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Month of Publication: July 2015
Executive Summary

Hong Kong was ranked 8th in terms of visitor arrivals (VA) to Singapore in 2014. VA had increased at a CAGR of 13% over 2010 and 2014. Travelling formed a significant part of the lives of Hong Kong travellers. Travel not only allowed them to take a break from the stress back home, but also to broaden their horizons through new experiences. They also saw travelling as a good time to bond with their family and loved ones. This, coupled with the lack of domestic tourism and excellent air connectivity, resulted in Hong Kong recording the second highest ratio of outbound trips to households in Asia Pacific.

As most Hong Kong consumers had only few annual leave days, they tend to time their trips around public holidays. The length of trips also tend to be quite short, averaging 2 to 3 nights and comprised mostly nearby destinations within Asia. Being value-conscious, Hong Kong consumers tend to conduct elaborate price comparisons on multiple channels before making a booking which offered the best value for their money. Travel planning typically took place within a month from their departure since most of the trips were to familiar destinations which required less planning.

As most Hong Kong consumers were mature travellers who preferred short getaways, majority of them had visited Singapore before. Singapore was perceived as a destination which was safe, familiar and easy to travel to. However, many Hong Kong consumers also felt that Singapore was similar to Hong Kong in many ways and there was nothing new to see or do in Singapore that they could not find back home. This resulted in the perception that Singapore did not offer a differentiated experience vis-à-vis other regional destinations such as Taiwan, South Korea and Japan. Therefore, the challenge would be to effectively communicate unique and differentiated leisure experiences that Singapore has to offer that cannot be found in Hong Kong.

In 2013, 1 in 3 arrivals from Hong Kong were here for business purposes. Hong Kong BTMICE visitors generally held a high regard for Singapore as a business destination. During their free time, Hong Kong BTMICE visitors enjoyed spending their time unwinding, having meals, shopping or engaging in nightlife activities. Almost half of them would also revisit Singapore for leisure as they wanted to visit Singapore with a different set of companions and to revisit particular sites they have been to during their business trips.

Methodology of STB Primary Research Sources

Figures from this report are gathered from STB internal research as well as publicly available sources. The STB’s research sources are STB’s Overseas Visitors Survey (OVS), the Leisure Segmentation Study (SEG), Business Traveller Study (BTS), Brand Health Tracking Study (BHTS) as well as various interviews and focus groups done.

Overseas Visitors Survey (OVS) – conducted annually at exit points in Singapore, the OVS covers visitors from every nationality. The sample size is usually around 28,000 per year.

Leisure Segmentation Study (SEG) – conducted in 2013 in 4 key markets, SEG sought to understand the needs of different segments of frequent air travellers within our key markets of United Kingdom, Germany, South Korea, and Hong Kong. The sample size was 600 per market, for a total of 2,400.

Business Traveller Study (BTS) – conducted over 2011-2012 in Singapore, BTS covers over 2,000 business travellers from our key business source markets to understand their pre-trip and during trip considerations, behaviour and touch points. Markets covered include Australia, China, Hong Kong, India, Indonesia, Korea, Philippines, Thailand, UK, US and Vietnam.

Leisure Traveller Study (FGD) – conducted in October 2012 in Hong Kong to gain deeper understanding of Hong Kong travellers, including their travel motivations and habits, as well as attitude and perception towards Singapore.

Visitor Experience Study (VES) – conducted annually in Singapore since 2014 covering Leisure and BTMICE visitors from 14 top source markets to gain deeper understanding of experiences they consume here and post-arrival satisfaction with Singapore experiences.
## About The Market

<table>
<thead>
<tr>
<th>Population (million) (^{(1)})</th>
<th>7.2 (2014)</th>
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| Distribution by Area (%) \(^{(1)}\) | Hong Kong Island: 18%  
Kowloon : 30%  
New Territories: 52% |
| Total Outbound Travel by air, land and sea (million) \(^{(2)}\) | 2010: 88.4  
2011: 84.4  
2012: 85.3  
2013: 84.4 |
| Outbound Travel by air (million) \(^{(2)}\) | 2010: 6.8  
2011: 7.1  
2012: 7.8  
2013: 8.6 |
| Top 5 Travel Destinations in Asia (‘000) \(^{(18)}\) | 1. China  
2. Macau  
3. Taiwan  
4. Thailand  
5. Japan |
| Type of Outbound Trips \(^{(18)}\) | Business: 41%  
Leisure: 59% |
| Seasonality of Outbound Trips \(^{(15)}\) |

### Notes:

- Population: 7.2 million (2014)
- Distribution by Area:
  - Hong Kong Island: 18%
  - Kowloon: 30%
  - New Territories: 52%
- Total Outbound Travel:
  - 2010: 88.4 million
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  - 2013: 84.4 million
- Outbound Travel by Air:
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  - 2011: 7.1 million
  - 2012: 7.8 million
  - 2013: 8.6 million
- Top 5 Travel Destinations: China, Macau, Taiwan, Thailand, Japan
- Type of Outbound Trips:
  - Business: 41%
  - Leisure: 59%
- Seasonality of Outbound Trips: Graph showing the trend of travel throughout the year.
The Hong Kong Traveller

For the first quarter of 2015, Hong Kong saw moderate GDP growth of 2.1% year-on-year as compared to a 2.5% growth in 2014. The economy was forecasted to grow by only 1% to 3% for full year 2015. This was mainly attributed to the slower global economic recovery that affected the demand for Hong Kong’s exports of goods and sluggishness in inbound tourism. While external demand was the main factor limiting Hong Kong’s economic growth, domestic demand remained a strong driver for Hong Kong’s economy.

Hong Kong’s outbound travel by air continued to grow at a steady rate of 8% CAGR over 2010 to 2013 despite an economic slowdown. In 2014, Hong Kong households recorded the second highest ratio (335%) of outbound trips to households in Asia Pacific, lagging only behind Singapore. Total outbound trips were expected to grow by 7 times faster than total household growth over 2015 to 2020, resulting in a ratio of outbound trips to households of 428% by 2020.

High consumer spending power coupled with Hong Kong’s lack of domestic tourism options were key reasons encouraging strong overseas travel. Outbound travel was also facilitated by Hong Kong’s excellent geographical location and accessibility as well as the Hong Kong Special Administrative Region (SAR) passport, which does not require visa to visit over 140 countries globally. Hence, overseas trips had become part of a lifestyle for most Hong Kong consumers, who were always on the lookout for relief from their stressful lifestyles.

Outbound travel from Hong Kong was dominated by destinations within Asia, with China being the most popular outbound destination. This was mainly due to China’s close proximity to Hong Kong, which meant that Hong Kong travellers could take short leisure trips easily to China. In addition, business travel also accounted for a significant proportion of outbound flows to China due to increasing foreign direct investments targeting the huge Chinese consumer base.

Besides China and Macau, Taiwan was also another popular outbound destination for Hong Kong travellers. This could be partly attributed to aggressive marketing done by the Taiwan Visitors Association (TVA) in recent years, promoting Taiwan to Hong Kong consumers. TVA had collaborated with numerous travel partners in Hong Kong to offer discounted travel packages to entice Hong Kong consumers to shop in Taiwan.

When Hong Kong travellers were asked to name their aspirational destinations in 2014, regional destinations such as Tokyo, Australia and South Korea were in the top 4 positions, alongside London. This signalled the importance of Asia Pacific destinations for Hong Kong travellers.

As an average worker in Hong Kong only had 10 to 14 days of annual leave, Hong Kong travellers tend to plan their trips around public holidays. Families with school-going children also tend to time their trips with the school holiday period. Hence, the peak travel period usually occurred during the Chinese New Year holidays (February) and year end Christmas and New Year holidays (December to January). As a result, most trips taken tend to be quite short, averaging 2 to 3 nights, and involved short haul regional destinations, which offered direct flights.
Media Consumption Habits

Hong Kong’s internet penetration was one of the highest in Asia. In 2013, 7 in 10 adults were Internet users (6). Hong Kong also recorded a higher proportion of older age group among its internet base, with 24% aged between 45-54 years old, compared to the global average of 14%.

Among Hong Kong consumers, Yahoo! sites were most frequently accessed, followed by Google, Microsoft sites and social networking site, Facebook (7). While Facebook was the fourth most frequently accessed site, Hong Kong consumers spent the most time on the site, at 244.6 minutes per visitor in 2013. In contrast, Yahoo! sites only clocked 203.3 minutes per visitor. In addition, Facebook topped the reach of social networks at 63%, surpassing other popular social networks such as Yahoo! Wretch and Sina Microblogging, at 17% and 16% respectively.

Hong Kong also recorded the highest video penetration among its internet audience globally, with 90% of the internet population viewing online videos in 2013. Chinese audience, in comparison, was the number 2 consumer of videos globally, with 87% of the internet population watching online videos. Yahoo! and Google were the most frequently accessed sites for online videos (7).

Smartphone penetration in Hong Kong has risen significantly over the recent years, from 35% in 2011 to 63% in 2013 (8). In 2013, Hong Kong recorded the highest mobile internet usage rate in Asia Pacific, with 96% of Hong Kong smartphone users accessing mobile internet daily. This was followed closely by Japan (94%), Singapore (93%) and South Korea (92%). 91% of Hong Kong users also watched videos online on their smart phones.

While digital media consumption was high, print media (e.g. newspapers and magazines) remained important in Hong Kong. In 2014, there were 16 Chinese newspapers, 3 local English newspapers and 3 regional English newspapers in circulation. Headline Daily, Oriental Daily News, Apple Daily and The Sun recorded the highest market share in the Hong Kong newspaper segment (16).
**Tourism Receipts** ($mil/%)**

**Purpose of Visits (%)**

**Weekly Flight Statistics** (Flight Freq. / Seat Capacity)

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*All visitors are classified by country of residence unless otherwise stated. Visitor arrivals include all visitors arriving by air and sea and non-Malaysian citizens arriving by land.

**Sightseeing, entertainment and gaming expenditure has been excluded from tourism receipts in the country breakdown due to commercial sensitivity of information.

Other TR Components include expenditure on airfares, port taxes, local transportation, business, medical, education and transit visitors

***Others include those here for education, healthcare, work-related purposes, accompanying passengers and personal events.
Hong Kong (HK) Visitors to Singapore \(^{(9,10)}\)

In 2014, visitor arrivals (VA) from Hong Kong reached its highest since 2007 and was ranked 8\(^{th}\) in terms of VA to Singapore. VA had grown at a CAGR of 13\% over 2010 to 2014 and this was partly boosted by more visitors twinning Singapore with Malaysia since the opening of the Legoland or Puteri Harbour theme park. However, a pullback in visitors twinning with Malaysia was observed in the last quarter of 2014, signalling that the novelty factor of such trips could be wearing off.

Despite the strong VA growth, tourism receipts (TR) from Hong Kong only saw a growth of 3\% CAGR over 2010 to 2014. Growth in TR was limited by per capita expenditure (PCE) which saw a 9\% CAGR decline from 2010 (S$1,290) to 2014 (S$876). Hong Kong visitors were staying in Singapore for a shorter period of time and spending less per day. Average length of stay (ALOS) of Hong Kong visitors had dipped from 3.1 days in 2010 to 2.7 days in 2014. Over the same period, their per diem expenditure had also declined by a CAGR of 6\%.

In 2014, the bulk of Hong Kong visitors’ expenditure in Singapore was contributed by accommodation (43\%), followed by food and beverages (14\%) and shopping (12\%). While the expenditure on all three components declined over 2010 to 2014, accommodation spend recorded the smallest decline of 4\% CAGR. This was in contrast to expenditure on shopping and food and beverages, which dropped by a greater magnitude of 13\% and 12\% CAGR, respectively. Coming from a country which was known for small and congested housing conditions, accommodation was considered an important element for outbound trips. Hence most Hong Kong consumers were willing to spend more to ensure that they could enjoy a good and comfortable stay when travelling overseas. This decline in PCE was evident among both BTMICE and leisure visitors, with BTMICE’s overall PCE declining at a slightly higher rate of 7\% CAGR over 2010 to 2014, compared to 5\% for leisure.
The Hong Kong Leisure Traveller

Needs of the Hong Kong Leisure Traveller \(^{(11, 12)}\)

For Hong Kong consumers, leisure travel was a necessary breakaway from stress and daily routines and an opportunity to wind down and recharge.

Hong Kong travellers also saw travelling as a way to connect with their family and loved ones. One respondent shared, “It is a form of gathering with family members. Normally we are busy and do not have much chance to spend quality time together.” For those who travelled with their families, they looked towards safer and more familiar destinations that were short haul and convenient for their elderly parents and children. However, if they travelled with friends, spouse or partner, they were more likely to consider longer haul or more exotic destinations.

Travelling was also seen as a form of personal enrichment that allowed them to broaden their horizons. For families with children, they were more likely to bring their children to countries where they have not visited before to increase their children’s exposure. As one respondent mentioned, “Actual travel experience cannot be replaced by reading books, so I would like to bring my children to actually go out and see it.”

Hong Kong parents’ enthusiasm to expose their children to new experiences could be attributed to the country’s highly competitive education system. The stiff competition had been exacerbated with the huge influx of students from Mainland China in recent years. To ensure that their children stayed ahead of the curve, many affluent Hong Kong parents were willing to spend on children's education and enrichment activities which could help broaden their horizons. Hence learning opportunities for their children while having fun on their leisure trips were highly sought after by family travellers.

Considerations for Travel \(^{(11, 12)}\)

As Hong Kong travellers had few annual leave days, the number of days available for the trip was the most important consideration for travel. Being value-conscious, it was also important for Hong Kong travellers to get the best travel deal which could fit their travel budget. For families who regarded travelling as a time of bonding with their loved ones, travel companions’ preferences and the safety and security of the destinations were valued. As dining and shopping were deeply ingrained in their local culture, Hong Kong travellers also enjoyed exploring the city through good food and shopping.
Majority of Hong Kong travellers planned and made bookings for their trips only within a month from their travel dates. This could be due to the fact that most of their trips were to familiar destinations within the region, which typically required less planning.

Among those who typically travelled with friends, spouse or partner, their decisions to travel could also be easily triggered by deals and promotions offered by credit cards, airlines and hotels. Hence, trip planning could sometimes be as short as a few days. This group of travellers also exhibited stronger preference for low season travel when airfare and accommodation tend to be cheaper.

As for family travellers, their travel period would typically be restricted to school holidays, which would coincide with peak travel periods. To better manage costs, some of them might book air tickets and accommodation at least a month in advance to take advantage of costs savings. As a result, trip planning period could be longer for this group of travellers.

Being mature travellers, most Hong Kong travellers were also comfortable making trip bookings online and liaising directly with airlines and accommodation providers. This behaviour was also in line with their value-conscious mind-set, whereby they would conduct elaborate price comparisons on multiple channels (e.g. offline and online travel agents, airline websites, hotel websites etc) before making a booking which offered the best value or could meet their preferences for specific airlines or hotels. In line with Hong Kong travellers’ predominant need to rest and relax during their trips, there was a much stronger preference for free and easy travel as opposed to guided package tours, which tend to be associated with a more hectic itinerary. Hong Kong travellers were also likely to travel to familiar destinations where they had visited before, thus they might not see the need to book a package tour. However, Hong Kong travellers might consider booking package tours if they were travelling to less familiar destinations with language barriers or if there were attractive promotions available.

For those who booked flight and accommodation themselves, flight tickets were usually prioritised to ensure availability and lower prices. Accommodation bookings were done only after flight tickets were secured.
Information Sources Before and During Travel \(^{(11, 12)}\)

Due to Hong Kong’s high internet penetration rate, most pre-trip research was conducted online through search engines such as Yahoo! or Google. There was also strong reliance on user-generated content as such information was considered richer, less biased and more up-to-date. Examples of such content would be online travel reviews on forums or blogs, which Hong Kong travellers found to be the most useful information source. While many travellers also accessed the respective NTO (National Tourism Organizations) websites as part of their pre-trip research, few found information on such sources useful.

Hong Kong travellers also liked to purchase travel magazines and guidebooks during their trip planning stage. Although some travellers felt that these sources were not as updated and recommendations tend to be more “touristy” in nature, travel magazines and guidebooks remained popular as a handy source of information when they arrived at their destinations.

During the trip, most Hong Kong travellers preferred to access free WIFI to search for information (e.g. activities to do) via the variety of devices they travelled with, such as laptops, tablets or smartphones, on the go. Travel magazines and guidebooks purchased pre-trip were typically referred to as an information source.

Advocacy \(^{(12)}\)

Similar to South Korean and Chinese travellers, Hong Kong travellers typically shared their travel experiences online (60%) or talked to their family members or friends about the trip (50%). This was in contrast with Japanese travellers who were more likely to share their experiences face-to-face than via online channels \(^{(9)}\).

Hong Kong Leisure Visitor in Singapore

In 2014, over 60% of Hong Kong leisure visitors to Singapore were repeat visitors and 4 out of 10 of these repeat visitors had come within the past 1 year. They typically stayed in Singapore for about 2 to 3 nights. As Hong Kong travellers tend to prefer short holidays, Singapore was a convenient and fuss-free option for a quick getaway. Among repeat visitors, Singapore was perceived to be a city that was easy to travel to since minimal planning was required. It was also seen as a dynamic city which constantly renewed its offerings. Singapore cuisine also enjoyed strong appeal among Hong Kong repeat visitors.

Singapore was also perceived to be a safe and well-organised destination and this was especially valued by family visitors, who saw Singapore as an ideal place to bring their elderly parents and children. Attractions which featured a strong enrichment component and appealed to all ages were especially popular.
Leisure Activities in Singapore

Shopping was the top activity for Hong Kong visitors when holidaying in Singapore. The top five places that Hong Kong visitors shopped at when in Singapore included Changi Airport, Orchard Road, Chinatown, followed by the Marina Bay area \(^9\).

Hong Kong consumers were shoppers by nature. As shown by a MasterCard survey in 2015, Hong Kong consumers topped Asia Pacific as having the most optimistic spending outlook on shopping in the region, especially for luxury goods. As value-conscious consumers, it was also shown in the study that shopping offers and discounts were key triggers for retail purchases. Hong Kong consumers also enjoyed shopping in airports during their trips. Chocolates, cosmetics, fragrances and personal care were the most popular categories purchased at the airports \(^{17}\).

However, shopping expenditure in Singapore among Hong Kong leisure visitors had been declining on a CAGR of 14% over 2010 to 2014 in almost all shopping categories such as fashion, accessories, souvenirs and consumer technology. The only shopping category which saw an increase in spend was confectionery and food items \(^9\). It would thus be vital to understand the product categories that appeal to Hong Kong visitors when they are in Singapore to better capitalise on their propensity to spend.

Visits to well-known landmarks, nature or animal-related attractions and theme parks also appealed to Hong Kong visitors \(^{12}\). The top three free-access attractions frequented by Hong Kong visitors were Orchard Road, Merlion Park and Singapore River (Clarke Quay and Boat Quay), while the top three paid-access sites visited were the integrated resorts (MBS/ RWS), Sentosa and Gardens by the Bay \(^9\).

While Hong Kong family visitors were more likely to explore the different attractions in Singapore, nightlife was a popular activity among visitors who came without children. The top night spot visited was in the Singapore River area (e.g. Clark Quay, Boat Quay and Robertson Quay). In Hong Kong, high-end night spots were often exclusive and networks were required to get access to such clubs. Other night spots that were more easily accessible, however, tend to be perceived as less safe and less appealing to those who desired a more premium experience. As a result, many non-family visitors appreciated the safety and ease of access to the variety of nightlife experiences in Singapore \(^{14}\).
Barriers to Visiting Singapore \(^{(11, 12)}\)

While Hong Kong travellers valued Singapore for its safety and ease of travel, they also perceived Singapore to be a formal and disciplined city with many restrictions and relatively little to do. Furthermore, many travellers also felt that Singapore’s offerings were similar to Hong Kong and preferred other neighbouring destinations which could offer more differentiated experiences.

The reason behind such perceptions could be attributed partly to the historical rivalry between Hong Kong and Singapore since the coining of the “Four Asian Tigers” in the early 1960s. Besides Hong Kong and Singapore, South Korea and Japan were the other two countries in Asia that were referred to as nations that have undergone rapid industrialisation and saw exceptionally high growth rates. Hong Kong and Singapore were, however, more heavily compared to each other, especially by the Hong Kong media, since both countries shared numerous similarities \(^{(17)}\). As a result, Singapore’s leisure offerings were often downplayed in the local media while the perception of Singapore being a successful but formal business city was entrenched in the minds of Hong Kong consumers. Many Hong Kong consumers also believed that they were already familiar with what Singapore had to offer and tend not to conduct any research on the destination.

Therefore, the challenge would be to change existing perceptions of Singapore among Hong Kong travellers and communicate new and unique attractions and experiences that could not be found in Hong Kong to interest them to visit Singapore.

Hong Kong BTMICE Visitor in Singapore

The Hong Kong BTMICE Visitor

In 2014, Hong Kong’s business travellers ranked Shanghai and Beijing as the top two business destinations, with Singapore and Tokyo in third and fourth positions respectively. In recent years, business travel to secondary cities in China had also picked up tremendously \(^{(5)}\), posing strong competition to Singapore in attracting Hong Kong BTMICE visitors.

Majority of Hong Kong BTMICE visitors to Singapore were repeat visitors, with about 80% having been to Singapore in the past 1 year. On average, Hong Kong BTMICE visitors stayed for 3.1 days in Singapore. Similar to leisure trends, BTMICE VA also reached its highest in 2014 since 2007. However, while VA grew at a CAGR of 4.3% over 2010 to 2014, PCE dropped at a CAGR of 6.7% over the same period, resulting in a decline in Hong Kong BTMICE tourism receipts from S$312mil in 2010 to S$280mil in 2014 \(^{(9)}\). This was contributed mainly by the drop in food and shopping expenditure, which declined at a CAGR of 13% and 15%, respectively over 2010 to 2014.
Perception of Singapore as a Business and Leisure Destination\(^{(13)}\)

Hong Kong BTMICE visitors valued Singapore for its safe and stable environment, its excellent infrastructure and world class business facilities that were conducive to doing business. Singapore was also seen as a systematic society with laws, regulations and processes in place.

With regards to leisure experiences in Singapore, most BTMICE visitors felt that Singapore was a modern and cosmopolitan destination that was perfect to mix business and leisure. Singapore was also appreciated for its friendly and efficient service and its ease to get around for visitors to enjoy the destination.

32% of BTMICE visitors indicated that they were “likely” or “very likely” to visit Singapore for leisure within the next two years. Respondents indicated that the main reasons were to visit Singapore with a different set of companions and to revisit particular sites (e.g. attraction or dining place) they have been to during their business trips.

However, 19% of Hong Kong BTMICE visitors indicated they were “unlikely” to revisit the destination, a percentage that was significantly higher than the global average of 11%. Main reasons were that they preferred to visit other destinations they have not been before or they felt that there was nothing new or interesting about Singapore as they had already been to the key sights and attractions.

Approximately 40% of BTMICE expenditure was contributed by accommodation, followed by 24% on entertainment, 12% on food, 11% on shopping and the rest on local transport and other miscellaneous expenditure\(^{(13)}\).
When planning for the trip, Hong Kong BTMICE visitors generally did very little pre-trip research. While their companies were the main decision makers for flight and accommodation options, 57% of Hong Kong BTMICE travellers indicated that they had control over their own itineraries, which was significantly higher than the global average of 43%.

During the trip, 82% of Hong Kong BTMICE visitors did not research for any information when they were in Singapore. For those who did, they relied mainly on their friends, family or colleagues residing at the destination as their main source of information.

Once they were done with their business activities, which tend to be after 6pm, Hong Kong BTMICE visitors enjoyed spending their after-work hours dining (93%), engaging in nightlife (29%) and shopping (25%). Hong Kong BTMICE visitors spent the highest share on entertainment (which included gaming and engaging in nightlife and other activities such as movies and karaoke), compared to the other countries. While shopping was the top activity for Hong Kong leisure visitors, BTMICE visitors had the lowest share of shopping spend relative to other Asian countries. 38% did not shop when they were on business trip compared to the global average of 20%. For those who shopped, they preferred to shop at locations convenient to where they were (21%) and bought gifts for their family, friends and colleagues (20%).

Not surprisingly, convenience was the most important consideration for those who engaged in nightlife experiences as they preferred bars or clubs that were in close proximity or easy to access from their hotels and offices (54%).

In terms of food preferences, Hong Kong BTMICE visitors were keen to try local cuisine (55%) although it might not be familiar to them as well as street food (42%). 40% also indicated that they were willing to go out of the way for good food, a percentage that was significantly higher than the global average.
Findings and Implications

As most Hong Kong travellers had been to Singapore before, it is vital to keep them interested in order for Singapore to remain top priority in their consideration set, especially in the midst of keener regional competition. Below are the key insights and opportunities we have identified for the tourism sector:

**Finding #1: Leverage Singapore’s strength as a family-friendly destination**

Singapore’s safe environment and other hygiene strengths were valued for family travel. Besides spending quality time with loved ones, broadening horizons and increasing exposure for their children and themselves were key needs among such travellers. To leverage Singapore’s strength as a family-friendly destination, it is thus important to highlight enriching and educational experiences that are available so that everyone in the family, especially the children, could learn and enjoy the holiday together.

**Tips for the Industry:**

- **Highlight enriching experiences which are differentiated from Hong Kong:**
  
  Feature interactive and educational experiences or attractions which cannot be found in Hong Kong in family travel itineraries. For example, sleepover programmes at the Marine Life Park and Living Classrooms at the Singapore Zoo and Night Safari would allow children to interact directly with the animals and learn about them in the process. Gardens by the Bay also provides Junior Horticulturist programmes for children to learn about biodiversity through hands-on activities and other educational attractions such as the Maritime Experiential Museum, Kidstop at the Science Centre and the upcoming KidZania would be appealing experiences to highlight.

  Hong Kong’s education system is also trying to broaden their students’ exposure to other cultures. In this regard, Singapore’s multicultural society serves as a good learning ground to expose the children to. Experiences in our museums and cultural precincts which showcase Singapore’s multiculturalism and racial harmony (e.g. Masjid Jamee Chulia, Sri Mariamman Temple and the Buddha Tooth Relic Temple and Museum located along the same street) would provide Hong Kong visitors with a first-hand enriching experience in a multicultural destination.

- **Timing of marketing efforts:** Hong Kong families usually time their travel with public and school holidays. Hence marketing efforts should be pushed out at least one month before these key holidays when potential travellers are starting to do planning and booking.
Finding #2: Focus on differentiated and novel lifestyle experiences for non-family travellers

Non-family travellers from Hong Kong enjoy exploring cities through lifestyle offerings such as entertainment options, F&B and night life. However, as many Hong Kong travellers saw Singapore as a familiar destination that shared many similarities to their home country, it is thus important to effectively highlight our new offerings by differentiating them from Hong Kong and other regional destinations in our marketing collaterals. New and novel developments and experiences should also be timely updated to allow Singapore to remain relevant among repeat visitors and reinforce its image as a dynamic city which constantly renews its offerings.

Another segment to focus on would be the business travellers with higher spending propensity and who spend their after work hours on dining and night life leisure activities. When marketing such lifestyle experiences to them, it is important to take into consideration their time-strapped schedule.

Tips for the Industry:

New discoveries: Increase awareness of novel offerings that are unavailable back home or less-known in Hong Kong to inspire and engage with Hong Kong travellers:

- **F&B:** Singapore cuisine could be an important aspect to leverage. Itineraries could feature lesser-known hidden gems (e.g. old eateries) which locals frequent, focusing on the diversity of cuisine that cannot be found in Hong Kong. It is important to note, however, that Hong Kong consumers are not very adventurous with their palettes. Hence cuisine such as Peranakan food could be a good balance between being distinctly local and tastefully palatable.

- **Food souvenirs:** Hong Kong travellers also like to buy food souvenirs back home. Hence raising awareness of local food brands and products such as Bengawan Solo pandan cakes and pastries, kaya and chicken rice paste would be key in driving souvenir spend.

- **Hotels:** Hong Kong travellers are willing to spend on accommodation, especially new and novel ones that are value for money. Hence, when reaching out to them, showcase new offerings such as boutique hotels or hotels which offer a differentiated accommodation experience from the mainstream (e.g. heritage elements etc).

- **Greenery:** Featuring greenery offerings (e.g. tree top walk at MacRitchie, Pulau Ubin, Marina Barrage and Gardens by the Bay) can potentially change perceptions of Singapore being another urban city similar to Hong Kong with little greenery and showcase how travellers can rest and relax in Singapore.

- **Night life:** While Lan Kwai Fong is the most prolific night spot in Hong Kong, marketing messages to Hong Kong travellers can focus on the wide variety of night life experiences in Singapore that are unavailable in Hong Kong. For example, the Singapore River area and Marina Bay night life offerings allow visitors to experience Singapore’s beautiful skyline. Duxton Hill gives them an opportunity to enjoy a drink in a neighbourhood, while Club Street and Ann Siang Hill in Chinatown allow visitors to soak in the culture of the precinct while they party away.

- **Bring out the “value” in our events and lifestyle experiences:** Being value-conscious consumers, it is important to highlight the differentiated lifestyle or entertainment components which our events offer. When promoting events such as the Formula 1® and Women’s Tennis Association Tour Championship, it would be critical to highlight the entertainment (e.g. concerts) and lifestyle offerings (wine, dine and parties).

- **Package “bite-sized” lifestyle experiences to time-strapped business travellers:** Marketing messages or itineraries catered to business travellers should be sharp and focus on the best of the best offerings that they can experience in a short amount of time.
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