Tourism Competitiveness and Urban Competitiveness

Integrating Indices and Indicators for Strategic Synergy

Mori Memorial Foundation
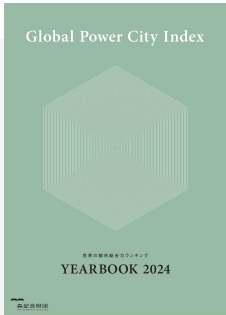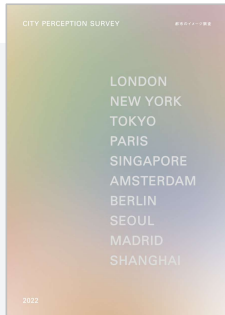Institute for Urban Strategies
Researcher

Peter Dustan

MORI MEMORIAL
FOUNDATION

Institute for
Urban
Development

Institute for
Urban
Strategies

Major Research Projects in Institute for Urban Strategies

	Global Power City Index (GPCI)	City Perception Survey (CPS)	Japan Power Cities
Purpose	Evaluates and ranks the major cities of the world according to their "magnetism," or their comprehensive power to attract people, capital, and enterprises from around the world.	Aims to not only help understand the image of cities, but to also contribute to the future branding strategies of target cities	Comparative and multi-faced analyses of city strengths based on quantitative and qualitative data and to shed light on city characteristics such as strengths and attractiveness.
Target Cities	World 48 cities	World 10 cities	138 Japanese cities and Tokyo 23 wards
Release date	Once a year since 2008	2016, 2022	Once a year since 2018

Global Power City Index
YEARBOOK 2024

CITY PERCEPTION SURVEY
LONDON
NEW YORK
TOKYO
PARIS
SINGAPORE
AMSTERDAM
BERLIN
SEOUL
MADRID
SHANGHAI
2022

Japan Power Cities
日本の都市特性評価
DATABOOK 2024

Beyond rankings – Using indices as strategic tools

RANKINGS

- Compares overall performance

- Produces winners & losers

- Answers "Who is the best?"

- One score

INSIGHTS

- Identifies underlying strengths

- Reveals diversity and uniqueness

- Answers "What makes this city unique?"

- Multiple narratives

"Every city is #1 at something."

Background and Objectives

Global Power City Index

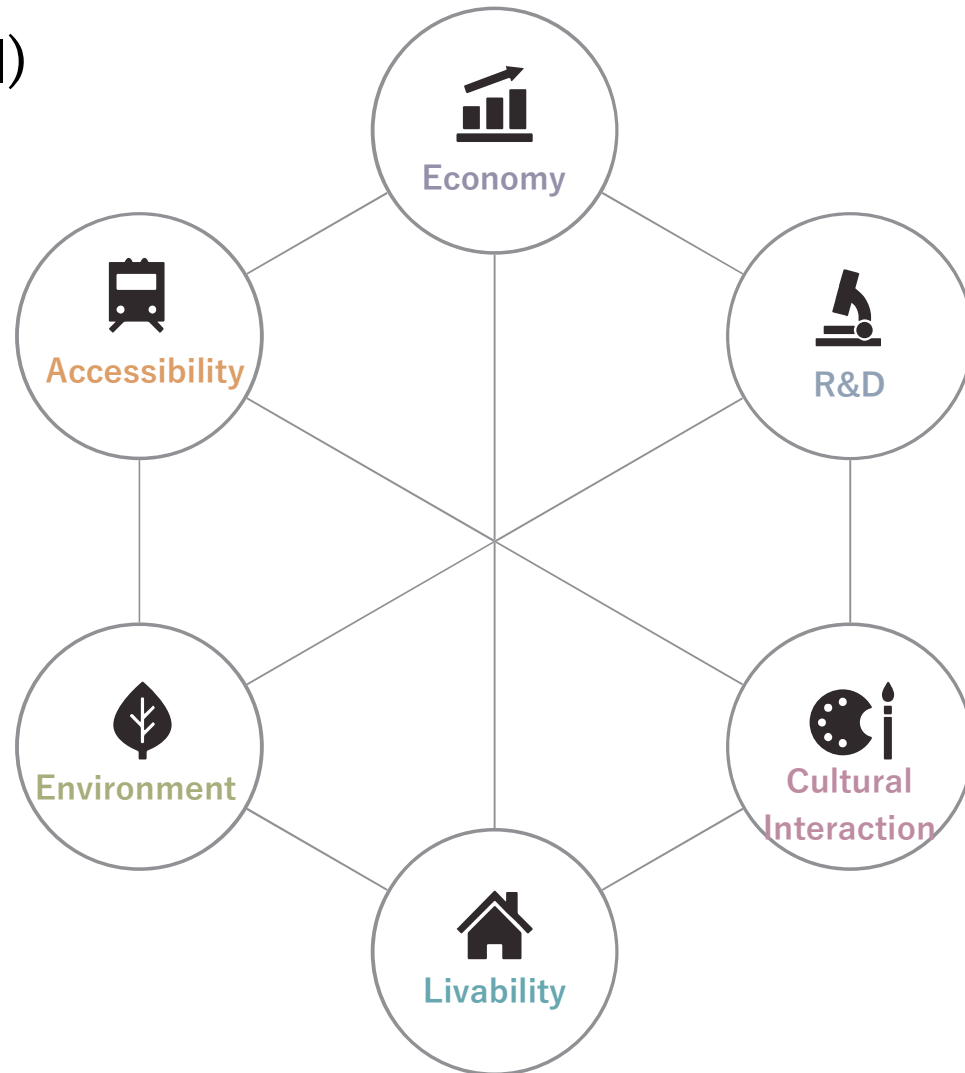The magnetism of the world's major cities is evaluated and ranked.

Global Power City Index (GPCI)

Comprehensive Power

6 Functions ⚙

+ 70 Indicators

Background and Objectives

Japan Power Cities—Profiling Urban Attractiveness

In order for Japan to continue to maintain its vitality in the future, each city needs to draw up a strategy to equip itself with " **magnetism"** and " **development potential** ' while utilizing its own ' **urban characteristics**

JPC **will clarify the urban characteristics (power of individuality) of each city** by analyzing Japanese cities from a relative and multifaceted perspective

J P C

JAPAN POWER CITIES

JAPAN
POWER CITIES

Profiling Urban Attractiveness

2 0 2 5

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Japan Power Cities (JPC)

Kyoto
A historic city distinguished by **cultural excellence** and **environmental initiatives**.

Osaka
Balances **culture, exchange,** and **economic strength**.

Yokohama
A sustainable city with strong **tourism** and **economic** foundations.

Fukuoka
A hub city of Asia promoting **business activities** and **international exchange**.

Nagoya
strong **academic** and **transportation infrastructure**, and high **livability**.

Indicators

Most tourism-related indicators fall under Cultural Interaction or Accessibility.

Economy

Market Size	1	Nominal GDP	
	2	GDP per Capita	
Market Attractiveness	3	GDP Growth Rate	
	4	Economic Freedom	
Economic Vitality	5	Stock Market Capitalization	
	6	World's Top 500 Companies	
Human Capital	7	Total Employment	
	8	Employees in Business Support Services	
Business Environment	9	Wage Level	
	10	Availability of Skilled Human Resources	
	11	Variety of Workplace Options	
Ease of Doing Business	12	Corporate Tax Rate	
	13	Political, Economic and Business Risk	

R&D

Academic Resources	14	Number of Researchers	
	15	World's Top Universities	
Research Environment	16	Research and Development Expenditure	
	17	Number of International Students	
	18	Academic Performance	
Innovation	19	Number of Patents	
	20	Winners of Prizes in Science and Technology	
	21	Number of Startups	

Cultural Interaction

Trendsetting Potential	22	Number of International Conferences	
	23	Number of Cultural Events	
	24	Cultural Content Export Value	
	25	Art Market Environment	
Tourism Resources	26	Tourist Attractions	Q
	27	Proximity to World Heritage Sites	
	28	Nightlife Options	Q
Cultural Facilities	29	Number of Theaters	
	30	Number of Museums	
	31	Number of Stadiums	
Visitor Amenities	32	Number of Hotel Rooms	
	33	Number of Luxury Hotel Rooms	
	34	Attractiveness of Shopping Options	Q
	35	Attractiveness of Dining Options	Q
International Interaction	36	Number of Foreign Residents	
	37	Number of Foreign Visitors	

Livability

Working Environment	38	Total Unemployment Rate	
	39	Total Working Hours per Capita	Q
	40	Workstyle Flexibility	
Cost of Living	41	Housing Rent	
	42	Price Level	
Security and Safety	43	Number of Murders	
	44	Economic Risk of Natural Disaster	
Well-Being	45	Life Expectancy	
	46	Social Freedom and Equality	
	47	Risk to Mental Health	
Ease of Living	48	Number of Medical Doctors	
	49	ICT Readiness	
	50	Number of Retail Shops	Q
	51	Number of Restaurants	Q

Environment

Sustainability	52	Commitment to Climate Action	
	53	Renewable Energy Rate	
	54	Waste Recycle Rate	
	55	CO2 Emissions per Capita	
Air Quality	56	Air Quality	
	57	Comfort Level of Temperature	
Natural Environment	58	Water Quality	
	59	Urban Greenery	
	60	Satisfaction with Urban Cleanliness	Q

Accessibility

International Network	61	Cities with Direct International Flights	
	62	International Freight Flows	
Air Transport Capacity	63	Number of Air Passengers	
	64	Number of Arrivals and Departures at Airports	
Inner-City Transportation	65	Station Density	
	66	Public Transportation Use	
	67	Travel Time to Airports	
Transport Comfortability	68	Commuting Time	Q
	69	Average Driving Speed	
	70	Ease of Mobility by Taxi or Bicycle	

*Q indicates that the indicator uses questionnaire survey data

GPCI tourism-related indicators

Tourism Effects

- Number of Foreign Visitors

- Number of Air Passengers

- Number of Arrivals and Departures at Airports

- Cities with Direct International Flights

Facilities & Services

- International Conferences
- Cultural Events
- Tourist Attractions
- Nightlife Options
- Number of Theaters
- Number of Museums
- Number of Stadiums
- Number of Hotel Rooms
- Number of Luxury Hotel Rooms
- Dining and Shopping
- Station Density
- Travel Time to Airports
- Ease of Mobility

City Identity

Strong Branding and city identity

vs

Perception Gap

Tourism competitiveness in global cities

NYC

#2
Overall
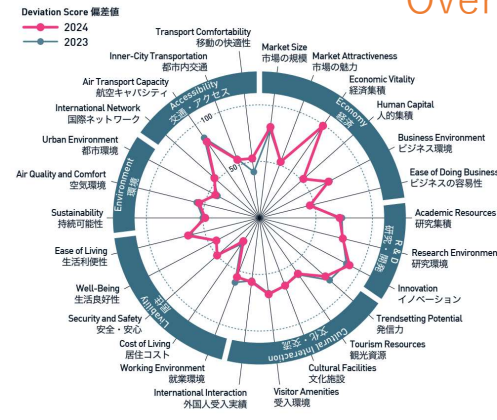
Cultural Interaction 文化・交流		
Trendsetting Potential 発信力	2	1
Tourism Resources 観光資源	8	(8)
Cultural Facilities 文化施設	7	(7)
Visitor Amenities 受入環境	4	(4)
International Interaction 外国人受入実績	8	7

London

#1
Overall
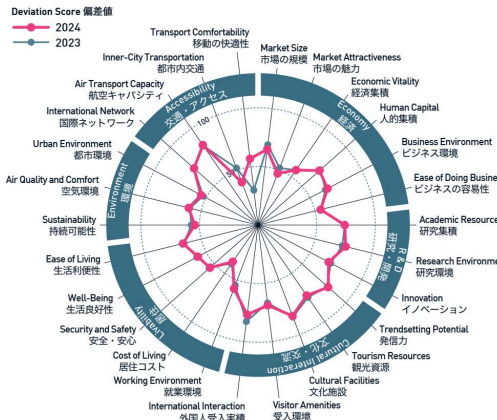
Cultural Interaction 文化・交流		
Trendsetting Potential 発信力	1	2
Tourism Resources 観光資源	1	(1)
Cultural Facilities 文化施設	1	(1)
Visitor Amenities 受入環境	3	(5)
International Interaction 外国人受入実績	2	2

Tokyo

#3
Overall
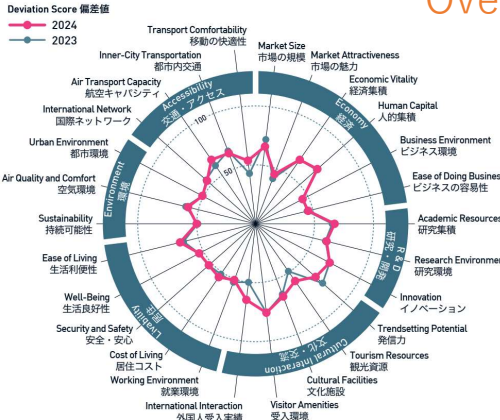
Cultural Interaction 文化・交流		
Trendsetting Potential 発信力	5	3
Tourism Resources 観光資源	10	(23)
Cultural Facilities 文化施設	5	(6)
Visitor Amenities 受入環境	2	(1)
International Interaction 外国人受入実績	5	16

Tourism Strengths among Japanese Cities （JPC）

Nagoya #2 Overall
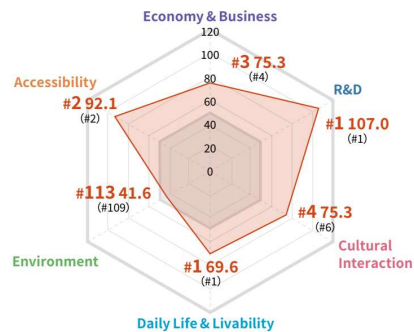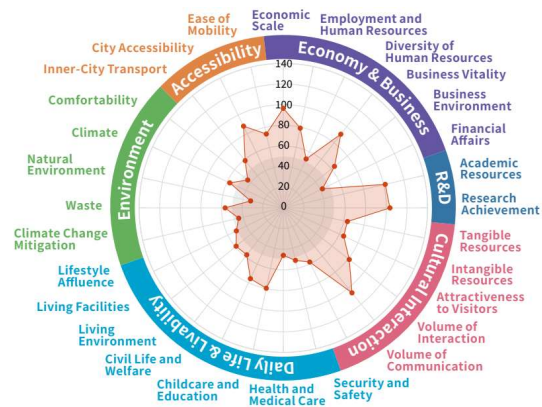
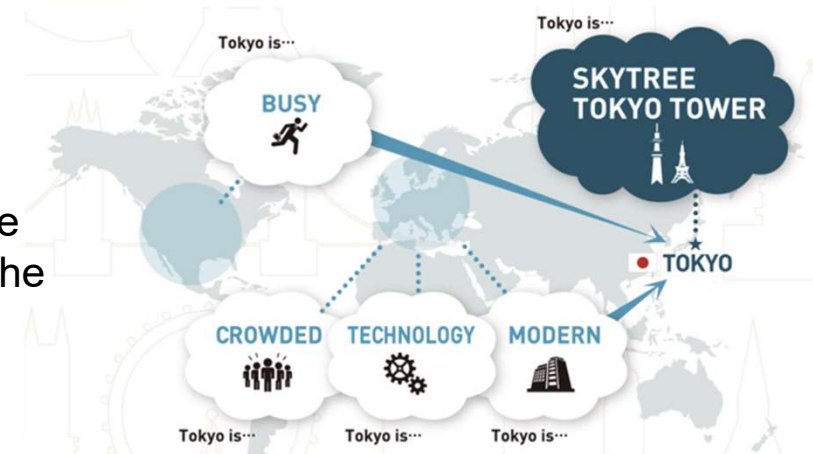## Osaka #1 Overall
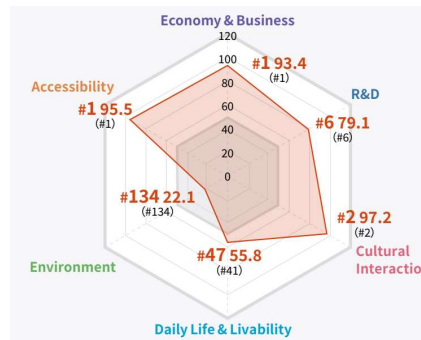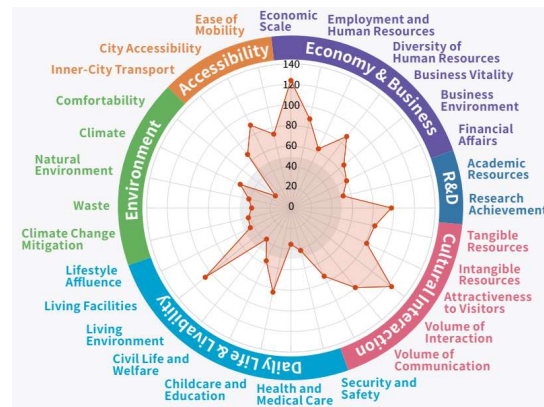
Fukuoka #3 Overall

City Identity and Recognition Gaps

CITY PERCEPTION
TOKYO

Population[人口]
9,297,310 Persons[人]

Area[面積]
626.70 km²[平方キロメートル]

Population Density[人口密度]
14,821 Persons per km²[人/km²]

GDP[Nominal GDP]
795,098 Mil. U.S. $[百万ドル]

Number of Visitors from Abroad
[海外からの訪問者数]
11,894,000 Persons[人]

TECHNOLOGY EXPENSIVE TRADITION MODERN BEAUTIFUL INNOVATIVE FOOD ADVANCED FASHION ORGANIZED
CROWDED SUSHI BUSY
NOISY
POLLUTION CLEAN
STRESSFUL SAFE
MANGA POLITE
FAR

Not Visited | **Visited**

Those respondents who had not actually visited the city described Tokyo as
a **STRESSFUL** and **NOISY** city, suffering from **POLLUTION**.

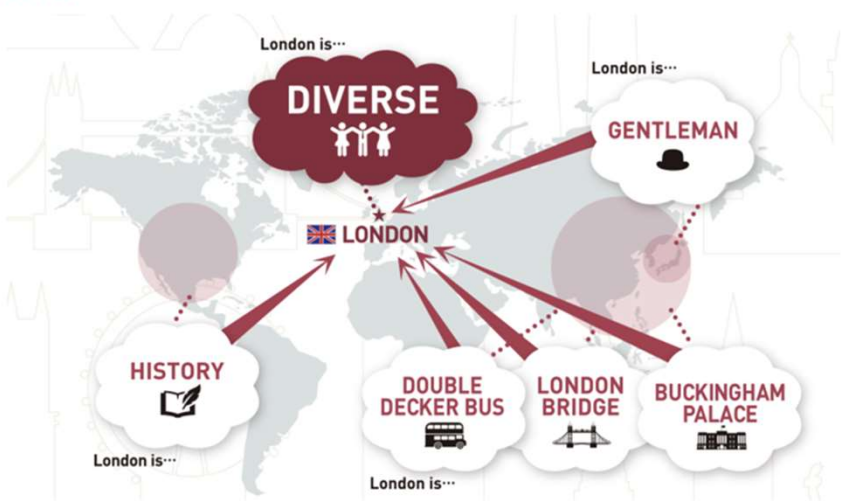**SKYTREE** and **TOKYO TOWER** are almost exclusively mentioned by respondents in Japanese cities—indicating the lack of global awareness of the two structures as a symbol of Tokyo.

Tokyo is…
BUSY
Tokyo is…
SKYTREE
TOKYO TOWER
TOKYO
CROWDED TECHNOLOGY MODERN
Tokyo is… Tokyo is… Tokyo is…

City Identity and Recognition Gaps

CITY PERCEPTION
LONDON

Population(人口)
8,538,700 Persons(人)

Area(面積)
1,572.15 km²(平方キロメートル)

Population Density(人口密度)
5,567 Persons per km²(人/km²)

GDP(Nominal GDP)
594,304 Mil. U.S. $(百万ドル)

Number of Visitors from Abroad
(海外からの訪問者数)
18,581,145 Persons(人)

Many non-visitors tend to associate strongly with the city's weather, providing keywords such as **CLOUDY** and **FOG**. In addition, the traditional English concept of the **GENTLEMAN. DIVERSE**, **BUSY**, and **COSMOPOLITAN** are more likely to find usage among experienced visitors.

Residents of North America possess a strong image of **HISTORY** for London. In contrast, residents representing Asian cities gravitate towards famous landmarks such as **LONDON BRIDGE**, and **BUCKINGHAM PALACE**.

City Identity and Recognition Gaps

CITY PERCEPTION
NEWYORK

Population【人口】
8,550,405 Persons【人】

Area【面積】
783.83 km²【平方キロメートル】

Population Density【人口密度】
10,908 Persons per km²【人/km²】

GDP【Nominal GDP】
697,300 Mil. U.S. $【百万ドル】

Number of Visitors from Abroad
【海外からの訪問者数】
9,741,000 Persons【人】

Broad and globally familiar terms rank higher in frequency for non-visitors, evident in responses such as **ECONOMY**, **MOVIE** and **9.11/TERRORISM**. Also mentioned by non-visitors is **OVERPOPULATED.**

SKYSCRAPERS
METROPOLIS
PROSPEROUS
DANGEROUS
OVERPOPULATED
CUTTING EDGE
9.11 / TERRORISM
MOVIE
ECONOMY
WALL-STREET
FASHION
BUSINESS
EXPENSIVE
BUSY
DIVERSE
FAST
BROADWAY
LIVELY
DYNAMIC
CENTRAL PARK
EXCITING

Not Visited 訪問経験なし

Visited 訪問経験あり

Respondents in parts of Asia, focus primarily on New York City's iconic landmark, the **STATUE OF LIBERTY**. In Europe, where there are comparatively fewer tall buildings, **SKYSCRAPERS** is answered more frequently, while in Asia this isn't the case.

New York is…
SKYSCRAPERS

New York is…
STATUE OF LIBERTY

NEW YORK

New York is…
BUSY
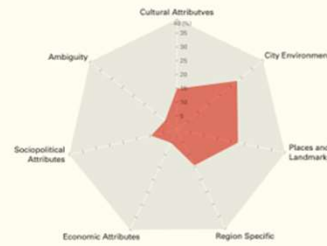
New York is…
BUSY
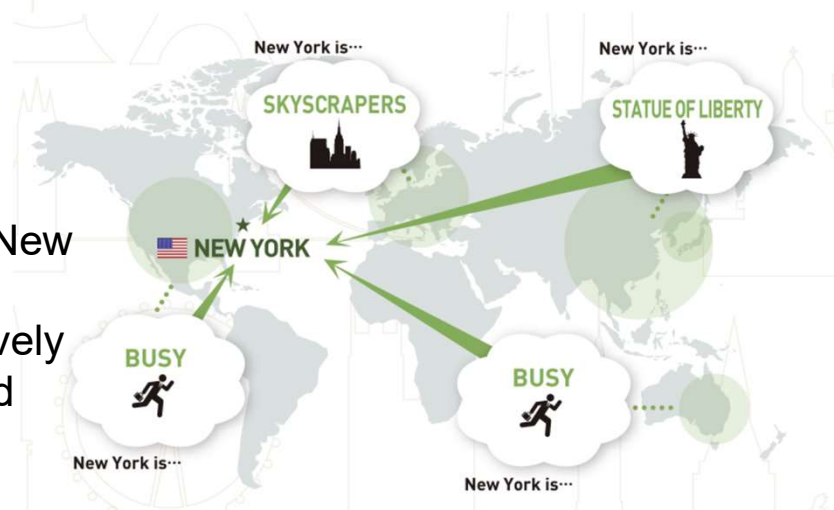
City Identity and Recognition Gaps

The <u>top 4</u> highest ranking have the **strongest** city image. For these cities, there were no words linked to Ambiguity in the top 10 highest responses. For cities ranking <u>#5 to #10</u>, the city image was less well known. **'No Image'** was in the top three most responded words for these six cities.
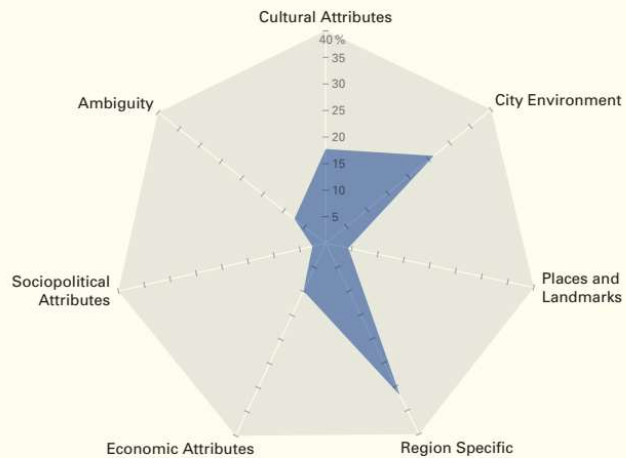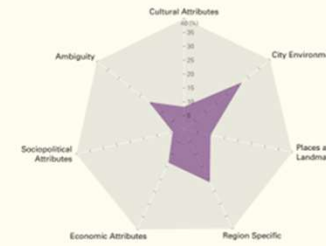
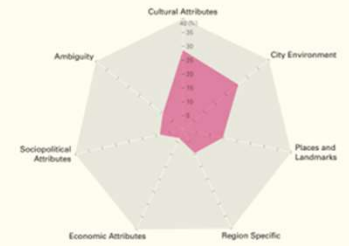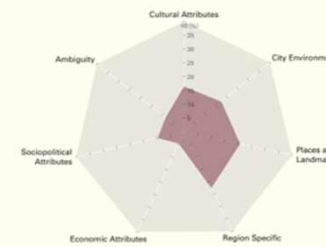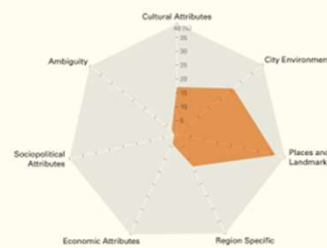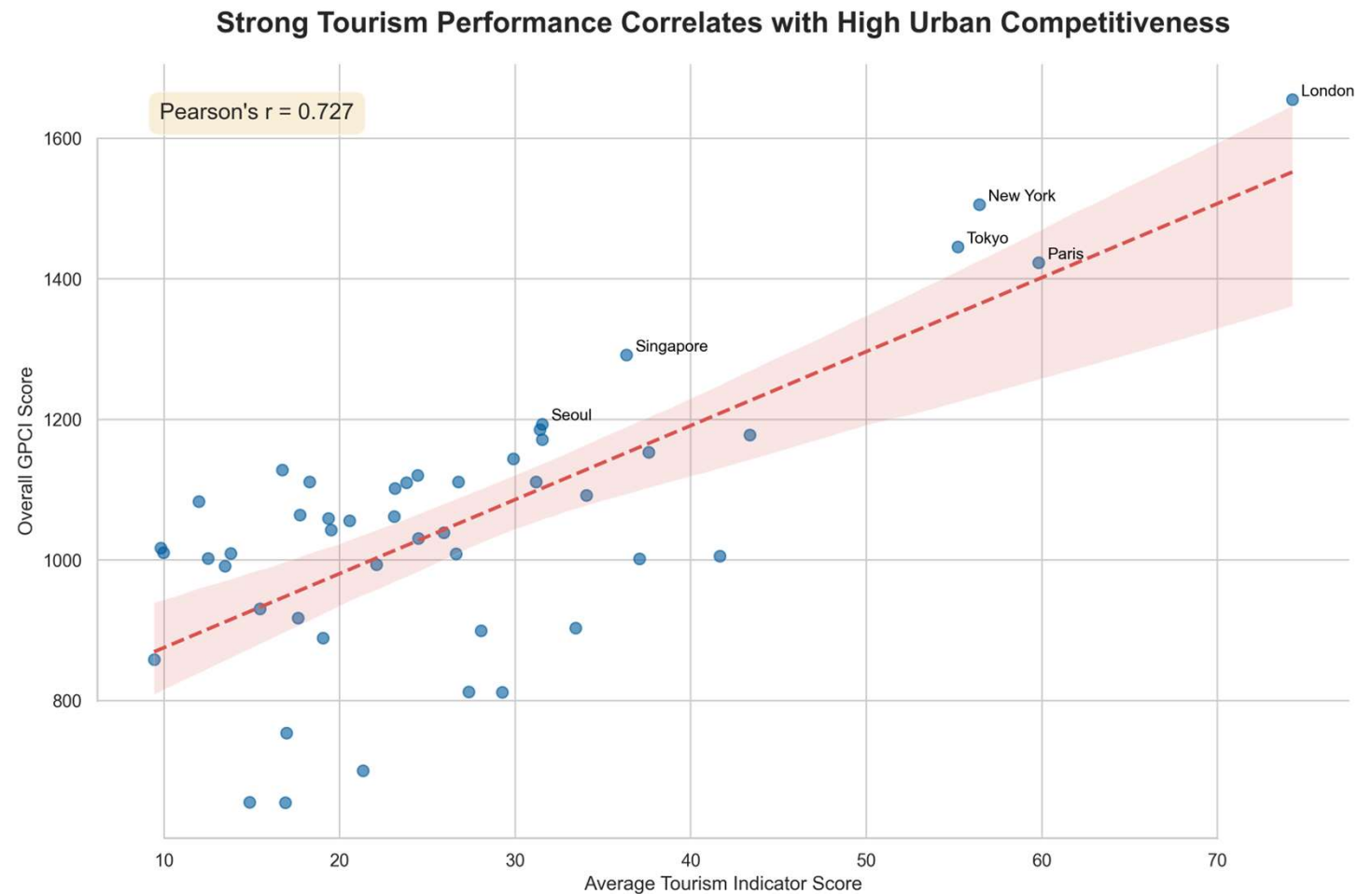# Tourism and Overall Competitiveness — A Positive Synergy

As a city's tourism performance improves, so does its overall competitiveness.

You can see our case study cities like **London** and **Tokyo** high up on this curve, demonstrating how their world-class tourism offerings are integral to their top-tier global standing."

Strong Tourism Performance Correlates with High Urban Competitiveness

Tourism and Overall Competitiveness — A Positive Synergy

Our Japanese cities show the same strong correlation.

When looking at **Economy** indicators, this drops to 0.622, while **Livability** shows 0.675.

A great tourist city can't succeed in a *vacuum*. It must have a functioning economy to support its amenities. It must be safe, clean, and pleasant—all hallmarks of livability. It must be accessible. It must have rich cultural assets.

Synergy in Japanese Cities: Tourism Performance vs. Overall Competitiveness
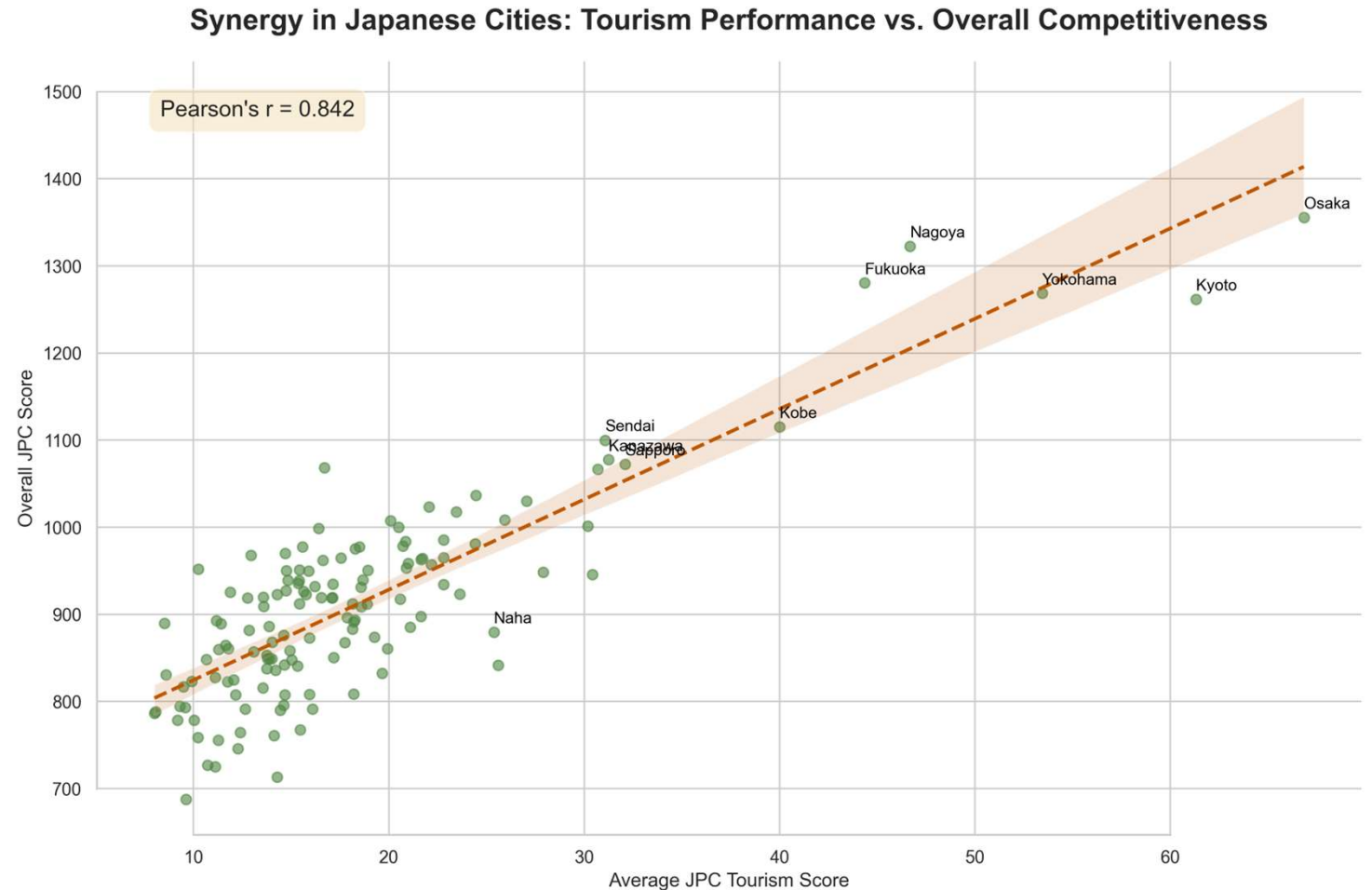
Key Takeaways

1. Indices should be used as **tools for discovery**, not just competition.

2. **Tourism competitiveness enhances and reflects** urban competitiveness.

3. Understanding **identity and perception gaps** can unlock new strategies.

Thank you!