacific
8	Osaka	Japan	Asia-Pacific	18	Mexico City	Mexico	Americas
9	Washington	United States	Americas	19	Beijing	Chinese mainland	Asia-Pacific
10	Miami	United States	Americas	20	Guangzhou	Chinese mainland	Asia-Pacific

Sub-index Rankings of Industry Prosperity (2024-2025) (Top 10)

First, regarding the size of the hotel and accommodation industry, six of the top 10 cities are located in the Americas, with the remaining cities distributed across Asia and Europe. New York led by a remarkable margin, with its hotel and accommodation industry valued at approximately USD 118.1 billion, far surpassing the second-ranked Tokyo. Tokyo and Los Angeles can be categorized as second-tier cities. London, Paris, Chicago, San Francisco, Osaka, and Washington, D.C., can be classified as third-tier cities.

Second, regarding the scale of retail commerce, the global retail market exhibits a clear regional concentration. New York ranked first globally with a retail scale of USD 205.4 billion, demonstrating its strong market dominance. Tokyo (USD 129.6 billion) and Los Angeles (USD 128.8 billion) followed in second and third places, respectively, forming a clear second tier.

Third, in terms of regional distribution, the cities leading in global retail commerce scale are mainly concentrated in the US, Japan, and Europe. American cities are particularly prominent. In addition to New York, cities such as Los Angeles (USD 128.8 billion), Chicago, Washington, D.C., and San Francisco also ranked among the global leaders. Europe was represented by international metropolises such as Paris and London. Tokyo and Osaka, two Japanese cities in Asia, were among the top leaders.

Notably, compared to the same period last year, the scale of the retail industry in major global cities generally showed an upward trend. This reflects the active performance of the consumer market in the context of the sustained recovery of the global economy, and highlights the resilience and development potential of the global consumer sector.

Fourth, regarding the size of the tourism catering industry, New York ranked first with a valuation of USD 145.8 billion, followed by Tokyo at USD 72.9 billion and Los Angeles at USD 69.9 billion. Six of the top 10 cities were in the US, namely New York, Los Angeles, Chicago, San Francisco, Washington, and Miami. Japan, the UK, and France occupied the remaining four spots. In comparison to the same period last year, the size of the tourism catering industry showed an overall downward trend.

Fifth, regarding the size of the leisure and entertainment industry, New York exceeded the USD 100 billion mark in 2024 again. Tokyo and Los Angeles followed behind, with some growth compared to last year. Chicago, London, Paris, and San Francisco had similar industry scales, which ranged between USD 30 billion and USD 50 billion. The size of the leisure and entertainment industry is generally close to last year's figures, maintaining a stable trend.

Sixth, in terms of the size of the tourism service industry, New York continued to lead by a significant margin with an industry scale exceeding USD 25 billion. Tokyo, Los Angeles, and Chicago maintained their trends from last year, each with an overall scale exceeding USD 10 billion. From the leisure and entertainment industry growth index, Miami and Osaka saw increases of 13 and 11, respectively, compared to 2023. The overall size of the leisure and entertainment industry in the top 10 cities showed a growth trend compared to 2023.

Seventh, regarding the size of the tourism transportation industry, Tokyo demonstrated its advantages as a transportation hub and led the world with an industry scale of nearly USD 4 billion. New York, London, and Paris, as the most important transportation hubs in Europe and the Americas, followed closely behind. Shanghai, Beijing, and Hong Kong have seen an increased industry scale with the implementation of China's visa-free policy for foreign visitors in the second half of the year. This highlights the key role of core Chinese cities including Beijing and Shanghai as global transportation hubs.

Changes in Annual Rankings by Industry Prosperity (2024-2025) (Top 10)

Table 11 Changes in Annual Rankings by Industry Prosperity for Top 10 Cities

Ranking	2024	2023
New York	1	2
Tokyo	2	1
Los Angeles	3	9
London	4	3
Paris	5	4
Chicago	6	11
San Francisco	7	10
Osaka	8	7
Washington	9	6
Miami	10	13

Analysis of the Characteristics of Rankings by Industry Prosperity (2024-2025)

Industry Resources are Rapidly Concentrating in Advantageous Areas

As shown by the industry prosperity rankings for world tourism cities, the top five cities in terms of the size of the hotel and accommodation industry, the retail industry, the catering industry, the leisure and entertainment industry, the tourism service industry, and the tourism transportation industry are all super-large global hub cities. The average industry prosperity index of the top four tourism cities is 79.1, which is 29.1 points higher than the average prosperity index. The average industry prosperity index of the top 10 tourism cities is 64, which is 14 points higher than the average prosperity index. Leading tourism cities have shown a better recovery in prosperity.

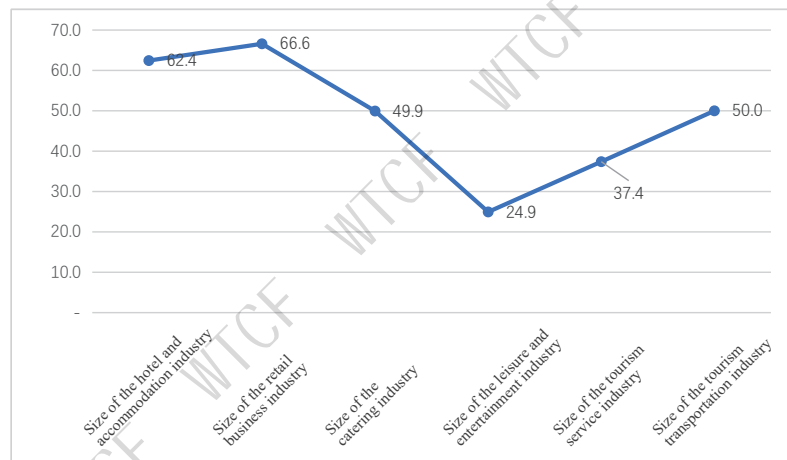
Table 12 Average Industry Prosperity Index for Cities with Different Rankings

City	Industry Prosperity Index	Accommodation industry index	Commercial service index	Tourism catering index	Leisure and entertainment index	Tourism service index	Tourism transportation index
CR4	79.1	98.5	98.5	97.7	97.7	98.0	96.7
CR10	64.0	81.2	95.3	95.4	94.8	93.9	94.5
CR20	64.1	82.7	89.7	89.4	88.7	89.1	89.8
CR50	54.8	68.8	75.1	74.9	75.2	75.1	75.1
Average of sample cities	50	50	50	50	50	50	50

Note: CR4 represents cities ranking among the top four for this index, with CR10 for the top ten, CR20 for the top 20, and CR50 for the top 50.

Tourism Service and Transportation Sectors Form the Dual Engines of Industry Recovery

The top 10 cities in terms of industry prosperity exhibit a differentiated competitive landscape across the six industry dimensions, including tourism transportation and travel services. New York has achieved a breakthrough in multiple dimensions to secure the top ranking, with significant advantages in foundational industries such as travel services and leisure & entertainment. Focusing on dimensions such as travel services and retail commerce, Tokyo has solidified its position as a core city in the Asia-Pacific region with multiple second-place rankings. Traditional cities like Paris and London have maintained stable competitiveness in consumption scenarios such as catering and retail. Overall, the top 10 cities leverage their strengths in relevant industry dimensions to form a prosperity support model of "core industry leadership and synergistic multi-industry development".



Industry Prosperity Index of 100 Sample Cities



London UK

The Industry Prosperity in the Americas Remains Strong

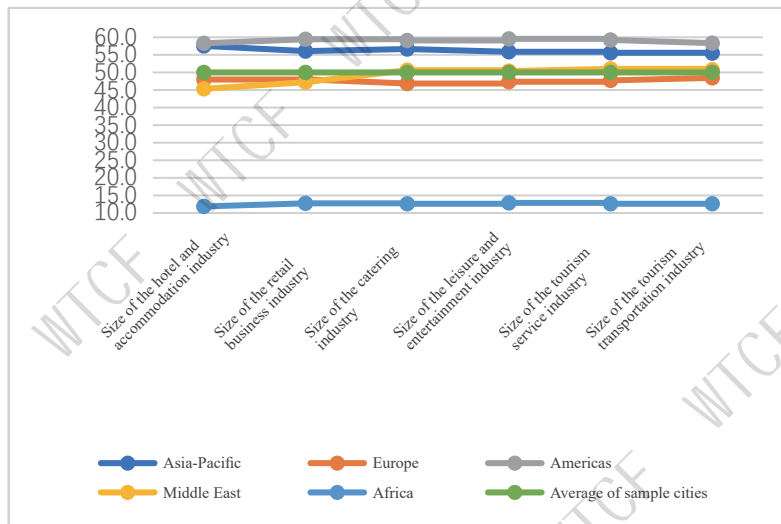
The industry prosperity of world tourism cities shows a rich and diverse development trend. Cities in Asia, Europe, and the Americas each have their strengths in the tourism industry, further highlighting the multi-polar trend in the global tourism industry. Cities are employing various strategies to compete for a share of the global tourism market and continuously improve their tourism service quality and international influence.

Cities in the Americas have shown exceptional performance in industry prosperity this year, with six cities appearing on the list. New York continues to lead in rankings by achieving a comprehensive upgrade in its tourism sector. In terms of hotel and accommodations, luxury hotels such as Four Seasons and St. Regis have modernized their guest rooms while introducing smart home systems to enhance customer convenience and comfort. Meanwhile, areas such as Midtown Manhattan have seen a surge of novelty-designed, affordable boutique hotels and hostels, thus enriching accommodation options. When it comes to retail business, Fifth Avenue continues to attract global top-tier brands to open flagship stores. The Times Square area strengthens its trendy retail formats with internet-famous stores and concept stores where fashion pop-up events are regularly held. This is complemented by digital interactive shopping facilities to stimulate consumer enthusiasm. In the catering sector, New York brings together global cuisine, with the rise of fusion restaurants and frequent food festival events such as NYC Restaurant Week. In the leisure and entertainment sector, Broadway continuously produces new shows, city parks host numerous outdoor concerts and art festivals, and emerging projects such as immersive theater and virtual reality experience centers are flourishing. The tourism service industry has launched multilingual travel guides both online and offline, improved smart guide systems, and set up one-stop service centers at airports and scenic areas.

The Asia-Pacific region also has two cities on the list. Tokyo maintained its leading position in 2024, making it the city with the highest prosperity in Asia. In the tourism service sector, Tokyo's luxury hotel occupancy rate index and catering consumption index both rank among the top in the Asia-Pacific region. The Japanese government has implemented policies to relax entry restrictions and provide nationwide travel support, including the New Tourism Nation Promotion Basic Plan and the Inbound Tourism Expansion Initiative for the New Era. Thanks to these measures, Osaka has managed to retain its top-ten status. In China, the further relaxation of visa policies has attracted global tourists from countries such as South Korea, thus significantly boosting the rapid recovery of the tourism economy. In 2024, China's domestic tourism market started strongly and maintained growth, with 5.615 billion domestic trips, a year-on-year increase of 724 million (14.8% growth). The total spending of domestic tourists reached RMB 5.75 trillion, a year-on-year increase of RMB 0.84 trillion (17.1% growth).

Table 13 Sub-indexes of Industry Prosperity in Various Regions

Region	Accommodation industry index	Commercial service index	Tourism catering index	Leisure and entertainment index	Tourism service index	Tourism transportation index
Asia-Pacific	57.5	56.1	56.7	55.9	55.6	55.5
Europe	48.0	48.0	46.8	47.3	47.7	48.5
Americas	58.3	59.4	59.1	59.5	59.2	58.3
Middle East	45.3	47.2	50.6	50.4	51.0	50.8
Africa	11.9	12.8	12.6	12.9	12.6	12.6
Average of sample cities	50.0	50.0	50.0	50.0	50.0	50.0



Average Scores of Sub-indexes of Industry Prosperity in Various Regions

City Intelligence Evaluation Index

Sub-index Rankings of City Intelligence (2024-2025)

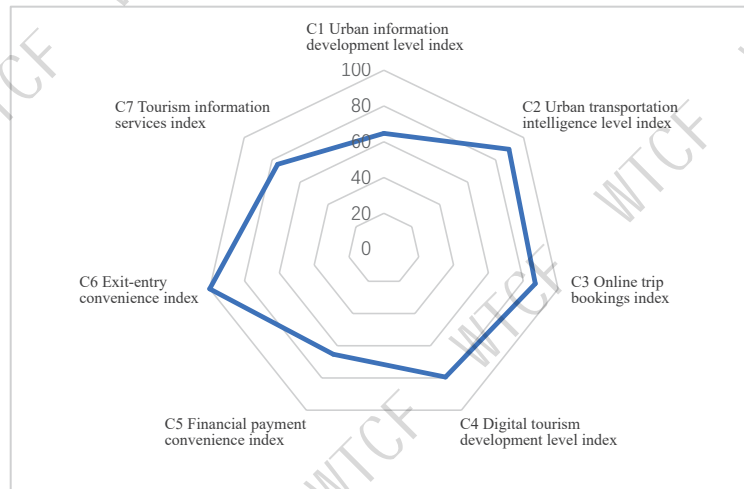
Rankings by City Intelligence (Top 20)

According to the ranking list of city intelligence, most of the top 10 cities are from the Americas and the Asia-Pacific region, with five from the Americas and five from the Asia-Pacific region. Among the top 20 cities, there are seven from the Americas, 12 from the Asia-Pacific region, and one from the Middle East.

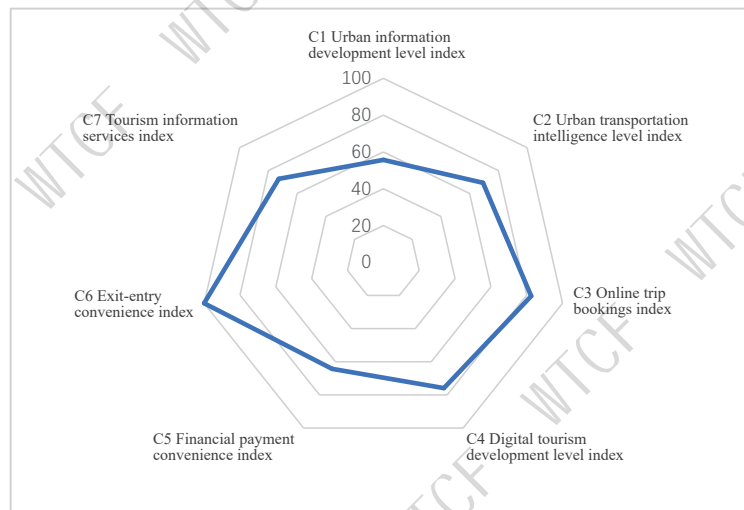
Table 14 Rankings by City Intelligence (2024-2025) (Top 20)

Ranking	Country	City	Sector	Ranking	Country	City	Sector
1	United States	New York	Americas	11	Chinese mainland	Chengdu	Asia-Pacific
2	Macao, China	Macao	Asia-Pacific	12	Japan	Tokyo	Asia-Pacific
3	Hong Kong, China	Hong Kong	Asia-Pacific	13	Chinese mainland	Qingdao	Asia-Pacific
4	Chinese mainland	Hangzhou	Asia-Pacific	14	Chinese mainland	Xi'an	Asia-Pacific
5	Chinese mainland	Shanghai	Asia-Pacific	15	Turkey	Istanbul	Middle East
6	Chinese mainland	Beijing	Asia-Pacific	16	Chinese mainland	Tianjin	Asia-Pacific
7	United States	Washington	Americas	17	United States	Chicago	Americas
8	Canada	Toronto	Americas	18	Chinese mainland	Chongqing	Asia-Pacific
9	Canada	Ottawa	Americas	19	United States	Los Angeles	Americas
10	United States	San Francisco	Americas	20	Chinese mainland	Kunming	Asia-Pacific

Sub-index Rankings of City Intelligence (Top 10)



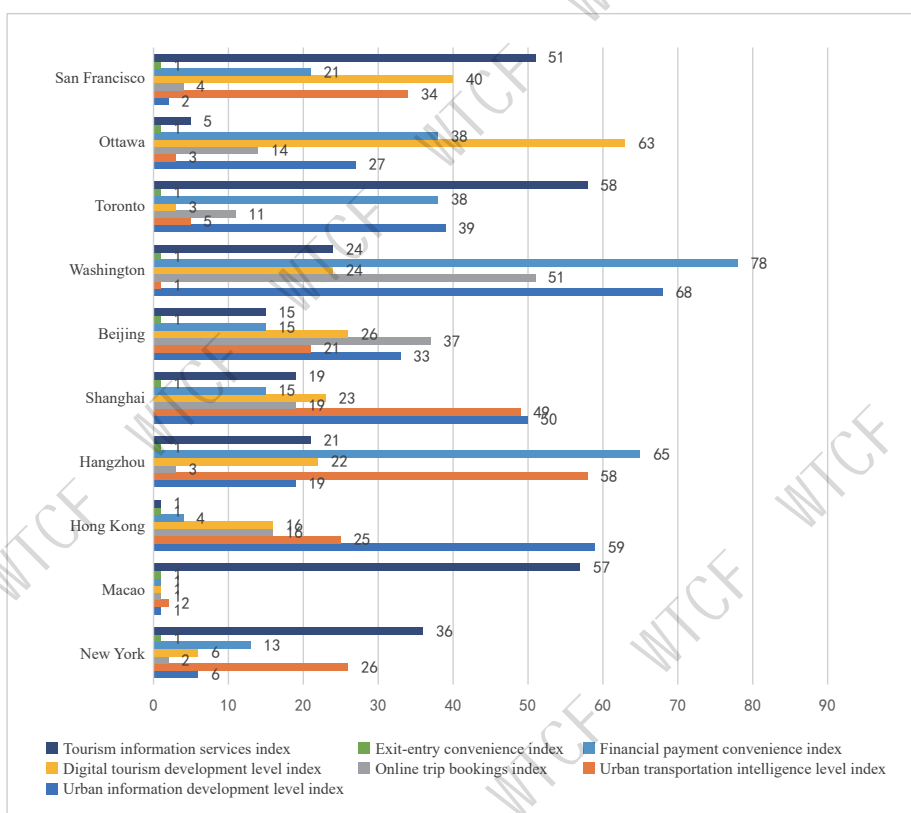
Average Scores of Sub-indexes of City Intelligence for Top 10 Tourism Cities



Average Scores of Sub-indexes of City Intelligence for Top 20 Tourism Cities

Table 15 Average Scores of Intelligence Sub-indexes of Cities with Different Rankings

City	Top 10	Top 20	Top 100
C1 Urban information development level index	64.7	55.7	48.3
C2 Urban transportation intelligence level index	89.5	69.3	52.7
C3 Online trip bookings index	86.9	82.5	50.3
C4 Digital tourism development level index	79.4	75.9	50.7
C5 Financial payment convenience index	65.3	64.3	50.5
C6 Exit-entry convenience index	100.0	100.0	87.3
C7 Tourism information services index	76.0	72.8	49.7



Sub-index Rankings of City Intelligence (Top 10)

Changes in Annual Ranking by City Intelligence (2024-2025) (Top 10)

The annual rank of city intelligence in 2024-2025 shows significant changes compared to 2023. New York jumped from 8th place to the top spot. Macao, due to insufficient expansion in its digital industry, fell from the 1st position to the 2nd. Hong Kong steadily rose to the 3rd position. Cities that notably improved their rankings in 2024 include Hangzhou (from 40th to 4th), Toronto (from 19th to 7th), and Beijing (from 26th to 6th).

Table 16 Changes in Annual Rankings by City Intelligence (2024)

	2024-2025	2023
New York	1	8
Macao	2	1
Hong Kong	3	4
Hangzhou	4	40
Shanghai	5	3

	2024-2025	2023
Beijing	6	26
Washington	7	31
Toronto	8	19
Ottawa	9	18
San Francisco	10	7



Macau China

Analysis of Characteristics of Rankings by City Intelligence (2024-2025)

Digitalization Empowers the Development of Tourism Cities and Enhances Visitor Experience

Based on the individual sub-index of city intelligence for 100 sample tourism cities, the digitalization of the global tourism industry in 2024 showed a steady upward trend. The development of smart tourism has transitioned from isolated technological applications to the construction of systematic ecosystems. From infrastructure to service experiences, digital technology is reshaping the landscape of the tourism industry in all aspects.

First, optimizing visa policies has become a primary means of attracting tourists. The tourism information services index, digital tourism development level index, and exit-entry convenience index have all maintained leading positions and remained at high levels. Each of them increased by 1% to 3% compared to last year. This reflects the continuous improvement in the application of tourism information technology and the quality of services in tourism cities. By June 2025, the number of countries eligible for China's 240-hour visa-free transit policy had increased to 55. As a major international gateway, Beijing is enhancing its international air route networks, streamlining customs clearance procedures, simplifying registration processes, offering one-stop visa issuance service, and supporting "tap-and-go" access to the urban rail transit system via foreign bank cards. These measures significantly enhance China's attractiveness to international tourists. Mexico announced plans to launch a new e-visa system in 2025, in collaboration with Canada, South Korea, Germany, Switzerland, Japan, and the US, aiming to revolutionize travel procedures. Several regions, represented by China, have introduced various policies such as visa on arrival, e-visa, and visa-free travel to significantly improve the convenience of entry and exit.

Second, technology enriches tourism scenarios and enhances the travel experience. The trend of digital tourism development and the gradual opening of global tourism policies continue to attract investments in urban smart construction and improve the quality of information services. Digital technologies are transcending physical boundaries to create immersive, next-generation tourism scenarios. In 2024, Beijing launched the "Exploring the Cultural Origins of the Grand Canal" series, which became a new highlight. Leveraging historic sites along the Tongzhou section of the Grand Canal, such as Zhangjiawan Ancient Town and Huoxian Ancient Town, the city offered a range of unique projects, including the "Immersive Theater at the Canal Dock" and "Ancient Ship Workshop Experience Course". Furthermore, holographic night projections restored the prosperity of canal transportation during the Ming and Qing dynasties, thereby enriching the content and encouraging spending opportunities for international tourists during their stay. In 2024, Tokyo's tourism authority partnered with Roblox to launch "HELLO! TOKYO FRIENDS", a virtual experience of Tokyo. Users can search for treasures in the MODERN TOKYO zone online and take photos with characters offline via the "TOKYO HUNT!" app. This forms a seamless loop of "virtual experience and real-world check-in". Complementary offline activities integrate manga-style puzzle-solving into subway passes, allowing tourists to explore the city through narrative-driven adventures.

The Convenience of Global Financial Payments has Improved, but Regional Disparities still Exist

Among the top 10 cities in terms of city intelligence, the financial payment convenience index decreases to 42 as the ranking drops. Furthermore, the top 10 cities in terms of city intelligence account for 19.6% of the financial payment convenience index, with the top 20 for 28% and the top 50 for 70.2%. These figures have all improved compared to last year. In Asia, particularly in China, mobile payment has become the mainstream payment channel, with a penetration rate of 86% — the highest globally. South Korea, leveraging "U-City" smart infrastructure, boasts over 70 million mobile users, with more than 80% of its residents equipped with smartphones. This near-universal hardware accessibility has removed technical barriers to electronic payments. Almost all restaurants and service providers are equipped with cashless payment terminals, and major cities like Seoul and Busan have essentially achieved cashless transactions in tourism consumption scenarios. In contrast, many countries in Europe and North America still rely primarily on credit cards and cash. When tourists travel across regions, different payment habits and region-specific payment barriers significantly will lower the quality of travel experiences. Although major tourist destinations including Spain and the Netherlands are promoting electronic payments, their overall penetration rate remains far below 50%. Many small and medium-sized merchants resist upgrading payment terminals due to high transaction fees. In India, cities such as Mumbai and New Delhi remain heavily cash-dependent, with cash transactions accounting for 70% of all payments, resulting in a low financial payment convenience index score of 36.3. Moreover, digital payments have brought new challenges. A few years ago, Marriott suffered a massive data breach that compromised the personal and financial data of millions of global customers — impacting major OTA platforms including Booking.com, Expedia, and Agoda. This has led to a decline in trust in smart payments among some travelers.



Seoul South Korea

The Asia-Pacific Region Boasts Distinct Advantages in City Intelligence

According to the ranking list of city intelligence, the top 10 cities are mostly from the Americas and the Asia-Pacific region, with five cities from the Asia-Pacific region, five from the Americas, and one from the Middle East. Among the top 20 cities, there are seven from the Americas, one from the Middle East, and twelve from the Asia-Pacific region.

The Asia-Pacific region leads in smart tourism. Compared to 2023, the proportion of the top 10 cities in terms of city intelligence in 2024 has changed across regions. The Asia-Pacific region holds five of the top 10 spots, with most of these cities being in China. Several Chinese cities have set benchmarks for replicable practices. For example, customs authorities in Macao, China have further optimized electronic services by launching the mobile app, "Macao Customs", enabling tourists to easily access the latest service information and updates. To provide a more diverse range of experiences, the Museum of Macao has introduced the mobile app, "Museum of Macao AR/VR Guide". This app uses augmented reality (AR) and virtual reality (VR) technologies to create an immersive experience, thus enabling users to virtually visit the museum and explore exhibits along a guided tour. In Hangzhou, China, "Hang Xiaoyi", an intelligent platform for cultural tourism, was launched to improve visitor experience in 2024. This service, which is available through the Alipay platform, covers over 40,000 service points across the city. Tourists can access various tourism services by simply tapping a smart sticker with their phones. The West Lake Scenic Area features a "one-click smart tour" system that provides precise information services and rescue functions. Regarding the digitalization of cultural heritage, the Archaeological Ruins of Liangzhu City developed the "Liangzhu VR Space" project which enables visitors to experience life in the ancient Liangzhu city of 5,000 years ago via VR technology. The park also achieved full 5G coverage and deployed 10 driverless sightseeing cars and patrol robots. Regarding the optimization of scenic area management, the West Lake Scenic Area has adopted various smart systems. It adjusts park entrance channels using LBS heat maps and employs smart cameras to monitor visitor emotions and provide corresponding services. Regarding data integration and governance, Hangzhou has established a cultural tourism data center to enable rapid response and handling of complaints. Beijing, as a megacity with over 20 million people, achieves its high degree of city intelligence through powerful overall digital capabilities. The coverage rate of digital payments in Beijing is nearly 100%, and almost all tourism consumption scenarios can be realized without cash. This has formed the "circulatory system" of smart tourism. Public transportation, including buses and subways, can be accessed using app scans or mobile NFC functions. Shared bicycles have been fully integrated with electronic fence technology, enabling bike deployment based on user demand at any time to solve short-distance travel issues for tourists. The high-density coverage of ride-hailing services, smart hotels, smart ordering, and convenient food delivery services greatly enhances the tourist experience. Map apps like Baidu Maps and Amap provide real-time traffic conditions, bus arrival predictions, and subway crowding information, helping tourists optimize their travel routes. 5G networks and free public Wi-Fi hotspots in major attractions ensure uninterrupted, high-speed connectivity for digital experiences. As China's comprehensive hub for science and technology innovation, Beijing leverages big data and artificial intelligence to deliver an extremely convenient smart tourism ecosystem.

The Global AI-driven Tourism Market is in a Faster-growing Phase

Since 2024, global travelers have increasingly shifted their trip planning and booking activities to cloud-based platforms. The online trip bookings index has increased by 4% compared to 2023, with OTA platforms dominating the travel consumption portal. The strong demand for personalized travel experiences and intelligent solutions has driven the widespread application and innovative development of AI technology in the tourism industry. Major OTAs are racing to launch AI-powered travel assistants. For example, Mafengwo launched the "AI Travel Full-chain Solution", which generates personalized itineraries through AI planning and provides services such as real-time translation. Destination intelligence platforms like "AI-aided Guizhou Tour" have been upgraded from conversational tools to structured service platforms. Smart guide products such as the AI-powered "Xiaoma Robot" are designed to further meet tourists' local travel needs. Tongcheng Travel, in collaboration with DeepSeek, has developed "Chengxin AI" (DeepTrip), which can deeply understand users' implicit needs based on its hundreds of millions of pieces of users' travel behavior data and comprehensive cultural and tourism resource library. This enables a closed-loop process from "AI recommendation" to "AI decision execution and booking execution". Agoda introduced an AI chatbot named "Property AMA Bot", which integrates Agoda's internal systems with ChatGPT-based technology and real-time property data. It can handle over 30,000 hotel-related queries daily, aiming to provide travelers with immediate, hotel-specific answers. The Vietnam National Administration of Tourism launched the national tourism data platform "Visit Vietnam", which integrates an AI Travel Assistant that can automatically generate personalized itineraries and complete service bookings.¹ According to a Statista report, the global AI tourism market size is expected to reach USD 12.6 billion by 2025, with a compound annual growth rate of 29.3%.

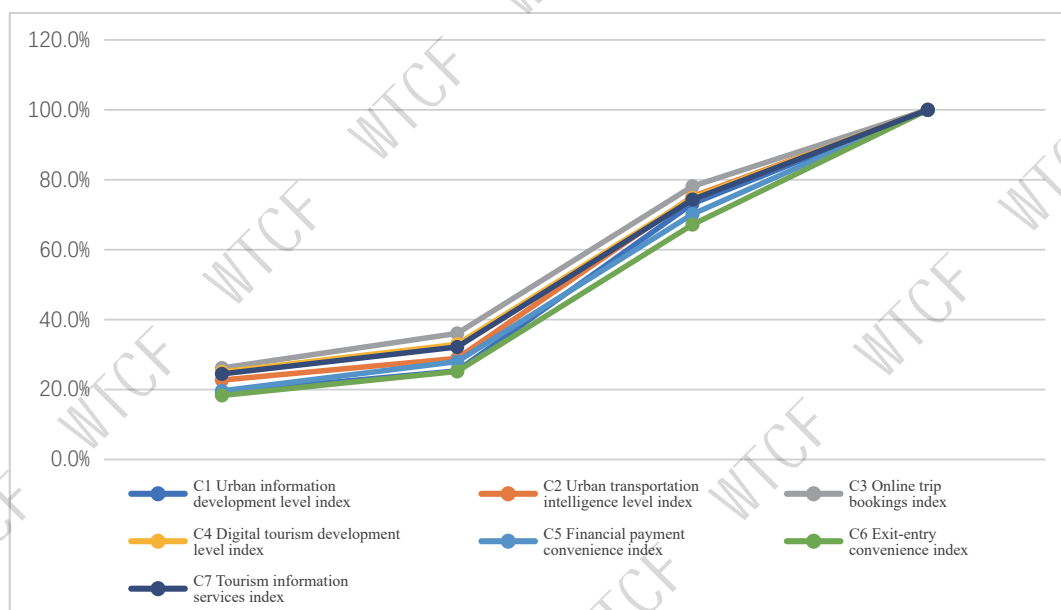


Singapore

¹ Statista is a leading global statistics platform that provides market data, research reports, and analysis tools for 170 industry segments across over 150 countries worldwide.

Table 17 Development Level of Sub-indexes of 100 Sample Cities

City	C1 Urban information development level index	C2 Urban transportation intelligence level index	C3 Online trip bookings index	C4 Digital tourism development level index	C5 Financial payment convenience index
Top 10 tourism cities	19.2%	22.7%	26.2%	25.1%	19.6%
Top 20 tourism cities	25.3%	28.9%	36.1%	33.0%	28.0%
Top 50 tourism cities	73.2%	75.2%	78.1%	74.9%	70.2%
Top 100 tourism cities	100.0%	100.0%	100.0%	100.0%	100.0%



Intelligent Development Level of 100 Sample Cities

Tourism Safety Evaluation Index

Sub-index Rankings of Tourism Safety (2024-2025)

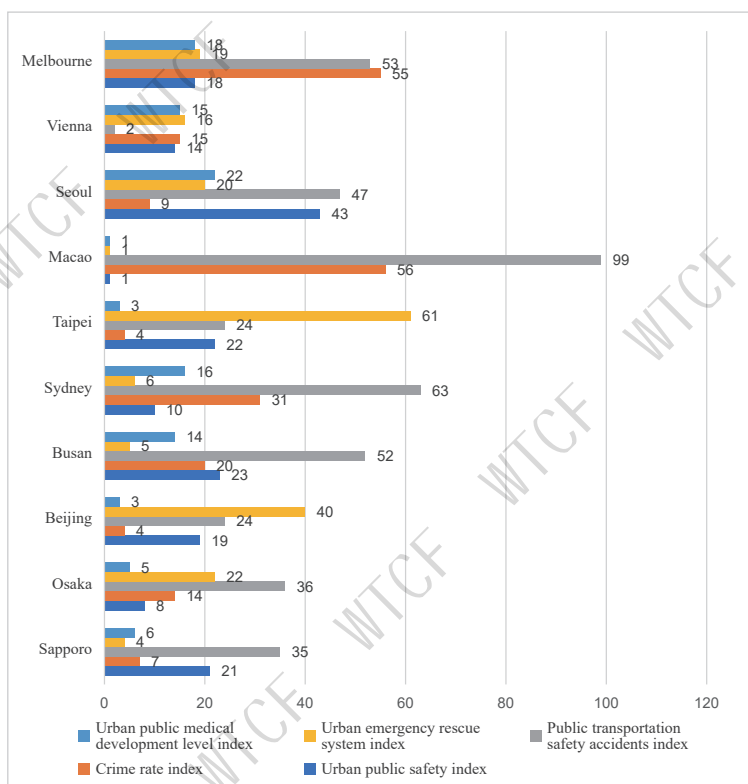
Rankings by Tourism Safety (2024-2025) (Top 20)

According to the ranking list of tourism safety, nine of the top ten cities are in the Asia-Pacific region and one is from Europe, with none from the Middle East or the Americas. Among the top 20 cities, 12 are from the Asia-Pacific region, six from Europe, none from the Americas, and two from the Middle East.

Table 18 Rankings by Tourism Safety (2024-2025) (Top 20)

Ranking	Country	City	Sector
1	Japan	Sapporo	Asia-Pacific
2	Japan	Osaka	Asia-Pacific
3	Chinese mainland	Beijing	Asia-Pacific
4	Korea	Busan	Asia-Pacific
5	Australia	Sydney	Asia-Pacific
6	Taiwan, China	Taipei	Asia-Pacific
7	Macao, China	Macao	Asia-Pacific
8	Korea	Seoul	Asia-Pacific
9	Austria	Vienna	Europe
10	Melbourne	Australia	Asia-Pacific
11	Munich	Germany	Europe
12	Lisbon	Portugal	Europe
13	Tokyo	Japan	Asia-Pacific
14	Amsterdam	Netherlands	Europe
15	Helsinki	Finland	Europe
16	Doha	Qatar	Middle East
17	Guangzhou	Chinese mainland	Asia-Pacific
18	Shanghai	Chinese mainland	Asia-Pacific
19	Abu Dhabi	United Arab Emirates	Middle East
20	Prague	Czech	Europe

Sub-index Rankings of Tourism Safety (2024-2025) (Top 10)



Sub-index Rankings of Tourism Safety among Top 10 Cities (2024-2025)

Note: The rankings of crime rate and public transportation safety accidents have been converted from negative to positive. A higher ranking represents a higher level of urban tourism safety.

Analysis of Characteristics of Tourism Safety Ranking (2024-2025)

The Tourism Security Situation in Major Global Cities Generally Remains Stable

Overall, the average tourism safety index for the 100 sample tourism cities in 2024 slightly decreased to 69.9 compared with 2023. This reflects the need for some cities to strengthen their efforts in ensuring tourism safety.

There are notable differences in development levels across various sub-indexes, and different cities have different priorities in urban safety construction. For individual indexes, there is still room for improvement. For example, Busan ranks 6th in the urban emergency rescue system index but only 52nd in the public transportation safety accidents index. This indicates weaknesses in its urban public transportation safety management.

East Asia Continues to Lead Global Tourism Safety Rankings

Overall, cities in the Asia-Pacific region and Europe have the highest urban tourism safety index, followed by the Middle East. Africa and the Americas rank relatively lower. Among the top 20 cities, twelve are from the Asia-Pacific region, with Beijing climbing six places and Taipei climbing eleven places compared to 2023. Under the influence of the pandemic, Asia-Pacific cities invested significantly more in tourist safety than their European and American counterparts, and their related measures were more comprehensive. Major tourism cities in the Asia-Pacific region generally prioritize the scientific assessment and management of tourist service capacity in scenic areas. Large international cities, represented by Beijing and Shanghai, typically conduct safety inspections of tourism facilities in advance and perform stress tests simulating extreme crowd conditions. This proactive safety management model effectively mitigates various risks associated with overcrowding and ensures high-quality tourist experiences. It has also earned Asia-Pacific tourism cities an international reputation for "safety, reliability, and attentive service". Beijing's public healthcare system is at the forefront in China and globally. Its comprehensive tiered diagnosis and treatment system and robust public health network, along with strong public health response capabilities, allow for rapid responses to public health emergencies. Many large hospitals have international medical departments or provide multilingual services. Translators or translation devices are also in place to effectively address language barriers for foreign tourists. Beijing also requires specific security and medical contingency plans for large-scale events. Through a network of intelligent cameras and sensors, the city monitors and analyzes real-time traffic and crowd conditions in key areas. Hence, the city is capable of predicting congestion and risk points in advance, issuing early warnings, and directing visitor flow to prevent potential issues. These measures significantly enhance Beijing's safety and livability.

Only one of the top 10 cities in terms of tourism safety is from Europe, while nine are from the Asia-Pacific region. It indicates that the latter outperforms the former in this regard.

Public Transportation Systems in Some Tourism Cities Still Face High Risks of Traffic Accidents

The recovery of the transportation sector in world tourism cities in 2024-2025 has been positive. As population density and vehicle ownership continue to increase in large cities, the public transportation safety accident rankings for the top 10 cities in terms of tourism safety are generally low. For instance, Busan ranks 52nd in this index, while Seoul ranks 40th. In recent years, due to labor shortages in South Korea, an increasing num-

ber of elderly individuals aged 65 and above have become taxi drivers. According to a 2024 report, the number of taxi drivers aged 65 and above in South Korea has exceeded 107,000, accounting for approximately 45%, an increase of over 29% compared to 2019. In 2023, the number of traffic accidents caused by drivers aged 65 and above reached 39,614, accounting for 20% of the total and showing a continuous upward trend for three consecutive years. The South Korean government is taking measures, such as extending the duration of pedestrian crossing signals, to improve road safety.

The Emergency Rescue System in Tourism Cities Slightly Improves

According to the sub-index of tourism safety, the urban emergency rescue system index for the 100 sample tourism cities is 58.4, an increase of 0.6 compared with the previous year. The pandemic has prompted tourism cities to further refine their rescue support mechanisms, leading to a systematic enhancement of overall emergency management capabilities. For example, Tokyo's disaster prevention planning system adopts a comprehensive analysis method, including disaster risk assessment, identifying system vulnerabilities, setting planning goals, formulating disaster prevention strategies, and planning implementation steps. Countries in the Asia-Pacific region have established relatively well-developed urban emergency rescue systems. Relevant assessment data indicates that the region performs excellently in building urban emergency rescue capabilities, with Taipei and Sapporo ranking first and second, respectively. Beijing boasts a world-leading urban emergency rescue system with a dense network of 120 and 999 emergency response points, thus ensuring that emergency response services can be delivered in the urban areas within 15 minutes. The widespread installation of AEDs (automated external defibrillators) and fire safety equipment in public places further demonstrates Beijing's commitment to safety.

Table 19 Distribution of Tourism Safety Index for Tourism Cities with Different Rankings

City	D1 Urban public safety	D2 Crime rate	D3 Public transportation safety accidents	D4 Urban emergency rescue system	D5 Urban public medical development level
Top 10 tourism cities	34%	16%	8%	11%	12%
Top 20 tourism cities	54%	28%	17%	23%	26%
Top 50 tourism cities	82%	61%	50%	57%	57%
Top 100 tourism cities	100%	100%	100%	100%	100%

Economic Contribution Evaluation Index

Sub-index Rankings of Economic Contribution (2024-2025)

Rankings by Economic Contribution (2024-2025) (Top 20)

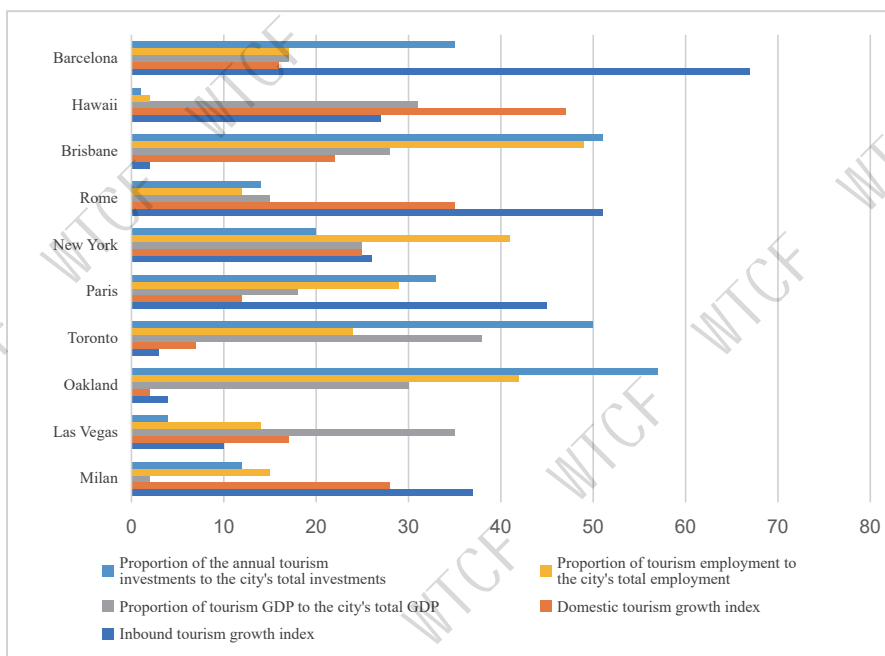
According to the ranking list of city economic contribution, among the top 10 cities, four are from the Americas, four from Europe, two from the Asia-Pacific region, and none from the Middle East. Among the top 20 cities, five are from Europe, nine from the Americas, five from the Asia-Pacific region, and one from the Middle East.

Table 20 Rankings by Economic Contribution (2024-2025) (Top 20)

Ranking	Country	City	Sector
1	Italy	Milan	Europe
2	United States	Las Vegas	Americas
3	New Zealand	Oakland	Asia-Pacific
4	Canada	Toronto	Americas
5	France	Paris	Europe
6	United States	New York	Americas
7	Italy	Rome	Europe
8	Australia	Brisbane	Asia-Pacific
9	United States	Hawaii	Americas
10	Spain	Barcelona	Europe

Ranking	Country	City	Sector
11	Mexico	Mexico City	Americas
12	Australia	Melbourne	Asia-Pacific
13	Greece	Athens	Europe
14	Canada	Ottawa	Americas
15	United States	Miami	Americas
16	United States	San Francisco	Americas
17	United Arab Emirates	Abu Dhabi	Middle East
18	Australia	Sydney	Asia-Pacific
19	Macao, China	Macao	Asia-Pacific
20	Canada	Vancouver	Americas

Sub-index Rankings of Economic Contribution (2024-2025) (Top 10)



Sub-index Rankings of Economic Contribution of Top 10 Cities

Changes in Annual Rankings by Economic Contribution (2024-2025)

Table 21 Changes in Annual Rankings by Economic Contribution for Top 10 Tourism Cities

City	2024-2025	2023
Milan	1	1
Las Vegas	2	2
Oakland	3	10
Toronto	4	23
Paris	5	15

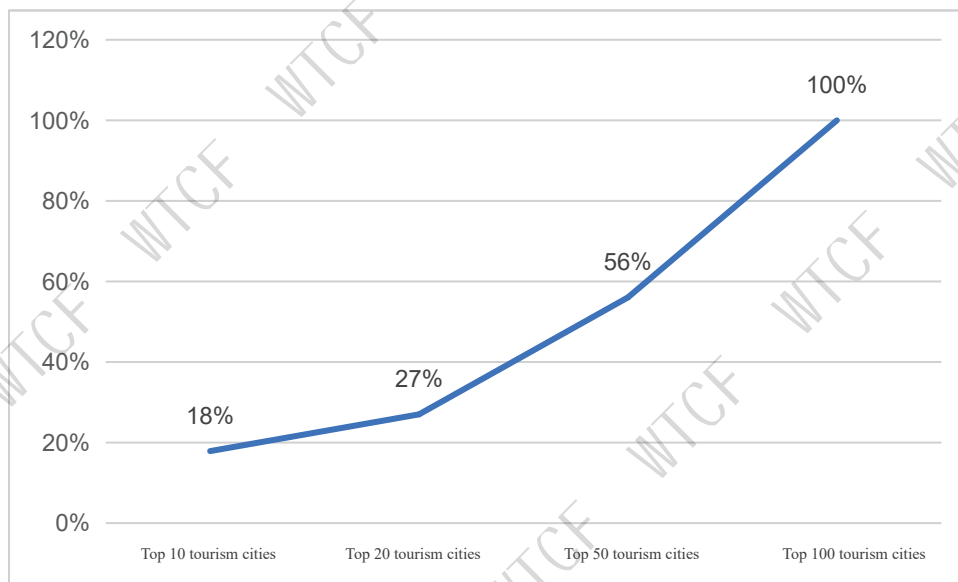
City	2024-2025	2023
New York	6	7
Rome	7	5
Brisbane	8	9
Hawaii	9	6
Barcelona	10	17

Analysis of Characteristics of Rankings by Economic Contribution (2024-2025)

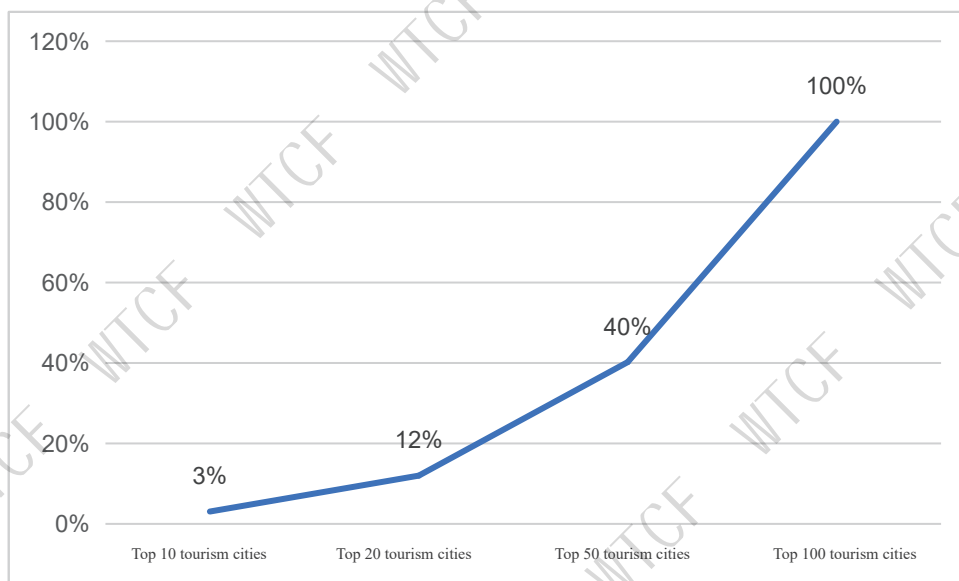
The Urban Tourism Economy has Entered a Full Recovery Phase, with of Growth Momentum Sustained

During 2024-2025, world tourism cities continue to witness the significant contribution of the tourism sector to GDP, with its pillar role becoming increasingly prominent. As tourists purchase urban goods and services and investors continue to invest in the tourism industry, tourism-related GDP has become one of the key revenue sources for city governments. In 2024, among the 100 sample cities, the proportion of tourism employment to the city's total employment reached 5.8%, while the average proportion of urban tourism investments to total social investments was 9.7%.

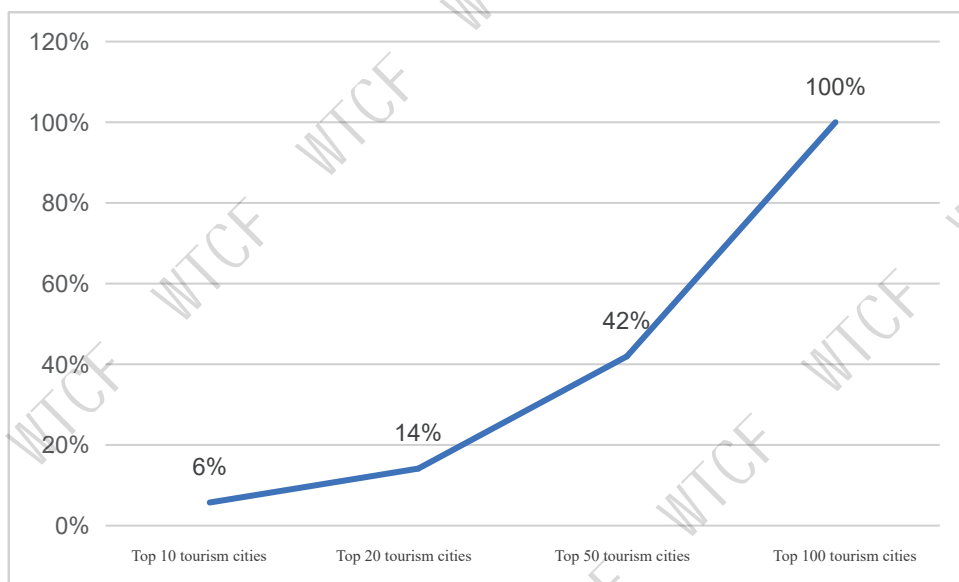
In 2024, the global tourism industry basically completed its recovery. Tourist numbers and industry revenue in many regions globally have surpassed their levels from the same period in 2019. UN Tourism Secretary-General Zurab Pololikashvili said that the recovery of the tourism industry has created millions of jobs, increased tax revenue for related economies, and the global tourism industry has basically completed its recovery process.



Impact of the Proportion of Tourism GDP to Total GDP on Economic Contribution Ranking



Impact of the Proportion of Tourism Employment to Total Employment on Economic Contribution Ranking



Impact of the Proportion of the Annual Tourism Investments to Total Investments on Economic Contribution Ranking

Tourism Cities Usher in a Period of Expanding Resource Demand, Significantly Enhancing Market Investment Value

Based on the proportion of the annual tourism investment to the city's total investment and its impact on the economic contribution ranking, the top 10 cities account for 18%, the top 20 for 27%, and the top 50 for 56%. These figures represent a slight increase compared to 13%, 20%, and 57% in 2023, respectively. Overall, the global tourism industry has largely achieved recovery, with many regions seeing tourist numbers and industry revenue surpassing the levels of 2019.

First, the global tourism industry presented a series of new trends from 2024 to 2025. According to the WTM Global Travel Report, international tourism has not only recovered from the impact of the pandemic but has also surpassed the development levels of 2019. The number of global overnight trips is expected to reach 1.5 billion and surpass the 2019 record. There has also been a significant increase in tourist spending, with global spending on leisure tourism expected to reach USD 5.5 trillion in 2024, an increase of 24% compared to pre-pandemic levels. The global tourism industry is facing new development opportunities, and its outlook is promising.

Second, resource-oriented tourism cities exhibit a higher concentration of tourism investment. Based on the study of the 100 sample cities, resource-oriented cities, due to their industry characteristics, often require sustained capital investment to improve the quality of tourism product supply and enhance supporting infrastructure. These measures aim to attract tourist consumption. Milan, an international fashion hub, and Las Vegas, known for its well-developed casino industry, rank first and second, respectively. Global hub tourism cities, compared to node tourism cities, have a lower proportion of tourism investment. For example, capital cities and economic centers of various countries, such as Rome in Italy and New York in the US, which serve as international commercial, financial, and transportation hubs, often have relatively limited scales of tourism investment. However, resource-oriented tourism cities are facing an important period of transformation the post-pandemic era. They need to continuously increase investment in the tourism sector to drive industry upgrades: on one hand, they must comprehensively enhance the modernization of tourism infrastructure; on the other hand, they need to innovate tourism product offerings, optimize the service system, and strengthen digital marketing capabilities to precisely meet the increasingly diverse consumption needs of tourists.

The Development of International Tourism in Asia and Africa is Accelerating

Since 2024, the international tourism market has rapidly recovered to pre-pandemic levels, but the recovery rates vary significantly across different regions. Tourism cities in the Asia-Pacific region and Africa are leading the recovery of inbound tourism, while the recovery in the Middle East, Americas, and Europe is relatively slower. In terms of the growth rate of inbound tourism, among the 100 sample tourism cities in 2024, Asia-Pacific tourism cities averaged at 30%, which is higher than the Americas. Europe, the Middle East and Africa (with a growth rate of 11.9%) have surpassed pre-pandemic levels, which indicates a faster growth rate. The main reasons are as follows:

First, there are differences in policy openness across regions. The Asia-Pacific region has the fastest growth rate but a lower recovery rate compared to 2019. Destinations like Japan and the Maldives have performed well. China has extended the permitted stay under its visa-free transit policy from 144 hours to 240 hours, thus attracting numerous foreign visitors. Due to a high base, the overall growth of the tourism industry in the Middle East has slowed down, but its recovery compared with the 2019 baseline level is faster. Factors such as visa facilitation policies, investment in large-scale tourism projects, increased air capacity, and diversification of tourism products have jointly driven the growth of inbound tourism in these destinations.

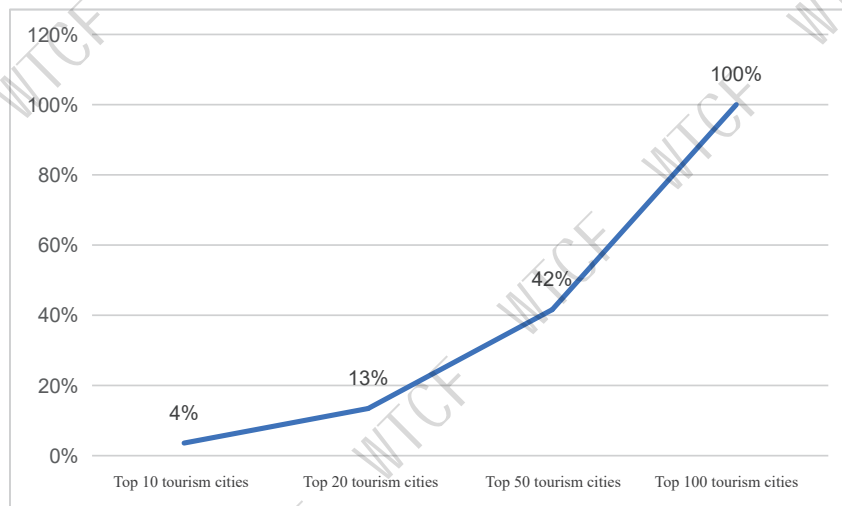
Second, tourism growth in Africa has accelerated, thanks to simplified visa policies, and improvements in transportation and tourism facilities. Kenya implemented a global visa-free policy from January 2024, which allowed visitors to apply for entry through the Electronic Travel Authorization (ETA) system online. This measure has significantly lowered the travel threshold, directly driving a significant increase in the number of international tourists.

The Growth of the International Tourism Market Outpaces that of the Domestic Tourism

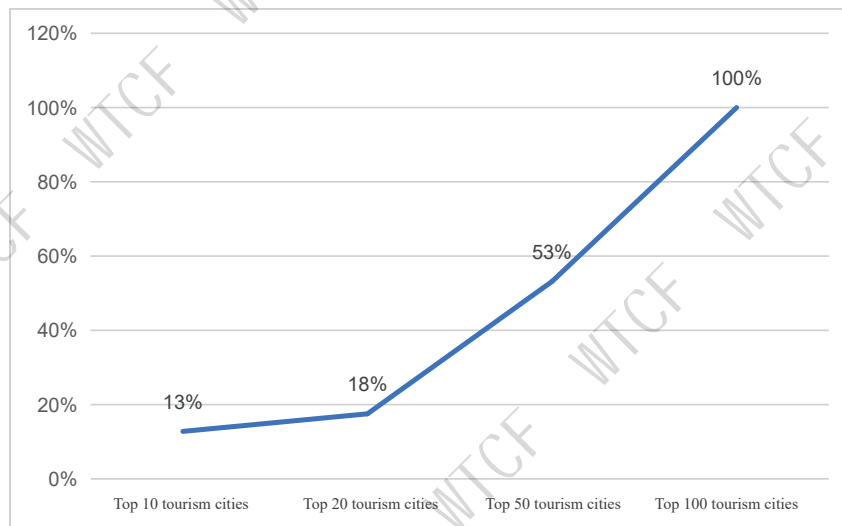
Among the 100 sample tourism cities, domestic tourism achieved varying degrees of growth, with an average growth rate of 7.9%. However, this represents a slowdown compared to the growth rate of 9.3% observed in 2023. In contrast, the international tourism market grew at an average rate of 15.9%, significantly outpacing domestic tourism and reflecting a strong recovery trend in leading tourism cities. Most of the 100 sample cities are international hub cities, intercontinental center cities, and regional node cities. They also serve as international tourist distribution centers and globally renowned tourist destinations. International air capacity only fully recovered in 2024, with long-haul flights showing the most substantial growth. This has provided foundational support for the revival of international tourism in these cities. In 2024, a growing number of countries introduced favorable policies and streamlined entry procedures for inbound tourism, aiming to stimulate economic development. These measures have directly boosted international tourist flows to the sample cities. In addition, favorable exchange rate differences have created a siphon effect for low-cost destinations. For example, emerging destinations such as Bangkok and Istanbul became "cost-effective choices" for international tourists due to their depreciated local currencies. As international tourists extend their stay, it will lead to increased international shopping and experiential service consumption. Furthermore, domestic tourism expe-

rienced a post-pandemic release of pent-up demand, fueling high-speed growth in 2022 and 2023. This high-base growth naturally saw a deceleration in 2024.

It is observed that the Inbound Tourism Growth Index and Domestic Tourism Growth Index account for 4% and 13% of the Economic Contribution Index for the top ten cities, respectively. For the top 20 cities, the figures are 13% and 18%, respectively. For the top 50, the figures stand at 42% and 53%, respectively.



Impact of Inbound Tourism Growth on Economic Contribution Ranking



Impact of Domestic Tourism Growth on Economic Contribution Ranking

Tourist Satisfaction Evaluation Index

Sub-index Rankings of Tourist Satisfaction (2024-2025)

Rankings by Tourist Satisfaction (2024-2025) (Top 20)

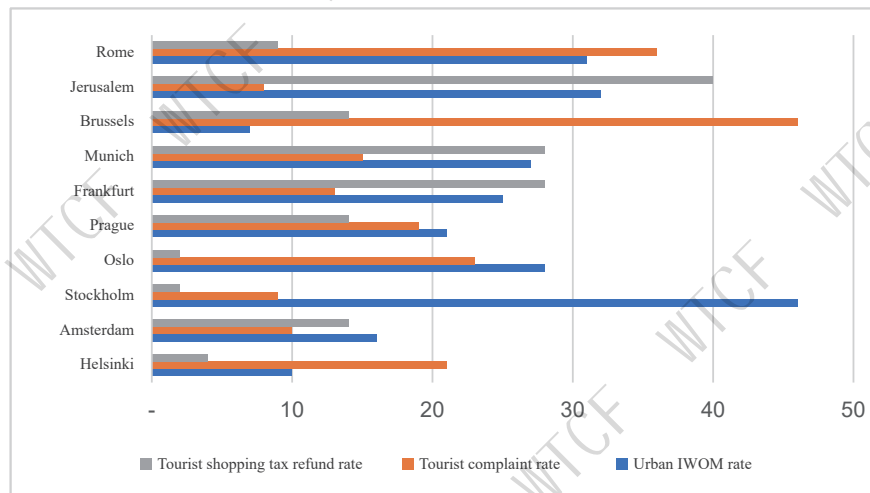
According to the ranking list of tourist satisfaction index for 2024, the top ten cities are mostly from the European region, with nine cities from the European region, none from the Asia-Pacific region and one from the Middle East. Among the top 20 cities, there are 14 cities from the European region, three from the Asia-Pacific region and three from the Middle East.

Table 22 Rankings by Tourist Satisfaction (2024) (Top 20)

Ranking	City	Country	Sector
1	Helsinki	Finland	Europe
2	Amsterdam	Netherlands	Europe
3	Stockholm	Sweden	Europe
4	Oslo	Norway	Europe
5	Prague	Czech	Europe
6	Frankfurt	Germany	Europe
7	Munich	Germany	Europe
8	Brussels	Belgium	Europe
9	Jerusalem	Israel	Middle East
10	Rome	Italy	Europe

Ranking	City	Country	Sector
11	Tokyo	Japan	Asia-Pacific
12	Dublin	Ireland	Europe
13	Oakland	New Zealand	Asia-Pacific
14	Istanbul	Turkey	Middle East
15	Rotterdam	Netherlands	Europe
16	Abu Dhabi	United Arab Emirates	Middle East
17	Berlin	Germany	Europe
18	Geneva	Switzerland	Europe
19	Osaka	Japan	Asia-Pacific
20	Lisbon	Portugal	Europe

Sub-index Rankings of Tourist Satisfaction (2024-2025) (Top 10)



Sub-index Rankings of Tourist Satisfaction among Top 10 Cities

Changes in Annual Rankings by Tourist Satisfaction (2024) (Top 10)

Compared to 2023, the tourist satisfaction index for European tourism cities in 2024 remained stable, with slight changes in rankings. European tourism cities such as Helsinki (rising to 1st place), Amsterdam (rising to 2nd place), Brussels (falling to 8th place), Prague (falling to 5th place), Oslo (rising to 4th place), and Rome (rising to 10th place) experienced minor shifts in their rankings. The tourist satisfaction index for tourism cities in the Middle East also showed a slight improvement, with Jerusalem rising to 9th place.

Table 23 Changes in Annual Rankings by Tourist Satisfaction for Top 10 Cities

City	2024	2023
Helsinki	1	2
Amsterdam	2	4
Stockholm	3	25
Oslo	4	5
Prague	5	3

City	2024	2023
Frankfurt	6	9
Munich	7	10
Brussels	8	1
Jerusalem	9	13
Rome	10	12

Analysis of Characteristics of Rankings by Tourist Satisfaction (2024-2025)

European Tourism Cities Consistently Achieve High Satisfaction Due to Diverse Advantages

Europe boasts the world's most concentrated collection of world heritage sites and cultural resources. From the Colosseum in Rome to Notre Dame in Paris, and from the Acropolis of Athens to Prague's Old Town, many attractions leverage modern technology to offer visitors novel historical and cultural experiences and breathe new life into ancient civilizations. The service infrastructure is highly mature, with multilingual support, clear signage, and efficient transportation networks covering major tourist scenarios, catering to the travel needs of international visitors. The dense layout of attractions, combined with convenient intra-city and inter-regional transport, makes it highly adaptable for tourists from various linguistic backgrounds. The social environment remains safe and stable, particularly in popular Western and Northern European regions, where public security consistently ranks among the global top tier. This provides tourists with a sense of psychological security, allowing them to enjoy their journeys with peace of mind. Furthermore, leading digital experiences, such as electronic tax refunds, smart guided tours, and cross-border transport passes, enhance travel convenience. These advancements streamline itinerary planning and service enjoyment, making every aspect—from shopping to sightseeing—more efficient and intelligent. The average shopping tax refund rate in European tourism cities reaches 19.7%, higher than the 9.5% in the Asia-Pacific region and 4.3% in the Americas. The figure exceeds 16% in cities like Helsinki, further contributing to their high visitor satisfaction.



Edinburgh UK

Middle Eastern Tourism Cities Benefit from IWOM Through Quality Service

Amidst the burgeoning global tourism industry, regional tourism cities are actively enhancing their service quality through innovative strategies. Notably, the Middle East has combined the advantages of digital platforms with innovation in tourism services, thus significantly boosting its international popularity.

Tourism cities in the Middle East boast the highest IWOM rate, with an average of 97. For example, Abu Dhabi ranks first globally in terms of IWOM. In 2024, Abu Dhabi's tourism marketing efforts expanded to 25 international markets. This, coupled with the implementation of visa-free or visa-on-arrival policies for tourists from countries including China, and streamlined entry procedures, attracted a considerable number of international leisure and business travelers. Beyond its world-class cultural landmarks, Abu Dhabi has continuously rolled out cultural and artistic events, such as exhibitions and handicraft displays, through its "Abu Dhabi 2030", aiming to offer visitors deeply immersive cultural experiences. As two major strategic tourism complexes spearheaded by the Abu Dhabi government, Yas Island and Saadiyat Island saw a significant increase in visitor numbers in 2024. Yas Island achieved an annual hotel occupancy rate of 74%. Visitor numbers surpassed 38 million, increasing by 10% compared to 2023. Theme park visits by international tourists increased by 40%, with particularly strong performance from visitors from China, India, the UK, and Russia. The UN E-Government Survey 2024 revealed that the UAE ranked first globally in the Telecommunications Infrastructure Index with a perfect score of 100%, which reflects the broad coverage and high efficiency of its digital networks. In recent years, the UAE has consistently held the top global spot for mobile internet speed, which also contributes to a high-quality experience for tourists. To attract more young tourists, the Middle East actively leverages the advantages of social media. Data from GO-Globe indicates that internet penetration across the entire Gulf region is nearly universal, with five GCC countries boasting an internet penetration rate of 99%, which is one of the reasons for its high IWOM rate. The Middle East is also stepping up investments in air transportation while increasing international routes and flight frequencies. In April 2024, China Southern Airlines and China Eastern Airlines launched direct flights from Beijing, Shenzhen and Shanghai to Riyadh. Chinese airlines have added multiple routes to the Middle East, including to cities such as Abu Dhabi and Qatar. The average IWOM score of tourism cities in Europe and the Asia-Pacific region are close at 96.5 and 96.1, respectively, ranking second and third. African tourism cities have the lowest IWOM score, which is only 85.3 and below the average score of the 100 sample cities.

African tourism cities registered the highest tourist complaint rate at 17.0%, which remains unchanged from last year. The main reasons include weak tourism infrastructure, where transportation, accommodation, and signage fall significantly short of international standards, making it difficult to meet basic experience needs; insufficient safety assurance measures, with some areas affected by geopolitical and security issues, resulting in a low sense of personal and property safety for tourists; and lower levels of professional service, where language communication barriers and improper service processes easily lead to complaints. The Middle East region has the lowest tourist complaint rate which stands at only 9.8%. This is attributed to the comprehensive service upgrades in countries like Saudi Arabia and the UAE, coupled with visa facilitation policies that lower travel barriers. These factors collectively propel the Middle East from being a "niche destination" towards a "high-satisfaction emerging market".

Asia-Pacific Tourism Cities Forge Unique Advantages Through Service Refinement and Digital Empowerment

Amidst the global recovery of tourism and the concurrent demand for high-quality experiences, Asia-Pacific tourism cities, represented by Tokyo and Beijing, have provided practical models for global tourism cities to enhance tourist satisfaction through innovations in service details and the application of digital tools.

Tokyo boasts the lowest tourist complaint index globally, a testament to its refined services and digital innovation. For example, Tokyo's Haneda Airport has deployed multilingual robot guides that use AI voice recognition to provide flight inquiries, route navigation, and translation services (available in 12 languages including Chinese, English, and Korean). The airport integrates the facial recognition system, "Face Express", which allows international tourists to pre-register their facial data for seamless, contactless processes during check-in, security checks, and boarding. It also features a smart baggage tracking system (using RFID technology), which enables tourists to monitor their luggage location in real-time via the airport app and thus alleviates anxiety during transfers. The official tourism guide platform, "GOTOKYO", offers multilingual (including Chinese) tourism information covering attractions, transportation, festivals, and more. In addition, taxi services with Chinese interface (such as the WeChat mini-program "GO / Taxi for Japan") are available, covering major areas of Tokyo and supporting WeChat Pay. All these measures have greatly simplified the travel process.

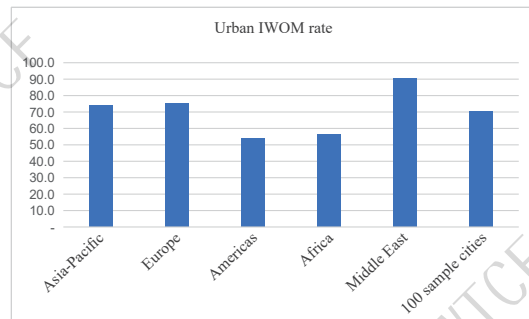
Beijing also excels in providing convenient services for inbound tourists. In 2024, the city introduced a "tap-and-go" service for foreign visitors to access its urban rail transit system via mainstream foreign bank cards. The city has also optimized the SIM card application process for foreigners by supporting "online application and offline collection". This has significantly reduced the time required to obtain communication services. Besides, Beijing has developed unique tourism products such as the "Great Beijing Central Axis Sightseeing Bus Tour" by seamlessly integrating cultural heritage with modern experiences. From its launch on August 17, 2024 to the end of the year, the bus route delivered 1,019 trips and transported nearly a total of 27,000 passengers. It has become a preferred choice for inbound tourists wishing to experience the charm of the ancient capital. Through optimized service processes, strengthened multilingual support, and enhanced digital infrastructure, Beijing's inbound tourist complaint rate continues to decline, and its tourist satisfaction ranks at the forefront among Asia-Pacific cities.

Growing Demand for Cost Performance Leads to Decline in Tourist Satisfaction

In the highly competitive global tourism landscape of 2024, enhancing tourist satisfaction has become a key strategic priority for major tourism cities and nations. However, despite concerted efforts to improve overall tourism service quality and reduce the number of complaints, the average tourist satisfaction index for the 100 sample tourism cities declined from 69.5 in 2023 to 67.3. Interestingly, visitors' evaluations of public services, shopping experiences, the cost performance of tourism products, and their willingness to recommend actually improved compared to the same period last year. Yet, there was a noticeable decline in satisfaction with experiences related to traditional tourism sectors, including scenic spot visits, transportation, accommodation, and travel agency services. The outbound tourism market has continued its rapid expansion, leading to a steady increase in tourists' demands for higher quality, better experiences, and greater cost performance. This demand upgrade has resulted in a mismatch with the resource supply at overseas destinations, particularly in accommodation and transportation, where excessively high prices have further impacted overall tourist satisfaction.



▶ Tourist Satisfaction Index in Different Regions



▶ Average IWOM Score in Different Regions



▶ Tourist Complaint Rate in Different Regions



▶ Average Tourist Shopping Tax Refund Rate in Different Regions

Countermeasures and Suggestions for Promoting the Comprehensive Development of World Tourism Cities

Since the beginning of 2024, the global tourism industry has continued its recovery trajectory, but it also presents a more complex and diversified development landscape and challenges. Tourist demand has shifted from a mere recovery of sightseeing to a profound pursuit of safety, smart experiences, cultural immersion, and high-quality experiences. Meanwhile, factors such as geopolitical frictions, accelerating technological iterations, and upgraded consumption concepts are intertwining to profoundly reshape the landscape and competitive rules of the tourism market. Based on the overall development characteristics of world tourism cities in 2024-2025, WTCF has analyzed and summarized six countermeasures and recommendations to effectively address these new changes and guide world tourism cities toward more resilient, sustainable, and attractive high-quality development.

Strengthen Urban Safety Construction and Build Resilient Tourism Cities

Tourism safety has become a primary consideration for global tourists when making travel decisions in 2024. On one hand, sustained geopolitical tensions, such as escalating conflicts in the Middle East, and shifts in certain national policies, including intensified US immigration scrutiny, have triggered feelings of insecurity and unfriendliness among tourists. These factors directly impact tourism markets in specific regions, thus causing notable shifts in tourist flows. Occasional safety incidents, in the internet era, can also create tourism shockwaves. For example, the kidnapping of Chinese tourists in Thailand in early 2025 directly resulted in a 155% surge in cancellations for Chinese trips to Thailand, which reflected a collective anxiety among tourists regarding safety concern. On the other hand, the far-reaching impact of the post-pandemic era has led to unprecedented attention to public health safety, transportation safety, accommodation safety, and emergency response capabilities. Furthermore, with the trend of in-depth tourism, tourists' sensitivity to various aspects of their journey, including transportation transfers, accommodation experiences, scenic area visits, and emergency risk avoidance, has also significantly increased. Tourism safety risks have become increasingly diversified and complex, making it necessary for urban managers to elevate them as a strategic priority.

Tourism cities should step up efforts to build a comprehensive, responsive, and transparent tourism safety prevention and resilience system. This includes systematically upgrading public health monitoring networks and emergency response plans to ensure strict adherence to internationally recognized hygiene and safety standards

in key locations including airports, stations, tourist attractions, hotels, restaurants, and public transport systems, as well as equipping these locations with essential emergency facilities; integrating advanced technologies such as intelligent video surveillance and big data analytics for early warnings to dynamically monitor public security conditions and predict risks and significantly enhance public security governance capabilities. For non-traditional safety risks such as geopolitical conflicts, public health incidents, and natural disasters, it is essential to establish robust dynamic risk assessment mechanisms and warning information release platforms. Real-time, accurate, and transparent safety risk alerts and action guidelines should be delivered to international tourists through multiple channels, including official apps, social media, and entry notifications. In addition, visa policies and entry inspection procedures should be continuously optimized to maximize entry convenience and provide traveler-friendly experiences without compromising national security. Further efforts should be made to reduce negative perceptions caused by policy barriers. At the infrastructure level, emphasis should be placed on strengthening the disaster prevention and mitigation capabilities of transportation hubs and tourist attractions, as well as planning emergency evacuation routes to ensure rapid and orderly protection of tourist safety during extreme weather or emergencies, along with clear, well-defined safety management standards and rigorous supervision across all links of the tourism activity chain.

By systematically building a comprehensive safety prevention and control system and resilient infrastructure, tourism cities will create a highly reliable and trustworthy environment for global tourists. Travelers will be able to explore destinations with peace of mind, free from concerns about geopolitical risks, health hazards, or unexpected incidents. This pervasive sense of security will become a core competitive advantage for cities, significantly enhance their international reputation and attractiveness, and draw more tourists seeking safe and comfortable experiences. Ultimately, it will lay the most solid foundation for the long-term prosperity of the tourism industry.

Deepen Technological Empowerment and Lead New Smart Tourism Experiences

New-generation information technologies, represented by artificial intelligence (AI), big data, and the Internet of Things (IoT), are reshaping the entire tourism consumption chain with unprecedented depth and breadth. In every aspect of planning itineraries, obtaining information, booking services, conducting on-site interactions, making payments, and even sharing reviews, tourists show a strong preference for intelligent, convenient, information-transparent, and highly personalized services. Traditional service models can no longer meet tourists' growing demand for "one-click" and "seamless" experiences. Smart tourism, from a concept to a reality, has become a key engine for enhancing cities' tourism competitiveness.

Tourism cities should comprehensively embrace digital transformation and vigorously promote the deep application and innovative integration of AI technology in tourism scenarios. For example, they can widely apply large language model-based generative AI intelligent assistants that can provide tourists with a series of highly customized services—from pre-trip inspiration, personalized itinerary planning, real-time multilingual translation, and in-depth cultural interpretation, to instant Q&A, smart guide recommendations, and emergen-

cy assistance during trips—significantly improving tourist satisfaction and experience depth. In addition, they should fully utilize AI-driven crowd flow prediction, resource scheduling, and demand analysis models to empower urban tourism authorities and enterprises in achieving more refined operational management and service optimization. Cities should focus on creating a seamless smart service ecosystem covering all dimensions of "dining, lodging, transportation, sightseeing, shopping, and entertainment". While consolidating and deepening existing applications such as online booking, mobile payments, and contactless check-in, they should actively promote innovative applications including smart guide systems, VR/AR immersive experience projects, virtual historical scene recreations, augmented reality landscape guides, hotel rooms equipped with smart guest control systems, unmanned convenience stores in scenic areas, and smart retail terminals. These innovations ensure that technology genuinely elevates tourist experiences. Furthermore, it is necessary to construct a city-level smart tourism comprehensive management hub platform that effectively integrates heterogeneous data from multiple sources such as transportation departments, security departments, meteorology departments, scenic areas, hotels, and online travel agencies (OTAs). This platform should be able to support core functions such as real-time monitoring and warning of passenger flows across the city, intelligent scheduling and diversion of transportation capacity, collaborative handling of safety risks, and dynamic evaluation of service quality and tourist satisfaction. It will provide strong data support and decision-making basis for precise policy implementation by government departments and agile operations by tourism enterprises.

Fully embracing AI and smart tourism technology will revolutionize urban tourism services. Travelers will enjoy unprecedented convenience and personalization, including pre-trip intelligent planning, immersive in-trip interactions and seamless post-trip sharing. Every step will be smooth, efficient, and full of surprises. City managers, equipped with in-depth insights from smart management hubs, will achieve optimal resource allocation and precise service delivery. This will not only remarkably enhance tourist satisfaction and loyalty but also forge a city's image as an innovative, efficient, and future-oriented smart tourism destination. As a result, these cities will lead new trends in global tourism experiences.



Hong Kong China

Delve into Cultural Characteristics to Enrich the New Essence of Tourism Products

Today, tourists' travel consumption behaviors are undergoing a profound shift from "superficial sightseeing" to "deep immersion". Tourists are no longer satisfied with simply visiting attractions and taking photos. Instead, they yearn for deeper cultural connections and emotional resonance with destinations, seeking to "take away unique cultural memories and stories". There is a significant increase in interest in cultural resources such as intangible cultural heritage, historical sites, local customs, and distinctive handicrafts. Tourists are willing to pay for tourism products that offer profound cultural content and unique experiential value. Niche markets such as sports tourism, wellness tourism, and cultural performance tourism (exemplified by concerts) continue to flourish, while the nighttime economy has emerged as a vital catalyst for activating consumer spending.

Tourism cities must regard culture as the core essence and competitive advantage of tourism development. They should systematically survey, explore, preserve, and revitalize local cultural heritage resources in an innovative manner, especially endangered intangible cultural heritage projects and historically significant sites. By creating distinctive historical and cultural districts, developing immersive interactive performance projects, and organizing widely influential cultural festivals, cities can transform static cultural resources into dynamic tourism experiences that are tangible, participatory, and memorable. Cities should elaborately design and promote in-depth tours and study tours enriched with compelling cultural stories, while also developing high-quality, creative cultural derivative products—such as heritage-inspired souvenirs and city-story-themed merchandise—to extend the cultural experience chain and boost industrial added value. Cities should actively respond to tourists' demands for diverse and personalized products by vigorously developing the "nighttime economy". This includes creating high-quality nighttime tourism products that combine evening sightseeing, themed performances, specialty markets, and local food experiences to enhance the city's nighttime appeal. To cater to thriving niche markets, cities should strategically develop sports tourism products, such as event-based sports experiences, wellness tourism packages, concert-themed tours, and study tour programs. They should also offer one-stop services for ticketing, transportation, accommodation, and peripheral experiences to create a diversified, multi-dimensional product supply system. During the development process, emphasis must be placed on the uniqueness and authenticity of local culture to avoid homogeneous competition. Sustainability should be upheld to ensure that cultural resource development aligns with ecological environmental protection.

When a city successfully infuses its unique cultural DNA into tourism products, visitors cease to be mere passersby and become active participants in the urban narrative and ambassadors of its story. In-depth cultural experiences, vibrant nighttime economies, and meticulously curated themed tours will combine into an enchanting tourism network. This approach not only delivers unique, unforgettable and soul-stirring experiences to travelers—who bring home both cultural memories and tangible pieces of the city's spirit—but also preserves and perpetuates invaluable cultural heritage. As a result, the city stands out in the global tourism landscape with its irreplaceable cultural charm, thus achieving a win-win situation where tourism development and cultural sustainability thrive together.

Enhance International Brand Recognition Through Precise Urban Positioning and Marketing

In the context of increasingly fierce competition in the global tourism market, a distinct, unique and compelling city brand image has become paramount. Today, tourists have access to more diverse information channels and make more rational choices, making traditional generic marketing approaches less effective. The key to attracting international visitors lies in accurately defining a city's core value proposition—whether it's distinctive historical culture, cutting-edge innovation, breathtaking natural landscapes, or premium leisure environments—and delivering this message through signature events and targeted campaigns. Successful marketing cases targeting Chinese tourists in Thailand, Africa, and other regions have demonstrated the value of precise positioning.

City brand building requires strategic focus and sustained investment. The core approach involves systematically developing or attracting signature events with global influence and buzz-generating potential. For example, tourism cities can actively bid for or host top-tier international sports events (e.g. the FIFA World Cup), attract high-profile MICE events, introduce large-scale global artist tours, and elaborately design complementary tourism products and urban experiences. These "mega-events" should be leveraged to fully enhance the city popularity, reputation and tourism economy. Every city must clearly define and consistently promote its unique "symbol" and core value proposition—whether it is known as a "millennium-old ancient capital", "design hub", "adventure paradise", or "coastal getaway". This requires integrated marketing strategies. This involves consistent, high-frequency, and creative promotion efforts through multiple channels, such as social media content operations, film and TV show placements, collaborations with globally influential key opinion leaders (KOLs/KOCs), and participation in international tourism exhibitions. All these measures aim to continuously reinforce the city's unique image. In-depth research into the consumption habits, cultural preferences, information channels, and pain points of core source and potential markets is essential to implement highly customized precision marketing. For example, Thailand has launched targeted marketing campaigns for Chinese tourists. Besides implementing a permanent mutual visa exemption policy with China, the Thai government also staged a tourism promotion event themed "Sawasdee Nihao" in Chengdu. Through celebrity meet-and-greets and other formats, Thailand has reshaped its image as a safe and friendly destination. It also provided exclusive discounts, culinary privileges, and one-stop consumption experiences for Chinese tourists. In addition, over 550 bus drivers in cities such as Bangkok and Chiang Mai have received training in Chinese language, cultural etiquette, and safe driving to create a more internationalized tourism service environment. Similarly, some African countries have provided tailored services for Chinese tourists, including convenient visa policies, Chinese-speaking guides, and customized itineraries. In this way, they have effectively addressed the practical concerns of target audiences. In the first half of 2025, the number of Chinese tourists traveling to Africa surged by approximately 1.2 times year-on-year. Flight bookings to Africa also showed strong growth, with Egypt and Kenya leading this expansion with exceptional growth rates of 236% and 167% respectively.

Through precise brand positioning and powerful international event marketing, cities will establish a distinct, unique, and highly attractive image in the minds of global tourists. Iconic events will generate sustained global exposure and positive word-of-mouth effects, making the city a dream destination for international travelers. Targeted source marketing will efficiently reach key audiences, significantly boosting conversion rates and tourist satisfaction. Ultimately, the city will evolve from a vague geographical name into a strong international tourism brand brimming with rich value, emotion, and experiences, thereby attracting a steady influx of global visitors and maximizing the economic benefits of tourism.

Optimize Service Details to Improve the Convenience of All-for-One Tourism

A convenient, comfortable, and barrier-free tourism service experience is the cornerstone of boosting visitor satisfaction, fostering word-of-mouth promotion, and encouraging repeat visits. In recent years, tourists have become more demanding about the details of tourism services, especially in areas such as language communication, payment methods, transportation connections, information access, care for special groups, and entry convenience. Any inconvenience in these aspects can significantly impact overall visitor evaluations and travel intentions. Issues such as tedious visa procedures, inconvenient intra-city transportation, language barriers and payment difficulties remain pain points for numerous international tourists.

Enhancing tourism service capabilities is a systematic endeavor, with the primary task being the continuous optimization of tourism infrastructure networks. This includes improving the operational efficiency and service quality of major transportation hubs such as airports and railway stations, and perfecting urban transportation systems like subways, buses, taxis, online car-hailing services, and intercity transit options (e.g., high-speed railway and dedicated tourist bus routes) connecting surrounding cities and key attractions. The goal is to ensure seamless, efficient "point-to-point" mobility for visitors, with particular attention to resolving "last-mile" connectivity and transportation challenges within scenic areas. A key priority is the construction of an internationalized, barrier-free, and hassle-free service environment. This involves installing clear, standardized multilingual signage systems in high-traffic areas such as airports, stations, attractions, hotels, and main streets; developing feature-rich, accurate, and user-friendly multilingual official tourism apps and websites that provide real-time information on transportation, attractions, events, and emergency services, as well as online services; and significantly enhancing payment convenience by widely supporting international credit cards, UnionPay, and mobile payment methods like Alipay and WeChat Pay, which are commonly used by tourists from major source countries. In addition, barrier-free environments must be prioritized. High-standard accessibility facilities such as ramps, elevators, and restrooms should be installed in public facilities, transportation systems, and tourist attractions. Caring services for special groups, including people with disabilities, the elderly, and children, should be provided to reflect the city's inclusivity and warmth. At the entry stage, visa facilitation policies should be actively promoted, such as expanding the list of visa-free/visa-on-arrival countries, optimizing e-visa application processes, shortening approval time, and improving the efficiency of customs clearance at ports of entry. Clear and accessible information on entry policies, visa requirements, and customs clearance procedures should be provided for potential tourists through official websites, embassies, consulates, and travel agencies to eliminate information barriers.

From the moment travelers set foot in the city until their journey's end, ubiquitous convenience, friendliness, and barrier-free care will deeply engrave the city's affability and professionalism in their hearts. Seamless transportation, barrier-free environments, effortless payments, clear multilingual guidance, and efficient entry services collectively weave an invisible web of welcome. This will greatly enhance tourists' overall satisfaction and comfort, inspire positive word-of-mouth promotion, and strengthen their desire to return. The city will leave global tourists with a profound impression of being "friendly, convenient, and inclusive", making it an ideal destination that travelers are eager to recommend and worth revisiting.

Deepen Regional Collaboration to Build a Win-Win Tourism Ecosystem

In the face of global challenges such as climate change, safety risks, and intensifying market competition, the traditional model of cities operating in isolation has proven inadequate. Strengthening cooperation among tourism cities at regional and even global levels through resource sharing, complementary advantages, mutual learning, and shared risk management is an inevitable choice to address uncertainties, enhance overall attractiveness, and boost competitiveness. Regional integrated tourism products, multi-city tours, and thematic routes are increasingly appealing to tourists, while visa facilitation remains a critical driver for promoting cross-regional tourism.

Upholding the principle of embracing openness and cooperation for mutual benefits, world tourism cities should actively explore and deepen multi-level, multi-sector cooperation mechanisms. At the regional level, cities can vigorously promote "mutual visa recognition" and "multi-stop itinerary" models. They can draw inspiration from successful practices such as the regional visa facilitation measures of Middle Eastern countries (e.g., Gulf Cooperation Council nations), relevant measures adopted by the Schengen Area in Europe, as well as China's domestic initiatives including the Beijing-Tianjin-Hebei coordinated tourism development centered around Beijing and the Yangtze River Delta's "2-hour city circle" centered around Shanghai. Through policy coordination and infrastructure connectivity, regional tourism resources can be effectively integrated to design themed routes linking multiple cities, facilitate two-way visitor flows, and jointly expand the regional tourism market. Deep exchanges and practical cooperation among regional cities should be strengthened in areas such as establishing unified safety and health standards, jointly responding to public emergencies, protecting the ecological environment (especially addressing the threats posed by climate change to tourism resources), collaborating on cultural heritage conservation and research, and sharing resources for tourism talent development and training. These efforts will collectively enhance global tourism governance. Furthermore, cities can jointly launch cross-regional marketing campaigns, co-create internationally influential themed travel brands, and participate in international tourism exhibitions together. By sharing marketing costs and amplifying collective visibility, regions can enhance their global reputation and appeal, thus achieving a synergistic effect that benefits all stakeholders.

By building a close regional tourism collaboration network, world tourism cities will transcend geographical boundaries and jointly create more attractive and competitive tourism products. Tourists will enjoy a seamless "multi-stop tour" experience while exploring broader and more diverse cultures and landscapes. Through resource sharing, risk mitigation, and joint development, cities can more effectively address global challenges, reduce costs, and amplify their impact. This deep-level cooperation will give rise to a more resilient, sustainable, and vibrant global tourism ecosystem, allowing every city involved to benefit from it and collectively drive the prosperity and progress of the global tourism industry.

By systematically and collaboratively advancing optimization and upgrades in the above six areas, world tourism cities will more effectively better navigate the future of the tourism industry. This strategic approach enables cities to effectively address the complex challenges posed by geopolitical shifts, technological revolution, and evolving consumer demands, while significantly enhancing the resilience and vitality of their tourism sectors. By delivering an exceptional travel experience for global visitors—one that is secure and reliable, intelligently seamless, culturally enriching, and meticulously personalized, cities can secure a competitive edge in the global market and realize a win-win scenario of economic prosperity, social harmony, and cultural development.

WTCF is the world's first global international tourism organization focusing on cities. Through diverse initiatives, it actively constructs a cooperation platform for the global tourism sector to exchange experience, strengthen cooperation, and build consensus, thereby promoting the sustainable development of world tourism cities. International tourism conferences and forums serve as vital platforms for fostering communication and cooperation among tourism cities. The Fragrant Hills Tourism Summit and the World Conference on Tourism Cooperation and Development, held annually by WTCF, provide channels for representatives from countries and cities to share best practices and experiences, strengthen exchange and cooperation, and jointly address changes and challenges in the global tourism market. These initiatives not only drive regional tourism growth but also offer invaluable platforms and opportunities for global tourism cooperation and development.

Cooperation among tourism cities is a key driver for tourism prosperity. As a core platform for cooperation among world tourism cities, WTCF remains committed to promoting in-depth exchanges, mutual learning, and substantive project cooperation among its member cities. Together, it aims to advance the global tourism industry toward a more sustainable, inclusive, and high-quality future.