

Global Destinations Rating for Competitiveness

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Traditional Iconic Tourism Destinations



- 1 million visitors per year
- Machu Picchu - Peru

- Strong traditional focus on iconic attractions
- Issues of over crowding
- Issues of environmental degradation
- Challenge of managing growth
- Economic impacts constrained
- Negative publicity from consumers and tourism industry
- Fear of limiting visitor numbers and consumer, industry and political backlash



Application of Resources



- 2 million visitors per year
- Angor Wat - Cambodia

- Local focus applied to trying to manage growth into iconic tourist sites
- International support to try and stem negative environmental impacts
- Desire not to limit visitor growth, visitor spend and net economic impact on local economies
- Resources often funnelled into management of sites
- Carrying capacity levels often overlooked
- concern that without access to the iconic sites visitors may not come



The Role of Global Cities



- Coliseum - Rome

- Historic role as tourism destinations
- Major locations for conventions, conferences and MICE markets
- Aviation hubs
- Cruise ship hubs
- Not just mere gateways to destinations
- They are destinations in their own right
- They reflect how we (as a society) treat our environment, our communities
- How we treat and value culture and diversity
- How we want others to see us



Global Cities Comparative Ratings



- Global cities liveability rating most often applied (rather than tourism)
- Most cities ratings offer a mix of mostly qualitative measures
- challenging to compare cities because of cultural, historic, geo – political, economic, social and environmental differences
- Liveability is an element of destination appeal, but not necessarily the driver



Global Cities Comparative Rating Criteria



- Focuses on quantitative data
- Avoids subjective assessments based on consumer or tour operator surveys
- Provides a series of performance measures, globally recognised
- Creates ratios to apply, rather than just raw data
- So doesn't disadvantage cities based on population size



Destination Performance Measures



- Visitor numbers (international and Domestic)
- Visitor nights (int and dom)
- Visitor spend (int and dom)
- Business tourist numbers
- International events
- General meetings (meetings market)
- New hotel accommodation over last 10 years
- Number of hotel rooms



Destination Performance Measures Continued



- Hotel occupancy
- Total air passenger movements
- Total aircraft movements
- Number of airlines
- Economic impact from visitor spend
- Jobs supported by tourism



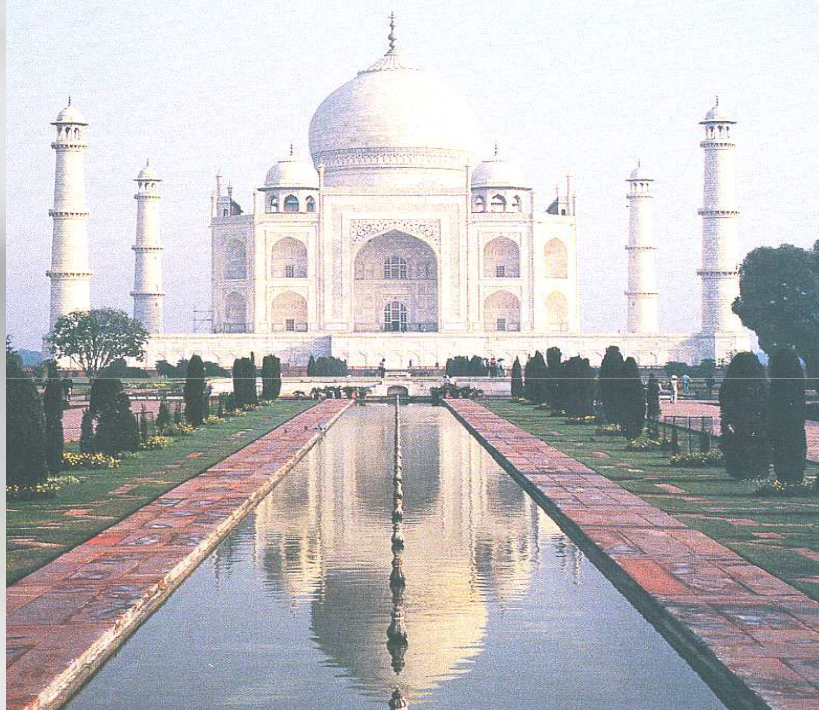
Factors for Improving Cities



- Governance structures to encourage coordinated and integrated development
- City tourism marketing
- Addressing infrastructure limitations
- Stimulating new investment
- Creating new attractions and experiences
- enhancing existing attractions and experiences
- Applying technology
- Engaging with communities



Global City Competitive Solutions- marketing



- Development of the City Brand
- Cities are not just gateways, they reflect who we are, imagery needs to follow
- Short break holiday options (shopping, events, attractions)
- Taste of culture
- Use of local cuisine
- Can't be delegated to industry to do, needs clever public private partnerships
- Build on business tourism



Global City Competitive Solutions- development



- One stop shop for tourism investment facilitation, development approvals
- Focus on product development and supporting infrastructure
- Advanced airport and cruise terminal facilities
- Protecting and enhancing heritage features and areas
- Making cities safe (reduced crime, improved public health etc)
- Improved walkability, signage, lighting, landscaping
- Avoiding alienating local communities



Global Ranking of Cities Compared



- Shanghai
- Hong Kong
- Tokyo
- Singapore
- Vancouver
- San Francisco
- Los Angeles
- New York
- London
- Sydney
- Melbourne
- Brisbane



Comparative Results (1st place)



- International visitor numbers (Hong Kong)
- International visitor nights (London)
- International spend per day US\$ (Tokyo)
- International spend per trip US\$ (Melbourne)
- Length of stay (Melbourne)
- Domestic day and overnight visitors (Tokyo)
- Domestic visitor spend per day (New York)
- Domestic length of stay (Vancouver)



Comparative Results (1st place)



- International business tourists (Shanghai)
- International conventions held (Singapore)
- Commercial accommodation built since 1999 (Shanghai)
- Total commercial accommodation stock (London)
- 2008 average occupancy rates (New York)
- Average daily achieved rate (Singapore)



Comparative Results (1st place)



- Total passenger movements (London)
- Total aircraft movements (New York)
- Number of airlines (London)
- Economic impact based on visitor spend (Tokyo)
- Jobs supported by tourism spend (Tokyo)
- Most affordable comparative standard Hilton hotel (Vancouver)
- Total visitor spend per capita (Los Angeles)



Per Capita Results (1st place)



International Visitors

- *Visitors* (Hong Kong)
- *Visitor Nights* (London)
- *Expenditure* (Hong Kong)

Domestic Visitors

- *Visitors* (Tokyo)
- *Expenditure* (Tokyo)

Business Visitor Numbers (Shanghai)

Number of conventions (Vancouver)



Result of data modelling

(change from 1999-2008)

- 1st place (score 3.46)
 - 2nd place (score 4.92)
 - 3rd place (score 5.15)
 - 4th place (score 5.31)
 - 5th place (score 5.77)
 - 6th place (score 5.85)
 - 7th place (score 6.85)
 - 8th place (score 7.62)
 - 9th place (score 7.63)
 - 10th place (score 8.15)
 - 11th place (score 8.62)
 - 12th place (score 8.69)
- New York
 - Hong Kong
 - Singapore
 - Tokyo
 - London
 - Shanghai
 - Los Angeles
 - Melbourne
 - San Francisco
 - Sydney
 - Vancouver
 - Brisbane



Next Steps



- We will increase the global city survey sample (ideally to 30 cities)
- We will create a regional global city survey for North and South Asia
- We will include a market trend analysis for top major inbound markets to offer comparisons
- We will extend our survey into major towns-mini cities



Summary Comments



- Global cities offer the mechanism to enrich tourism experiences
- Cities offer the mechanism for controlling and containing visitor numbers and managing visitor growth
- City destination growth offers a solution for iconic tourism site carrying capacity problems
- It is a highly competitive market environment
- Cities and destinations should know how they are ranked to remain competitive

