BOP 500

Culture and Creativity in Global Cities

Cultural Tourism Index
Measuring Impact and Sustainability in 250 Global Cities

BOP
Consulting

Tokyo, number one on the
BOP500 Cultural Tourism Index

Top 10, Cultural Tourism Index

BOP
500

Culture and Creativity in Global Cities

SECOND EDITION

Cultural Tourism Index
Measuring Impact and Sustainability in 250 Global Cities

SUMMARY
JANUARY 2025

Introducing the Cultural Tourism Index

The Need

Culture and creativity are fundamental to a city's success. They contribute to economic development, diversification, and innovation—underpinning, enabling, and driving sustainable urban development.
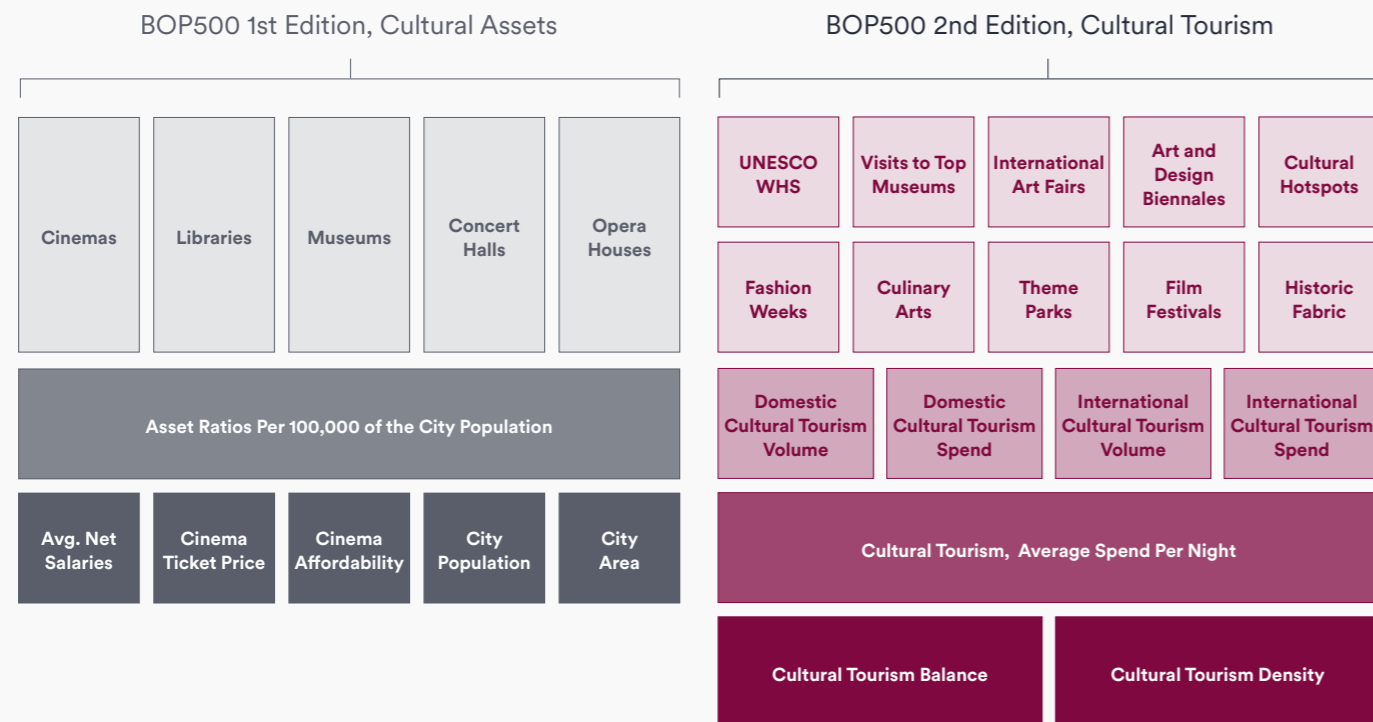
Despite this importance, until now, there has been no consistent, robust way to measure and benchmark the many dimensions of culture and the creative economy. Existing approaches have lacked global reach and the ability to leverage detailed, record-level data on individual cultural assets.

Last year, with the first edition of BOP500, we began filling this gap, uncovering compelling stories about how global cities provide culture to their residents.

Now, in our second edition, we turn our focus outward. The rapid rise of urban tourism has brought pressing challenges and many successful destinations are grappling with overtourism and sustainability issues. This report delivers the data and insights needed to measure and manage these impacts, empowering stakeholders in travel, tourism, and hospitality to unlock the full potential of cultural tourism while safeguarding the unique qualities that define cities.

In coming editions, the BOP500 data will grow in terms of both depth and breadth, meaning the index will be enriched with new data, introducing further measurements that will tell new stories on the creative economy, and the potential for sustainable growth.

BOP500 Data and Measurements

BOP500 1st Edition, Cultural Assets

Cinemas	Libraries	Museums	Concert Halls	Opera Houses

| Asset Ratios Per 100,000 of the City Population | | | | |

Avg. Net Salaries	Cinema Ticket Price	Cinema Affordability	City Population	City Area

BOP500 2nd Edition, Cultural Tourism

UNESCO WHS	Visits to Top Museums	International Art Fairs	Art and Design Biennales	Cultural Hotspots
Fashion Weeks	Culinary Arts	Theme Parks	Film Festivals	Historic Fabric

Domestic Cultural Tourism Volume	Domestic Cultural Tourism Spend	International Cultural Tourism Volume	International Cultural Tourism Spend

| Cultural Tourism, Average Spend Per Night | | | |

Cultural Tourism Balance	Cultural Tourism Density

Key Findings

- **Cultural Tourism is an important force for economic growth** within emerging global cities and fast-growing economies. We estimate that the combined value of cultural tourism across our 250 featured cities[1], was **$750 billion in 2023**. Roughly equivalent to the value of the entire combined economies of Denmark and Finland.

- **Traditional urban cultural powerhouses drive the top of the Index.** Tokyo is first and Moscow, London, Rome, New York, Paris, Shanghai and Beijing, are all in the top 20, as well as newer cultural powerhouses, such as Berlin, Seoul, Sydney, Guangzhou and Mexico City.

- **European cities dominate in historic cultural assets like UNESCO sites and opera houses,** while East Asian cities lead in theme parks and high-density cultural hotspots, reflecting regional specialisations and trends.

- **Average cultural tourism spend by region, is biggest in Asia,** almost one third more than that of North America.

- While **historic assets provide lasting appeal** in places like Mexico City or Athens, **newer cultural investments,** such as cutting-edge opera houses and/or globally significant events, in cities like Sydney and Detroit **allow emerging cities to compete for attention and tourism**.

- While important, scale is not everything; **cities that are specialised in culture like Las Vegas,** (in terms of its importance to the image, identity and economy of a place), **also perform well**.

- While the idea of the 'Bilbao effect', centred on the construction of the Guggenheim Museum, still exerts a strong pull in some urban policy circles, for most cities in a hurry, it is likely to be easier to build profile and reputation faster via major international cultural events than through built assets.

- **Small and Medium-sized cities in Europe** (e.g. Florence, Nice, Strasbourg and Dublin, but also including San José in Costa Rica and Washington in the US), **are highly likely to be exceeding their current carrying capacity,** given their population size and geography.

- Cities that are operating within sustainable limits are likely to be small capital cities of smaller, less visited countries (e.g. Tallinn, Tbilisi, Oslo), or Medium-sized cities in populous countries that are the second or third-tier destinations within these countries (e.g. Düsseldorf, Dresden, Salvador and Palermo).

> **While the idea of the 'Bilbao effect', centred on the construction of the Guggenheim Museum, still exerts a strong pull in some urban policy circles, for most cities in a hurry, it is likely to be easier to build profile and reputation faster via major international cultural events than through built assets.**
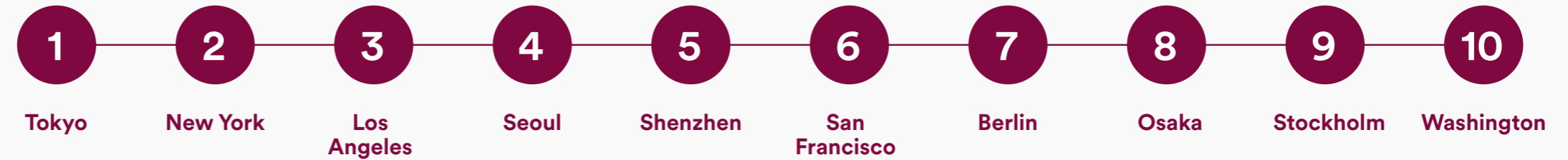
1 as generated by overnight staying visitors (both domestic and international)

Cultural Tourism Index Top Ten Rankings

Overall

1. Tokyo
2. Berlin
3. Moscow
4. Seoul
5. London
6. New York
7. Rome
8. Sydney
9. Shanghai
10. Madrid

Cultural Tourism Impact

1. Tokyo
2. New York
3. Los Angeles
4. Seoul
5. Shenzhen
6. San Francisco
7. Berlin
8. Osaka
9. Stockholm
10. Washington

Major Cultural Attractors

1. Paris
2. London
3. Mexico City
4. Beijing
5. Stockholm
6. New York
7. Madrid
8. Moscow
9. Rome
10. Tokyo

Cultural Tourism Sustainability

1. Düsseldorf
2. Karachi
3. Tallinn
4. Warsaw
5. Santiago
6. Oslo Budapest
7.
8. Stuttgart
9. Guangzhou Salvador Palermo
10.

Cultural Tourism the $750bn Opportunity

Ranking Cultural Tourism Globally

Richard Naylor, Director of Research, BOP

Our research reveals, for the first time, the enormous economic value of cultural tourism to the world's major cities. Traditional urban cultural powerhouses drive the top of the Overall Index. Tokyo is first and Moscow, London, Rome, New York, Paris, Shanghai and Beijing, are all in the top 20, as well as newer cultural powerhouses, such as Berlin, Seoul, Sydney, Guangzhou and Mexico City.

The economic estimates of cultural tourism spend, and visitation levels contained in Tourism Impact show that **Asian cities dominate and in particular, Chinese cities** - when we look at scale it is these two groups of cities that drive the big numbers at the top of the rankings.

Adding in the data from Major Attractors a more nuanced picture emerges. While some degree of scale is necessary to compete in the cultural tourism market, the data highlights the **strong performance of cities that are specialised in culture**. For instance, Rome and Kyoto perform well all round on the combined Index. Venice and Las Vegas also rank highly (until we assess their performance through the lens of sustainability).

Most cities that specialise in culture have very long histories and can draw on a rich legacy of cultural heritage. Looking in more detail at Major Attractors suggests that for ambitious cities wanting to grow their cultural tourism, doing so via fixed cultural assets is likely to be a long game. However, pairing new built assets with innovative building designs, or buying into a global arts or entertainment franchise – whether an international museum group or theme park operator – are both ways to speed up and amplify their likely recognition and attraction. But in the short term, major international cultural events provide more options for cities looking to build profile and reputation quickly.

When we measure Tourism Sustainability, **we provide empirical proof that places such as Florence, Venice and Barcelona are indeed overtouristed.** This is relative not just to other cities in general, but specifically in relation to their city destination peers. As measured relative to the spaces of the city where tourists congregate, the urban centres of bigger cities such as Paris, Beijing, and Buenos Aires are also likely to be exceeding their current carrying capacity.

The high levels of cultural tourism generated by cities at the bottom of Tourism Sustainability pose major challenges for the environment and for social cohesion. **While change in a global economy is a constant, the pace of change, and the unintended consequences of the rapid growth in the numbers of tourists, threatens the very essence of what attracted visitors to these cities in the first place.** City governments, together with their partners in the travel, tourism and hospitality industries, need to find ways to strike a better balance in the future for these cities.

Sometimes the answer will be more regulation, particularly with regard to major polluters such as cruise liners, or in the case of the Short Term Let market, and restricting access via capped ticket numbers and permits for the busiest / most fragile sites. But in many more cases, the solutions will lie in culture and tourism stakeholders working together to support more imaginative, more meaningful and regenerative cultural tourism. The good news is that the evidence suggests that having levels of tourism within more sustainable limits need not necessarily mean reduced visitor spend, engaging tourists more deeply with the cultural offer and experience of a city tends to increase spend per head.

The problems of overtourism are not widespread across our featured 250 cities. Cities as diverse as Hanoi, Budapest, Karachi and Hamburg all currently attract sustainable levels of cultural tourists, and many

more cities have upwards room to grow in terms of visitor numbers, particularly in Africa and Latin America and the Caribbean. There are also long run underlying trends (e.g. greater affluence across multiple economies, increasing urbanisation, and changing travel motivations and preferences among younger generations), that support the continued development of city-based cultural tourism.

A range of stakeholders – tourism authorities, travel and tourism operators, major funders of culture and events, property developers, inward investment agencies, and city planners – all need to understand how to maximise the benefits of this $750bn+ opportunity and minimise challenges. We are committed to providing unparalleled global data insight to support this process, continually adding to and refreshing the datasets we can bring to the table, working in tandem with our existing consulting offer and team. The rich datasets contained within BOP500, have value individually as well as collectively, and in multiple combinations of indicators and cities.

The next edition of the BOP500 Report will turn the attention and focus to the creative economy, looking at how the cultural and creative industries are an essential element of a modern urban economy, providing valuable sources of innovation and economic diversification.

Cultural Tourism Rankings, Top 25 Cities

1 Tokyo		

2 Berlin	4 Seoul	6 New York	8 Sydney	10 Madrid	12 Guangzhou	14 Stockholm	16 Budapest	18 Kyoto	20 Singapore	22 Brussels	24 Amsterdam
3 Moscow	5 London	7 Rome	9 Shanghai	11 Beijing	13 Paris	15 Melbourne	17 Hamburg	19 Mexico City	21 Lima	23 Warsaw	25 Venice

Cultural Tourism Impact

How long do cultural tourists stay and how much do they spend?

How We Measure Cultural Tourism Impact

Cultural Tourism Impact is based on datasets that assess[2]:

1. **Tourism Visits:** total number of overnight stays by both international and domestic cultural tourists.

2. **Tourism Spend:** total annual spending by international and domestic cultural tourists, divided by the total number of nights stayed to derive average per night value.

3. **Specific data on visitor numbers** to the world's top 150 most visited museums, sourced from *The Art Newspaper*.

Key Findings

- The growing demand for experiential travel, driven by Millennials and Gen Z, has reshaped cultural tourism.

- **Cultural tourists** not only **stay longer and spend more than other travellers** but also contribute more directly to local economies.

- The combined value of cultural tourism across our 250 featured cities, was $750 billion in 2023. Roughly equivalent to the value of the entire combined economies of Denmark and Finland.

- Cities located in China and the USA account for almost 40% of the total cultural tourism spend in our index[3].

- **There is remarkable growth in the development of cultural tourism across Asia: i.e. Bangkok in Thailand, Jakarta in Indonesia and particularly in China.**

- Scale and the stage of economic development drives cultural tourism spend.

- Scale is not everything; **cities that are specialised in culture like Las Vegas, (in terms of its importance to the image, identity and economy of a place), also perform well.**

- Some cities like, Buenos Aires and Rio de Janeiro attract very large volumes of cultural tourists but **are not currently able to fully capitalise on the spend** made by these cultural tourists.

2 More detail on the data sourcing, processing and economic modelling used to create these estimates is contained in the Technical Appendix.

3 In terms of aggregate value

Who Is On Top?
Ranking Cultural Tourism Impact Globally

Combining the data on Tourism Spend and Visits with data on visits to the world's top museums, the result is more nuanced and diverse than when just taking each dimension individually. The cities that benefit are: those in Europe, which has as many representatives in the top 25 as Asia; Medium-sized cities (San Fransico, Stockholm, Amsterdam) and Large Cities (Berlin, Taipei, Rome); as well as cities that specialise in culture (Kyoto, Las Vegas and Venice).

Figure 7 Cultural Tourism Impact top 25 cities, 2023   Source: BOP Consulting (2024)

1 Tokyo	**2** New York	**3** Los Angeles	**4** Seoul	**5** Shenzhen
6 San Francisco	**7** Berlin	**8** Osaka	**9** Stockholm	**10** Washington
11 Kyoto	**12** Taipei	**13** Jakarta	**14** Rome	**15** Beijing
16 Shanghai	**17** Amsterdam	**18** Venice	**19** Chicago	**20** Las Vegas
21 Boston	**22** Madrid	**23** Paris	**24** Miami	**25** London

Major Cultural Attractors

What attracts cultural visitors to a city?

After assessing the feasibility, comparability and global regional coverage of data, we focused down on:

- **Four types of fixed cultural assets:** UNESCO World Heritage Sites, internationally awarded restaurants, opera houses, and theme parks.

- **Four types of time-limited events:** international film festivals, art and design biennales, fashion weeks, and art fairs.

We also assess how cultural assets sit within the geography of our featured cities, to make them even more appealing to visitors. We look at:

- **The Historic Urban Fabric:** how much of our cities are accounted for by internationally recognised heritage assets?

- **Cultural Hotspots:** how clustered are cities' cultural assets to make them easily accessible to visitors? We measure this through identifying the greatest density of cultural assets within a 2km radius in each city, as well as how many of these hotspots exist in each city.

Key Findings

- All cultural assets in a city are important to its appeal. But there are **some types of assets that** – through scale, uniqueness or quality, or their standing with international industry professionals – **are important in driving visitation, building profile, mindshare and soft power for cities**

- In this category cities find their unique strengths. For example, **European cities dominate in historic cultural assets like** UNESCO sites and opera houses, while **East Asian cities lead in theme parks**, reflecting regional specialisations and trends.

- While global culinary hubs like London, Paris, and Tokyo dominate with 65-96 internationally acclaimed restaurants respectively, smaller cities (e.g Copenhagen) or less wealthy cities (e.g. like Lima) also excel, proving that **specialisation has impact**.

- Cultural clustering and hotspots are predominantly in capital cities that have built up their cultural assets over a long time, such as Paris, London, and Rome.

- **Historic assets provide lasting appeal** in places like

Mexico City or Athens, but newer cultural investments, such as cutting-edge opera houses and/or globally significant events, in cities like Sydney and Detroit **allow emerging cities to compete for attention and tourism** on the global stage.

- While the data suggests that **historical legacy is hard to shortcut** for built cultural assets, it is easier for major international cultural events, which exhibit a much greater variety of high performing cities.

- While the "big four" fashion weeks still dominate (New York, London, Milan and Paris), the **international fashion week calendar has become more global and diverse** as well as calendars for international art and design biennales, and film festivals.

- The idea of the 'Bilbao effect', centred on the construction of the Guggenheim Museum, still exerts a strong pull in some urban policy circles. But for most cities in a hurry, **it is likely to be easier to build profile and reputation faster via major international cultural events than through built assets**.

Who Is On Top?
Ranking Major Cultural Attractors Globally

Major Attractors draws cultural assets and international cultural events that are by their nature scarce. This is either because they are deemed to be 'best in class' or because they only exist in relatively small numbers across the world (e.g. theme parks, opera houses, WHSs). These factors confer a cachet on these assets that helps them stand out from the crowd and appeal to visitors far beyond the city limits.

The top cities are all historic cities in Europe, which account for 15 of the top 25 places. While some assets (e.g. theme parks, and international events with major industry standing) can be 'bought in' or homegrown by ambitious, younger cities other assets are the result of long-term processes of urban and cultural development.

The combined results suggest that this historical process is hard to shortcut for permanent built cultural assets, but easier for major international cultural events, which exhibit a much greater variety of cities at the top

While the idea of the 'Bilbao effect', centred on the construction of the Guggenheim Museum, still exerts a strong pull in some urban policy circles, for most cities in a hurry, it is likely to be easier to build profile and reputation faster via major international cultural events than through built assets.

The importance of duration and heritage in the development of built assets is most likely the reason that there are more cities (Mexico City and Lima) from the older urban cultures in Latin America and the Caribbean in the top 25 than in the US (New York), and that the five Asian cities contain only Singapore that could be said to be a 'newcomer' among city destinations. While the high placings of the Australian cities (Sydney and Melbourne) may feel contrary to this, both cities are older than we perhaps might think, with their fastest periods of growth happening in the second half of the nineteenth century.

Figure 14 Major Cultural Attractors, top 25 cities, 2023　　　　Source: BOP Consulting (2024)

1 Paris	**2** London	**3** Mexico City	**4** Beijing	**5** Stockholm
6 New York	**7** Madrid	**8** Moscow	**9** Rome	**10** Tokyo
11 St. Petersburg	**12** Melbourne	**13** Seoul	**14** Sydney	**15** Singapore
16 Istanbul	**17** Kyoto	**18** Helsinki	**19** Vienna	**20** Venice
21 Berlin	**22** Amsterdam	**23** Milan	**24** Lima	**25** Athens

Cultural Tourism Sustainability

How much tourism is too much?

In part as a response to rising concerns about the emerging negative impacts of tourism in some cities, the UNWTO recently published a Statistical Framework for measuring 'sustainable tourism'.[4]

While a major leap forward, their framework does not define 'how much cultural tourism is too much', because it does not provide benchmarks for 'carrying capacity', i.e. data on what is the actual 'maximum number' of people that is likely to lead to the destruction of the physical, economic, and sociocultural environment.

For the Cultural Tourism Sustainability Metric we are using two of the UNWTO sustainability indicators:

1. **The general UNWTO indicator, which we call 'tourism balance':** which is the relationship between the number of cultural tourists and the resident population; and

2. **UNWTO 'Tourism concentration' indicator:** the number of cultural tourists (proxied by the total number of nights stayed) compared to the geographical size of the city's footprint (in sq. km), which we term, 'tourism density'.

The two indicators, Tourism Balance and Tourism Density, reveal how well cities manage cultural tourism relative to their population and geographic size. Using data on visits, population, and city scale, BOP500 identifies cities with "goldilocks" levels of tourism—neither too much nor too little—by ranking them based on their proximity to the median for each indicator.

Key Findings

- We are now able to empirically define what the maximum 'carrying capacity' of all of our featured cities is likely to be in terms of numbers of cultural tourists.[5]

- **Small and Medium-sized cities in Europe** (e.g. Florence, Nice, Strasbourg and Dublin, but also including San José in Costa Rica and Washington in the US), **are highly likely to be exceeding their current carrying capacity**, given their population size and geography.

- The problems of overtourism are not widespread across our featured 250 cities. Cities as diverse as Hanoi, Budapest, Karachi and Hamburg all currently attract sustainable levels of cultural tourists

- Many more cities have upwards room to grow in terms of visitor numbers, particularly in Africa and Latin America and the Caribbean.

- **Medium-sized cities** like Düsseldorf and capital cities of smaller countries (e.g., Oslo, Budapest) **perform well in balancing cultural tourism levels**, offering a model for sustainable tourism management that benefits both locals and visitors.

- **Smaller capital cities** in less-visited nations, such as Oslo, Tbilisi, and Budapest, **also maintain balanced cultural tourism** due to their scale

and focus.

- Larger cities with extensive footprints, such as Guangzhou, Karachi, and Hanoi, manage to **absorb high visitor volumes without exceeding sustainable limits.**

We are now able to empirically define what the maximum 'carrying capacity' of all of our featured cities is likely to be in terms of numbers of cultural tourists.

Who is in the 'Goldilocks Zone'?

Ranking Cultural Tourism Sustainability Globally

The cities that have 'goldilocks level' of cultural tourism – i.e. not too much, not too little – are[6]:

1. **Mainly Medium-sized** cities in quite populous countries, where the cities are the second or third tier city destinations in the country. This group includes cities such as Dusseldorf that tops this Sub-Index, but also Dresden, Cologne, Birmingham, Salvador and Palermo, or else are:

2. **Capital cities, usually smaller cities,** that are the number one city destination in their country, but the countries themselves are typically small, less visited nations (e.g. Tallinn in Estonia, Oslo in Norway, Tbilisi in Georgia). The main exceptions to this are:

3. **A few larger cities** (e.g. Mega Cities, Very Large and Large) that **have a footprint big enough to absorb the volume of visitors** they attract (e.g. Guangzhou, Karachi, Nanjing, Hanoi, Caracas and Santiago).

The cities performing well on this metric are not cities that do not have cultural tourists. Compared to the average city, they are enviably successful – for instance, the top 20 below all have between 2.42 and 3.85 times as many cultural tourists as residents – it is simply that these numbers of cultural tourists are likely to be within the carrying capacity of the cities.

Figure 17 Sustainability, top 20 cities[7], 2023

1 **Düsseldorf**	**2** **Karachi**
3 **Warsaw**	**4** **Santiago**
5 **Tallinn**	**6** **Oslo**
7 **Budapest**	**8** **Palermo**
9 **Stuttgart**	**10** **Guangzhou**
11 **Salvador**	**12** **Tbilisi**
13 **Hamburg**	**14** **Caracas**
15 **Hanoi**	**16** **Dresden**
17 **Brisbane**	**18** **Birmingham**
19 **Antwerp**	**20** **Cologne**

6 See Figure 17
7 It is a top 20 as opposed to a top 25 as there are four cities tied in 25th place.

Düsseldorf

Contact Us

**To discuss bespoke data packages,
projects, or to access the full report please get in
touch.**

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