

# 《世界旅游城市发展报告（2016）》发布

## 伦敦位列世界旅游城市综合排行榜第一

本年度研究项目在以往研究成果的基础上，进一步完善指标体系，以期更客观、准确地反映各城市旅游业发展的现实状况。在数据收集方面，本次报告在大力依托中国旅游研究院国家旅游文献情报中心数据库的同时，积极开展面向会员城市的数据采集工作，逐步建立世界旅游城市数据库。数据的积累与数据库的建设，是一项持续性、时效性、协同性的具体工作，是与市场密切互动和交流的必要内容，是指导旅游业发展的科学依据。未来，建好数据库，依托数据库，是世界旅游城市联合会更好服务于会员城市旅游业发展、提供有效服务的重要参考内容之一。

### 样本城市的选择

课题组通过构建世界旅游城市发展指数，对全球104个城市的旅游发展水平进行评估。其中，样本城市首先覆盖了世界旅游城市联合会的63个会员城市，其余41个城市包括全球较大的国际都市，如纽约、芝加哥、法兰克福、悉尼、东京等，以及知名的国际旅游城市，如火奴鲁鲁、拉斯维加斯、坎昆、安塔利亚、黄金海岸、普吉岛等。

根据世界旅游组织的统计数据，欧洲和北美地区占国际旅游市场的份额最大，亚太地区旅游发展势头强劲，增长速度最快，有赶超北美之势。从样本城市的洲际分布来看，位于美洲的城市有20个，欧洲的城市有35个，亚太地区43个，中东和非洲地区8个。因此，样本城市的选择基本符合国际旅游市场的洲际格局。

综上，样本城市在全面覆盖世界旅游城市联合会会员城市的基础上，无论从城市类型还是城市洲际分布上来看，样本城市的选择是较科学合理的。

### 研究方法和数据来源

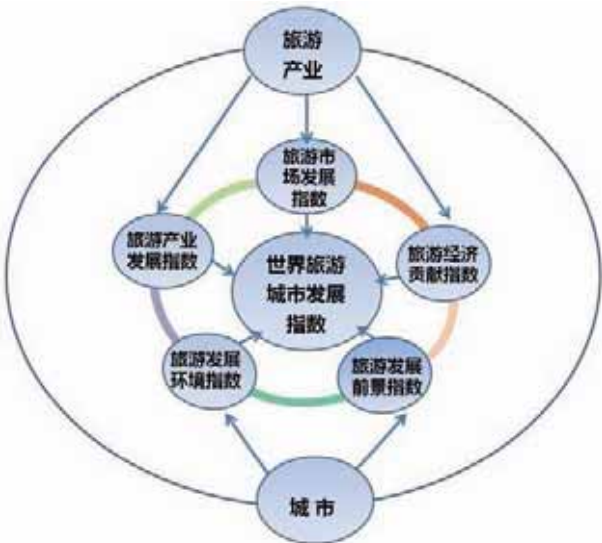
课题组在以往评价体系的基础上，综合各方专家的意见，最终从旅游市场、旅游产业、发展环境、发展前景和经济贡献五个维度构建能综合反映城市旅游发展水平的指标体系，即世界旅游城市发展指数，该指数按照以上五个维度细分为五个二级指数，分别是：

- ☐ 旅游市场发展指数
- ☐ 旅游产业发展指数
- ☐ 旅游发展环境指数
- ☐ 旅游发展前景指数
- ☐ 旅游经济贡献指数



旅游市场发展指数旨在反映城市旅游市场的繁荣程度；旅游产业发展指数主要衡量城市旅游产业（旅行服务、住宿和旅游交通业）的发展水平；旅游发展环境指数包括政策环境、开放度和人才支持力度三个方面的因素；旅游发展前景指数从城市知名度、吸引力和游客满意度三个方面对城市旅游发展前景进行评估；旅游经济贡献指数主要从共享经济发展水平、旅游发展的经济和社会贡献度三个方面来衡量旅游业对城市发展的贡献水平。二级指数由不同的变量整合而成，共涉及30个变量。

在指数计算方面，课题组首先采用因子分析分别计算以上五个二级指数的得分，然后在二级指数得分的基础上再次进行因子分析，得出最终的世界旅游城市发展指数。相对于



世界旅游城市发展指数体系逻辑关系图

常用的指数分析，各变量和二级指数的权重并非主观给出，使本研究结果更加客观、科学。本报告中各个指数及其构成变量的得分均为经过0—1标准化处理后的相对值。其中，将二级指数和世界旅游城市发展指数的得分赋值为0—100，0分为最低分，100分为最高分。

世界旅游城市发展指数所涉及的各变量数据来源主要为：中国旅游研究院国家旅游文献情报中心的数据库数据、课题组自主收集整理的各城市官方数据、咨询和研究机构的数据库数据。具体使用的数据库包括：欧睿（Euro monitor）城市、世界旅游组织（UNWTO）；作为共享经济的典型代表Airbnb数据库、TripAdvisor、Expedia等在线旅游数据库各变量数据涉及2014—2016年数据，但以2015年数据为主。为克服城市旅游数据获取难这一问题，课题组力图使数据采集的渠道多元化，除以上数据获取渠道外，本次报告较多地依托中国国家旅游经济实验室的互联网大数据来获取相关数据，以更加客观、准确地反映城市旅游发展水平。需要说明的是，相对于城市旅游评价体系的全面性和会员城市需求的特殊性，现有的数据支撑尚需进一步完善，这将是一个长期的过程。

世界旅游城市发展指数

世界旅游城市发展指数包括五个二级指数：“旅游市场发展指数”“旅游产业发展指数”“旅游发展环境指数”“旅游发展前景指数”和“旅游经济贡献指数”。每个二级指数又包括三级指标以及各自的表征变量。

世界旅游城市发展指数排名

研究结果显示，在世界旅游城市发展指数排名前20的榜单中，知名国际大都市，如伦敦、纽约、巴黎、北

京等排名较靠前，国际知名旅游城市，如拉斯维加斯、巴塞罗那、威尼斯等同样榜上有名。

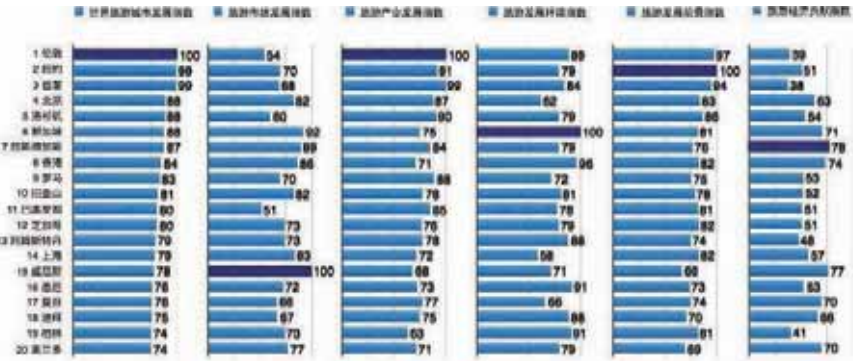
在世界旅游城市发展指数排名前20的榜单中，伦敦、纽约、巴黎、北京、洛杉矶、新加坡、拉斯维加斯、香港、罗马和旧金山位居榜单的前十。伦敦在三个单项指数中得分均较高，综合实力最强，超过巴黎位列综合排行榜第一位；纽约作为国际大都市，具有颇高的城市知名度和吸引力，其市场发展前景指数得分最高。

巴黎和洛杉矶的各项指数得分较为均衡，说明巴黎和洛杉矶旅游发展较为全面。新加坡和拉斯维加斯分别在旅游发展环境指数和旅游经济贡献度指数中表现突出。其他城市，如香港、罗马、旧金山等有三个单项指数得分位列前二十。

值得一提的是，北京作为发展中经济体的典型代表，其旅游城市发展指数得分进入前五，北京在旅游市场发展指数、旅游产业发展指数、旅游发展前景指数中的得分均进入了排行的前十，表明北京无论在市场需求还是供给方面均已具有坚实的发展基础，且发展前景较好。

总之，各城市在旅游发展过程中各具特色，在发挥城市旅游发展优势的同时，也要看到可能存在的不足。要进一步提升旅游发展的综合实力，一方面，可充分发挥城市旅游发展的优势，实现扬长避短；另一方面，可针对城市旅游发展的薄弱环节，采取相应措施，全面提升城市旅游发展的综合实力。

指数	二级指数	三级指标	变量
世界旅游城市发展指数	A.旅游市场发展指数	入境旅游市场状况	A1 入境旅游人次
			A2 入境旅游收入
		国内旅游市场状况	A3 国内旅游人次
			A4 国内旅游收入
		出境旅游市场状况	A5 出境旅游人次
	B.旅游产业发展指数	住宿业发展水平	B1 住宿设施价格水平
			B2 住宿设施数量
		旅行社发展水平	B3 旅行社发展水平
			B4 航空目的地数量
		旅游交通发展水平	B5 航空旅客人次
			B6 市内交通便捷度
		在线旅游发展水平	B7 在线旅游发展水平
	C.旅游发展环境指数	政策环境	C1 安全性
			C2 政府公共服务水平
			C3 政策法规实施水平
			C4 平均赋税
			C5 购物退税政策
		城市开放度	C6 签证便利度
			C7 外语环境
	D.旅游发展前景指数	人才支持力度	C8 人才支持力度
		城市知名度	D1 媒体曝光度
			D2 搜索引擎指数
		城市吸引力	D3 购物吸引力
			D4 世界遗产数量
			D5 环境质量
			D6 国际会议数量
	E.旅游经济贡献指数	旅游发展贡献度	D7 游客满意度
			E1 共享经济发展水平
			E2 旅游发展经济贡献度
			E3 旅游发展社会贡献度



注：数值为相对比，不能横向比较，只适用于纵向比较。

# *Release of Annual Report on Development of World Tourism Cities (2016)*

## **London Tops the World Tourism Cities List**

On the basis of previous research results, this annual research project further improve the index system in order to more objectively and accurately reflect the reality of the cities' tourism development. In terms of data collection, the report mainly relies on the database of National Tourism Centre for Documentation and Information of China Tourism Academy, and actively carries out the data acquisition from the member cities, so as to gradually establish the world tourism cities' database. As a continuous, timeliness, and collaborative work, the accumulation of data and the construction of this database are the required contents for intimate market interaction and communication as well as the scientific basis for guiding tourism development. In the future, constructing and basing everything on the database is one of the most important content, with which WTCF will be able to provide better and effective service for the member cities' tourism development.

### **Selection of Sample Cities**

By building World Tourism Cities Development Index, the research group has assessed the tourism development level of 104 cities around the world. The sample cities are made up of 63 WTCF member cities, and other 41 larger international cities such as New York, Chicago, Frankfurt, Sydney, Tokyo, as well as the famous international tourism cities such as Honolulu, Las Vegas, Cancun, Antalya, Gold Coast,

Phuket and so on.

According to the statistics of world tourism organizations, Europe and North America accounted for the largest share of international tourism market. Tourism development in the Asia Pacific region was thriving and its growth rate was the fastest, whose rate might supersede that of North America. In terms of the continental distribution of the sample cities, there were 20 cities located in America, 35 in Europe, 43 in Asia Pacific region, and 8 in the Middle East and Africa. Therefore, the selection of sample cities in this report is in accordance with the intercontinental landscape of the global tourism economy.

In summary, the selection of sample cities, of which 63 are WTCF member cities, is scientific and reasonable both from the perspective of city types and cities continental distribution.

### **Research Methods and Data Sources**

Based on the previous evaluation system, the research group synthesizes different scholars' opinions and establishes the index system that can comprehensively reflect the tourism cities' development level from five dimensions: tourism market, tourism industry, development environment, development potential and economic contribution, namely the World Tourism Cities Development Index. The index can be divided into five sub-indexes







World Tourism Cities Development Index

Index. The weight of each variable and sub-index is not given subjectively, so the result of this research is more objective and scientific than the commonly used index analysis. In this report, the scores of each index and its constituent variables are the relative values after going through 0—1 standardization. Among them, the scores of the World Tourism Cities Development Index and the sub-indices are assigned in a range of 0—100, where 0 corresponds with the lowest rank while 100 corresponds with the highest rank.

The data of variables related to World Tourism Cities Development Index are mainly from these sources: the data from the database of National Tourism Centre for Documentation and Information of China Tourism Academy, the official data autonomously collected by the research group from different cities, and the data from the database of related consulting and research institutions. The specific databases used include Euromonitor, UNWTO, Airbnb (a typical example of sharing economy), and online tourism databases such as TripAdvisor and Expedia. All variable data is that of year 2014—2016, with focus on the year of

in accordance with the five above mentioned dimensions. They are:

- Tourism Market Development Index
- Tourism Industry Development Index
- Tourism Development Environment Index
- Tourism Development Potential Index
- Tourism Economy Contribution Index

Tourism Market Development Index aims to reflect the prosperity level of urban tourism market. Tourism Industry Development Index mainly measures the level of urban tourism industry (traveling services, accommodation, and tourism transportation). Tourism Development Environment Index includes three factors: policies, openness, and talent support. Tourism Development Potential Index assesses the potential of urban tourism development from three aspects: the city's popularity, the level of attractiveness, and the satisfactory level of tourists. Tourism Economy Contribution Index evaluates the tourism contribution to the urban development mainly from the three aspects: development level of sharing economy, economic contribution and social contribution of tourism to local development. The sub-indices are integrated by a total of 30 different variables.

As for the calculation of the indexes, the research group firstly calculates the above five sub-indices' scores by adopting the factor analysis, and then makes another factor analysis on the basis of the sub-indices scores, so as to work out the final World Tourism Cities Development



The sample cities include not only WTCF member cities, but also other famous international tourism cities like Phuket.

2015. In order to overcome the difficulty to obtain tourism cities data, the research group managed to diversify the data acquisition channels. In addition to the above mentioned channels, this report also relies largely on the online big data of National Laboratory for Tourism Economy, in order to accurately and objectively reflect the development level of urban tourism. It is necessary to explain that, compared to the comprehensiveness of urban tourism evaluation system and the of

member cities' specific demands, the current data support still needs to be further improved, which will be a long-term process.

## World Tourism Cities Development Index

World Tourism Cities Development Index includes five sub-indexes: "Tourism Market Development Index," "Tourism Industry Development Index," "Tourism Development Environment Index," "Tourism Development Potential Index,"

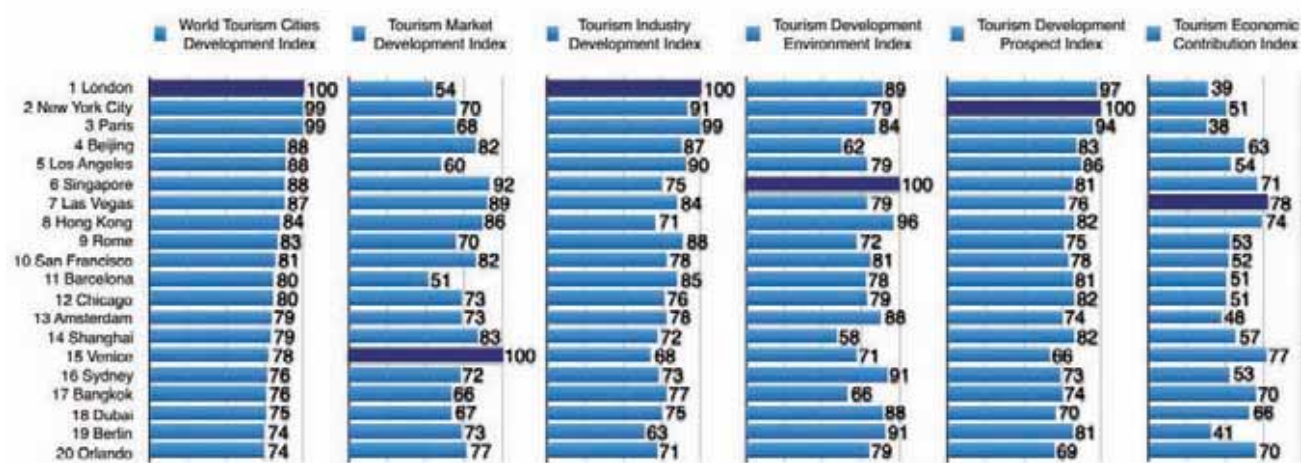
"Tourism Economy Contribution Index." Each sub-index further includes three tertiary indicators and their respective variables.

## Rankings of World Tourism Cities Development Index

The results show that well-known international metropolis, such as London, New York, Paris, Beijing, and other top ranking cities, as well as internationally renowned tourism cities such as

Index	Sub-indexes	Tertiary Indicator		Variables	
World Tourism Cities Development Index	A. Tourism Market Development Index	Inbound Tourism Market Conditions		A1 the inbound arrivals	
				A2 inbound tourism revenue	
		Domestic Tourism Market Conditions		A3 the domestic trips	
				A4 domestic tourism revenue	
		Outbound Tourism Market Conditions		A5 the outbound departures	
	B.Tourism Industry Development Index	Accommodation Industry Development Level		B1 the price level of accommodation facilities	
				B2 the number of accommodation facilities	
		Travel Service Industry Development Level		B3 travel service industry development level	
		Tourism Transportation Industry Development Level		B4 the number of air destinations	
				B5 the number of air passengers	
		B6 downtown traffic convenience			
		Online Tourism Development Level		B7 online tourism development level	
	C.Tourism Development Environment Index	Policy Environment	Macro-Level Factors	C1 political stability	
				C2 government effectiveness	
				C3 regulatory quality	
			Tax Policy	C4 average tax	
				C5 tax refund policy	
				C6 visa convenience	
		City Access		C7 foreign language environment	
		Talent Support		C8 talent support	
		D.Tourism Development Potential Index	City Visibility		D1 media exposure
					D2 search engine index
		City Attractiveness		D3 shopping attraction	
				D4 the number of world heritage	
				D5 environmental quality	
				D6 the number of international conference	
		Tourist Satisfaction		D7 tourists' satisfaction	
	E.Tourism Economy Contribution Index	Contribution to Tourism Development		E1 sharing economy development level	
				E2 economic contribution by tourism development	
				E3 social contribution by tourism development	





Note: Values here are relative ratios, only applicable to vertical comparison.

Las Vegas, Barcelona, and Venice, are among the top 20 cities on the World Tourism Cities Development Index list.

Amongst the top 20 cities on the World Tourism Cities Development Index list, London, New York, Paris, Beijing, Los Angeles, Singapore, Las Vegas, Hong Kong, Rome, and San Francisco rank among the top 10. London has obtained three relatively high individual index scores. It is relatively strong overall, and has surpassed Paris to rank first on the comprehensive list. As an international metropolis, New York has a high reputation and is a very attractive city; its Tourism Development Potential Index scores are the highest. For cities such as Paris and Los Angeles, the index scores are more balanced, which indicates that tourism development of Paris and Los Angeles is comprehensive. Singapore and Las Vegas have outstanding index performance in the areas of the Tourism Development Environment Index and the Tourism Economic Contribution Index respectively. Other cities such as Hong Kong, Rome, and San Francisco have three individual index scores ranking in the top 20.

It is worth mentioning that Beijing, as a typical representative of developing economies, ranks amongst the top five on the Tourism Cities

Development Index list. In terms of the scores of the Tourism Market Development Index, the Tourism Industry Development Index, and the Tourism Development Potential Index, Beijing ranks in the top ten. This illustrates that Beijing has a solid foundation for development in terms of market demand and supply, and that its developmental potential is promising.

In short, every city has its own characteristics in the process of tourism development. When making full use of the advantages

of urban tourism development, we also need to observe the possible deficiencies. In order to further enhance the comprehensive strength of tourism development, on the one hand, we can give full play to the strengths of urban tourism development so as to foster one's strengths while circumventing one's weaknesses; on the other hand, we can promote a city's comprehensive strength by taking corresponding measures to address the shortages of its urban tourism development.



London Tops the World Tourism Cities List