

South & Southeast Asia

南亞及東南亞

Arrivals reached 2.41 million in 2005, an increase of more than 16% over the previous year, which confirmed the position of South and Southeast Asia as Hong Kong's second-largest regional source market. Five major markets recorded best-ever performances: Singapore, Malaysia, Thailand, India and Indonesia. Arrivals from the Philippines also grew robustly.

在 2005 年，來自南亞及東南亞的旅客達 241 萬人次，較前一年增加超過 16%，令該區成為香港的第二大地區客源市場。其中五個主要市場：新加坡、馬來西亞、泰國、印度及印尼的業績，更刷新歷年最佳紀錄。此外，來自菲律賓的旅客人次增長亦十分強勁。

MARKET OVERVIEW

Although many Asian economies continued to grow and the region remains relatively stable politically, the threat of avian flu still needs to be taken seriously. Increased bilateral trade with Mainland China is having a positive effect on visitor numbers to Hong Kong, with business travellers – especially from India and Indonesia – tending to include the city in Mainland itineraries.

While the growth in low-cost carriers (LCCs) from some regional markets created opportunities by boosting air capacity and introducing more competitive pricing, as indicated by the increase in traffic from Singapore to Hong Kong in 2005, they also brought challenges.

TAILORED STRATEGIES ENHANCE HONG KONG'S POPULARITY

Hong Kong enjoys high popularity in this region and is regarded as a lively, energetic and fashionable city with a cosmopolitan and modern atmosphere. While this is a unifying factor, the HKTB also structures its marketing to address key regional differences in terms of spending power, and a variety of preferences towards culture and entertainment.

The HKTB identified the Philippines and Thailand as being high-potential markets in this region, while key target segments in all individual markets were families and young travellers. The HKTB also continued to leverage the growing trend towards free independent travel (FIT). Business travel remained healthy, and the HKTB actively marketed Hong Kong as a world-class MICE destination, especially in Singapore, Malaysia, Thailand and India.

市場概覽

雖然多個亞洲國家的經濟持續增長，該區的政局亦相對穩定，但各地仍須密切注意禽流感的威脅。區內各國與內地的雙邊貿易愈趨頻繁，則愈有助推動訪港旅客的增長，特別是來自印度及印尼的商務旅客，大多傾向將香港納入其內地行程之內。

在區內的部分市場，由於提供廉價機票的航空公司增加，除了航空載客量顯著上升外，機票價格亦變得更具競爭力，為旅遊業帶來不少商機，以新加坡為例，2005年來自該市場的訪港旅客便有所增加。不過，廉價航空公司的崛起，亦為香港旅遊業帶來一定挑戰。

度身制定策略 提升香港魅力

香港深受該區旅客歡迎，並獲公認為是活力澎湃及充滿時尚魅力的現代國際都會。儘管如此，旅發局仍然按照區內各個市場的不同特性，包括旅客的消費力，以及他們對文化及娛樂節目的喜好等，制定不同的市場推廣策略。

旅發局鎖定了菲律賓及泰國為區內的高潛力市場，而在所有個別市場，則以家庭及年輕客群為主要目標。同時，旅發局亦繼續把握自助旅遊日益盛行的趨勢。隨著商務旅遊繼續穩健發展，旅發局亦在區內，特別是新加坡、馬來西亞、泰國及印度，積極推廣香港為世界級的會議、展覽及獎勵旅遊目的地。

Bringing fun and magic to families

The HKTB leveraged Hong Kong's new and existing attractions to position the city as the premier destination to families from around the region. To pave the way towards the launch of 2006 Discover Hong Kong Year, it took part in the Hong Kong Government's "Discover the Hong Kong Magic" tourism promotions in Bangkok and Singapore, which were well received by family segments. The Board ensured a strong presence of local trade partners and media at both events.

The HKTB also worked with travel agents and airlines in key markets around the region to develop "Family Fun" packages, including such major attractions as Hong Kong Disneyland and Ocean Park during peak family travel periods, and "Family Warmth" promotions leveraging Hong Kong WinterFest.

In the primary markets of the Philippines and Thailand, the HKTB developed a range of family-oriented marketing programmes. In Thailand, for example, an integrated promotion was devised around the "Discover Special Family Moments in Hong Kong" theme, covering print, TV and radio, and online elements. This was in co-operation with the Rak Luke Family Group, the country's biggest family-oriented media group.

Targeting young and independent travellers

The HKTB targeted the growing number of FITs through a number of initiatives. A customised *Discover Hong Kong Guide* was distributed in co-operation with media partners in India, Malaysia, the Philippines, Singapore and Thailand, as part of a tailor-made integrated promotion. Targeted market-specific content included nightlife listings for Filipinos,

營造繽紛天倫樂

旅發局利用嶄新及現有的旅遊特色，把香港推廣為區內首選的家庭旅遊勝地。由於「2006精采香港旅遊年」即將啟動，旅發局積極參與香港特區政府在曼谷及新加坡舉行的「精彩香港 奇妙之旅」推廣活動，這項活動深受兩地家庭的熱烈歡迎，同時亦吸引了兩地的旅遊業界及傳媒踴躍參與。

旅發局亦與區內主要市場的旅行社及航空公司合作，在家庭旅遊旺季，推出包括香港迪士尼樂園及海洋公園等大型景點的親子配套行程。此外，在「香港繽紛冬日節」期間，則推出以溫馨天倫樂為主題的宣傳活動。

在菲律賓及泰國這兩個主要市場，旅發局亦以家庭客群為目標，進行一系列推廣。例如在泰國，旅發局跟以家庭為對象的最大傳媒機構－Rak Luke Family Group 合作，推出以享受天倫樂為主題的綜合推廣活動，分別透過刊物、電視、電台及互聯網等渠道推廣。

年輕客群及自助旅遊

旅發局把握自助旅遊人士不斷增加的趨勢，集中向這類旅客進行推廣。例如旅發局在印度、馬來西亞、菲律賓、新加坡及泰國，為自助旅遊人士度身設計綜合推廣活動，當中包括與傳媒夥伴合作，派發專為這類旅客而編製的《精采香港》旅遊指南。而指南的內容亦針對個別市場的需要，例如為菲律

- ▶ The HKTB takes part in the "Discover the Hong Kong Magic" roadshow to Bangkok, organised by the Hong Kong Government
旅發局參與香港特區政府在曼谷舉行的「精彩香港 奇妙之旅」巡迴展覽



Hong Kong Super Fans

The HKTB co-operated with the regional TV channel AXN Asia in the *Hong Kong Super Fans* show, which highlighted the city's multi-dimensional appeal through the experience and passion of bona fide travellers. These four "Super Fans" visited special places that enabled them to relive their own memories of the city, took part in activities that they had always wanted to experience and also visited new attractions. Featured locations included Tai O, the Wisdom Path, Hong Kong Disneyland, a ride on the *Duk Ling* sailing junk and the Avenue of Stars, while experiences ranged from *tai chi* practice to sampling local dishes. The show generated publicity worth more than HK\$4 million.

Halal restaurant listings for Malaysians, expanded temple coverage for Thai visitors and a Bollywood movie map and Indian restaurant listings for visitors from the sub-continent.

The Board also worked with the regional cable channel AXN Asia to produce the *Hong Kong Super Fans* travel show, which featured the emotive personal discoveries of four independent travellers, following their experiences and recording their insights on a visit to Hong Kong. The show was aired between January and March 2006. Recognising that FITs are more likely to book trips online, the HKTB also co-operated in promoting attractive Hong Kong travel promotions with Zuji.com in Singapore and Makemytrip.com in India.

超級旅遊發燒友

旅發局與區內的AXN Asia電視頻道合作攝製「Hong Kong Super Fans」旅遊特輯，透過熱愛旅遊人士的體驗，展示本港多層面的吸引力。四位「超級旅遊發燒友」到訪可以勾起他們回憶的地方，或者體驗一直想參與的活動，以及參觀新的景點。取景的地點包括大澳、心經簡林、香港迪士尼樂園、中式帆船「鴨靈號」及星光大道。他們更親身體驗各式各樣的旅遊樂趣，例如參加太極班和品嚐地道美食。這個旅遊特輯的宣傳效益超過 400 萬港元。

賓旅客提供晚間娛樂資訊；為馬來西亞旅客介紹回教餐廳；為泰國旅客提供詳盡的廟宇資料，以及為印度旅客印製地圖，介紹該國電影曾在港取景的地點，及編印介紹印度餐廳的資料。

旅發局又與區內的AXN Asia有線電視頻道合作，製作旅遊特輯「Hong Kong Super Fans」。節目於2006年1月至3月播放，以感性的手法，報道四位自助旅遊人士在港的所見所聞和旅遊體驗。此外，自助旅遊人士傾向使用互聯網預訂行程，因此，旅發局與新加坡的Zuji.com及印度的Makemytrip.com合作，推廣富吸引力的訪港旅遊優惠。



▲ Prepared for the South & Southeast Asian region, the *Discover Hong Kong Guide* is specially customised for each key market 針對南亞及東南亞市場的需要，旅發局編製內容專為各主要市場而設的《精采香港》旅遊指南



▲ Ticker-tape flies when 2006 Discover Hong Kong Year is launched to consumers in Manila, the Philippines 旅發局在菲律賓首都馬尼拉，舉行「2006 精采香港旅遊年」啟動儀式

Celebrities bring glamour to launch events

The HKTb has long capitalised on the synergies between movies and TV on one hand, and travel on the other. In India, the December 2005 launch event for the 2006 Discover Hong Kong Year campaign featured leading characters from the popular family TV drama series *Kavyanjali*. Sixteen episodes of the series were partly filmed in Hong Kong, providing a perfect showcase for the city's glamour, cosmopolitan lifestyle and fusion of cultures to an audience of more than 40 million viewers. A *Discover Kavyanjali in Hong Kong* flyer, featuring locations used in the series, was distributed with India's leading daily *The Hindustan Times*.

Local TV personalities also added glamour to many of the three-day consumer fairs that marked the launch of 2006 Discover Hong Kong Year, which were held in shopping malls in several regional capitals. In Malaysia, for example, a celebrity gourmet judge in the 2005 Best of the Best Culinary Awards attended the launch and shared her dining experiences in Hong Kong. Trade participation at these "Discover Hong Kong Year" fairs offered special packages tailored for each market. To help sustain the launch, the HKTb ran a multimedia marketing programme using TV, radio, print and e-channels.

名人薈萃 倍添姿采

旅發局一向善用電影、電視與旅遊之間的協同推廣效應。在印度，旅發局邀請備受家庭觀眾歡迎的電視劇 *Kavyanjali* 的主要演員，出席於2005年12月舉行的「2006精采香港旅遊年」啟動儀式。該電視劇其中16集在香港取景，估計超過4,000萬印度電視觀眾，透過劇集欣賞到本港國際都會的魅力、多姿多采的生活方式，以及中外薈萃的多元文化。此外，一份名為《Discover Kavyanjali in Hong Kong》的宣傳單張，亦隨印度的主要日報《The Hindustan Times》派發，介紹該劇在港取景的地點。

在南亞及東南亞，旅發局於多個城市的購物商場，舉行為期三天的消費者展銷，以配合「2006精采香港旅遊年」啟動，由於得到各城市的電視藝人及名人的鼎力支持，令活動生色不少。例如在馬來西亞，一位曾擔任「2005美食之最大賞」評判的食家，便在啟動儀式上分享她在香港的美食體驗。旅遊業界亦積極參與這些「精采香港旅遊年」展銷活動，紛紛推出專為個別市場度身設計的配套行程。此外，旅發局為延續宣傳效應，更推出多媒體市場推廣活動，透過電視、電台、刊物及網上渠道宣傳。

- ▶ Filming of India's top TV drama *Kavyanjali* takes place in Hong Kong and features Murray House in Stanley and Ocean Park
印度最受歡迎的電視劇集 *Kavyanjali*，曾在香港赤柱美利樓和海洋公園取景

- ▶ Guests share their Hong Kong experience with the audience at the 2006 Discover Hong Kong Year consumer launch event in Bangkok, Thailand
在泰國曼谷，出席「2006精采香港旅遊年」啟動儀式的嘉賓，與消費者分享他們在港的旅遊體驗



Leveraging Hong Kong's MICE appeal

South and Southeast Asia was Hong Kong's third-largest source market for incentives and corporate meetings in 2005, a popularity that partially reflected the HKTB's efforts to promote the city as a world-class MICE destination.

A key HKTB initiative in this respect was the Hong Kong delegation that attended the Pacific Asia Travel Association (PATA) Travel Mart 2005 in Kuala Lumpur in September 2005, which paved the way towards the staging of the event in Hong Kong in 2006. Including members of Hong Kong's hotel industry, as well as operators of key attractions and travel agents, this was the largest-ever travel mission to Southeast Asia. The HKTB hosted a "Journey of Discovery to Hong Kong" lunch reception for more than 1,000 guests as part of a wider promotion of 2006 Discover Hong Kong Year. This initiative was extended with a travel mission to Singapore and Malaysia, in which 28 travel companies from Hong Kong met with local travel-trade partners.

A travel mission to Bangkok in October 2005 also provided an opportunity for 20 travel businesses from Hong Kong to meet 70 Thai companies from the MICE and leisure sectors. Finally, a successful Contract Hong Kong event for the South and Southeast Asia region was held in the city in February 2006, in co-operation with Cathay Pacific Airways, which brought buyers from six key markets.

PROSPECTS

The HKTB can leverage many growing trends in South and Southeast Asia. The trend towards independent travel is likely to increase across the region, especially with the continued growth of LCCs and a growing preference for online booking. The HKTB is also leveraging the expanding niche segment of affluent families with strong interest in such attractions as Hong Kong Disneyland in the predominantly Muslim markets of Malaysia and Indonesia. Meanwhile in India, the HKTB is exploring interlining opportunities with domestic carriers serving cities in southern and western India that currently have no direct flights to Hong Kong.

While all these factors provide a positive foundation for further growth in outbound travel, challenges remain from LCCs, which continue to divert travellers to other regional destinations, particularly in view of the aggressive marketing adopted by several of Hong Kong's competitors. Although the growth of health tourism, especially to cities such as Singapore and Bangkok, poses a further challenge, the HKTB will continue leveraging Hong Kong's expanded portfolio of attractions and diversity of experiences to rejuvenate its image, expand its offerings and attract yet more visitors from the region.

善用會展及獎勵旅遊魅力

在南亞及東南亞市場，旅發局一直致力推廣香港為世界級的會議、展覽及獎勵旅遊勝地，而在 2005 年，該區已成為本港獎勵旅遊及企業會議業務的第三大客源市場。

在這方面，旅發局的其中一項主要工作，是組織香港旅遊業代表團，於 2005 年 9 月前往吉隆坡參與「2005 亞太旅遊協會交易會」，並為 2006 年在港舉行的交易會作好準備。代表團的成員來自香港酒店業、主要景點營運商及旅行社，是歷來前赴東南亞地區最龐大的旅遊業代表團。期間，為進一步推廣「2006 精采香港旅遊年」，旅發局舉辦名為「精采香港旅程」午餐會議，出席的嘉賓超過 1,000 人。其後，旅發局又組織旅遊業代表團前赴新加坡和馬來西亞，讓香港 28 間旅行社與當地業界夥伴會面。

2005 年 10 月，另一個旅遊業代表團到曼谷訪問，讓本港 20 家旅遊機構，與泰國 70 家會議、展覽、獎勵及消閒旅遊業的企業洽商業務。此外，旅發局又於 2006 年 2 月，與國泰航空公司合作，舉辦「旅業訪港考察活動」，邀請南亞及東南亞地區的業界參與，出席的買家來自該區六個主要市場。

展望

旅發局將會把握南亞及東南亞市場的發展趨勢，進一步拓展業務。廉價航空公司持續增加，加上旅客愈來愈喜歡在互聯網預訂行程，相信自助旅遊將會更為盛行。此外，旅發局亦會把握富裕家庭日漸增加的趨勢，特別是在馬來西亞及印尼這些以穆斯林家庭為主的客源市場，推廣如香港迪士尼樂園等家庭旅遊景點。現時，印度南部及西部的部分城市，均未有直航香港的班機，所以旅發局正與營辦接駁航班的內陸航空公司洽商，合作推廣香港。

上述因素均有助推動南亞及東南亞地區的外遊市場，然而，香港亦要面對種種挑戰，例如廉價航空公司增加，將會繼續吸引旅客前往區內其他目的地，尤其是一些正積極進行推廣活動的競爭對手。此外，保健旅遊正持續發展，特別是在新加坡及曼谷等城市更份外蓬勃，亦為香港帶來挑戰。雖然如此，旅發局會繼續利用香港更多元化的特色，以及多姿多采的旅遊體驗，推廣香港煥然一新的形象，並向旅客介紹更豐富的行程選擇，以吸引更多區內旅客來港。