

行政院國家科學委員會專題研究計畫 成果報告

亞太地區旅遊趨勢分析—以旅遊專業雜誌為例 研究成果報告(精簡版)

計畫類別：個別型
計畫編號：NSC 97-2410-H-029-003-
執行期間：97年08月01日至98年07月31日
執行單位：東海大學餐旅管理系

計畫主持人：潘東傑

計畫參與人員：此計畫無其他參與人員

處理方式：本計畫可公開查詢

中華民國 98 年 10 月 09 日

摘要

對於受外界因素（例如自然災害、政治動亂、政治、社會、科技及經濟發展）影響極大的旅遊業來說，趨勢分析有助把握未來發展契機與策略。本計畫植基於二〇〇五年聯合國世界旅遊組織的亞太地區旅遊趨勢報告，旨在透過分析旅遊專業雜誌的報導，借助記者對業界的分析與掌握，以及業界對媒體的專業闡述，找出旅遊發展的趨勢。本次計畫共分析了 TravelWeekly 與 TTG Asia 等兩份旅遊專業雜誌網路版二〇〇六（七五五篇）及二〇〇七年（七〇七篇）之文章，合計八十一萬七千七百八十二字。分析結果顯示二〇〇五年所找出之主要趨勢仍持續發展，例如：

（一）旅遊者以活動來決定旅遊點，而非先決定旅遊點再決定從事何種活動；（二）社區與環境保護意識的持續加強；（三）中國與印度旅客仍是各國積極爭取之對象，但在此同時，這兩國亦成為入境旅客的熱門旅遊國家；（四）各旅遊國家或地區面臨日益增加的競爭壓力，紛紛在行銷與公關上加強，同時與媒體保持良好互動，及時糾正不利之旅遊形象；（五）婦女與銀髮族旅遊的成長，帶動相關旅遊活動如文化古蹟之旅與康健之旅的發展。

其他的趨勢變化如下：（一）低成本航空（low-cost carrier）開拓長途飛行市場，加強與旅行社與 GDS 之合作以拓展行銷通路，同時逐漸強調其以價值為主軸之營運策略（value-focused carriers）；（二）亞太各國積極開拓會展產業（MICE）；新加坡與香港拓展遊輪旅遊，國際遊輪公司亦積極佈局亞太市場；（三）由於旅遊市場競爭激烈，從旅遊管理公司到旅行社出現一股合併或結盟風潮，主要目的是為降低營運成本。此外，東南亞的新加坡、汶萊、印尼與東北亞的香港與澳門，展現既合作又競爭的旅遊發展趨勢。東南亞國協及大湄公河次區域組織亦進行區域旅遊之整合，在簡化簽證與開放航權上進行磋商；（四）俄羅斯與中東旅客成為東南亞各國爭取的新興客源市場，越南進一步鞏固其新興旅遊點之地位。

Abstract

Tourism is an industry that is prone to outside influences such as nature disasters, political turmoil, social demographic changes, economic cycles, technological advances, *et cetera*. It is, therefore, imperative, that the industry identify travel trends in order to invest in the future, prepare for incoming challenges, minimize or mitigate imminent risks, and seize potential opportunities to maximize the profits. This project is based on the author's previous research project, which was later turned into a monograph published by UNWTO (United Nations World Travel Organization) in 2006 and a paper published in Journal of Travel Research in 2008. Building on the previous research (it included only articles published in 2005), this project further analyzed online articles published by TravelWeekly and TTG Asia in 2006 and 2007. Altogether, 1,462 articles with 817,782 words were content analyzed using a refined coding protocol that incorporated trend characteristics of three years. Findings indicated that the following trends are still prevalent and salient: (1) travel is more activity-interest based, rather than destination based; (2) consolidation of social-environmental awareness and consciousness; (3) chasing Chinese and Indian tourists – but these two countries are also becoming a hot destination for international inbound tourists; (4) increased marketing and public relations activities to alleviate health and safety concerns and to mitigate negative impacts on destination image; and (5) demographic changes facilitate the continued growth of seniors and women travel which, in turn, boost the development of cultural and heritage tourism and wellness

(medical) tourism. Other findings in trend changes include: (1) low-cost carriers (LCCs) expand into long-haul market, cooperate with travel agents and GDS to increase sales channels, and they are becoming value-focused carriers; (2) MICE (meetings, incentives, conferences and exhibitions) industry is the fashion word in the region, while Singapore and Hong Kong also focus on the development of cruise travel; (3) Merger, acquisition and alliance within the industry become more common and frequent in order to save costs and take on the keen competition. Singapore, Brunei and Malaysia display both a competitive and cooperative attitude. ASEAN and GMS (Greater Mekong Subregion) also speed up the intra-regional travel by simplifying visa application and opening their skies; and (4) Russian and Middle-eastern tourists are emerging source markets chased by Southeast Asian countries. Vietnam is consolidating its status as an established emerging popular destination.

Research Objectives

The research objective of this project is to identify travel trends in Asia-Pacific region through content analyzing two travel trade publications, that is, TravelWeekly and TTG Asia. The identified trends are useful for the industry to plan ahead future strategies in order to seize potential opportunities. Another objective is to further refine the techniques and coding protocol for media content analysis in identifying travel trends.

Results and Discussions

Following the methodology proposed by Pan, Chon and Song (2008), the following trends were identified from content analysis of articles published by TravelWeekly and TTG Asia in 2005, 2006 and 2007. The word count and article numbers for each year (in parenthesis) are: 368,244, 766 (2005); 406,307, 755 (2006); 411,375, 707 (2007), respectively. Altogether, 2,228 articles with 1,185,926 words were analyzed for six months during the period of February 2006 to September 2009.

Consulting Table 1 and Figure 1, some trends are identified within certain years. For example, “social-environmental awareness and consciousness” (SE) is singular to year 2007, so is “human resources” issue. Trends of business travel (BT) which includes MICE, “marketing” (MA), “safe and health concern” (SH), “activity-oriented” (AO) are quite salient for both year 2006 and 2007. Low-cost carriers are not as frequently covered by travel media in 2007 as in the previous two years. Since the

purpose of identifying trends is to help us look into future, the focus should be placed on more recent changes. Therefore, the following trends require more attention. First, business travel is booming in Asia-Pacific region, especially in the MICE (meetings, incentives, conferences and exhibitions) sector. Infrastructure and human resources are two key factors for successfully developing MICE industry. However, authorities need to monitor closely the global economic development before implementing related development plans as MICE industry is closely related to economic development (GDP growth to be exact). Second, social-environmental awareness is now a must, not a plus, requirement in conducting tourism business. Green hotel, community tourism, pro-poor tourism, and volunteer tourism are all the trends that will stay with us.

Third, marketing is becoming more important as destination image plays a crucial role in consumers’ travel decision-making process. Destination image is closely related to media channels, and travel safety and health concerns all have a strong impact on destination image. Public relations campaign like FAM (familiarization) trips and media strategies during crisis are key areas that destination marketing organizations (DMOs) need to look into so as to reinforce positive image, while mitigating negative one when crises are looming or already in existence. Lastly, wellness (medical) tourism and cruise tourism are two activities that are gaining popularity in the region. Some demographic changes that lead to the niches like the increase of travel by seniors, singles, women and families are the trends that deserve the industry’s attention.

Next we identify relationships between trends and subregions. These subregions are Northeast Asia, Southeast Asia, South Asia and Oceania, according to the classification of UNWTO. As we can see from Table 2, Southeast Asia has the largest number of quotations and codes and also the highest coverage (nearly 55%) by the two publications. This is followed by Northeast Asia (31% coverage), South Asia (9%) and Oceania (5%). Journalist usually cover stories or regions that their readers concern, and for the two travel publications, these regions apparently are North- and Southeast Asia. Nearly 86% of articles cover these two subregions, and they also take a lion's share of about 88% of international tourist arrivals to the Asia-Pacific.

When there are more tourism activities and issues, associated trends are generated accordingly. For Northeast Asia, "China fever" (CF) is more singular to it, so are "business travel" and "human resources" trends. Trends like "competition/cooperation" (CC), "activity-oriented" (AO), and "demographic niche markets" are both salient to North- and Southeast Asia. On the other hand, Southeast Asia is more associated with "emerging destinations/markets" (ED) and "safety and health concerns", and hence "marketing" (MA) to mitigate negative images. Social-environmental awareness is also more salient in Southeast Asia as countries in this subregion rely heavily on natural (green) tourism as their economic source and hence a well-preserved nature is critical to the sustainable development of tourism. Low-cost carriers are also a trend closely associated to Southeast Asia and South

Asia. Air Asia is the first LCC in the region and the development of LCCs is more mature in Southeast Asia than in other subregions. India is also keen on developing LCC. LCCs bring in new challenges to traditional airlines and new opportunities to regional airports. Therefore, "aviation industry" is also closely related to these two subregions. The trend "India fever" is intuitively singular to South Asia.

In Oceania, the trend "experience economy" (EE) is more singular to it, indicating the emphasis on tourist experience. Australia is pursuing Chinese market eagerly through implementation of travel quality program. However, the close association between trend "travel agent transformation" (TA) and Oceania cannot be explained logically by consulting the original frequency table. This is because Correspondence Analysis cannot explain accurately all the distances (i.e., the relationships) between row and column variables. However, the statistical technique is good enough in explaining most other relationships.

Table 1

Asia-Pacific Tourism Trends by Year

Trend	2005	2006	2007	Total	%
AO	158	137	140	435	17.09%
CF	136	70	33	239	9.39%
BT	100	69	56	225	8.84%
CC	86	52	35	173	6.79%
MA	39	69	52	160	6.28%
LCC	71	50	28	149	5.85%
PI	73	34	16	123	4.83%
PO	73	14	33	120	4.71%
AI	71	29	16	116	4.56%
SH	40	38	26	104	4.08%
HI	48	12	25	85	3.34%
ED	47	8	21	76	2.99%
SE	32	18	23	73	2.87%
ET	55	9	8	72	2.83%
TA	36	13	20	69	2.71%
EE	49	9	10	68	2.67%
IF	37	9	11	57	2.24%
DN	31	5	20	56	2.20%
HR	20	6	30	56	2.20%
IM	30	8	9	47	1.85%
IN	22	9	12	43	1.69%
Total	1254	668	624	2546	100.00%

Note:

AI = aviation industry; HI = hotel industry; PI = political influence/exchange rate;
 AO = activity oriented; HR = human resources; PO = polarization;
 BT = business travel; IF = India fever; CC = competition/cooperation;
 IM = image/rebranding; SE = social-environmental consciousness;
 CF = China fever; IN = infrastructure; SH = safety and health;
 DN = demographic niche market; ED = emerging destination;
 LCC = low-cost carriers; TA = travel agent transformation;
 EE = experience economy; MA = marketing; ET = e-travel.

Values are frequencies;

Table 2

Asia-Pacific Tourism Trends by Subregions

Trend	NE Asia	SE Asia	S Asia	Oceania	Total
AO	163	218	35	19	435
CF	138	60	11	30	239
ET	22	34	11	5	72
BT	104	96	12	13	225
AI	22	63	25	6	116
CC	58	86	12	17	173
LCC	30	91	13	15	149
PO	38	60	17	5	120
HI	31	46	8	0	85
PI	36	55	16	16	123
TA	33	22	11	3	69
EE	25	23	5	15	68
ED	13	55	5	3	76
SE	19	42	7	5	73
SH	13	79	11	1	104
DN	18	32	2	4	56
IF	4	22	24	7	57
IM	13	27	2	5	47
IN	17	20	6	0	43
HR	27	25	3	1	56
MA	44	93	9	14	160
Total	868	1249	245	184	2546

Note:

AI = aviation industry; HI = hotel industry; PI = political influence/exchange rate;
 AO = activity oriented; HR = human resources; PO = polarization;
 BT = business travel; IF = India fever; CC = competition/cooperation;
 IM = image/rebranding; SE = social-environmental consciousness;
 CF = China fever; IN = infrastructure; SH = safety and health;
 DN = demographic niche market; ED = emerging destination;
 LCC = low-cost carriers; TA = travel agent transformation;
 EE = experience economy; MA = marketing; ET = e-travel.

Values are frequencies.

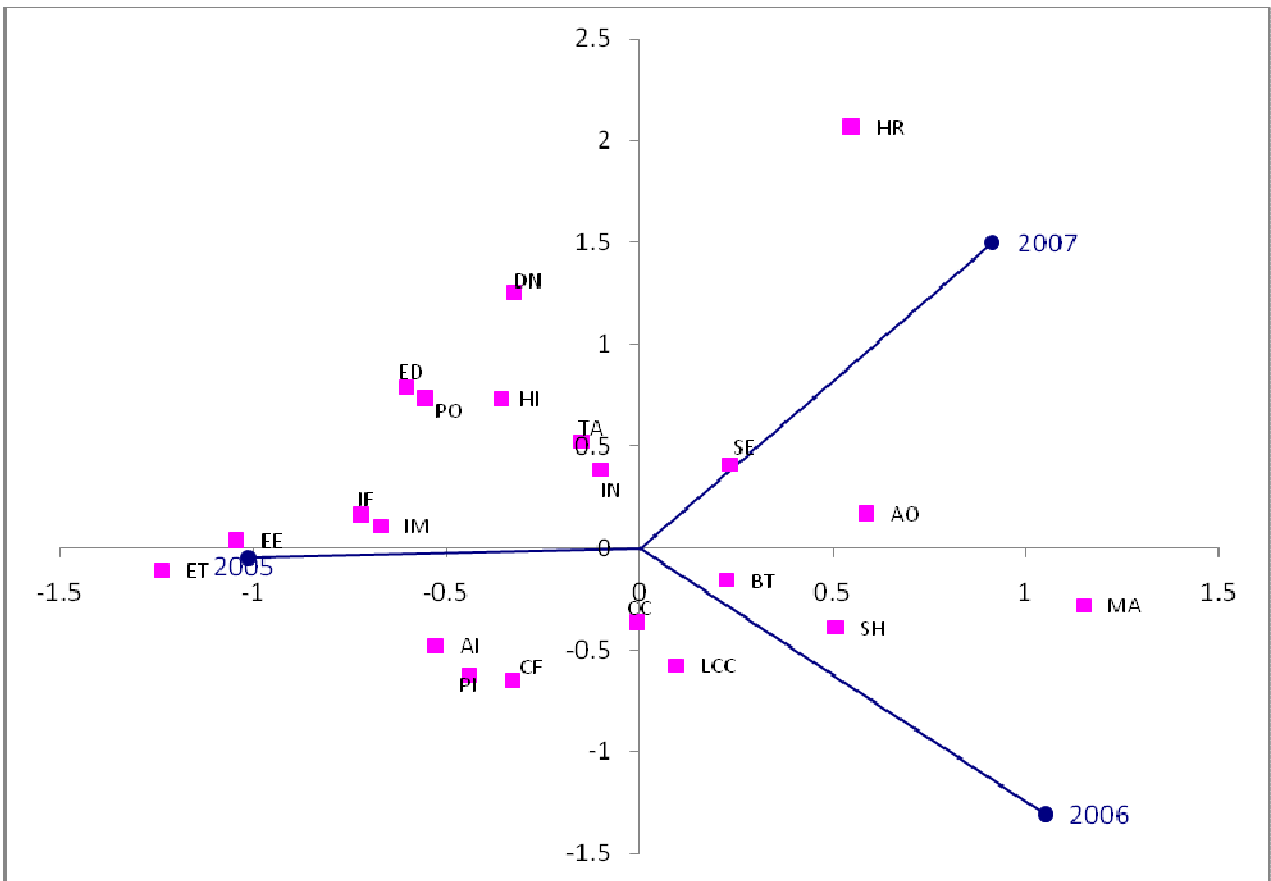


Figure 1. Corresponding Relationship between Trend and Year

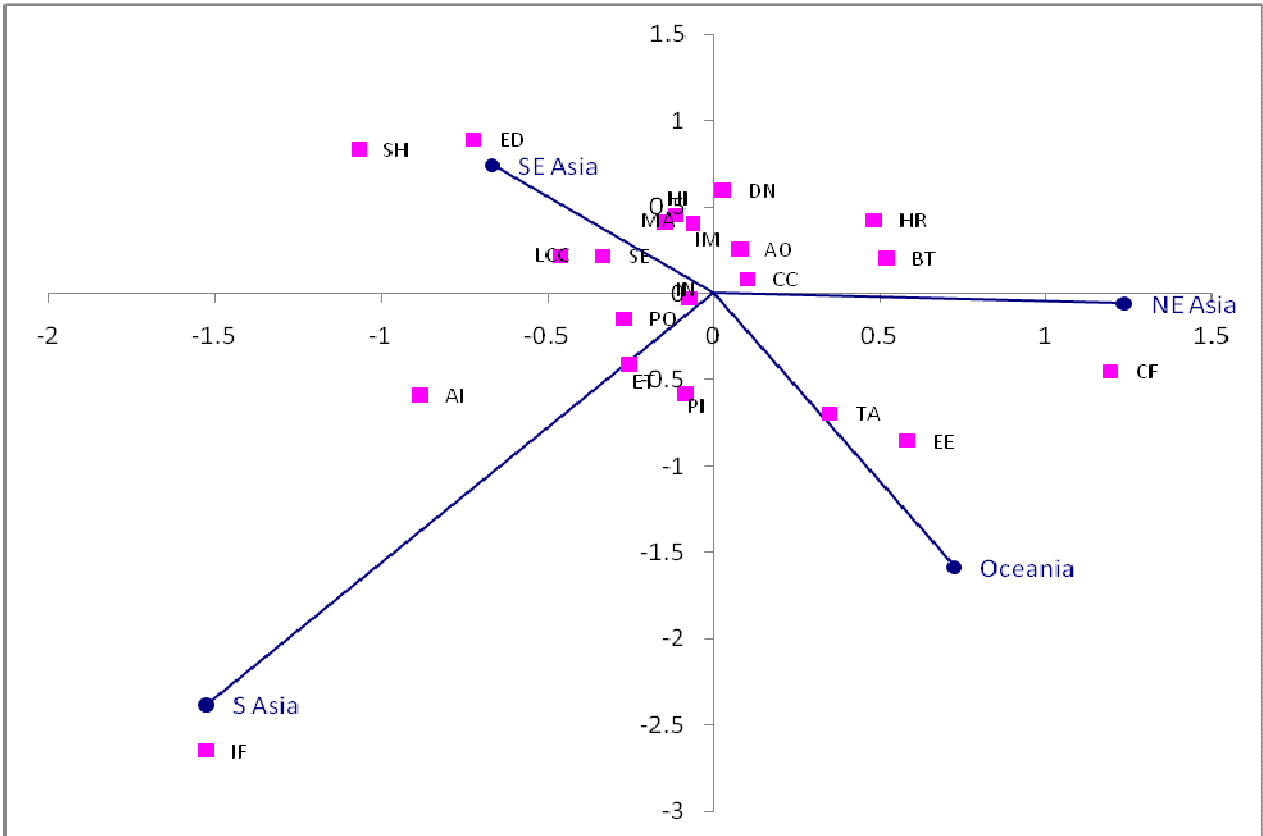


Figure 2 Corresponding Relationship between Trend and Subregion (2005-2007)

Project Evaluation

The project aims to identify major travel trends in the Asia-Pacific. Through the inclusion of two additional years' data, the findings reconfirmed the validity of previous project and identify some new trends. It also refined the techniques of identify travel trends. The results contribute to the literature of travel trend and provide managerial implications.

References

- Pan, S., Chon, K., & Song, H.-y. (2008). Visualizing tourism trends: A combination of ATLAS.ti and BiPlot *Journal of Travel Research*, 46(3), 339-348.