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TRAVEL &
TOURISM
COUNCIL

Destination 2030

Global Cities' Readiness For Sustainable Tourism Growth

Foreword

The Travel & Tourism sector has been an economic powerhouse, outpacing the growth of the global economy for almost a decade until 2019, with an annual growth of 4.2% compared to 3.0%, and creating one in four of all new jobs in the five years prior to the pandemic. While COVID-19 has been devastating to the sector, including the cities that welcome millions of tourists a year, there are signs of recovery. As the role of the Travel & Tourism sector continues to evolve, the pause in travel provided policymakers and destination leaders alike with newfound challenges, but also with the opportunity to enhance tourism readiness, while benefitting local communities through this recovery and beyond. The pandemic reminded us of the importance of involving all relevant stakeholders, including the Travel & Tourism sector, in decision making and future planning.

In this context, JLL and the World Travel & Tourism Council (WTTC) partnered once again to assess global cities' tourism readiness. It is clear that regardless of the current level of readiness, cities can learn from both data and the experiences of other destinations to both recover from COVID-19 and grow in a way that is sustainable and benefits local communities and travellers as well as the public and private sectors. To build back sustainably, inclusively, and resiliently, cities must take a holistic view of readiness that considers and includes a variety of factors and all relevant voices. While readiness will depend on the ambitions and goals of every city, WTTC & JLL define tourism readiness as a strategic and all-inclusive approach that proactively addresses and implements factors and policies relating to scale, concentration, leisure and business offerings, environmental and urban readiness, safety & security as well as the prioritisation of tourism. Indeed, no two cities are better or the same and, as such, the challenges they will face, and the opportunities to unlock their tourism potential, will differ. However, commonalities can be identified to provide a framework through which cities can assess their context and plan for the future.

To take a more comprehensive look at what it means to be "ready" for tourism growth as a global destination of choice, this updated report revisited our framework from 2019; enhancing it to include new pillars which highlight the rising importance of sustainability, safety & security and social impact on the global agenda. Additionally, JLL and WTTC added new cities to account for a broader global landscape and balance the geographic considerations. In effect, as cities work to enhance their readiness and attractiveness as destinations, they will need to consider and incorporate these important environmental, social, and economic factors in their objectives and strategies. The report is more than a static narrative, as JLL and WTTC created a new diagnostic tool for the Global Tourism Readiness analysis that can be applied to the cities studied as well as any destination looking to plan for its long-term future. The report provides initial insights on the current level of readiness of 63 cities. The diagnostic tool will not only provide a framework for cities to better assess their current context but support them in addressing the complex notion of readiness in a sector and context that continues to evolve. More specifically, the tool will provide further guidance on how to maximise a city's tourism potential.

While readiness will differ for each city on the basis of its context and unique objectives, this report highlights examples of strategies and policies implemented in destinations across the globe to support and inspire city leaders as they develop and refine their plans to enable sustainable, inclusive, and resilient tourism growth. We hope the report will serve as a useful resource as cities strive to chart a path for sustainable growth. While each city has its own challenges and opportunities, by deeply engaging with the stakeholder community, taking a holistic approach to destination development and management and learning from each other's experience, we can build a future that enriches the lives of people and preserves our planet.

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Executive Summary

As nations and destinations strive to build back sustainably, inclusively, safely, and resiliently during their recovery from COVID-19, cities, as critical economic and societal centres, have an essential role to play. In this new era, city and tourism leaders will be required to prioritise strategies that not only create meaningful travel experiences to maximise the benefits of tourism for their city but also create balance as great places to live.

In this context, JLL and WTTC joined forces once again to provide cities around the world with insights and guidance, as they chart their path to achieve destination readiness. Building on its unique methodology developed in 2019, this edition further integrates sustainability, safety & security, and social impact into the framework; providing a more timely definition of destination readiness that will enable cities to meet global ambitions and needs.

This comprehensive analysis addresses what makes a city ready for sustainable Travel & Tourism growth and how it can be achieved, through the analysis of 75 indicators which were integrated within eight pillars, namely scale, concentration, leisure, business, environmental readiness, urban readiness, safety & security and policy prioritisation for the 63 selected cities. While all destinations and their respective goals are different, there are clear commonalities between destinations. Building on the indicators classified within eight pillars, JLL and WTTC developed a framework which defined five city typologies that showcase the pressures, challenges, and opportunities that destinations face as they endeavour to smartly grow in a sustainable and inclusive way.

1 **Dawning Developers** These cities tend to have emerging tourism infrastructure, perhaps having placed less emphasis historically on their Travel & Tourism sector. To date, these cities have experienced gradual tourism growth, but have lower levels of concentration. Such destinations often have a clean slate in planning long term tourism development with many opportunities ahead. *Examples include Delhi and Riyadh.*

2 **Emerging Performers** These cities have experienced growing tourism momentum, enabled by emerging tourism infrastructure. This can provide tremendous opportunities for strategic development. However, some of these cities are characterised by a smaller scale, and should the speed of visitor arrivals outpace scale and capacity,destinations in this category may experience pressures and challenges such as overcrowding. *Examples include Dubrovnik and Buenos Aires.*

3 **Balanced Dynamics** These cities have established tourism infrastructure and potential for further Travel & Tourism growth, across both leisure and business segments, whilst balancing scale and concentration. *Examples include Auckland and Vancouver.*

4 **Mature Performers** These cities have strong leisure and/ or business travel dynamics and an established tourism infrastructure. As these destinations look to further drive Travel & Tourism growth, they will need to proactively consider potential pressures as well as opportunities for diversification to avoid strains linked to visitor volumes. *Examples include Berlin, Miami and Hong Kong.*

5 **Managing Momentum** These cities have historically had high growth momentum, supported by an established tourism infrastructure. Destinations within this typology are more likely than 'Mature Performers' to have already reached the stage of feeling the pressures of balancing scale and concentration as they continue to benefit from Travel & Tourism. *Examples include Amsterdam, London and Las Vegas.*

The extensive number of indicators highlight the complexity of achieving tourism readiness, requiring cities to proactively address all data points included in the analysis. In effect, marketing and positioning are only one aspect to consider. Cities also need to define and implement policies and strategies that will address issues such as visitor flows and traveller safety, and diversify segments and offerings, to successfully manage and sustainably grow their destinations.

While cities can move from one typology or category to another over time, no typology is better than another. Rather, each category offers different opportunities and challenges that cities must consider and prepare for. Through this unique approach to assessing readiness, city governments and tourism bodies can better understand, respond to and plan for the future, to ultimately enhance overall tourism readiness.

The report not only delves into each of the different pillars highlighting interesting examples but also analyses interlinkages between pillars such as the intersection between scale and concentration and the required balance needed in approaching destination readiness, as well as policy engagement and urban readiness with a clear positive relationship emerging between the two.

Introduction

Every year, between 2010 and 2019, Travel & Tourism grew faster than the global economy, thus enriching local communities and destinations at a faster rate than many other sectors. For decades, Travel & Tourism has been a driver of growth, job creation and prosperity for destinations and countries around the world. As one of the largest economic sectors globally, it accounted for 10.3% of global GDP and 1 in 10 jobs on the planet in 2019. Of the 1.5 billion international tourist arrivals recorded in 2019 , 44% went to cities. As the world continues to urbanise, with 55% of the world's population already living in cities, it is expected that cities continue to be attractive places to live, do business and to discover as destinations[1].

Although COVID-19 has been devastating for Travel & Tourism, with GDP losses amounting to nearly US$4.9 trillion and 62 million jobs lost in 2020, people's desire to travel and discover the world has remained unabated. In fact, travellers are increasingly seeking out secondary and tertiary destinations, showcasing the continued importance to prioritise destination readiness, not just for existing but also emerging destinations, as consumers plan for their next travels. What's more, COVID-19 has led to the acceleration of numerous trends which align with shifting traveller expectations. These include an increased focus on health and safety, the expansion of technology for a more seamless and contactless experience, the growing ability to be a digital nomad, and the rise in the prioritisation of sustainability and social impact at the community level. These issues which have been amplified in recent years will ultimately be key for the resilience, sustainability, and long-term competitiveness of destinations.

Prague

To reflect shifting global priorities and support destinations in growing their Travel & Tourism sector sustainably, resiliently, and inclusively, whilst maximising their potential, JLL and WTTC have once again joined forces to enhance their framework which will support cities in achieving destination readiness in alignment with their respective goals and ambitions. The last years and decades have not only showcased the importance of the sector, but the complexity and interconnectedness of the challenges at hand, requiring the public sector, the global Travel & Tourism private sector and communities to come together, have a seat at the table, and meaningfully engage to truly be the stewards of destinations.

Unlocking a destination's tourism potential will require a deep understanding of key factors, drivers, and enablers. To support this ambition, this report provides a distinctive analysis for destinations to engage and learn from meaningful data points, whilst gaining insight into the strong policies implemented by governments around the world. While each city has its own challenges and opportunities, there are commonalities, as per the five typologies described in the Destination 2030 framework, and learnings which can be shared, regardless of the size and type of destination. Indeed, destinations and policymakers can learn from the comparative data and the experiences of others to inform their decision-making, successfully anticipate challenges and enhance their long-term resilience.

Methodology

To further support cities in their quest to maximise their Travel & Tourism potential, and be stewards of their destinations, JLL and WTTC refined and enhanced the methodology developed for the 2019 publication of the *Destination 2030: Global Cities' Readiness for Tourism Growth.*

As the has world shifted in the past three years, so has Travel & Tourism; requiring the sector to adapt and reprioritise as it builds back better in the wake of COVID-19. Aside from an enhanced emphasis of safety and security, there has been a renewed commitment and interest from travellers to preserving our planet and the people and communities who are a part of it. Indeed, long-term sustainability is becoming synonymous with competitiveness, with over 83% of global travellers intending to make sustainable travel a priority[2] , in turn demanding deeper engagement to combat this significant threat with strategic planning. Simultaneously, travellers are increasingly looking to discover less well-known destinations, making destination readiness a priority for small and large destinations alike.

In this context, JLL and WTTC reviewed the framework for analysis, increasing the number of pillars and reviewing the indicators analysed. The pillars added include safety & security and environmental readiness, in addition to the already existing six pillars of scale, concentration, leisure, business, urban readiness and policy prioritisation. This shift allowed for an increased focus on sustainability, social impact, safety and security, in addition to more traditional indicators that continue to drive our sector. To enhance the quantity and quality of the insights, JLL and WTTC also increased the number of cities assessed, from 50 in 2019 to 63 in this edition.

The framework integrated data from 75 indicators within the eight pillars to provide a holistic picture of destination readiness. Still, data standardisation remains a challenge across the world, with many cities measuring and reporting information differently. In the context of this analysis, global sources were used for the majority of indicators, however data gathering proved to be a challenge at times, requiring additional research. Data availability, collection and standardisation are critical. In effect, as destinations work towards enhancing readiness, investment in securing quality data is essential to inform effective decision-making.

Through the assessment of 75 indicators integrated across eight pillars, five city typologies or categories were defined in terms of distinctive contexts, challenges, and opportunities to achieve tourism readiness. This unique clustering approach is aligned with the vision and goals of this report, to support destinations to grow sustainably, inclusively, and resiliently through Travel & Tourism and become stewards of their destinations regardless of their readiness. In effect, the policy challenges and development opportunities that cities such as London and Delhi face for instance, are different, so they cannot be compared. All destinations have potential and can achieve readiness, with the framework providing an opportunity to analyse, compare and maximise that potential, regardless of a city's current typology. Still, cities can change categories over time, with no typology being better than any other, as the clusters are effectively a sliding scale. Indeed, any destination can unlock its Travel & Tourism potential through preparedness and smart investment. The following section provides more details of each of the five city typologies.

75

Indicators

=

4,725

Indexed outcomes across 63 cities create destination pillars and typologies

Scale

Concentration

Leisure
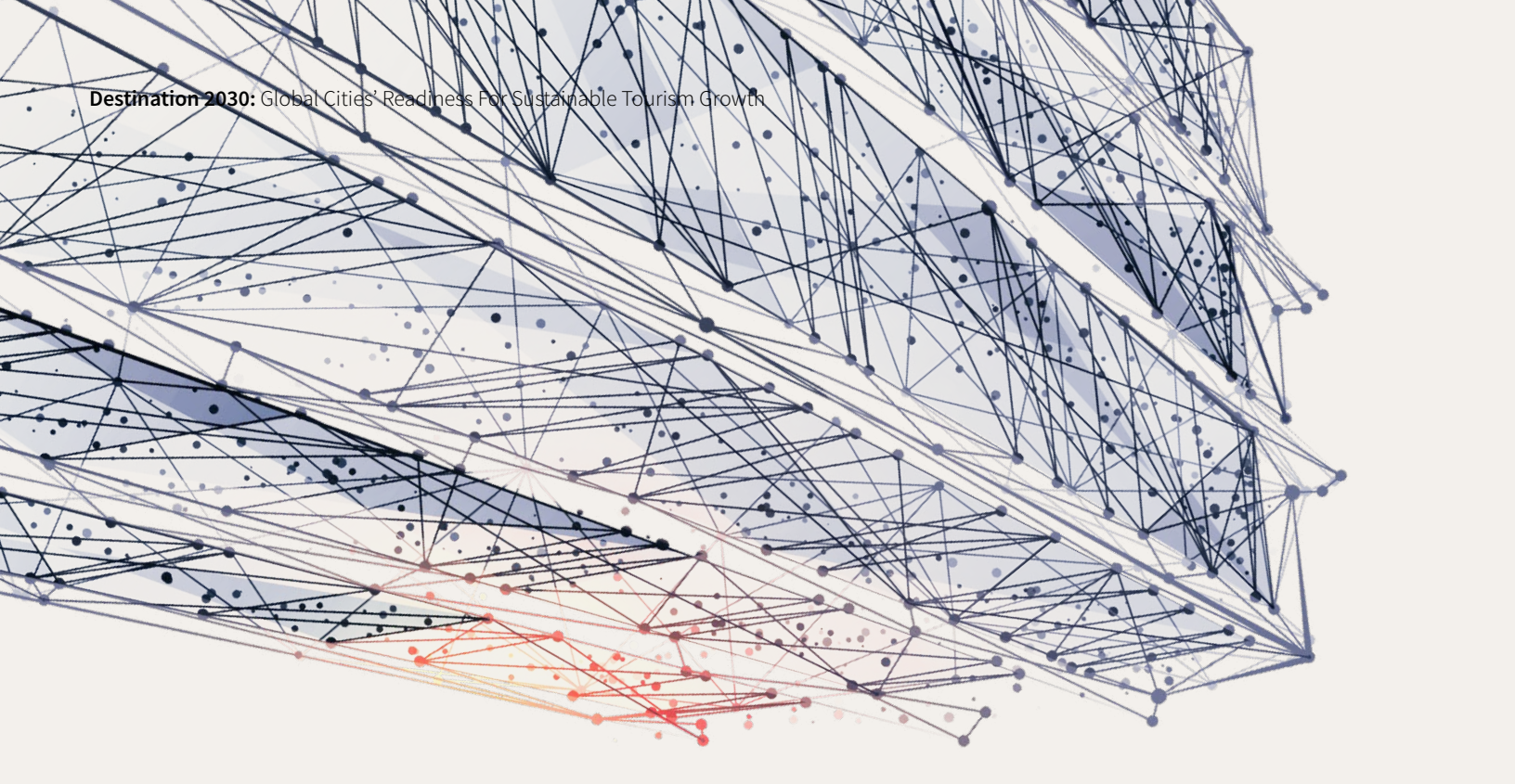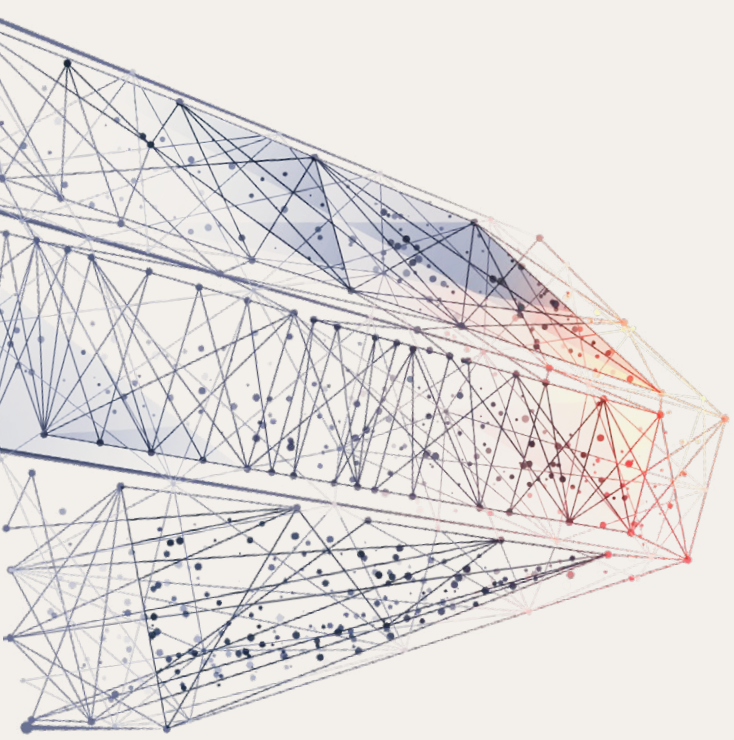
Business

Urban Readiness

Safety & Security

Environmental Readiness

Policy Prioritisation

City Typologies: *Explained*

While every destination is unique, and as such cannot be ranked in a traditional linear fashion, there are clear commonalities between destinations. It is in this context that five city typologies have been defined, which showcase the pressures, challenges, and opportunities that destinations face as they strive to smartly grow in a sustainable and inclusive way.

Whereas each of the five clusters or typologies will require different approaches to development, with no one typology being better than another, all will demand proactiveness in strategic planning and implementation at the destination level:

Levels of City Readiness

Dawning Developers

These cities tend to have emerging tourism infrastructure, perhaps having placed less emphasis historically on their Travel & Tourism sector. To date, these cities have experienced gradual tourism growth, but have lower levels of concentration. Such destinations often have a clean slate in planning long term tourism development with many opportunities ahead.

Ex: **Delhi and Riyadh**

Emerging Performers

These cities have experienced growing tourism momentum, enabled by emerging tourism infrastructure. This can provide tremendous opportunities for strategic development. However, some of these cities are characterised by a smaller scale, and should the speed of visitor arrivals outpace scale and capacity, destinations in this category may experience pressures and challenges such as overcrowding.

Ex: **Dubrovnik and Buenos Aires**

Balanced Dynamics

These cities have established tourism infrastructure and potential for further Travel & Tourism growth, across both leisure and business segments, whilst balancing scale and concentration.

*Ex:* **Auckland and Vancouver**

Mature Performers

These cities have strong leisure and/or business travel dynamics and an established tourism infrastructure. As these destinations look to further drive Travel & Tourism growth, they will need to proactively consider potential pressures as well as opportunities for diversification to avoid strains linked to visitor volumes.

Ex: **Berlin, Miami and Hong Kong**

Managing Momentum

These cities have historically had high growth momentum, supported by an established tourism infrastructure. Destinations within this typology are more likely than 'Mature Performers' to have already reached the stage of feeling the pressures of balancing scale and concentration as they continue to benefit from Travel & Tourism.

Ex: **Amsterdam, London and Las Vegas**
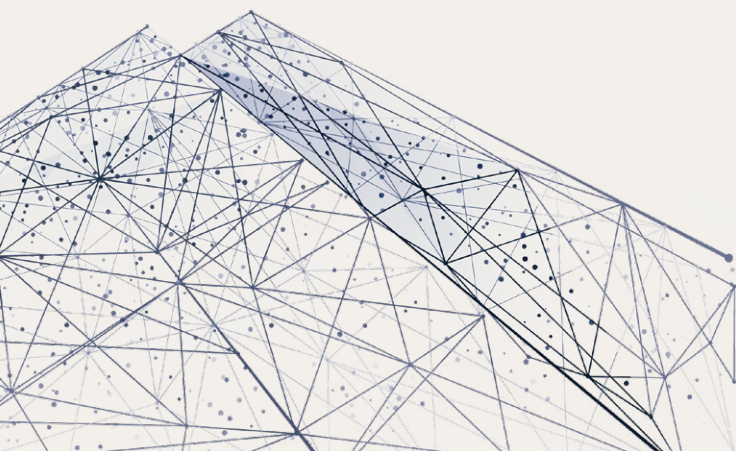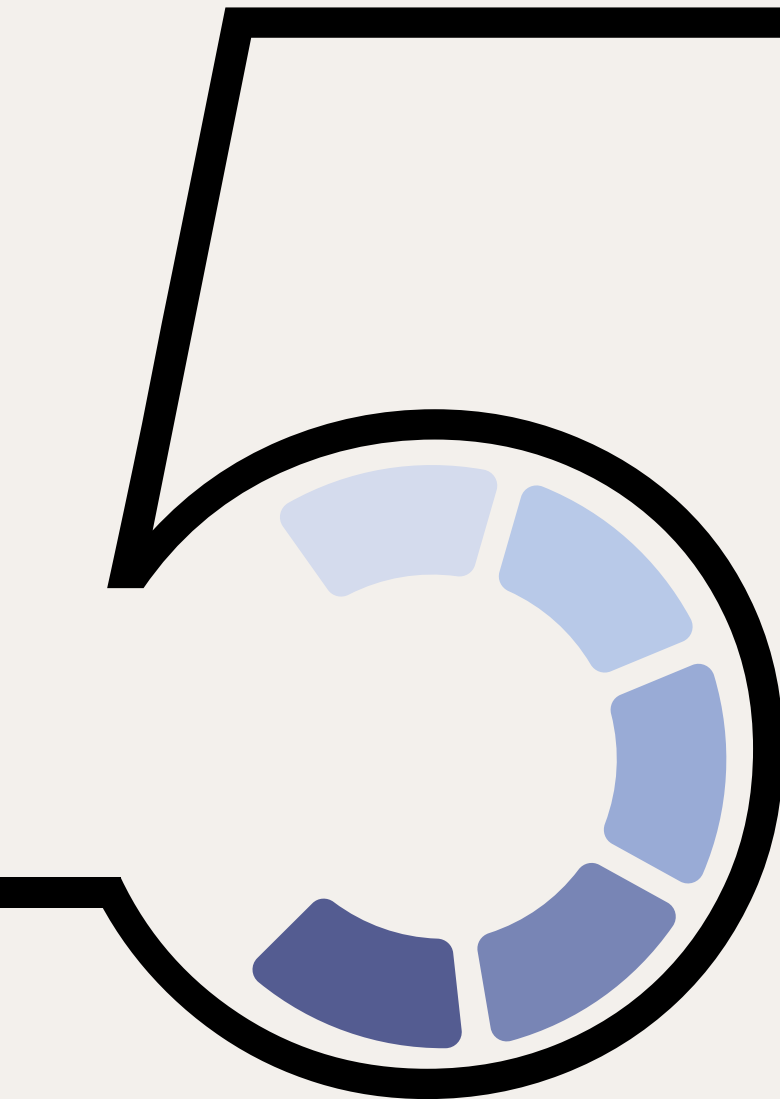
Results

The analysis of 75 indicators within the eight pillars - scale, concentration, leisure, business, environmental readiness, urban readiness, safety & security, and policy prioritisation - which encompass tourism readiness, enabled the clustering of cities into the five typologies, namely, Dawning Developers, Emerging Performers, Balanced Dynamics, Mature Performers and Managing Momentum. On this basis, the framework was developed to showcase the relationship and interconnectedness of the many factors required to enhance a city's tourism readiness. The five typologies which emerged can help destinations to better understand the opportunities, pressures, and challenges which different cities are likely to experience in their current state: with no typology being superior to the others. What's more, every city is unique, with a different combination of results on the basis of the 75 indicators, requiring a proactive, tailored, and strategic approach to destination planning and management, to further enhance tourism readiness and achieve sustainable, inclusive, and resilient growth. As cities evolve over time, they may shift from one typology to another; requiring destinations to reassess, prepare and plan on the basis of their new status quo.

This section outlines the results of the analysis, first providing an overarching categorisation per typology and then showing the leading cities within the eight pillars; showcasing how different cities have distinctive strengths and opportunities. The following section, *Analysis*, will delve deeper into the specific results, highlighting strong policies implemented across the world.

Where does my city stand?

The below graph showcases the results of the analysis, categorising the 63 cities examined into the five defined city typologies, in alphabetical order per typology.

Managing Momentum

Mature Performers

Balanced Dynamics

Emerging Performers

Dawning Developers

AMSTERDAM   BARCELONA   HONOLULU   LAS VEGAS   LONDON

NEW YORK   PARIS   SAN FRANCISCO   SINGAPORE   TOKYO

BERLIN   CHICAGO   DUBAI   DUBLIN   HONG KONG   LOS ANGELES

MADRID   MIAMI   OSAKA   ROME   SHANGHAI   SYDNEY   TORONTO

AUCKLAND   AUSTIN   BEIJING   BRUSSELS   GUANGZHOU   LISBON   MACAU

MUNICH   PRAGUE   SEOUL   SEVILLE   STOCKHOLM   VANCOUVER   WASHINGTON D.C.

ABU DHABI   BANGKOK   BUENOS AIRES   CAPE TOWN   CHENGDU   DUBROVNIK   FORT LAUDERDALE

ISTANBUL   KUALA LUMPUR   MEXICO CITY   MOSCOW   RIO DE JANEIRO   SANTIAGO   VENICE

ANTALYA   BOGOTA   CAIRO   DELHI   DURBAN   HO CHI MINH CITY   JAKARTA

LAGOS   LIMA   MANILA   MUMBAI   RIYADH

Pillar Breakdown

The cities were categorised into the five different typologies based on the eight pillars. Here we highlight the cities that took leadership and scored highest in each of the eight respective areas. As cities prioritise destination readiness, they may find different opportunities as well as implications linked to each of the specific pillars to further unlock their tourism potential.

Scale

The pillar of scale included indicators such as total visitor arrivals, total air passengers, the volume of visitor attractions, the number of hotel rooms and the number of shared home rental listings, among others, showcasing the breadth and volume of the city's tourism infrastructure. Within this pillar, unsurprisingly, the leading cities tended to be larger metropolises.

Concentration

The concentration pillar integrated indicators including visitor arrivals per population, seasonality of airline seats, visitors per square kilometre, and growth in visitor arrivals vs. accommodation stock, among others. This pillar highlights elements relating to density of visitors within the city as well as visitation timing over a year. Most of these destinations tend to be popular as leisure destinations, with visitors often focusing their interest on select key attractions and areas.

Leisure

The leisure pillar integrated indicators including leisure travel spend, the volume of 3+ star visitor attraction ratings and price competitiveness and value, among others. This pillar focuses on elements specifically linked to leisure travel, considering spending, perceived attractiveness as well as specific attractions, both in terms of cultural and natural heritage sites but also in relation to retail. These destinations have prioritised the creation of a strong leisure offering and environment for travellers.

Business

The business pillar integrated indicators including business travel spend, the volume of business travellers, corporate presence and convention centre exhibit space, among others. This pillar focuses on elements specifically linked to business travel, with destinations in this pillar tending to be large and attractive business hubs which have invested in the development of their business travel segment.

	Scale		Concentration		Leisure		Business
1	London	1	Amsterdam	1	Macau	1	Singapore
2	Shanghai	2	New York	2	Dubrovnik	2	Washington
3	New York	3	Sydney	3	Seville	3	Chicago
4	Beijing	4	Prague	4	Honolulu	4	New York
5	Tokyo	5	Honolulu	5	Rio de Janeiro	5	Beijing
6	Paris	6	Las Vegas	6	Lisbon	6	Riyadh
7	Bangkok	7	Rome	7	Hong Kong	7	Jakarta
8	Dubai	8	Bangkok	8	Barcelona	8	Stockholm
9	Las Vegas	9	Paris	9	Delhi	9	Shanghai
10	Istanbul	10	London	10	Madrid	10	San Francisco

Environmental Readiness

While measuring sustainability remains a challenge at the global and destination level, the importance of environmental sustainability should not be underestimated. The environmental readiness pillar integrated indicators including air quality, water availability and quality, the use of renewables, the risk of a natural disaster and protected areas, among others. With travellers increasingly prioritising sustainability in their decision making, a dedicated pillar for environmental sustainability has been created to reflect societal priorities. The destinations ranking highest in this pillar have prioritised environmental sustainability, reflected not only in their strategies and policies but in their positioning as destinations.

Urban Readiness

The urban readiness pillar integrated indicators including both physical and digital infrastructure, healthcare availability, cost of living and workforce availability, among others. This pillar focuses on the resilience of cities as urban centres and their attractiveness as urban hubs, also considering elements such as congestion and accessibility for individuals with disabilities. These destinations tend to have made significant urban investments, beyond Travel & Tourism, as it relates to connectivity within the destination, making themselves more attractive to business opportunities, talent and visitors.

Safety and Security

The safety & security pillar integrated indicators including COVID-19 vaccination data, crime and safety, stability, and the safety of specific segments such as women and the LGBTQ+ community, among others. With travellers increasingly concerned for their safety, security and wellbeing, this pillar has been added to reflect societal priorities. Destinations ranking highest in this pillar have prioritised safety and security, reflected not only in their policies but in their positioning as destinations.

Policy Prioritisation

The policy prioritisation pillar brings together indicators relating to the definition and implementation of policies, including the creation of a tourism strategy plan, economic development plan, sustainable growth strategy and tourism flow management policy, among others. This pillar highlights the focus a city has placed on Travel & Tourism specifically, as well as how it has integrated tourism policy within the broader city urban agenda.

	Environmental Readiness		Urban Readiness		Safety and Security		Policy Prioritisation
1	Sydney	1	Singapore	1	Vancouver	1	Auckland
2	Seville	2	New York	2	Toronto	2	Las Vegas
3	Bogota	3	Los Angeles	3	Stockholm	3	Vancouver
4	Paris	4	Tokyo	4	Singapore	4	Honolulu
5	Barcelona	5	San Francisco	5	Auckland	5	London
6	Venice	6	Chicago	6	Amsterdam	6	Hong Kong
7	Rome	7	Honolulu	7	Sydney	7	Cape Town
8	Amsterdam	8	London	8	Osaka	8	Paris
9	Macau	9	Seoul	9	Brussels	9	Barcelona
10	Chengdu	10	Washington	10	Dublin	10	Austin

Analysis

Analysis by Pillar

Moving from an understanding of data to the implementation of tangible actions requires an understanding of both the pillars themselves and the policies that can and have been successfully implemented in cities across the globe, as well as the interlinkages between pillars.

This analysis chapter begins with an explanation of the benefits cities can gain from focusing on each of the eight pillars, along with examples of cities that have done just that.

Scale

Growing scale requires a focus on the development, enhancement and investment in tourism infrastructure. In effect, to be able to sustainably welcome more visitors, cities need to improve and perhaps consider diversifying their value offering to travellers, catering to their varying needs and expectations, whether it be for business or leisure. In an era where travellers are looking for increasingly personalised and authentic experience, scale can be connected to experiential travel through the creation of intimate experiences which can drive demand. While creating more visitor attractions, from sports arenas and festivals to large conference spaces, will enhance the positioning of a destination, the ease of accessibility to the city itself and accommodation availability will be essential to increasing the volume of visitors. Indeed, cities wishing to enhance scale should carefully assess their airport connectivity and capacity as well as lodging availability, both in terms of hotel rooms and short-term rentals. The prioritisation of scale can be undertaken in a way that benefits both visitors and residents. For instance, London used its bid to host the 2012 Olympic Games as an opportunity to accelerate redevelopment, ultimately making the destination more attractive. Another example is that of Paris, which complemented its strong hotel room offering with policies to support short-term rentals in the city. These not only enabled the city to attract more visitors, but also increased the dispersal of visitors across the city, thereby spreading the benefits of tourism beyond traditional hotspots.

Paris

London

In its bid to host the 2012 Olympics, London used this as an opportunity to accelerate redevelopment in East London. The Games led to regeneration of the area, as a 500-acre site of mostly toxic wasteland was converted into the Olympic Park and 11,000 homes were built following the Games. Beyond the venues for the Olympics, London cleaned up and revitalised its canals, extended transportation, and built new transport links, whilst also investing in hospitality infrastructure. The 2012 Games are estimated to have generated a net increase in tourism arrivals of 10.8 million between 2005 and 2017, generating £2 billion contribution to GDP and supporting over 61,000 jobs. Londoners were still reaping the benefits from the Olympics in 2018, with events taking place in the 2012 venues generating US$176 million.

Paris

As a leading short-term rental destination globally, Paris integrated home-sharing policies within its 2016 Tourism Strategy Development Plan, and implemented in 2017, measured home-sharing regulations to balance sustainable tourism growth and the city's liveability for residents. This enabled Parisian residents to rent their main home for up to 120 days a year as furnished tourist accommodation on the proviso that it must be registered with the authorities. Platforms such as Airbnb have partnered with the city to provide access to data to the local city officials, such as the activity of furnished tourist rentals and the collection of the tourist tax. By 2021, building on its success in Paris, similar policies relating to home-sharing had expanded to many towns and cities in the country collaborating with leading platforms to jointly achieve sustainable and responsible tourism.

Concentration

Having a thorough understanding of the level of tourist concentration within a city, specifically the concentration and density of tourist and visitor activity, can help a destination as it develops or refines its sustainable growth strategy. Like all other issues, concentration should not be considered in isolation, but rather in conjunction with other strategies, particularly scale, as well as in collaboration with other key stakeholders. A city's tourist concentration will be dependent on a number of factors including the seasonality of the destination itself, the number and popularity of tourist attractions, the dispersal of tourism sites across the city and its focus on business vs. leisure. It is the specific combination of factors which may lead a city to face extreme levels of concentrations, notably overcrowding, regardless of its typology. Indeed, cities from Venice to Barcelona, included in the Emerging Performers and Managing Momentum typologies respectively, have historically struggled with overcrowding, which in turn has negatively impacted their local communities. Concentration should be considered on a scale, with policy levers available to either enhance or decrease concentration. For instance, cities with higher concentration levels - which often have a disproportionate focus on leisure - may opt to invest in growing a larger corporate traveller base, work to have travellers come year-round rather than during a specific season, and design new tourist attractions across neighbourhoods to disperse tourists and to maximise the benefits of tourism across the city itself. Policies to shift concentration can be undertaken in a way that benefits both visitors and residents. For instance, while Berlin focused on a dispersal strategy to better channel the flow of tourists across its city, Dubrovnik, which has high concentration only seasonally has implemented initiatives to reduce seasonality for its destination, and Bangkok aimed to alter its visitor mix to support its city's tourism industry.

Dubrovnik

Berlin

With Berlin's tourism being historically concentrated in its inner-city areas, the city prioritised, in its 2018 sustainable tourism plan, the active channelling of the flow of tourists to improve distribution, and the expansion of marketing activities to promote services and attractions in outer districts. To achieve its objectives, Visit Berlin intensified its cooperation with its districts, supporting many district-specific projects, events, cycle routes and city tours. It also updated the 'Going Local Berlin' mobile phone app which presents the highlights of Berlin's 12 districts and launched a magazine with the same name. In addition, in 2019, Visit Berlin began a project with the Telekom subsidiary Motionlogic which monitors visitor flows via mobile phone data, enabling Berlin for the first time to see the distribution of visitors in time and place.

Bangkok

For many years, Bangkok heavily relied on international visitors, which accounted for 81% of all tourism spending in 2018. The stark decline in international travellers resulting from COVID-19-related border closures led the Thai government to focus on stimulating domestic demand, including targeting more than two million expatriate residents. In addition to funding subsidised tourism packages nationally, the destination launched initiatives such as the 'Treasure Trip' mobile phone app, in Thai and English, which promotes visits to various cultural, recreational, and shopping spots of Bangkok. In 2020, it also launched the 'Khung Bang Kachao' project (the 'Lung of Bangkok') to encourage expats to explore unseen areas on the periphery of Bangkok; an area with environmental, economic, tourism, social, and cultural significance.

Dubrovnik

The city of Dubrovnik is impacted by seasonality, with half of all annual overnight stays taking place in the summer months; at times leading to overcrowding during the peak season. The city tourist board enacted several initiatives to encourage off-season visits, such as the 2018 marketing campaign 'A City for All Seasons', which included the promotion of the October 'Good Food Festival, the 'Winter Festival and Carnival. In addition, the tourist board added to its website a visitor numbers prediction tool based on machine-learning algorithms, that supports travellers in planning visits on dates that are likely to be less busy. By 2019, more international airlines were extending their schedules into the off-season.

Leisure

In 2019, leisure travel accounted for 79.4% of overall travel spending, a figure which only increased as a result of COVID-19 in 2020 to reach 80.4% of total spending. Given the critical nature of leisure travel for tourism development, increasing the attractiveness of a city's leisure offering should be a priority for many destinations. Leisure travellers come in all shapes and sizes, from backpackers to luxury travellers, from day-trippers to those taking extended stays as well as those with disabilities. This requires destinations to examine their tourism mix and cater to the combination they currently have and the one they wish for. Venice for instance, shifted its approach as it prioritised overnight visitors over day trippers. Cities will also need to consider the quantity and quality of their attractions, as it relates to their cultural and natural assets and sites, their luxury retail availability as well as their broader price competitiveness. While all cities across typologies have the ability to build, shift and enhance their leisure offering, Dawning Developers have the added benefit to be able to integrate their leisure strategy in the early stages of destination planning, as they encourage smart investment. Riyadh, for instance, has taken notable steps to enhance its leisure offering through strategic investments, in turn boosting both domestic and international arrivals. More broadly, according to our research, cities which are heavily reliant on leisure travel tend to be more likely to drive stronger Average Daily Rates (ADR) for hotels and reinvest into the Travel & Tourism sector, similarly to cities with strong business hubs.

Venice

Riyadh

In 2018, leisure travel accounted for just 42% of Travel & Tourism spending in Riyadh, with tourism directly contributing only 2.6% to the city's GDP. However, tourism has been put front and centre as part the part of Saudi Arabia's Vision 2030. In effect, Riyadh has been enhancing its value proposition and appeal to leisure visitors, from the opening of the 300m-high 'Overlook' bridge at the Kingdom Tower in 2018 to the inauguration of the Museum of Illusions in 2021. Riyadh also launched the 'Riyadh Season', a four-month festival of culture, shows and entertainment, which welcomed more than 11.4 million visitors in 2019 and attracted over 4.2 million visitors in its first month in 2021. Riyadh is planning to further enhance its leisure offering through the development of the King Salman Park, which will be the world's largest city park and will include a Royal Arts Complex, National Theatre, and a central area surrounded with art and water features.

Venice

With tourists often outnumbering locals in Venice and increasing local resentment, the city took steps to prioritise overnight visitors over day-trippers and promote slow and sustainable tourism. In fact, Venice was one of the first cities to test limited access. Venice began by separating day-trippers from residents and overnight visitors by introducing turnstiles at key aggregation points in the city in May 2018. This approach favoured overnight travellers, forcing day-trippers to use back streets to reach the main attractions, while the main walkways were reserved for residents and visitors with a Venezia Unica card. Simultaneously, the city government has been working closely with cruise lines who have taken voluntary actions to reduce congestion, to ultimately find a long-term balanced approach.

Business

Although business travel represented 20.6% of global travel in 2019, the segment is linked to economic development and often responsible for the highest spending in many destinations, making it essential as cities develop and implement strategic tourism plans for both their recovery and long-term sustainable growth. Business travel is not only a key segment for Travel & Tourism, but critical to supporting the growth of all economic sectors including manufacturing, pharmaceuticals, construction, and consulting, among others. Given the importance of business travel, increasing the attractiveness of the city as a business hub, and investing in its business venues and amenities should be carefully considered for the positioning of a destination. Las Vegas, for instance, has made significant investments in the

renovation and expansion of its convention centre to become the second largest convention facility in the United States. Beyond events and conferences, which bring together leaders and business partners, the appeal of a city as a business hub is contingent on broader corporate presence, an enabling business environment and the appropriate workforce availability. Indeed, a collaborative approach between the public and private sectors as it relates to talent recruitment and retention, will ultimately benefit the sector, by enabling the growth of a destination as a business hub and enhancing corporate culture. Dubai, for instance, created an enabling environment to attract investments from large businesses whilst positioning itself as an innovation hub.

Dubai

Las Vegas

Although the majority of travellers visit Las Vegas for its unique leisure offering, including its casinos and shows, the city is increasingly prioritising business travel through large conferences and events. In fact, Las Vegas' destination marketing organisation owns and operates the Las Vegas Convention Center (LVCC). The LVCC launched its District Project in 2012 which kickstarted significant renovations, modernisation and a major expansion to accommodate both current customer needs but also capture future opportunities. In 2021, the latest additions to the convention centre were unveiled, notably a 1.4 million square foot West Hall and the Las Vegas Convention Center Loop, an underground tunnel to shuttle convention attendees in all-electric Tesla vehicles. Through its investment and expansion, the city of Las Vegas now has the second largest convention facility in the United States.

Dubai

In its quest to welcome the world to Dubai, the Emirate designed an enabling business environment to support the growth of Travel & Tourism, amongst other economic sectors. As a result of its policies, Dubai was ranked as the easiest place to do business in the Middle East and the 16th globally by the World Bank. Key enabling policies implemented in Dubai include the permission for foreign investors to set up a company and have 100% ownership, including hotels, and the opportunity to make profits in semi tax-free conditions. To support Travel & Tourism businesses, among others, Dubai also launched 'Invest in Dubai', an integrated digital business set-up platform to simplify the business journey. More recently, in 2020, Dubai unveiled the 'Innovation Attraction Programme', which aims to facilitate the market entry of over 25,000 innovative start-ups worldwide in six sectors, including aerospace, transport and mobility.

Environmental Readiness

With climate change worsening at an alarming pace and the looming biodiversity crisis, cities have an important role to play in proactively integrating environmental sustainability in their Travel & Tourism vision and strategies, as well as their broader city planning. Indeed, Travel & Tourism has the ability to meaningfully contribute to a city's sustainability ambitions and goals and support environmental readiness and regeneration. Local communities and travellers alike are paying closer attention to the human impact on the environment, in turn seeking more sustainable options in how they live and travel. In this context, the sustainability and liveability of a destination are and will increasingly become, key decision-making factors in where people choose to live, and the cities travellers decide to visit. Cities around the world are already taking action, focusing not only on how to preserve and protect their natural assets but also improve their liveability. Indeed, there are visible examples of cities not only prioritising, but priding themselves on

sustainability, as they consider issues from green construction and transportation and air and water quality, to recycling and waste, emissions, and the preservation of their biodiversity. For instance, Vancouver ingrained sustainability, not only as part of its tourism plan but also as part of its city's strategy, making great strides towards its ambitious commitments. Similarly, Copenhagen underwent a major infrastructural transformation to enhance sustainability through transportation, dubbing itself the 'City of Cyclists', whilst enhancing its attractiveness as a destination. With renewed calls to action to address sustainability, cities will need to embed environmental readiness in their strategic plans, engaging all key stakeholders, to effectively respond to current challenges and successfully position themselves for the future.

Vancouver

Vancouver

Vancouver is a world-leading sustainable community and tourism destination, with its policies clearly aligned to the city's goal. In the last decade, through its 'Greenest City' initiative, Vancouver developed a 28km seawall, planted 150,000 trees, restored 34 hectares of natural areas, increased its recycling rate from 40% to 60%, and decreased its water usage by 26%, among others. To ensure tourism considerations were integrated in municipal and infrastructure planning, the City of Vancouver actively engaged in the development of the Tourism Master Plan together with industry leaders and environmental and community bodies. The focus on sustainability translated in a lighter footprint by visitors and residents alike, with over 50% of trips taken by foot, bike, or transit. To continue moving forward, Vancouver hired a Sustainable Destination Manager to support tourism businesses develop sustainable solutions, and released its Tourism Vancouver 2030 report.

Copenhagen

Copenhagen went through a major infrastructural transformation process, investing US$300 million in the last decade, to shift from the use of cars to bicycles, proclaiming itself the 'City of Cyclists'. In 2018, 1.44 million kilometres were cycled by Copenhageners daily, with 49% of all trips to work and education done by bike. This move is not only more eco-friendly but has enhanced the efficiency and reduced costs of transportation for residents and visitors alike, with the societal benefits of cycling estimated at €228 million per year. The shift from cars to bikes changed the character of Copenhagen, which has become calmer, quieter, and less polluted; in turn making it a more attractive tourist destination. Indeed, Copenhagen involved tourism in its vision, creating materials addressing visitors. The city not only offers bike tours but has created a free bike system, with half of all available bikes being used by tourists.

Urban Readiness

Accommodating the continued sustainable growth of Travel & Tourism requires urban readiness. Indeed, given the link between higher levels of urban readiness and visitation levels to cities, the importance of future-proofing a destination - which includes not only a focus on physical infrastructure and digital connectivity, but also healthcare availability and workforce preparedness - cannot be underestimated. It is essential to ensure that travellers are not only able to reach a city, but easily move within it, in turn requiring investment in airport connectivity, ground transportation, including a public and alternative mobility network, as well as tourism service infrastructure. For instance, Abu Dhabi complemented its investment in air connectivity with ground transportation solutions to enhance quality of life and improve the experience of visitors and residents alike. As cities enhance their infrastructure, accessibility should be prioritised. Indeed, to date, there are over one billion people, amounting to about 15% of the global population, who live with some form of disability; a figure which is only increasing. New York City, for instance, has made great strides in prioritising and showcasing accessibility across its five boroughs, including the experience it provides at its theatres, museums, sport stadiums and dining facilities. As cities delve into accessibility, they should consider the quality, timeliness, and comprehensiveness of information; for example pictures and measurements, whether routes have been designed for people with disabilities, and should train customer-facing staff on accessibility issues.

The preparedness of cities will inevitably entail a focus on digital connectivity and incorporate the latest technologies, which can help destinations support and enhance their efforts to reshape urban mobility and improve the experience and liveability for both its residents and visitors alike. Seoul, for instance, has invested US$ 1.19 billion in the innovation of the daily lives of its citizens, with a plan to install over 50,000 sensors supporting Internet of Things (IoT) to transfer diverse urban life data into big data analytics. The shift towards digital connectivity at the city level has been further accelerated as a result of COVID-19, during which a seamless, contactless, and healthy experience has become a priority. Indeed, travellers are increasingly seeking to ensure the availability of quality healthcare within a city, should anything happen to them while travelling. At the overarching level, as cities prioritise urban readiness, they will simultaneously need to ensure that they have a workforce available and interested in joining the sector, and that the labour force has the necessary skills, including digital skills, to respond to travellers needs. For instance, Singapore continues to identify the skills gap and develop training and reskilling programmes, with a strong focus on digital literacy, to ensure the employability of its workforce.

Abu Dhabi

New York City

New York City has taken noteworthy steps across its five boroughs to prioritise accessibility for travellers with disabilities. NYC & Company created 'Accessible NYC', a guide which showcases the different accessible experiences that the city has to offer including arts, entertainment, dining, museums, and sports, among others. New York City has already made all its theatres wheelchair accessible and many of its leading museums have been offering tours for visitors with physical disabilities for decades. In recent years, New York City's leading art museums, including the MoMA, Met, the Jewish Museum and the Whitney, developed programmes for people of all ages with developmental disabilities or who are on the autism spectrum. The Mayor's office is also partnering with GalaPro to revolutionise the theatre experience, particularly for the deaf, hard of hearing, low vision, and blind communities.

Seoul

Seoul has been a "smart city" pioneer since the 1990s, using cutting-edge technology to benefit its citizens and visitors alike, including the introduction of an advanced intelligent transport system. In 2018, it launched a four-year smart city action plan after analysing residents' demand for effective smart city projects. It utilises IoT, Artificial Intelligence and Blockchain to improve the experiences of, and engagement with, its citizens and visitors. For instance, it introduced smart crosswalks for children's safety, the 'Smart Seoul Map', an interactive map-based information tool, and sensors to monitor pollution levels and count visitors at tourist attractions. By the end of 2022, Seoul aims to launch the 'Metaverse Seoul' platform, a virtual communication ecosystem, which will among others benefits, help reanimate destroyed historical sites such as Donuimun Gate with Augmented and Virtual Reality, and provide a virtual tour between popular tourist attractions.

Abu Dhabi

Abu Dhabi's investment in physical connectivity not only enabled the city to become an aviation hub, but to facilitate the movement of visitors and residents alike within its destination. Over the past decade, Abu Dhabi's road network almost doubled; lauded for its layout and smooth management and supported by smart transportation technology systems. Since 2019, to enhance quality of life, the city encouraged the use of diverse transport options, implementing new initiatives including buying 327 new buses, launching a free Park & Ride service with dedicated parking spaces in the suburbs of Abu Dhabi Island, and launching a new toll gate system 'Darb' that charges drivers who go through the gates during peak hours. To support the mobility of visitors, a minibus service was added to connect Abu Dhabi International Airport with the city's main tourist attractions, and at the end of 2021, the free Visit Abu Dhabi Shuttle Bus service was launched, which connects visitors between Abu Dhabi's top hotels and attractions.

Singapore

Singapore, through Workforce Singapore (WSG) and SkillsFuture Singapore (SSG), led the way in the identification of key skills and the delivery of a wide range of training and reskilling programmes, including digital literacy, to enhance employability across its workforce. For its tourism workforce, the Singapore Tourism Board (STB) collaborated with WSG and SSG, industry associations and training providers to develop the 'SkillsFuture Skills Framework for Tourism', a one-stop portal providing guidance and information on tourism trends, job roles, emerging skills, and a training programme. The STB also offers scholarships and internships, as well as a one-year Technology Associate Programme for graduates keen to transform Singapore's tourism landscape using data and digital technology. In the wake of COVID-19, new initiatives including subsidised, tourism-specific training courses have been launched to help Singaporeans acquire in-demand and emerging skills.

Safety and Security

While the perceived level of safety and security in a destination has always been a key factor in the decision-making of visitors, the wake of COVID-19 has heightened concerns around health, safety and security at the societal level as well as for Travel & Tourism specifically. As such, it is essential that cities, regardless of their size, consider safety & security as a major part of their development, and in conjunction with their tourism plan to ensure a safe, secure, seamless, and welcoming traveller experience. The perception of a lack of safety or security for the traveller will hinder the competitiveness of a destination. Moreover, changing the perception of a destination in terms of safety, security and stability can be challenging, not only requiring time and effective policies, but also creativity and authenticity to engage citizens and travellers in accepting the change. For instance, Brussels proactively worked to rebuild its image with travellers whilst implementing tangible policies to enhance its safety and security, following the 2015 terrorist attacks. Cities can also focus on changing their positioning and perception with specific traveller segments such as women and the LGBT community. Cape Town, for instance, as well as other destinations such as New York, Fort Lauderdale, and Tel Aviv, have actively encouraged the LGBT community to travel to their respective destinations, not only catering to their needs but making the community's members feel safe and welcome. While cities cannot mitigate all risks, destinations should closely collaborate with the Travel & Tourism sector to enhance their resilience, and invest in the safety and security of both local communities and travellers. Given the importance of building traveller trust and confidence, the city of Seville responded to health concerns linked to COVID-19 by offering free COVID-19 insurance to all its international visitors.

Cape Town

Brussels

Since the 2015 terrorist attacks in Brussels, the city has continued to take significant steps to enhance the safety and security of residents and visitors alike, with crime falling by 20% in Brussels over the past decade. Among other initiatives to bolster security and enhance traveller confidence, Brussels launched the '#CallBrussels' campaign, which had residents answer questions from tourists. Between 7-11 January 2016, 12,688 people called the hotline from 154 different countries, with 74% of the callers being international and over 9 million seeing the hashtag. More recently, Brussels implemented initiatives to enhance women's safety, pedestrian safety, and address pickpocketing, as well as increasing police presence and improving street lighting. To continue monitoring traveller satisfaction, Visit Brussels conducts a monthly visitor survey, which includes elements relating to security.

Seville

Seville, as part of the region of Andalusia, introduced measures in the wake of COVID-19 to restore confidence in travellers and encourage them to book a trip as restrictions ease. To rebuild trust and give travellers peace of mind, the Andalusian authorities, of which Seville is the capital, offered free COVID-19 insurance to all non-resident international visitors staying in regulated accommodation in the region throughout 2021. The comprehensive policy covered the costs of the visitor as well as their travelling companions, should they develop COVID-19 during their stay. It also covered the costs of pharmaceuticals, medical treatment, hospitalisation, transport to or from hospital, repatriation to their home country if needed, and accommodation, should an extended stay be required due to necessary quarantine.

Cape Town

Since legalising same-sex marriages in 2006 and enshrining equal treatment of the LGBT community in law, South Africa, and specifically Cape Town actively encourages gay travellers to its destination. Cape Town has become a leading destination for LGBT travellers, with over 10% of its tourists being members of the LGBT community, thanks to its cosmopolitan lifestyle which is welcoming, embraces diversity and makes members of this community feel safe. The city's positioning is strengthened by the presence of an active local gay community with many tourism-related and other businesses being gay-owned or gay-run. The city not only proactively markets to LGBT visitors, but also offers tailored advice, including a Cape Town Gay Guide, which includes a Pink Map and lists upcoming events. Cape Town also organises a number of celebrations catered to the gay community, including the Cape Town Pride Festival which culminates in the Pride Parade.

Policy Prioritisation

The growth of cities, and their rising importance to the global economy, has enabled these new powerhouses to have increasing influence in the definition and implementation of their policy agenda across areas such as Travel & Tourism. As cities expressly look to achieve tourism readiness and unlock their Travel & Tourism sector's potential, the prioritisation of a balanced and enduring approach to Travel & Tourism in strategic planning, and the implementation of enabling policies are essential, and require the involvement of all key stakeholders, including the private sector and local communities. Indeed, as a city aims to prioritise Travel & Tourism, it should start with a thorough assessment of the destination itself, collectively decide on a vision and goals, and develop a detailed roadmap for implementation. Any strategic plan should not only consider how to cater to the existing tourism mix and explore how to better attract its desired market segments, but also address visitor flows, whilst integrating the views and perceptions of the local residents and communities to ensure buy-in. For instance, Tokyo developed a holistic plan to grow Travel & Tourism sustainably, through both its broader city-wide strategy as well as its specific tourism plan. Beyond tourism strategic plans, the COVID-19 crisis highlighted the importance of making Travel & Tourism an integral part of any city-wide planning including emergency plans. Honolulu, the State Capital of Hawaii, for instance, implemented well-organised structures to respond to shocks, bringing together all stakeholders, including Travel & Tourism, in both planning and decision-making.

As cities gain greater influence in policymaking, they can have the increased ability to shape or reshape a variety of policies, such as taxation policies, as well as collaborate with national governments on visa policies. Austin, for instance, continues to reinvest its tourism fee revenues to further fund and promote Travel & Tourism to its destination, through Visit Austin, its Convention Center and businesses looking to preserve or create tourism experiences. To facilitate and increase travel to their destination, cities such as Shanghai and Beijing have implemented a unique and innovative gateway transit visa, which enabled foreign travellers transiting through China to benefit from the 144-hour Transit Visa Exemption. The prioritisation and implementation of enabling Travel & Tourism policies in a city's strategic agenda should be supported by systems to monitor and evaluate the impact of the sector and its policies.

Honolulu

Tokyo

In 2016, the Tokyo Metropolitan Government created a comprehensive four-year city strategy 'New Tokyo. New Tomorrow. The Action Plan for 2020', to further develop Tokyo as a safe, diverse, sustainable and smart city; whilst making tourism a leading industry. To create a comfortable environment for international visitors and increase the number of inbound visitors from 11.9 million in 2015, Tokyo aimed, among other goals, to create multilingual signs and collaborate with other international destinations. As a result, in 2017, traffic signs for 'Stop' and 'Slow down' began to be shown in English, in addition to Japanese, to help foreign visitors. That same year, Tokyo launched a cross-promotional tourism campaign with New York City, with NYC & Company organising the advertisement of Tokyo including on television and social media. These objectives were integrated into the city's 2018 Tourism Strategy Action Plan, which by 2019, through a combination of public and private sector efforts, supported the increase of international tourists to the city to 15.2 million.

Honolulu

Honolulu, the State Capital of Hawaii and located on Oahu, which is home to roughly two thirds of the State's population, has prioritised disaster preparedness and management to maximise the safety of its residents and visitors alike. The State of Hawaii has well-organised structures to respond to shocks, bringing together all key stakeholders including the Travel & Tourism sector in planning and decision-making. Indeed, in the event of a crisis, the State activates its emergency operations centre, during which time the Governor of Hawaii, together with the Head of Tourism in Hawaii and other key leaders, jointly make rapidly actionable decisions. What is more, to help tourists stay safe and improve communication to travellers, the Hawaii Tourism Authority has designed videos with locals conveying safety information to visitors.

Austin

To promote and fund tourism, Austin continues to reinvest tourism fee revenues, gathered through its Hotel Occupancy Tax, into the sector. In 2017 alone, the 9% levy brought in around US$310 million. Indeed, Austin businesses looking to restore tourist-facing historic buildings or promote visitor engagement through interactive cultural experiences, can become beneficiaries of the proceeds from the city's visitor fee through the Heritage Preservation Grant Program. To date, the majority of the city's tourism fee revenues has been hypothecated into funding Visit Austin and the Austin Convention Center. In fact, the levy was raised to 11% in 2019 to fund the expansion of the city's convention centre. Both organisations are key levers to bringing significant tourism spending to the city, through media promotion and selling tours, as well as hosting symposia and attending international shows.

Shanghai and Beijing

To boost tourism in key cities in China and facilitate travel, a unique gateway transit visa has been implemented in select Chinese cities, including in Shanghai and Beijing, rather than at the national level. The gateway visa enables foreign travellers transiting through China to reach another destination country to benefit from the 144-hour Transit Visa Exemption. The visa exemption is available to the citizens of the 53 countries who are already eligible for the 72-hour Transit Visa Exemption, however, the number of participating cities is more limited. In effect, the 144-hour Transit Visa Exemption was first introduced to three cities in East China, namely, Shanghai, Hangzhou, and Nanjing. As of December 2017, it was expanded to Beijing, Shijiazhuang, Tianjin, and Qinhuangdao.

Interlinkages Between Pillars and Indicators

Often, achieving destination readiness involves more than solely focusing on the Travel & Tourism sector; it involves a holistic approach to destination planning and management. As shown in some of the previous city examples, cities wanting to enhance destination readiness will also need to engage a variety of stakeholders from the start of the planning process, ranging from city planning authorities, developers, investors, and legislators to community groups.

In many cases, cities will also benefit from assessing, and building on, the interlinkages between the eight pillars as well as specific indicators and datapoints. This section details examples of such interlinkages, for instance the relationships between scale and concentration, and domestic and international travel.

Scale vs. Concentration

Exploring the intersection of scale and concentration can effectively highlight the potential level of pressure that a destination's tourism economy places on the city as a whole. Where a destination sits at this intersection should be monitored and considered in the design of policies to support the city's sustainable tourism growth. Interestingly, the results show that the majority of highly concentrated and large-scale cities were those cities in the Managing Momentum typology; less concentrated and smaller-scale cities mostly were in the Dawning Developers typology. While this may seem intuitive, it begins to lay a foundation to better understand what balance may look like. Cities such as Washington D.C., Lisbon and Munich, appeared to be the most balanced against the norm for scale and concentration. Specific examples of measures to address both scale and concentration are in the pillar-by-pillar analysis.

Dawning Developers

6.19M
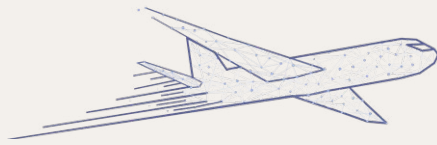**Avg. annual
overnight visitors**

216K
Avg. visitors per sq. km.

1,135
**Avg. number of
visitor attractions**

1.15
**Avg. visitor to
city population ratio**

Managing Momentum

21.37M
Avg. annual
overnight visitors

460K
Avg. visitors per sq. km.

3,735
Avg. number of
visitor attractions

5.02
Avg. visitor to
city population ratio

Balanced Dynamics

13M
Avg. annual
overnight visitors

320K
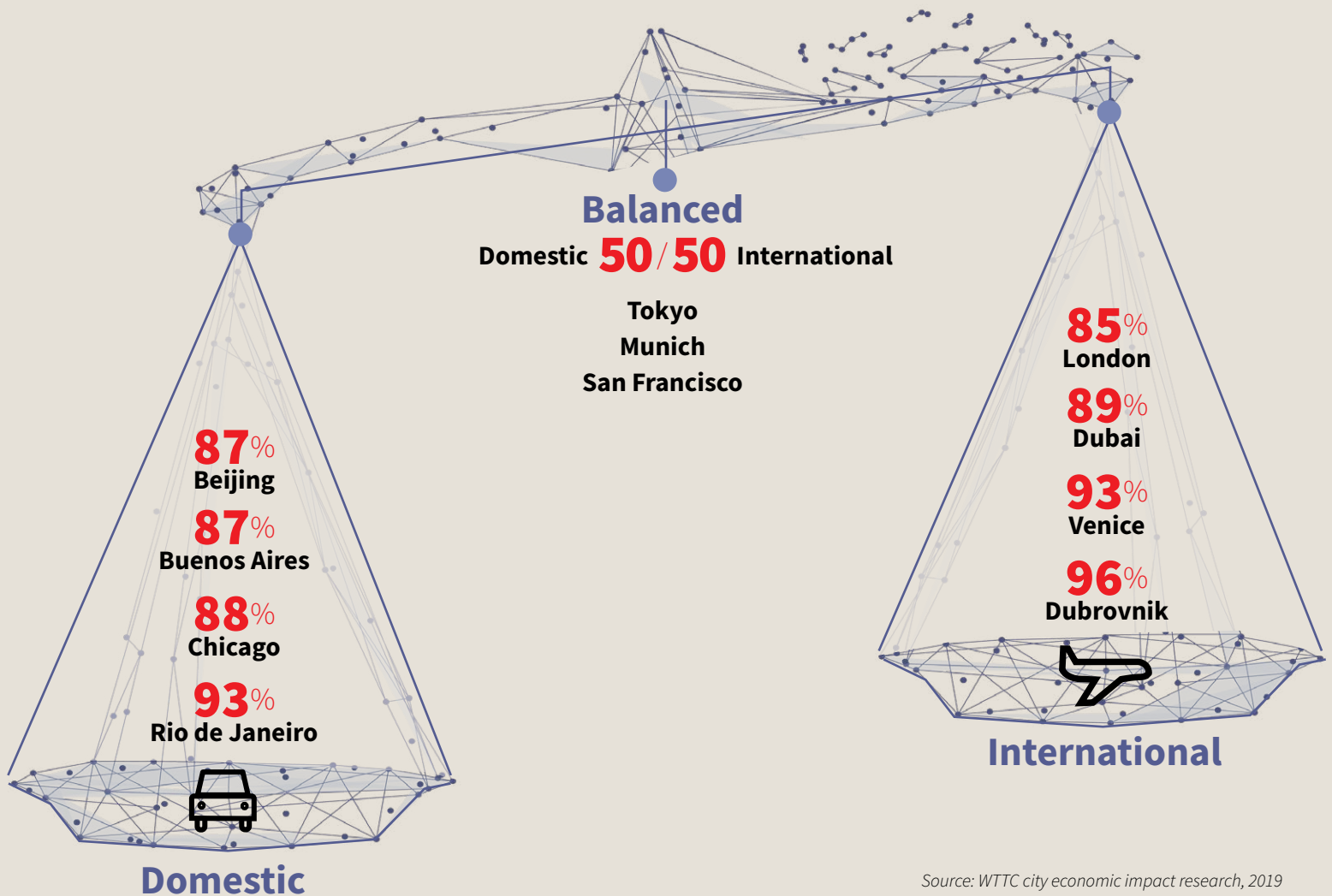Avg. visitors per sq. km.

1,600
Avg. number of
visitor attractions

7
Avg. visitor to
city population ratio

This illustration shows the progression of cities across three of the five city typologies with several of the key factors affecting both scale and concentration. As cities expand and become more densely populated, the impacts of Travel & Tourism tend to mirror these factors.

Domestic vs. International

Each city has a unique balance in terms of its reliance on domestic vs. international visitors. While no mix is without its risks and opportunities, cities should ensure that their balance is aligned with both their vision and goals of their sustainable tourism growth strategy. To date, domestic travel remains the leading form of tourism, accounting for 71.6% of total global travel spend in 2019; a figure which increased to 81.3% in 2020 as a result of COVID-19 related travel restrictions. Domestic travel has historically proven to help address seasonality within regions, while also dispersing tourists to less visited rural areas which are at times overlooked by foreign visitors. The growth of the middle class, which is expected to reach 5.5 billion by 2030[3], will further enable people to travel, with research suggesting that domestic tourism demand picks up at an income level of about US$35,000, while international travel takes off at around

US$50,000[4]. Although international travel accounted for 28.4% of total travel spending in 2019, and 18.7% in 2020, the average international visitor spends more than a domestic traveller at a destination. What's more, international Travel & Tourism, and particularly, international spend, is vital to support job creation in cities, which have been heavily impacted by travel restrictions during COVID-19. In fact, at the global level, for every 34 international visitors to a destination, one new job is created[5]. The following graphic highlights the varying dependence of cities on domestic and international tourism, with cities such as Rio de Janeiro and Beijing being highly reliant on domestic travel spend, while cities including Dubai, London and Dubrovnik have a much higher reliance on international travel spend. Cities which revealed the closest one to one ratio in our research included Tokyo, Munich and San Francisco.
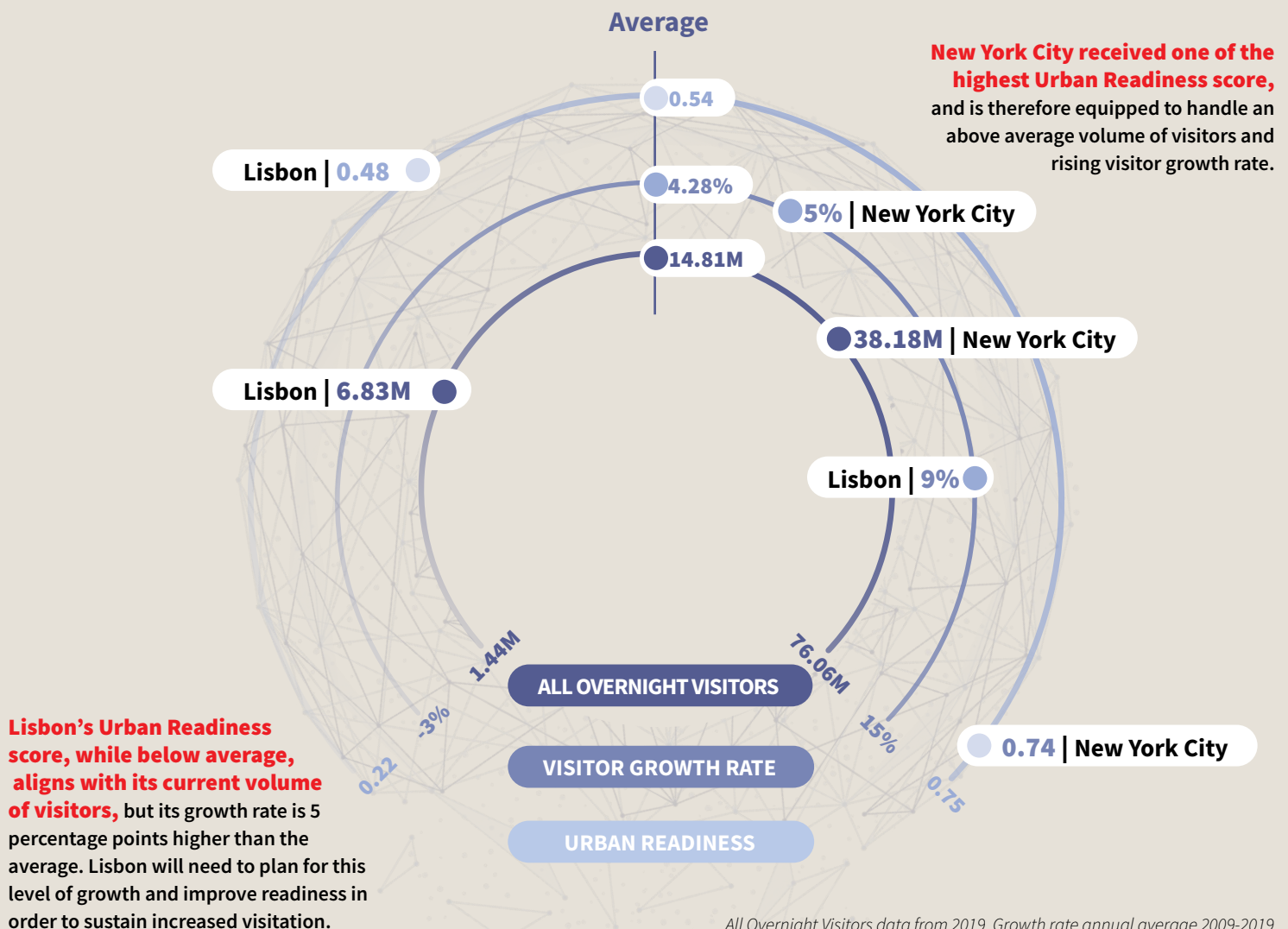

Balanced

Domestic **50**/**50** International

Tokyo
Munich
San Francisco

85% London
89% Dubai
93% Venice
96% Dubrovnik

International

87% Beijing
87% Buenos Aires
88% Chicago
93% Rio de Janeiro

Domestic

Source: WTTC city economic impact research, 2019

Urban Readiness vs. Tourism Growth and Visitor Volumes

Perhaps unsurprisingly, our research suggests that cities with a higher urban readiness score tend to be positively correlated to higher visitation. While there may not be a singular causation, it is clear that travellers value strong connectivity, both physical and digital, accessibility as well as the availability of quality healthcare services at the destination level. What's more, in the context of Travel & Tourism business development, an enabling business environment and the availability of workforce are key factors in the decision of businesses to invest and settle in foreign cities. The following graphic showcases the relationship between urban readiness, tourism growth and visitor volumes,

revealing that the cities with the fastest tourism growth rates may be at risk if urban readiness is not proactively addressed. Indeed, cities which currently experience a lower volume of visitors but are outpacing the average growth rates of all the analysed cities, such as Riyadh, Ho Chi Minh City, Delhi, Lisbon, and Cairo, will need to plan for their rapid increases in visitation and improve urban readiness accordingly. On the other hand, cities such as Mexico City and Beijing, which have some of the greatest volumes of visitors but slower growth rates, may need to consider how to enhance urban readiness to continue driving sustainable tourism growth.

Urban Readiness
Enables Greater Visitation

Average

New York City received one of the highest Urban Readiness score, and is therefore equipped to handle an above average volume of visitors and rising visitor growth rate.

0.54

Lisbon | 0.48

4.28%

5% | New York City

14.81M

38.18M | New York City

Lisbon | 6.83M

Lisbon | 9%

1.44M

76.06M

ALL OVERNIGHT VISITORS

-3%

15%

VISITOR GROWTH RATE

0.22

0.75

URBAN READINESS

0.74 | New York City

Lisbon's Urban Readiness score, while below average, aligns with its current volume of visitors, but its growth rate is 5 percentage points higher than the average. Lisbon will need to plan for this level of growth and improve readiness in order to sustain increased visitation.

All Overnight Visitors data from 2019, Growth rate annual average 2009-2019

London

Policy Prioritisation vs. Urban Readiness

Although there may not be a singular causation, the analysis revealed a strong positive relationship between urban readiness and a destination's policies and Travel & Tourism prioritisation. Indeed, cities with friendlier Travel & Tourism policies tend to have a higher level of readiness than others, with cities like Auckland, Las Vegas, London and Honolulu being highlighted as cities with high levels of urban readiness and enabling Travel & Tourism policies. In effect, for enabling Travel & Tourism policies to be effective, they will need to be complemented by investment into physical and digital infrastructure as well as improved connectivity. This may require an enhanced accommodation offer, including options for both solo travellers and families, quality hotels and rental apartments. In addition, improved transportation options, such as direct flights, quality roads and rail networks, should be considered, along with investment in recreation and attractions. What's more, with access to health services becoming an important criterion for travellers, it will be essential for cities to direct investment towards the development and maintenance of quality health infrastructure.

Recommendations

Beyond the various specific policy areas outlined and the successful policies highlighted, achieving tourism readiness requires a collaborative approach. Cities will need to look holistically at the 75 indicators, and their intersectionality, to first identify their current level of tourism and chart their path forward. More broadly, to enhance destination readiness and drive sustainable, regenerative, and inclusive Travel & Tourism growth, governments and decision-makers will need to prioritise strategic planning, public-private-community engagement, sustainability and effective communication and outreach, whilst leveraging technology and providing the enabling environment. The following are key considerations and factors to enhance a destination's readiness.

Public-Private-Community Engagement

Partnerships and multi-stakeholder engagement have always been key to effective destination planning and management. However, in recent years, the concept of destination stewardship, an approach that balances and meets the needs of all stakeholders, has gained increased traction. To thrive, destination stewardship must approach needs and goals holistically and requires public-private-community collaboration. Rather than involving different stakeholders in times of crisis, key stakeholders should be engaged in both the development and the execution of a strategic plan for Travel & Tourism. Indeed, the collaboration and engagement of both public and private sector partners builds trust and commitment in the strategic plan as they work towards common goals.

Strong partnerships with the private sector not only make destinations more viable and attractive to furthering investment in Travel & Tourism but also more competitive and resilient in the long term. Through a co-creation approach, destinations can enhance their access to finance and investment, increase their ability to acquire more advanced technologies and innovations, become more attractive to high-quality talent and support the diversification of products at the destination level. In addition, public-private partnerships can help ensure the shared commitment and accountability of a mandate for destination management. Through such partnerships, destinations can improve liveability whilst strengthening their destination's image and creating a more resilient visitor economy. Indeed, private sector partners can help bring a city's vision to life and be tremendous advocates for the destination's Travel & Tourism economy.

For a destination to thrive in the long-term, it is essential that the local community and its residents, not only understand the benefits of Travel & Tourism to their community and destination, but also feel ownership and commitment to the vision and strategy. Indeed, destinations should not solely be great places to visit, but great places to live in. As such, the proactive engagement of local communities in the definition and development of strategy plans will enable the development of the sector but also enhance local quality of life. In this context, residents and neighbourhood representatives should be invited proactively to contribute to strategic plan consultations to share their concerns, provide feedback and help devise solutions to help maximise the benefits of Travel & Tourism for all. Ultimately, an approach of community-centred Travel & Tourism development will enable residents to rediscover and reclaim their neighbourhoods, whilst enhancing the attractiveness of the city.

As cities review the Destination 2030 framework and consider ways to enhance destination readiness, such an approach is essential to ensuring sustainable growth in the Travel & Tourism sector. Indeed, cities should determine if the key leaders and constituents in each of the focus areas are both collaborating and engaged in the tourism readiness planning and execution process.

Sustainability at the Core

As highlighted during COP26 in 2021, climate change and environmental degradation are worsening at an alarming pace, requiring urgent action to avoid a devastating impact on destinations, businesses, local communities, the global economy, and our way of life. With today's decisions defining the world of tomorrow, there is a need to increase both ambitions and actions to protect people and planet. In the past few years, conversations and efforts linked to environmental sustainability have reached a turning point, with more and more governments, businesses, civil society organisations and destinations setting clear, tangible and increasingly ambitious commitments. What's more, travellers are increasingly prioritising sustainability as they choose their next destination. This growing momentum requires the creation of sustainable growth plans which are balanced and durable and enable a city to achieve its ambitions and targets.

With commitments to sustainability intensifying as a result of COVID-19, governments and destinations alike should capitalise on this renewed interest and build on the Paris agreement to further enhance wildlife and environmental protection, in collaboration with both the private sector and local communities. Beyond the prioritisation and commitments made by the global Travel & Tourism private sector, there has been a growing awareness and prioritisation of sustainability by travellers themselves. Indeed, travellers are increasingly seeking more sustainable and responsible travel options, with over 80% of travellers planning to prioritise sustainability in their travels in the coming year[6].

With cities being on the frontline of major global and societal changes, they have a role and responsibility to continue prioritising and driving the sustainability agenda, which is ultimately key to the destination's readiness and sector's long-term competitiveness. In this context, the development of sustainable growth plans which are enduring, balanced, measurable, and not only consider the needs of a city's economy, but also its natural assets, residents, and travellers, will support destinations in achieving their long-term vision and goals. Through its quantifiable metrics, the Destination 2030 framework can effectively support cities in setting measurable targets to drive change. Indeed, given the rising importance of sustainability on the global agenda, there is an expectation that destinations that protect nature or offer an insider view into wildlife, will increasingly attract a steady following.

Communication and Outreach

A clear and compelling communications and outreach strategy is essential to support a city's strategic plan for sustainable and resilient tourism growth. Indeed, effective communication and outreach can significantly contribute to deeper engagement by all stakeholders, including city officials, business leaders and the local community, as well as building trust, in turn making the plan more impactful. Such communication should leverage technologies and make use of the tools available to communicate in real time, thereby ensuring engagement and alignment. Regular communication can enhance stakeholder awareness of the plan, the understanding of its activities, sharing outcomes and successes to date as well as building support for the strategic plan.

The development of a comprehensive communications plan in a collaborative way from inception is not only a strategic education tool, but also enables destinations to enhance their agility through swifter feedback from their communities

and partners themselves, whilst creating an opportunity for continued conversations and engagement. Strategic communications and outreach can also help destinations shift mindsets.

The impact of both the strategic plan and communications strategy should be monitored and evaluated to ensure it is delivering the desired results. This can be achieved both through qualitative and quantitative means. From a qualitative perspective, satisfaction and perception surveys to travellers and residents can reveal the sentiment towards Travel & Tourism at the destination level. At the quantitative level, a comparison of indicators, including the many included in this framework, can provide measurable data to understand change. Having a core group, including representation across stakeholder groups from government, business, and the local community, to own the plan, monitor progress and adapt as needed, has proven to be a recipe for success.

Leveraging Technology

While the acceleration of digital technologies and the resulting innovations have been a prominent feature of the COVID-19 crisis, digitisation has been a growing trend for decades. Although digitisation should not be employed to replace human interaction, given the high-touch nature of the Travel & Tourism sector, it should be leveraged as a means to enrich the traveller's experience and enhance the liveability of the city. Indeed, travellers across generations are increasingly expecting a frictionless experience, making digital infrastructure investment key to cities' long-term attractiveness.

Cities around the world should invest in, leverage, and integrate digital solutions into their offering to enhance the experience of travellers, whilst simultaneously enhancing measurability, enabled by technologies to better address the management of crowds, tourist flows and marketing of their destination. Digital platforms, particularly social media, can be employed to promote awareness of the destination and build support for various initiatives and activities. What's more, to support the promotion of destinations, virtual tourism, through the design of virtual experiences, has helped cities inspire wanderlust, thereby increasing sales through digital marketing.

Technology can also be used to facilitate the delivery of more sustainable tourism solutions whilst providing critical tools to measure impact, such as through the collection of data on nature, wildlife, and environmental conservation work. Nevertheless, to maximise the use of technologies, destinations, together with the private sector, will need to enhance digital skills within the local community.

Strategic Planning

Successfully integrating tourism into the destination's agenda requires careful planning and consideration. It is not only essential to have a comprehensive tourism plan, but also to ensure that the Travel & Tourism goals and approach are aligned and integrated into the destination's broader strategy to steward the destination's future successfully.

In this context, understanding the clear essence or DNA of one's destination is key. A destination must assess what are its unique assets and value proposition that will attract visitors; specifically, considering its culture, history, gastronomy, heritage, natural and cultural resources, as well as its infrastructure. It will be important for a destination to also consider how it is perceived by travellers. Beyond their strengths and potential, destinations should identify their limitations and challenges, recognising that each destination is different. The destination readiness framework outlined in this report, through its 75 indicators and policy analysis can be used by destinations to support this understanding; and ultimately help shape or reshape a destination's vision for its strategic plan and ambitions for the future as well as its clearly defined goals.

Looking Ahead

The COVID-19 pandemic has provided an opportunity for Travel & Tourism to build back more sustainably, inclusively and resiliently; ensuring that destinations are not only great places to visit, but great places to live in. This call to action has resonated with cities around the world which are increasingly prioritising quality growth as they look to the future. Not only have traditionally popular urban centres taken leadership in assessing and reassessing their destination readiness, but secondary and tertiary destinations which are rising in popularity are following suit, requiring these cities to be as cognisant of future opportunities and constraints as larger urban destinations.

While the concept of destination readiness for sustainable growth of Travel & Tourism is not new, these unique times have showcased the need to take a holistic view when addressing destination planning and management, balancing all the dynamics that make up a city's fabric. The tremendous importance of cities as drivers of prosperity cannot be underestimated, making it ever more important to recommit and prioritise the futureproofing of destinations, regardless of size.

As cities work to make tourism readiness a priority, it is not only important for them to understand their DNA and assets but have tangible data points to inform their decision-making. The JLL and WTTC framework developed provides such data points and can support destinations in taking a holistic view as well as the development of a diagnostic platform and strategy on the basis of their current context, both assets and pressure points, as well as their ambitions for the future.

The report highlights best practices and case studies from sustainability to urban readiness and safety, to the management of concentration and scale which destinations across the world have adopted, to inspire city leaders as they evaluate their own strategies. Indeed, for cities to harness the positive social and economic impact from tourism, for travellers and residents alike, the sector's growth must be planned and strategic. As such, JLL and WTTC encourage city and Travel & Tourism leaders to review the readiness framework, considering opportunities and the most effective approach to enhance destination readiness.

As we look to the global economic and societal recovery from COVID-19, it is clear that no one group can resolve challenges ahead on their own. It requires multi-stakeholder engagement and partnerships, as we jointly pave the way to a better future.

Acknowledgements

Appendix

Indexed Cities

Abu Dhabi	**Bogota**	**Cape Town**	**Delhi**
Amsterdam	**Brussels**	**Chengdu**	**Dubai**
Antalya	**Buenos Aires**	**Chicago**	**Dublin**
Auckland	**Cairo**		**Dubrovnik**
Austin			**Durban**
Bangkok			**Fort Lauderdale**
Barcelona			**Guangzhou**
Beijing			
Berlin			

Ho Chi Minh City	**London**	**New York**	**Seville**
Hong Kong	**Los Angeles**	**Osaka**	**Shanghai**
Honolulu	**Macau**	**Paris**	**Singapore**
Istanbul	**Madrid**	**Prague**	**Stockholm**
Jakarta	**Manila**	**Rio de Janeiro**	**Sydney**
Kuala Lumpur	**Mexico City**	**Riyadh**	**Tokyo**
Lagos	**Miami**	**Rome**	**Toronto**
Las Vegas	**Moscow**	**San Francisco**	**Vancouver**
Lima	**Mumbai**	**Santiago**	**Venice**
Lisbon	**Munich**	**Seoul**	**Washington**

Readiness Index Indicators

Scale

Total Overnight Visitor Arrivals

Total Air Passengers

International Air Passengers as Share of Total

Airline Seat Capacity

Number of Destinations Served by Airport

Volume of Visitor Attractions

Largest venue square footage

Number of Sports Arenas

Number of Mega Events

Total Hotel Meeting Space

Number of Hotel Rooms

Number of Shared Home Rental Listings

Concentration

Visitor Arrivals / Population

Number of Attractions / Visitor Arrivals

Seasonality of Airline Seats

Visitors per Square km

Hotel Occupancy

Seasonality of Hotel Occupancy

Home Rental Occupancy

Home Rental Inventory as percent of total lodging inventory

Dispersal of Tourism

Growth in Visitor Arrivals vs. Accommodation Stock

Share of Negative Visitor Attractions Reviews

Leisure

Leisure Travel Spend (% of total spend)

Volume of 3 plus star Visitor Attraction Ratings

Price competiveness and hotel ADR value

World Heritage status

Seasonality of Airport Arrivals

Cruise Passenger Arrivals

Presence of luxury brands / retail availability

Business

Business Travel Spend (% of total spend)

Volume of business travellers

GDP per Capita

Size of Workforce

Corporate Presence

Office square footage

Largest venue square footage

Gender balance

Environmental Readiness

Protected areas

Renewables being used

Number of sustainable hotels

Temperature Extremes

Air quality index

Water availability and quality

Risk Level of a natural disaster

Does the city have an emission goal?

Carbon emission production

Urban Readiness

Cost of Living

Availability of workforce

Well-being survey of citizens

Infrastructure Index

Digital Security Index

Business friendliness

Traffic Congestion

Disability Readiness

Travel & Tourism employment

Travel & Tourism Employment Growth

Travel & Tourism supply chain

Safety and Security

COVID-19 vaccination levels

Overall safety

LGBTQ+ safety

Personal Security Index

Healthcare Index

Family Friendliness

Women's safety

Social and Political Stability

Day/Nighttime safety

Policy Prioritisation

Economic Openness Index

Does the City have a Tourism Strategy Plan?

Economic Development Plan

Sustainable Tourism Growth Plan

Tourism Flows Management Policy

Home Rental Policy

Small Business Incentives / Entrepreneurial Accessibility

Tourism Development Tax Legislation

Emergency Planning

Visa policy at country level

Endnotes

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