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Preface

Seizing Opportunity of Tourism City Development

Tourism is the most powerful and comprehensive industry. As the world economy struggles to recover, the tourism market rises as a new force and has outpaced global economic growth for six consecutive years since 2010. It becomes an important engine of economic growth. International tourist arrivals and travel spending both grow persistently worldwide. The former increased from US\$25 million in 1950 to US\$1,184 million in 2015 and the latter from US\$2 billion in 1950 to US\$1,260 billion in 2015.

Tourism city is a basic unit and important node of world tourism. Cities play a crucial role in the development system of world tourism in such aspects as source of tourists, destination reception and transit. Without cities, it is impossible to grasp the rules and trends of modern tourism, or formulate national and local strategies in promotion, resource development, project construction and public service optimization. Meanwhile, tourism is a major driving force of city development. Besides basic economic function such as boosting economic growth and increasing jobs, it can also improve quality of life and create a good city image through urban infrastructure construction, and protection of environment, social and culture heritages. Tourism can create value and opportunities for cities and even the whole country. Against the backdrop of flourishing mass tourism, the new challenges of world tourism cities lie in how to give play to the synergistic effect of tourism and cities so that they can promote each other, how to improve the quality of tourism services, and how to seek for new energy of industry development.

World Tourism Cities Federation (WTCF) is an international tourism organization jointly initiated by famous tourism cities worldwide. To promote the exchange and cooperation among tourism cities, WTCF has started a special project on World Tourism City Evaluation System since the beginning of its establishment. It hopes to study on and analyze city tourism

from various dimensions by building development indexes and making objective evaluation, so as to summarize the successful experience and weak links of tourism cities, tap the potential of various cities, grasp the latest trend of world tourism development and offer the basis for member cities to formulate tourism policies.

The World Tourism Cities Development Report is an annual issue, and has been released for three consecutive years as of 2016. The reports add a new research perspective with its exploration of systematic evaluation on world major tourism cities. *The World Tourism Cities Development Report 2016* is compiled by WTCF and China Tourism Academy. To complete high-quality research, the team further improves the index system on the basis of former research results and sorts out a database of world tourism cities. From five dimensions, 104 sample cities are comprehensively evaluated to reflect current tourism development and future potential of worldwide tourism cities. The report aims to review world tourism development from the city's perspective. It highlights the city's status and role in tourism, and also takes account of tourism's driving force to urban development. The report develops a comprehensive ranking of World Tourism City Development Index and sub-rankings, and makes in-depth analysis and comparison of the ranking causes, developments, changes and influencing factors to serve as reference for member cities to formulate economic and social development strategies.

Chinese Academy of Tourism has actively fulfilled its responsibility as a think-tank, completing the research and draft of the report. On behalf of WTCF, I would like to take this opportunity to extend my appreciation to Chinese Academy of Tourism and its research team for their great efforts in the report. In the preparation of the report, we also invited the world's tourism scholars, entrepreneurs and industry experts to participate in the discussion and improvement of the research subject, and I'd also like to express my thanks to them!

The research on development evaluation system of world tourism cities and the issue of evaluation index are important measures of WTCF to serve its members and promote the development of world tourism. World tourism research institutes, experts and scholars and

industry elites are welcome to offer their valuable opinions on our work. We will continue to observe, track and study the construction and development of world tourism cities. We sincerely invite people around the world who are interested in this work to join us and contribute to the sustainable development of world tourism cities and world tourism.

Song Yu

Secretary-General of World Tourism Cities Federation

City Plays Core Role in Tourism and Is Vital Force

Cities are playing an increasingly important role in the economic pattern of world tourism. They contribute a majority of tourists and travel consumption. Cities, with highly centralized populations and fashion-forward high consumption, generate tourists for global market continuously and become the weather vane leading tourism consumption. In 2015, China saw 4 billion domestic tourist arrivals and urban residents represented 70.3%. Domestic tourism generated RMB3.42 trillion incomes, 80.7% of which was contributed by tourists from cities. Statistics show that whether in terms of source of tourists or travel consumption, cities are the most important basis of the operation of tourism economy. They are also the most important space support in the travel destination system. As tourists' purpose is shifting from sightseeing to leisure and experience, more of them choose to stay in one city in one journey, spend some time tasting the daily lifestyle of citizens and experiencing local culture. We find that in order to adapt to the change, an increasing number of cities have begun to consider themselves as individual destination in construction, management and promotion. In terms of the space pattern of global tourism, cities have always been significant in traffic hub and transit stop. Without the support of city infrastructure such as airports, ports, railway stations and highways, long-distance travel is impossible. Many airports have even evolved from pure transportation infrastructure to airport cities with both functions of traffic hub and daily life. And airport economy is thus developing.

There are some noticeable changes or new tendencies in the present city tourism. No matter at home or abroad, the trend has become more obvious that cities are becoming each other's destination and tourist source region. So are neighboring countries like the U.S. and Canada, as well as EU members. In China, Beijing, Tianjin, Shanghai and Guangzhou also serve as each other's basic tourist source market. In the national strategic system of tourism development, cities are more associated with surroundings and countryside and can promote their development. With the help of all kinds of traffic facilities, cities have further radiated

and penetrated into the surrounding areas. Tourism has shown obvious spillover effect, and its influence has gone far beyond city boundaries, and is increasing remarkably in regional integration as well as urban and rural co-development. Internationally, cities are playing a key role in interconnection. Tourism partnership becomes the pioneer in China's "Belt & Road" initiative for international cooperation, which relies on the network connecting worldwide cities, especially investment and improvement in transportation and communication infrastructures like ports, wharfs, railways, highways and telecom. On the other hand, tourism promotes personnel and capital exchanges as well as industrial cooperation among cities, and offers inevitable passenger flow and consumption support for the efficiency of above-mentioned infrastructure. Currently, the landscape of tourism exchange and cooperation among global cities has basically taken shape. WTOF is a major booster in the process.

We also find that city tourism is challenged by consumption concept, economic development and social changes. In terms of consumption, tourists' criteria for a mature destination are not just the abundance and characteristics of traditional scenic spots, but also overall reception environment of the city destination. Therefore, the construction of a city destination should go beyond mere scenic resorts and spots, but a whole city. As tourism develops, the country and regions also put forward more responsibilities and higher expectation on city tourism. Tourism, with its innovative development, has brought benefits to a city's progress, and is irreplaceable in expanding employment, and improving community environment and infrastructure. In the process, city tourism is also in a critical period of shifting from old energy to new one. Cities have all necessary elements for innovative development of tourism such as science and technology, cultural creativity, capital and talents. These elements have gradually replaced traditional resources of nature, history and culture, and become brand-new driving forces of modern tourism.

It is our sincere hope that all countries can focus more on the value of cities and endow them with the status of strategic support. In the research of city tourism development, besides

quantitative analysis, benchmarking and samples are necessary for mutual learning and exchange. We hope that cities can integrate with tourism and also achieve the integration of internationalization and localization. Urban infrastructure is firstly to serve local citizens and then foreign visitors. The demands of both sides shall be coordinated in the planning of city development and both macro and micro perspectives shall be taken to construct a living space shared by local citizens and then foreign visitors.

We are now in an era featured by flourishing tourism, as well as competition between new trade protectionism and globalization. There is also an array of challenges such as terrorism, public health events, traffic safety and fluctuations in exchange rates. Therefore, the consensus and cooperation on city tourism is in great need. We also need to pay attention to and strengthen the construction of theories of modern tourism development, and to promote new consensus on tourism ideology. We have every reason to believe in cities and tourism and keep optimistic. No matter how changeable the international situation is, tourism can make city life better!

Dai Bin
dean of China Tourism Academy

Abstract

This report is the annual keynote report of World Tourism Cities Federation (WTCF), a systematic and regular review on the world tourism development from the city's perspective. It contains in-depth explanation of cities' contribution to tourist source regions and destinations from the aspects of market, industry and regional landscape, as well as their role in tourism development. The report offers intellectual and decision-making support for global tourism cities.

Based on existing research results, the report builds a systematic World Tourism City Development Index including 5 sub-indexes, i.e. Tourism Market Development Index, Tourism Industry Development Index, Tourism Development Environment Index, Tourism Development Prospect Index, and Tourism Economic Contribution Index, which consist of 30 indicators. Factor analysis is also adopted in the report for comprehensive assessment of 104 sample cities worldwide and final ranking of World Tourism City Development Index. Among them are 63 member cities of the WTCF, and the rest 41 are large cosmopolitan cities such as New York, Chicago, Frankfurt, Sydney and Tokyo, as well as world-renowned tourist cities such as Honolulu, Las Vegas, Cancun, Antalya, Gold Coast and Phuket.

For the first time, the report takes into consideration various factors and innovative measures such as online tourism and sharing economy that contribute to urban tourism development. By including these indicators, World Tourism City Development Index is improved and can reflect new features and phenomena of global tourism development.

This annual report also expands data source, covering data submitted by member cities, official data of various cities compiled by the research group, and databases of relevant advisory and research institutions. Specifically, there are databases of over 10 international organizations

like World Bank, UNWTO and WTO, representative of sharing economy Airbnb, as well as online tourism operators such as TripAdvisor and Expedia. The report also employs the database of National Tourism Library of China Tourism Academy and big data of National Laboratory for Tourism Economy, in hope of more objective and accurate reflection of cities' tourism development.

Research results show that among top 20 cities by the ranking of World Tourism City Development Index, 7 are located in Europe, 5 in North America, 6 in Asia-Pacific and 1 in Middle East and Africa, which is consistent with overall competitive pattern of world tourism development. It reveals not just the advantages of European and North American tourism cities, but also strong growth momentum and potential of emerging Asia-Pacific region.

The research report is composed of a general report and a sub-report. The former makes overall analysis of the current market, industry operation trends as well as regional development pattern of world tourism cities, and details the development index, sample cities and data source. The latter explains the rankings of World Tourism City Development Index and sub-indexes, and also analyzes their causes, developments, changes and influencing factors.

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