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The Measurement of High-Quality Development Level of Tourism: Based on the Perspective of Industrial Integration

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Abstract: The integration of the tourism industry is an important motivation in promoting high-quality development. Based on the analysis of the relationship between tourism industry integration and high-quality development, this paper constructs an evaluation index system to evaluate the high-quality development level of the tourism industry for 2011–2018 in China by using a combination of fuzzy mathematics and a clustering model, which includes 4 dimensions, 11 secondary indicators and 28 tertiary indicators. The results show that the level of high-quality development in China's tourism industry has been greatly improved, but the gap between regions is large. The performance level of the tourism industry economy is relatively high, and the tourism industry structure and industrial integration level need to be improved urgently. There are differences in the overall level and degrees of change of the high-quality development level of the tourism industry in 31 provincial regions, and there are also differences in the main influencing factors.

Keywords: tourism; industrial integration; high-quality; evaluation system



Citation: Lu, Y. The Measurement of High-Quality Development Level of Tourism: Based on the Perspective of Industrial Integration. *Sustainability* **2022**, *14*, 3355. <https://doi.org/10.3390/su14063355>

Academic Editors: Thorsten Merkle and Kayhan Tajeddini

Received: 21 January 2022

Accepted: 8 March 2022

Published: 12 March 2022

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1. Introduction

As a new growth point of the national economy, the development of tourism level is an important indicator of the level of productivity and the progress of social civilization in a country and region. Since the reform and opening up, the Chinese government has attached great importance to the development of the tourism industry. The State Council has successively issued the Notice of the State Council on Further Accelerating the Development of Tourism (2001), Opinions of the State Council on Accelerating the Development of the Tourism Industry (2009), and other guiding documents promoting tourism industry development. According to the statistics of the Ministry of Culture and Tourism, in 2019, the number of China's domestic tourists was 6.006 billion, an increase of 8.4%; the comprehensive contribution of tourism to GDP was CNY ¥10.94 trillion, accounting for 11.05% of the total GDP. Tourism employed 28.25 million people directly, and 79.87 million people directly and indirectly, accounting for 10.31% of the total employed population of the country [1]. However, tourism resources, tourism facilities, and tourism services have not yet been able to meet the ever-increasing demand for tourism, and tourism is far from becoming a modern service industry that the people are more satisfied with. The tourism industry urgently needs to transform from high-speed growth to high-quality development.

The high-quality development of tourism is accompanied by industrial integration. In 2018, The General Office of the State Council issued Guiding Opinions on Promoting the Development of Global Tourism, proposing to promote the integrated development of tourism and urbanization, industrialization and commerce, as well as promote the integrated development of tourism and agriculture, forestry, and water conservancy, the integrated development of tourism and transportation, environmental protection, national land, ocean, and meteorology, the integrated development of tourism and technology, education, culture, health, sports, etc., and promote the development of tourism in the whole

region [2]. The National Tourism Demonstration Zone, The National Tourism Resort, The National Wetland Tourism Demonstration Base, The National Traditional Chinese Medicine Health Tourism Demonstration Zone, The National Industrial Tourism Demonstration Base, and The National Key Rural Tourism Villages have sprung up all over the country. Numerous new integrated tourism products, integrated tourism business models, and integrated tourism business formats continue to emerge. However, the integrated development of China's tourism industry is basically driven by the government. There is an insufficient understanding of the internal mechanisms of the integrated development of the tourism industry, and there is blindness in practice. It is urgent to promote the deepening of tourism integration, and continuously improve the performance of tourism industry integration according to the internal mechanisms of industrial integration and development.

With the development of the integration practice of the tourism industry, the existing research on the integration of the tourism industry has gradually deepened from the initial analysis of the phenomenon of the integration of tourism, agriculture, sports, and other industries to the exploration of the definition or connotation of the integration of the tourism industry, as well as the motivations, paths, mechanisms, modes, and evaluation of the integration of the tourism industry [3–6]. However, there are few literatures exploring the high-quality development of the tourism industry from the perspective of tourism industry integration. The tourism industry has entered a golden period of development in China, and it is also in a period of prominent contradictions: tourism quality is not high, the tourism's products and formats are singular, the market is out of order, tourism's technology content is insufficient, and the high-end market is being lost overseas. To solve this problem, "high-quality development" is the only choice. In January 2018, the fifth meeting of the Inter-ministerial Joint Conference on Tourism Work of the State Council proposed to vigorously promote the improvement, transformation, and upgrading of the quality and efficiency of the tourism industry, achieving high-quality development, and building an industry that is a strategic pillar of the national economy and is generally happy. Promoting the high-quality development of the tourism industry has rapidly become the aim of the government and the industry. However, the study of high-quality tourism development is just beginning. What is the high-quality development of the tourism industry? How to evaluate the high-quality development of the tourism industry? What is the status of the high-quality development of the tourism industry in China? This paper intends to explore these problems from the perspective of industrial integration, which has important theoretical and practical significance in guiding the high-quality development of China's tourism industry.

In light of this situation, this paper proposes a comprehensive index system to measure the high-quality development level of tourism in the presence of industrial integration, which includes 11 secondary indicators and 28 tertiary indicators from the four dimensions: tourism industry economy, tourism industry structure, tourism industry integration, and tourism industry performance. According to the evaluation index system, we examine the stage characteristics of the high-quality development of China's tourism industry from a vertical perspective, and investigate the regional differences in the high-quality development of China's tourism industry from a horizontal perspective.

The remainder of this paper is organized as follows. In Section 2, we discuss the relevant literature, and highlight our contributions in this regard. In Section 3, we lay out the evaluation index system. Section 4 evaluates the high-quality development level of the tourism industry in China for 2011–2018. Finally, we conclude our work in Section 5.

2. Literature Review

The report of the 19th National Congress of the Communist Party of China (2017) pointed out that China's economy has changed from a stage of high-speed growth to a stage of high-quality development, and put forward the concept of high-quality development for the first time. The theoretical connotation of high-quality development has not been unified in academic circles. There is little literature on the high-quality development of

tourism, which is still in the stage of research and development. The existing literature focuses on the high-quality development of the economy, the quality of the service industry, and tourism development. Jin [7] showed that a fundamental feature of high-quality economic development is multidimensional. Cappelli and Pisano [8] showed that tourism quality is a combination of the main aspects of tourism products provided in a certain society, culture or environment. Fick and Brent Ritchie [9] proposed the SERVQUAL instrument to measure the perceived service quality in the travel and tourism industry. Atilgan et al. [10] extended the SERVQUAL mode to avoid managerial decision-making by employing correspondence analysis. Compared with the SERVQUAL model, Cronin Jr and Taylor [11] developed the SERVPERF model to measure the service quality, as opposed to the gap-based SERVQUAL scale. Some researchers (e.g., Al Khattab and Aldehayyat [12], Abdullah et al. [13], Attallah [14], Brady et al. [15]) also replicated and extended the SERVPERF model. Babić-Hodović et al. [16] combined the IPA and SERVPERF models to assess conceptualizations of the service quality. Albacete-Saez et al. [17] proposed five dimensions—personnel response, complementary offer, tourist relations, tangible elements and empathy—to measure the service quality in rural accommodation. Ren et al. [18] examined how the income level of a country's touristic arrivals affects economic growth and environmental pollution in eight Mediterranean countries over the period 1995–2004. They showed that the income levels of a country's tourist arrivals has positive or negative impacts on economic growth and emissions, depending on the environmental pollution quantiles. A variety of literature studies have addressed how to measure the level of tourism development. Gooroochurn and Sugiyarto [19] analyzed tourism competitiveness using eight main indicators: price, openness, technology, infrastructure, human tourism, social development, environment and human resources. Blancas et al. [20] used the synthetic indicator of socio-economic and environmental to assess the sustainability of tourism in Spain's coastal tourist destinations. Wan and Li [21] examined the sustainability of Macao tourism by assessing the economic, socio-cultural and environmental impacts of tourism, visitor satisfaction, and the level of community involvement in local tourism planning from 2002 to 2009. Luo [22] constructed a framework for evaluating destination performance under the 4E rubric of economy, efficiency, effectiveness, and environmental quality. Chen et al. [23] studied how to evaluate regional eco-efficiency and the tourism industry's economic development level using the super-efficient DEA model and the grey entropy weight method. Andrey [24] showed that the development of the hotel business, the development of the tourism business, the profitability of tourism and hospitality, and the popularity of regional tourism products can represent the level of the tourism industry's development. Kim et al. [25] constructed an evaluation system with 18 subdomains, and 60 items constructed from seven points of view: heritage and local identity, conviviality, education, tourism and hospitality, quality of urban landscape, environment, and energy and infrastructure.

The results of research on the integration of the tourism industry at home and abroad are very rich, focusing on the connotation [3,26–28], motivation [4,29–32], modes [5,33–36] and paths [6,37–43] of the integration of the tourism industry. Pulina et al. [26] proposed that agricultural tourism is a series of activities whereby people integrate tourism with agricultural production, service and agricultural experience, which may benefit agricultural output and increase the incomes of farms. Llorca-Rodriguez et al. [32] found that domestic tourism convergence is a better instrument for enhancing territorial cohesion. Rhee et al. [5] studied the integration mode of the beauty industry and the tourism industry, and divided the integration factors of beauty enterprises and tourism enterprises into three levels. There are 12 indicators in the first level, 21 indicators in the second level, and 57 indicators in the third level. The integration of the beauty industry and the tourism industry is the integration mode of cooperation between enterprises of both sides, based on these factors. Wernz et al. [33] used semi-structured interviews and archive data, in-depth analyses of business model innovation, and the implementation of product differentiation and globally competitive prices to assess the factors driving tourism and medical care

integration based on the case of Thailand's Bumrungrad International Hospital (BIH). Industry integration plays an important role in the medical tourism service industry. Lin [36] analyzed the sustainable development strategies of industrial tourism using the IOA-NRM approach. Wang [6] studied the integration paths of the tourism industry, such as technology integration, business integration, product integration and market integration between tourism and agriculture, and established a rural tourism model for the integration of tourism and related industries. Richards [38] assessed how creativity affects tourism. Krogmann et al. [41] examined recent changes in cultural tourism in urban areas, and addressed how alternative cultural tourism products diversify the offerings. Zhi [42] and Higham [43] investigated the convergence path of the sports and tourism industry.

In summary, the theoretical connotation of the high-quality development of the tourism industry has not yet been recognized and clearly defined. The relationship between the integration of the tourism industry and the high-quality development of the tourism industry needs to be clarified; an evaluation of the high-quality development of the tourism industry has not yet been launched, and the evaluation index system of the tourism industry has not yet been formed; the influencing factors of the high-quality development of the tourism industry need to be revealed urgently. Starting from the relationship between tourism industry integration and tourism high-quality development, this paper constructs an evaluation index system of tourism high-quality development based on industrial integration, quantitatively measures the phase characteristics and regional differences of China's tourism high-quality development, and accurately illustrates the current situation and trend in China regarding its provincial-level regional tourism. It provides a theoretical basis and decision-making reference for national and local governments to formulate plans and policies promoting the integration of the tourism industry and its high-quality development.

3. The Construction of an Evaluation Index System for the High-Quality Development of Tourism Industry Based on Industrial Integration

3.1. *The Relationship between Tourism Industry Integration and High-Quality Development*

The report of the 19th National Congress of the Communist Party of China (2017) put forward the concept of "high-quality development" for the first time. Although the theoretical connotation of high-quality development has not been uniformly recognized in academia, the ideological implications of high-quality economic development is the same. These are the five development concepts in the new era, proposed in the report of the 19th National Congress of the Communist Party of China: innovation, coordination, green, open, and sharing. The theoretical premise of high-quality economic development is to pursue the quality of economic development rather than the growth rate, and the fundamental requirement of high-quality development is to improve quality and efficiency. In summary, high-quality economic development meets people's growing demand for a better life [7]. Meanwhile, tourism quality is the experiential quality of tourists in the whole process of travel [8], which must meet the needs and expectations of customers, employees and owners [44]. The quality of tourism development refers to improvements in the investment efficiency of the tourism industry, and the stability, coordination and sustainability of the tourism industry in the process of growth, which can not only contribute to the healthy development of the entire national economy, but also helps meet the growing touristic demand and improve tourist satisfaction [20]. The development quality of the tourism industry refers to tourism's quality from the tourists' perspective, and the developmental quality of the tourism destination from the destination's perspective [22]. From the perspective of tourism destinations, the quality of tourism development refers to the ability or degree of tourism destinations to meet the needs of tourism development with the resources they possess [45].

Therefore, the high-quality development of the tourism industry involves meeting the growing tourism needs of the general public and improving the satisfaction of tourists. The integration of sub-industries in the tourism industry, and the integration and development

of other industries, will help develop more diversified tourism resources, new tourism products, new tourism business models, and new formats to better appease the diversification and personalization of tourism consumers. In summary, the integrated development of the tourism industry involves the high-quality development of the tourism industry.

3.1.1. The High Consistency of the Integrated Development of the Tourism Industry with High-Quality Development

The tourism industry is the product of residents' living standards reaching a certain stage. Increasing consumption demands are the fundamental driving force in the integrated development of the tourism industry. With the growth of the disposable income of urban and rural residents, tourism consumption is upgraded in terms of diversification, personalization and convenience, driving the integrated development of sub-industries within the tourism industry, and the integrated development of tourism with agriculture, cultural and sports industries. Generally speaking, the purpose of the high-quality development of the industrial economy is to meet people's growing demands for a better life. The high-quality development of the tourism industry is intended to meet the growing demands of tourism consumers for diversified, personalized and convenient tourism. The two are highly consistent. The integrated development of the tourism industry is also one kind of high development, which also is an important indicator of high-quality development.

3.1.2. Industry Integration Promotes the High-Quality Development of Tourism

The integrated development of the tourism industry promotes the transformation of the tourism industry from factor-driven to innovation-driven, by triggering tourism product innovation, creating new tourism business models, and forming new tourism formats. This enables tourism to lead the high-end service industry by improving the efficiency of tourism resource utilization and improving the quality of tourism products. Growth drives the upgrading of the tourism industry's structure. Cross-industry integration promotes scale growth, while cross-industry competition helps improve resource utilization efficiency, and multi-industry cross-integration innovation forms new growth points and helps improve the tourism industry's organizational performance.

3.1.3. The High-Quality Development of the Tourism Industry Achieved through Multiple Industrial Integration Paths

Through industrial restructuring, the integrated development of sub-industries, such as the travel agency industry, the accommodation industry and the scenic spot management industry, within the tourism industry can be realized; through industrial intersection, the integrated development of the tourism industry and the agriculture, industry, culture, sports and other industries can be realized; through industrial penetration, the integrated development of the tourism industry and the internet industry can be realized. With the deepening of the integration of the tourism industry, the continuous development of new tourism products, the innovation of business models of tourism service companies, and the creation of a new integrated tourism industry, the tourism industry has realized a transformation in its driving force, moving from factor-driven to innovation-driven, enabling industrial structure upgrading and the promotion of industrial organization performance. High-quality development could be achieved.

3.2. The Construction of Index System

Prior research suggests that we can measure the level and quality of tourism development through various indicators; for example, economy and development, environment and sustainability, society and culture, tourism value creation, industry element quality, industrial structure quality, industrial operation quality, product quality, and public service quality [6,9,19–23,34]. In practice, however, the quality of the tourism industry's development is related to the high-quality development of the tourism industry, but this is not the same thing. The former is a static concept, while the latter is a dynamic concept. The former is only a form of quality evaluation, while the latter is a mode of development eval-

uation that refers to quality. Therefore, existing research results on tourism developmental quality evaluation can be used for reference, but the connotations of high-quality development must be highlighted instead of simply evaluating the high-quality development of the tourism industry with the development quality index. Meanwhile, according to the connotations of high-quality development, to evaluate the high-quality development of the tourism industry, we must not only use tourism industry economic indicators that reflect the tourism industry's contribution to economic growth and industrial structure upgrades, but also use the tourism industry structure and tourism industry performance indicators that reflect the quality of tourism industry development. In addition, the integrated development of the tourism industry is an important indicator of high-quality development, and the indicators of the integration development of the tourism industry should be highlighted.

According to the existing research results, this paper selects 11 secondary indicators and 28 tertiary indicators from the four dimensions of tourism industry economy, tourism industry structure, tourism industry integration, and tourism industry performance to measure the high-quality development level of tourism based on industrial integration. The Delphi method and AHP method are applied to assign weights to the primary indicator, secondary indicator and tertiary indicator, in order to form a scientific and operable evaluation index for the high-quality development of China's tourism industry, as shown in Table 1.

Table 1. The evaluation index system of the high-quality development level of the tourism industry.

Primary Indicator (A_i)	Weight (Q_i)	Secondary Indicator (B_{ij})	Weight (Q_{ij})	Tertiary Indicator	Measurement Method	Weight (Q_{ijk})
tourism industry economy (A_1)	0.18	economic growth of tourism industry (B_{11})	0.62	total tourism revenue growth (C_{111})	current year income / general year income	0.33
				total domestic tourism revenue growth (C_{112})	current year income / general year income	0.29
				total international tourism revenue growth (C_{113})	current year income / general year income	0.38
		economic contribution of tourism industry (B_{12})	0.38	proportion of tourism in GDP (C_{121})	added value of tourism / GDP	0.75
				proportion of inbound tourism in service trade (C_{122})	foreign exchange income from international tourism / total income in service trade	0.25
tourism industry structure (A_2)	0.28	the structure of tourism service (B_{21})	0.16	ratio of inbound tourists to domestic tourists (C_{211})	number of inbound tourists / number of domestic tourists	0.38
				ratio of inbound tourists to outbound tourists (C_{211})	number of inbound tourists / numbers of outbound tourists	0.62
		the structure of tourist destination (B_{22})	0.35	proportion of domestic tourists (C_{221})	number of domestic high-level tourists / total number of domestic tourists	0.44
				proportion of inbound tourists (C_{222})	number of inbound overnight tourists for sightseeing and leisure / total number of inbound overnight tourists	0.56

Table 1. Cont.

Primary Indicator (A_i)	Weight (Q_i)	Secondary Indicator (B_{ij})	Weight (Q_{ij})	Tertiary Indicator	Measurement Method	Weight (Q_{ijk})
tourism industry structure (A_2)	0.28	the structure of tourism service (B_{23})	0.28	proportion of destination income (C_{231})	scenic spot income/total tourism revenue	0.45
				proportion of inbound tourism shopping and entertainment (C_{232})	income of inbound tourism in shopping and entertainment/total income of inbound tourism	0.55
		the structure of tourism resource (B_{24})	0.21	proportion of high-grade scenic spots (C_{241})	(number of national 4A and 5A)/total number of scenic spot	0.68
				proportion of high-grade hotels (C_{2421})	starred hotel revenue/total accommodation income	0.32
				integration degree of tourism resources and industrial resources (C_{311})	number of national industrial scenic spots/total number of national scenic spots	0.17
				integration degree of tourism resources and agricultural resources (C_{312})	number of national agricultural and rural scenic spots/total number of national scenic spots	0.28
tourism industry integration (A_3)	0.29	integration degree of tourism resources (B_{31})	0.22	integration degree of tourism resources and cultural resources (C_{313})	number of national cultural scenic spots/total number of national scenic spots	0.55
				integration degree of tourism and Internet business (C_{321})	number of online traveler/total number of travelers	0.34
				integration degree of tourism and agricultural business (C_{322})	number of country side tourist/total number of travelers	0.33
		integration degree of tourism business (B_{32})	0.36	integration degree of tourism and performing arts business (C_{323})	number of performing arts tourists/total number of travelers	0.33
				integration degree of tourism market (C_{331})	(total tourism revenue—tourism revenue)/total tourism revenue	0.44
				integration degree of scenic spot industry market (C_{332})	(total revenue of scenic spot-scenic spot ticket revenue)/total revenue of scenic spot	0.38
		integration degree of tourism market (B_{33})	0.42	integration degree of accommodation market (C_{333})	(total hotel revenue-hotel accommodation income)/total hotel revenue	0.18

Table 1. Cont.

Primary Indicator (A_i)	Weight (Q_i)	Secondary Indicator (B_{ij})	Weight (Q_{ij})	Tertiary Indicator	Measurement Method	Weight (Q_{ijk})
tourism industry performance (A_4)	0.25	profit margin of tourism industry (B_{41})	0.58	profit tax rate of travel agency (C_{411})	profit tax of travel agency/income of main business of travel agency	0.28
				accommodation profit tax rate (C_{412})	accommodation profits and taxes/income of main business of accommodation	0.46
				scenic spot profit tax rate (C_{413})	profits and taxes of scenic spots/income of main business	0.26
	0.42	technological progress of tourism industry (B_{42})	0.42	productivity of travel agency industry (C_{421})	DEA-Malmquist index method	0.38
				productivity of accommodation (C_{422})	DEA-Malmquist index method	0.27
				productivity of scenic spot industry (C_{423})	DEA-Malmquist index method	0.35

3.2.1. Tourism Industry Economy

The contribution of the tourism industry economy to high-quality economic development includes the contributions of the tourism industry to economic growth and the upgrading of industrial structure. The tourism industry has the characteristics of integration, and there is no clear industrial boundary. In order to make comparisons, it is necessary to unify the statistical caliber. The indicators reflecting the contribution of the tourism industry to economic growth mainly include main business income, industry added value and foreign exchange income, while indicators reflecting the contributions of the tourism industry to the upgrading of the industrial structure mainly include the tourism industry added value as a percentage of GDP, the tourism industry revenue as a percentage of services, the proportion of the tourism industry income and the proportion of foreign exchange income from tourism in the service trade.

3.2.2. The Structure of the Tourism Industry

The upgrading of industrial structure is an important indicator of high-quality economic development. The structure of the tourism industry refers to the stable contact mode of technology and the economy between sub-industries in the tourism industry. The indicators reflecting the upgrading of tourism industrial structure mainly include the tourism service object structure, the tourist destination structure, the tourism service business structure, tourism resource structure, etc.

3.2.3. The Integration of the Tourism Industry

Industrial integration refers to the economic phenomenon whereby the industrial boundary (according to the traditional industrial classification system) is blurred, or even disappears, resulting in a new competition and coordination relationship among industries, and a greater compound economic effect. The integration of the tourism industry has given rise to new tourism products, new tourism business models, new tourism formats and new tourism industries, which meet the needs for diversified, personalized and convenient tourism consumption. It is an important indicator of the high-quality development of tourism. The main indicator reflecting the integration of the tourism industry is the integration of tourism resources, tourism business and the tourism market.

3.2.4. The Performance of the Tourism Industry

Industrial performance refers to the comprehensive economic effect of industrial organization operation. The measurement indicators of industrial organization performance usually include industrial profit margin level, technological progress level, resource allocation efficiency and economies of scale. Industrial performance improvement is the core of high-quality economic development. The integration characteristics of the tourism industry mean that the overall industrial input boundary and industrial output boundary of the tourism industry do not correspond, and the overall performance is difficult to measure. Only the organizations of each subdivided tourism industry, such as the travel agency industry, the scenic spot management industry, the accommodation industry and so on, can be measured separately. The core indicators reflecting the improvement of the tourism industry organization performance are the profit margin level and the technological progress level of each subdivided tourism industry.

4. The Measurement of the High-Quality Development Level of Tourism Based on Industrial Integration

4.1. The Measurement Methods, Data Sources and Processing

4.1.1. The Measurement Methods

According to the evaluation index calculation method and index weights in Table 1, the evaluation model of the high-quality development of the tourism industry is established by using the fuzzy mathematics method:

$$P_t = A_{ti} * Q_i \quad (1)$$

$$A_{ti} = B_{tij} * Q_{ij} \quad (2)$$

$$B_{tij} = C_{tijk} * Q_{ijk} \quad (3)$$

In Formulas (1)–(3), P_t is the comprehensive score of the annual high-quality development level of China's tourism industry; A_{ti} is the primary level index evaluation matrix. In the equation $i = 1, 2, 3, 4$, 1 is the tourism industry economy, 2 is the tourism industry structure, 3 is the tourism industry integration and 4 is the tourism industry performance; B_{tij} is the secondary level index evaluation matrix of t year; C_{tijk} is the tertiary level index evaluation matrix in t year. Q_i is the weight matrix of the primary indicators, Q_{ij} is the weight matrix of the secondary indicators and Q_{ijk} is the weight matrix of tertiary indicators. Then, by collecting, sorting and measuring the original data of the three-level indicators, and standardizing the original data, the annual index data are dimensionless and comparable. Finally, according to Formulas (1)–(3), the data are processed to obtain the evaluation results.

4.1.2. Data Sources and Processing

The data comes from China Tourism Statistics Yearbook, China Tourism Statistics Bulletin, China Economic Network Industry Database and China Business Industry Frontier Report Database. The data periods are uneven, the longest period is from 1995 to 2019, the shortest period is from 2013 to 2016, and the period with concentrated data is from 2010 to 2018. In 2009, The Opinions of the State Council on Accelerating the Development of Tourism were issued and implemented, and the development of China's tourism industry entered a new stage. Therefore, the period for measuring the high-quality development of China's tourism industry was selected as 2010 to 2019. For some indicators lacking data in 2019, the data change trend in the most recent three years was used to predict and supplement, in order to ensure the integrity of the data [46].

4.2. Analysis of the High-Quality Development Level of China's Tourism Industry

According to Formulas (1)–(3), the comprehensive index of the high-quality development level of the tourism industry in each provincial region from 2011 to 2018 has been calculated (See Table 2).

Table 2. The evaluation value of the high-quality development in China's provincial regional tourism industry.

Province	Year (2011)	Ranking	Year (2018)	Ranking	Average	Ranking
Guangdong	0.6082	1	0.5662	1	0.5872	1
Shanghai	0.5033	2	0.4913	2	0.4973	2
Jiangsu	0.5018	3	0.4553	3	0.4786	3
Fujian	0.4723	6	0.4351	5	0.4537	4
Shanxi	0.4729	5	0.4343	6	0.4536	5
Beijing	0.4509	7	0.4285	7	0.4397	6
Zhejiang	0.4773	4	0.3902	16	0.4338	7
Anhui	0.4244	11	0.4403	4	0.4323	8
Hebei	0.4428	10	0.4215	10	0.4321	9
Liaoning	0.4437	9	0.4071	13	0.4254	10
Guangxi	0.4452	8	0.3885	17	0.4169	11
Shandong	0.4004	13	0.4152	11	0.4078	12
Sichuan	0.3985	14	0.4127	12	0.4056	13
Chongqing	0.3867	17	0.4235	8	0.4051	14
Ningxia	0.4104	12	0.3850	18	0.3977	15
Inner Mongolia	0.3582	21	0.4221	9	0.3901	16
Jiangxi	0.3876	16	0.3745	21	0.3810	17
Xinjiang	0.3958	15	0.3658	25	0.3808	18
Heilongjiang	0.3476	24	0.4012	14	0.3744	19
Jilin	0.3676	19	0.3725	23	0.3701	20
Henan	0.3257	30	0.4002	15	0.3629	21
Hunan	0.3776	18	0.3411	28	0.3593	22
Hubei	0.3380	26	0.3756	19	0.3568	23
Gansu	0.3380	27	0.3742	22	0.3561	24
Tianjin	0.3347	29	0.3747	20	0.3547	25
Qinghai	0.3633	20	0.3453	26	0.3543	26
Yunnan	0.3420	25	0.3661	24	0.3541	27
Shaanxi	0.3512	23	0.3424	27	0.3468	28
Tibet	0.3561	22	0.3295	29	0.3428	29
Hainan	0.3376	28	0.3229	31	0.3303	30
Guizhou	0.3034	31	0.3234	30	0.3134	31

4.2.1. Tourism Industry Economy

Due to the incomplete statistical data of provincial regions, The National Tourism Statistical Yearbook, Tourism Statistical Bulletin and China Economic and Trade Industry Database only provide the number of overseas inbound tourists and foreign exchange income of provincial regions. The statistical caliber of domestic tourism, total tourism income and tourism contribution to economic growth of each province is inconsistent and not comparable. Therefore, the first level economic indicators of tourism industry use tourism foreign exchange income as a proxy variable (See Table 3 for details).

It can be seen from Table 3 that there are many differences in the development of the international tourism foreign exchange revenue among provinces. Guangdong accounts for the largest share in China, with its foreign exchange revenue increasing from US \$2.638 billion in 1996 to US \$12.432 billion in 2010 and US \$20.502 billion in 2019, an increase of 7.77 times in 14 years. Its share in the country increased from 23.26% in 2011 to 24.25% in 2018, an increase of 1% point. Yunnan showed the fastest growth rate, with its foreign exchange revenue increasing from US \$221 million in 1995 to US \$1324 million in 2010 and US \$5147 million in 2019, an increase of 23 times in 14 years. Its share in the country

increased from 2.69% in 2011 to 5.22% in 2018, an increase of 2.5%. Fujian exhibited the largest increase in national share, with its foreign exchange revenue increasing from US \$555 million in 1996 to US \$2.978 billion in 2010 and US \$10.243 billion in 2019, an 18-fold increase in 14 years. Its share in the country increased from 6.08% in 2011 to 10.75% in 2018, an increase of 4.67%. Five provinces exhibited a large decline in national share: Zhejiang decreased by 4.5%; Jiangsu dropped by nearly 4%; Liaoning and Beijing decreased by 2.5%, respectively; Shanghai fell by 1%.

Table 3. The growth of foreign exchange income from international tourism in China's provincial regions.

Province	Year (2011)	Year (2018)	Average	Province	Year (2011)	Year (2018)	Average
Beijing	0.3895	0.2689	0.329	Hubei	0.0676	0.1160	0.092
Tianjin	0.1262	0.0541	0.090	Hunan	0.0748	0.0741	0.074
Hebei	0.0322	0.0414	0.037	Shandong	1.0000	1.0000	1.000
Shanxi	0.0408	0.0184	0.030	Guangxi	0.0756	0.1354	0.106
Inner Mongolia	0.0482	0.0620	0.055	Hainan	0.0270	0.0376	0.032
Liaoning	0.1951	0.0848	0.140	Chongqing	0.0696	0.1068	0.088
Jilin	0.0277	0.0334	0.031	Sichuan	0.0427	0.0737	0.058
Heilongjiang	0.0660	0.0262	0.046	Guizhou	0.0097	0.0155	0.013
Shanghai	0.4196	0.3594	0.390	Yunnan	0.1157	0.2154	0.166
Jiangsu	0.4065	0.2266	0.317	Tibet	0.0093	0.0120	0.011
Zhejiang	0.3266	0.1266	0.227	Shaanxi	0.0931	0.1524	0.123
Anhui	0.0848	0.1554	0.120	Gansu	0.0013	0.0014	0.001
Fujian	0.2614	0.4432	0.352	Qinghai	0.0019	0.0018	0.002
Jiangxi	0.0298	0.0363	0.033	Ningxia	0.0004	0.0027	0.002
Shandong	0.1834	0.1605	0.172	Xinjiang	0.0335	0.0461	0.040
Henan	0.0395	0.0353	0.037				

4.2.2. The Structure of the Tourism Industry

Due to the incomplete statistical data at the provincial level, The National Tourism Statistics Yearbook, the Tourism Statistics Bulletin, and The China Economic Industry Database only provide the number of overseas tourists in the provincial region, the foreign exchange income, and the contributions of domestic tourism, total tourism revenue, and tourism to economic growth in the provinces. The statistical calibers of these indicators are inconsistent and not comparable. Therefore, the first-level economic indicators of the tourism industry use tourism foreign exchange income as a proxy variable (See Table 4 for details).

It can be seen from Table 4 that the structure level of national tourism resources decreased from 2011 to 2018, and the national average decreased by 11.23%. Among these, the structure level of nine provincial regions, such as Tianjin, Inner Mongolia, Liaoning, Heilongjiang, Anhui, Henan, Hainan, Yunnan and Xinjiang, improved to varying degrees. For example, Tianjin increased by 78.8%, Xinjiang increased by only 2.7% and Heilongjiang increased by only 2%. More than two-thirds of the provincial regions are in decline, and Fujian has shown the largest decline, at 40.6%.

Table 4. The evaluation value of tourism resource structure in China's provincial regions.

Province	Year (2011)	Year (2018)	Average	Province	Year (2011)	Year (2018)	Average
Beijing	0.4673	0.3982	0.4328	Hubei	0.4347	0.4179	0.4263
Tianjin	0.2354	0.4210	0.3282	Hunan	0.4419	0.3099	0.3759
Hebei	0.5481	0.4741	0.5111	Guangdong	0.6288	0.5245	0.5767
Shanxi	0.6731	0.6225	0.6478	Guangxi	0.6253	0.5328	0.5791
Inner Mongolia	0.3391	0.4918	0.4155	Hainan	0.3024	0.3796	0.3410
Liaoning	0.4102	0.4374	0.4238	Chongqing	0.5621	0.4828	0.5225
Jilin	0.4135	0.3314	0.3725	Sichuan	0.4924	0.4910	0.4917
Heilongjiang	0.3625	0.3698	0.3662	Guizhou	0.4899	0.4228	0.4564
Shanghai	0.6560	0.6494	0.6527	Yunnan	0.4313	0.4401	0.4357
Jiangsu	0.4806	0.4600	0.4703	Tibet	0.4655	0.4146	0.4401
Zhejiang	0.5131	0.4162	0.4647	Shaanxi	0.3806	0.3143	0.3475
Anhui	0.5035	0.5268	0.5152	Gansu	0.5039	0.4553	0.4796
Fujian	0.6381	0.3788	0.5085	Qinghai	0.4948	0.4884	0.4916
Jiangxi	0.5081	0.4404	0.4743	Ningxia	0.5726	0.5107	0.5417
Shandong	0.4781	0.3693	0.4237	Xinjiang	0.4731	0.4857	0.4794
Henan	0.3798	0.4474	0.4136				

4.2.3. The Integration of Tourism Industry

Due to the lack of statistical data of provincial regional tourism related industries required for the calculation of tourism resource integration and tourism business integration, and since the statistical calibers are inconsistent, this area is not comparable. The input–output tables of most provinces for 2017 have not been published, and it is not convenient to use the input–output method to calculate the integration of the tourism industry. As the main body of the tourism industry, the integration of the tourism hotel and scenic spot markets can reflect the integration of the tourism industry market to a certain extent, and in this way, the evaluation value of tourism market integration for provincial regions from 2011 to 2018 can be calculated (See Table 5 for details).

Table 5. The evaluation value of tourism market integration in China's provincial regions.

Province	Year (2011)	Year (2018)	Average	Province	Year (2011)	Year (2018)	Average
Beijing	0.4536	0.5158	0.4847	Hubei	0.3837	0.5025	0.4431
Tianjin	0.4725	0.4958	0.4842	Hunan	0.4899	0.5318	0.5109
Hebei	0.5489	0.6319	0.5904	Shandong	0.4828	0.4736	0.4782
Shanxi	0.6307	0.5197	0.5752	Guangxi	0.5068	0.3621	0.4345
Inner Mongolia	0.5805	0.6092	0.5949	Hainan	0.4288	0.3403	0.3846
Liaoning	0.6269	0.5561	0.5915	Chongqing	0.4227	0.6110	0.5169
Jilin	0.5159	0.6068	0.5614	Sichuan	0.4831	0.5813	0.5322
Heilongjiang	0.4536	0.6393	0.5465	Guizhou	0.2147	0.4081	0.3114
Shanghai	0.3104	0.3826	0.3465	Yunnan	0.3363	0.3840	0.3602
Jiangsu	0.5902	0.5537	0.5720	Tibet	0.3724	0.3758	0.3741
Zhejiang	0.5809	0.4865	0.5337	Shaanxi	0.4309	0.4757	0.4533
Anhui	0.5655	0.5896	0.5776	Gansu	0.3527	0.5571	0.4549
Fujian	0.4669	0.5201	0.4935	Qinghai	0.3654	0.4591	0.4123
Jiangxi	0.4443	0.5267	0.4855	Ningxia	0.5155	0.5280	0.5218
Shandong	0.4643	0.6369	0.5506	Xinjiang	0.5455	0.4779	0.5117
Henan	0.4571	0.5969	0.5270				

It can be seen from Table 5 that the market integration degree of the tourism industries in the eight provincial regions such as Shanxi, Liaoning, Jiangsu, Zhejiang, Guangdong, Guangxi, Hainan and Xinjiang have decreased, and the market integration degrees of the tourism industries in more than two-thirds of the provincial regions have shown an upward

trend. Guangxi and Hainan decreased by 28.55% and 20.64%, respectively; Heilongjiang and Shandong increased by 40.94% and 37.17%, respectively.

4.2.4. The Performance of Tourism Industry

The primary indicators of tourism industry performance are composed of two secondary indicators: tourism industry profit and tax rate, and tourism industry technological progress. The tourism industry performance evaluation values of 31 provincial regions from 2011 to 2018 are here calculated (See Table 6 for details).

Table 6. Evaluation value of the tourism industry performance in China's provincial regions.

Province	Year (2011)	Year (2018)	Average	Province	Year (2011)	Year (2018)	Average
Beijing	0.4737	0.4759	0.4748	Hubei	0.3712	0.3678	0.3695
Tianjin	0.4361	0.4131	0.4246	Hunan	0.3933	0.3469	0.3701
Hebei	0.4974	0.3920	0.4447	Guangdong	0.4483	0.4078	0.4281
Shanxi	0.3767	0.4240	0.4004	Guangxi	0.4382	0.4397	0.4390
Inner Mongolia	0.3448	0.3863	0.3656	Hainan	0.4950	0.4445	0.4698
Liaoning	0.4476	0.4323	0.4400	Chongqing	0.3769	0.3676	0.3723
Jilin	0.3890	0.3909	0.3900	Sichuan	0.4514	0.3735	0.4125
Heilongjiang	0.4106	0.4302	0.4204	Guizhou	0.4087	0.3354	0.3721
Shanghai	0.6165	0.5353	0.5759	Yunnan	0.4116	0.3711	0.3914
Jiangsu	0.4916	0.5007	0.4962	Tibet	0.4645	0.4092	0.4369
Zhejiang	0.4254	0.4393	0.4324	Shaanxi	0.4115	0.3562	0.3839
Anhui	0.4165	0.3752	0.3959	Gansu	0.3776	0.3395	0.3586
Fujian	0.4447	0.3936	0.4192	Qinghai	0.4737	0.3002	0.3870
Jiangxi	0.4446	0.3675	0.4061	Ningxia	0.4020	0.3534	0.3777
Shandong	0.3953	0.3930	0.3942	Xinjiang	0.3965	0.3317	0.3641
Henan	0.3186	0.3818	0.3502				

It can be seen from Table 6 that the performance of the tourism industry in nine provincial regions such as Beijing, Shanxi, Inner Mongolia, Jilin, Heilongjiang, Jiangsu, Zhejiang, Henan and Guangxi showed an upward trend, and Henan showing a large increase of 19.8% in 2018 compared with 2011. More than two-thirds of the provincial regions have shown downward trend, and Hebei, with a large decline, decreased by 21.2% in 2018 compared with 2011.

4.3. The Regional Differences of High-Quality Development Level of Tourism Industry Based on Cluster Analysis

4.3.1. The Echelon Division of High-Quality Development Level

In order to scientifically analyze the regional differences in the high-quality development level of China's tourism industry, using the MATLAB software for cluster analysis, we can produce four echelons according to the high-quality development levels of the 31 provincial tourism industries in China from 2011 to 2018 (See Table 7 for details).

Table 7. Evaluation value of the tourism industry performance in China's provincial regions.

Echelon	Region
First Echelon	Guangdong, Shanghai, Jiangsu
Second Echelon	Fujian, Shanxi, Beijing, Zhejiang, Anhui, Hebei, Liaoning, Guangxi, Shandong, Sichuan, Chongqing
Third Echelon	Ningxia, Inner Mongolia, Jiangxi, Xinjiang, Heilongjiang, Jilin, Henan, Hunan, Hubei, Gansu, Tianjin, Qinghai, Yunnan
Fourth Echelon	Shaanxi, Tibet, Hainan, Guizhou

The first echelon, comprehensive high-level development areas with a score of 0.4700 or above, includes Guangdong (0.5872), Shanghai (0.4973), and Jiangsu (0.4786). With a

comprehensive score of 0.4000–0.4599, the second echelon is a medium to high-level development area, including Fujian (0.4537), Shanxi (0.4536), Beijing (0.4397), Zhejiang (0.4338), Anhui (0.4323), Hebei (0.4321), Liaoning (0.4254), Guangxi (0.4169), Shandong (0.4078), Sichuan (0.4056) and Chongqing (0.4051). With a comprehensive score of 0.3500–0.3999, the third echelon includes middle and low-level development areas; Ningxia (0.3977), Inner Mongolia (0.3901), Jiangxi (0.3810), Xinjiang (0.3808), Heilongjiang (0.3744), Jilin (0.3701), Henan (0.3629), Hunan (0.3593), Hubei (0.3568), Gansu (0.3561), Tianjin (0.3547), Qinghai (0.3543), Yunnan (0.3541), etc. With a comprehensive score of less than 0.3500, the fourth echelon is a low-level development area, including Shaanxi (0.3468), Tibet (0.3428), Hainan (0.3303) and Guizhou (0.3134). These four provinces are major tourism province, but the level of high-quality tourism development needs to be improved urgently.

4.3.2. The Changes of High-Quality Development

The comprehensive scores of the three high-level development regions decreased, and the top three—Guangdong, Shanghai and Jiangsu—decreased by 6.9%, 2.4% and 9.3%, respectively, but the ranking remained unchanged. Beijing (ranked seventh in the year and sixth in the average) and Hebei (ranked tenth in the year and ninth in the average) showed the same annual rankings, but they have higher average scores. There are 10 provincial regions with rising comprehensive scores and ranking, including Henan, Inner Mongolia, Heilongjiang, Anhui, Shandong, Sichuan, Hubei, Gansu, Tianjin and Chongqing. Among them, the comprehensive scores of Henan, Inner Mongolia and Heilongjiang increased by 22.87%, 17.84% and 15.42%, respectively, in 2018 compared with 2011. The rank positions increased by 15 (from 30 to 15), 12 (from 21 to 9) and 10 (from 24 to 14), respectively. Sichuan and Chongqing were upgraded from low- and medium-development level areas to medium- and high-development areas. Zhejiang, Hunan, Xinjiang, Liaoning, Guangxi, Ningxia, Jiangxi, Jilin, Qinghai and Shaanxi are the 10 provincial regions showing a downward trend in both comprehensive score and ranking. Among these, the comprehensive scores of Zhejiang, Hunan and Xinjiang decreased by 12.77%, 9.67% and 7.58%, respectively, in 2018 compared with 2011. The ranking decreased by 12 (from 4 to 16), 10 (from 18 to 28) and 10 (from 15 to 25), respectively. Zhejiang, Guangxi and Ningxia decreased from medium and high development level areas to medium and low development level.

4.3.3. The Main Factors Affecting the Changes of High-Quality Development Level

The high-quality development level of the tourism industry in 31 provincial regions showed differences in not only the overall level and changes, but also in the main factors that determine the level and changes. We analyze the main factors affecting the high-quality development level of provincial tourism industries via the four primary indicators of high-quality development. It can be seen from Table 6 that, although the rankings and groupings of Guangdong, Shanghai and Jiangsu in the high-level development group remained unchanged, their comprehensive scores decreased. The main factor affecting the decline in Guangdong's comprehensive score is the decline in the level of tourism industrial structure, from 0.6288 in 2011 to 0.5245 in 2018, a decrease of 16.6%, indicating that there is still much room for improvement in Guangdong's tourism industrial structure. The integration level of Guangdong's tourism industry was low and showed a downward trend, which restricts further high-quality developments in this tourism industry. Its national ranking decreased by 10, from 14 in 2011 to 24 in 2018, indicating that the integration of Guangdong's tourism industry needs to be improved. The main factor affecting the decline in Shanghai's comprehensive score was the performance of the tourism industry, which decreased from 0.6165 in 2011 to 0.5353 in 2018, a decrease of 13.17%, indicating that there is still much room for improvement in the performance of Shanghai's tourism industry. Although the integration level of Shanghai's tourism industry increased slightly, it was still low. In 2018, it was only 0.3826, ranking fourth from the bottom in China, which seriously restricts the further high-quality development of Shanghai's tourism industry. Vigorous improvements in the integration level of the tourism industry are essential to the further

high-quality development of Shanghai's tourism industry. The main factor in the decline of Jiangsu's comprehensive score was the integration of the tourism industry, which decreased from 0.5902 in 2011 to 0.5537 in 2018, a decrease of 6.18%, from 10 to 12, showing that there is much room for improvement in the high-quality development of Jiangsu's tourism industry, and the main means to achieve this is to vigorously improve the integration level of the tourism industry. Obviously, the common feature of the high-level development group is that they all need to urgently improve the integration level of tourism industry.

Henan, Inner Mongolia and Heilongjiang, where the high-quality development level of the tourism industry improved greatly, achieved comprehensive improvements in the three aspects of tourism industrial structure, industrial integration, and industrial performance. Henan's scores in these three aspects increased by 17.80%, 30.58%, and 19.84%, respectively. The national rankings of these three aspects increased by 8 (from 27 to 15), 11 (from 18 to 7) and 13 (from 31 to 18), respectively. Inner Mongolia's scores in these three aspects increased by 45.03%, 4.94%, and 12.04%, respectively. The national rankings of these three aspects increased by 22 (from 29 to 7), 4 (the annual score remained at 5, but the average score increased to 1) and 13 (from 30 to 17), respectively. Heilongjiang's scores in these three aspects increased by 2.01%, 40.94%, and 4.77%, respectively. The national rankings of these three aspects increased by 1 (from 28 to 27), 19 (from 20 to 1), and 11 (from 19 to 8), respectively. The common feature of these three provinces is that improvements in the level of industrial integration made greater contributions to the high-quality development of the tourism industry.

Zhejiang, Guangxi, Ningxia and Hunan, where the level of high-quality development in the tourism industry decreased significantly, showed a downward trend in tourism industrial structure, industrial integration, and industrial performance, respectively. The scores of Zhejiang's tourism industrial structure and industrial integration decreased by 18.89% and 16.25%, respectively, and its national rankings decreased by 13 (from 9 to 22) and 17 (from 4 to 21), respectively, which shows that the high-quality development of the tourism industry in Zhejiang has great potential, and there is great development space for tourism industrial structure and industrial integration. The comprehensive score of the tourism industry integration in Guangxi decreased by 28.55%, and its national ranking decreased by 19 (from 11 to 30), while Ningxia's tourism industry performance score decreased by 12.09%, and its national ranking decreased by 4 (from 21 to 25). Hunan's tourism industrial structure and industrial performance scores decreased by 29.87% and 11.80%, respectively, and the national ranking decreased by 10 (from 21 to 31) and 3 (from 24 to 27).

5. Conclusions and Discussion

Based on industrial integration, this paper constructs an evaluation index system for the high-quality development of the tourism industry, and measures the phase characteristics and regional differences of the high-quality development of the national tourism industry. The conclusions are as follows:

- (1) This paper proposes an evaluation index system for the high-quality development of the tourism industry, which consists of 4 first-level indicators, 11 second-level indicators, and 28 third-level indicators. The integrated development of the tourism industry provides more abundant tourism resources and tourism services, and better meets the diverse and personal needs of tourists. Therefore, it is incorporated into the evaluation index system as an important indicator for evaluating the high-quality development of the tourism industry. The indicator has the highest weight, and its secondary indicators include the levels of integration of tourism resources, tourism business, and the tourism market;
- (2) On the whole, the high-quality development level of China's tourism industry has improved greatly, and the development gap between cities is large. In terms of sub-dimensions, the tourism industry economy and the performance level of the tourism industry have contributed relatively high, and the structure of the tourism industry

and the level of industrial integration urgently need to be improved. Specifically, the 31 provinces and regions are divided into four groups, including three high-level development groups, 11 medium-high-development level groups, 13 medium-low-development level groups, and four low-level development groups. This shows that most regions are still at the stage of developing their tourism industry, which is in line with the actual state of the development of the national tourism industry. The unbalanced and insufficient development of the tourism industry in 31 provincial regions is prominent, and their rankings have been significantly changed. In total, 5 are unchanged, 13 are showing an upward trend, and 13 are showing a downward trend;

- (3) The unbalanced and insufficient development of the factors contributing to the high-quality development of the tourism industry is obvious. The provincial regions in the high-level development group have shown the insufficient development of some factors, such as Guangdong, which ranks 1st in the comprehensive ratings and 10th in the country in terms of tourism industry performance. Shanghai, which ranks second in terms of its comprehensive score, ranks second-to-last in the country for the integration of its tourism industry. Jiangsu, which ranks 3rd in terms of its comprehensive score, ranks 15th for tourism industry structure. In provincial regions in the low-level development group, some factors show better competitiveness, such as in Guizhou, which ranks last in terms of its comprehensive score, but its tourism industrial structure ranks 17th; Hainan ranks second-to-last in terms of its comprehensive score, but its industrial performance ranks 4th; Tibet, which is 3rd lowest in terms of its comprehensive score, ranks 8th in industrial performance.

By constructing an index system to quantitatively measure the phase characteristics and regional differences of China's high-quality tourism development, the path of industrial integration in order to achieve high-quality development of the tourism industry is not clear, and this is worthy of further research. In addition, the COVID-19 pandemic has changed the travel and tourism industry; it will thus be worthwhile to explore how the COVID-19 pandemic affects the high-quality development of tourism.

Funding: This work was supported by the Henan Province Philosophy and Social Science Planning Project of China (grant numbers 2020BJJ050).

Institutional Review Board Statement: Not applicable.

Informed Consent Statement: Not applicable.

Data Availability Statement: The data used to support the findings of this study are available from the author upon request.

Conflicts of Interest: The author declares no conflict of interest.

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