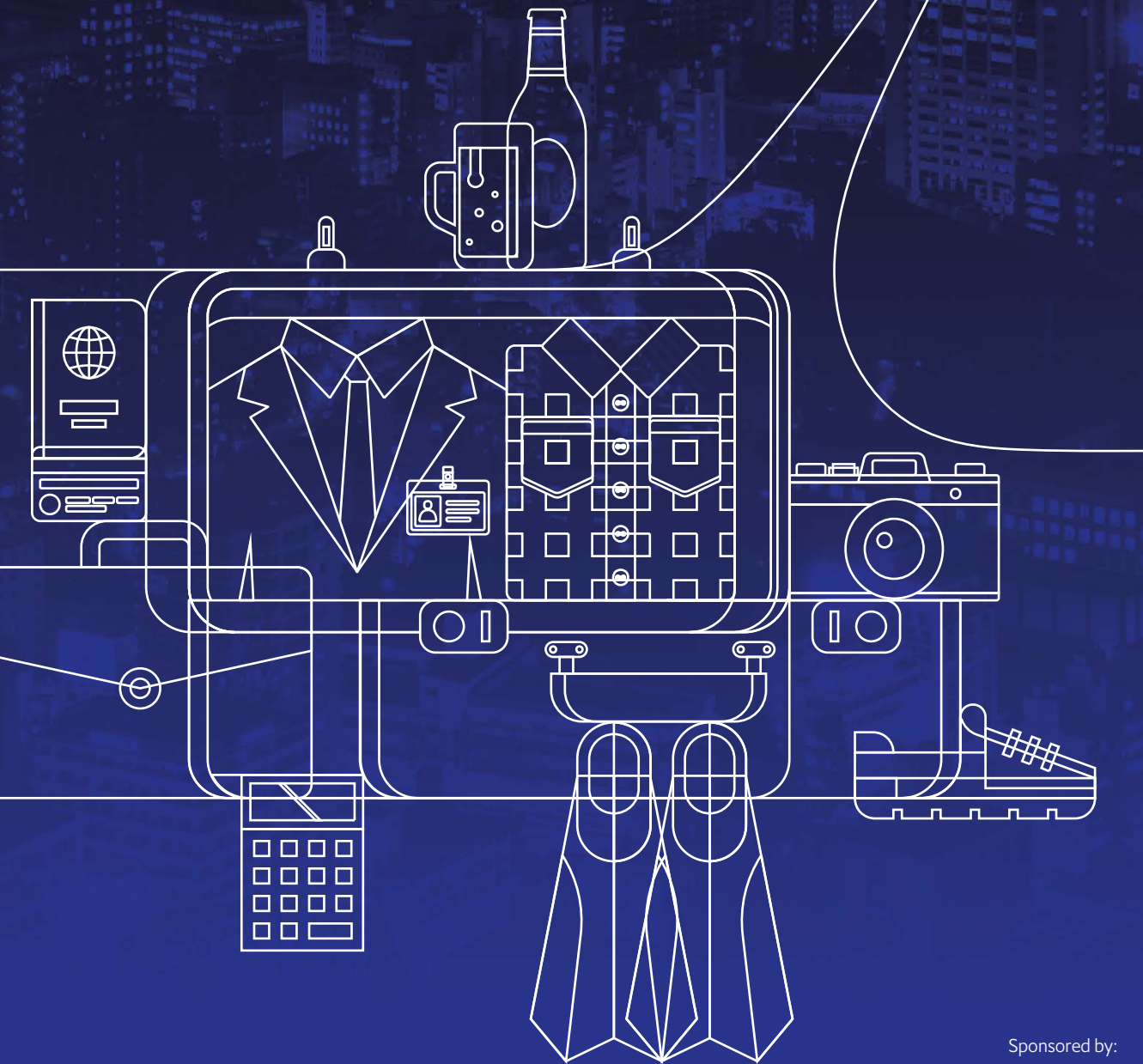


THE 2019 BLEISURE BAROMETER:

Asia's best cities for
work and recreation



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About the research and acknowledgments

The 2019 bleisure barometer: Asia's best cities for work and recreation is an Economist Intelligence Unit report, sponsored by All Nippon Airways. It measures the opinions of global corporate travellers toward various cities in Asia-Pacific with regard to their environment for both business and leisure, referred to as "bleisure" in this study. It is based on a survey of 1,500 people engaged in full-time employment, who have travelled for business to or within Asia-Pacific at least once within the past three years and incorporated leisure activities into their trip. The respondents hail from every continent and represent companies of various sizes and a range of seniority and age levels. See appendix II for full survey demographics.

The report also includes input from three experts in business travel trends. We would like to thank the following people for their time and insight:

- Jessica Collison, director of research, Global Business Travel Association, Alexandria, Virginia, US
- Brian King, associate dean and professor, School of Hotel and Tourism Management, Hong Kong Polytechnic University
- Jessica Lichy, international research professor, IDRAC Business School, Lyon, France

The report was written by Michael Gold and edited by Naka Kondo. Scott Aloysius conducted the data analysis and contributed research assistance.

Executive summary

As the booming cities of Asia-Pacific play host to an increasingly large share of the world's corporate travellers, the concept of bleisure is growing in importance. This term—a portmanteau of business and leisure—describes the fusion of work and recreation that typifies many foreign trips in the modern era. For example, alongside conventional tourists, corporate travellers explore scenic wonders, dine out at local eateries and share space in queues at historical sites.

This report evaluates the bleisure potential of various cities in Asia-Pacific, based on a survey of global business travellers. It reveals that while Asia's top bleisure destinations provide the right balance of business activity, high-quality infrastructure and top-flight leisure experiences, many less obvious choices stand out for different reasons, often involving opportunities for cultural exchange.

The key findings are:

- **Tokyo is Asia's best bleisure destination, ranking first out of 26 cities in the region.** The Japanese capital is joined by Singapore, Sydney, Hong Kong and Melbourne as a “five-star” bleisure city, as determined by a quantitative barometer constructed for this programme, based on survey responses. Raw scores and number of stars may not correlate perfectly, as the former is an absolute measure and the latter a relative one (see appendix I for the full methodology of barometer and star scoring).
- **Less-affluent cities comprise most of the one-star destinations, with notable exceptions.** Business travel may prove arduous in the emerging metropolises of South and South-east Asia, but greater GDP is hardly the only predictor of a high bleisure score.
 - New Delhi and Hanoi tie for second (alongside Beijing and Hong Kong) in the category measuring opportunities for cultural experiences, providing them a leg up over cities with stronger infrastructure and a bigger international business scene.
 - Shanghai and Beijing, often criticised for their poor urban environments, rank highly on business aspects such as quality of international links and level of digital connectivity, helping them best more ostensibly liveable cities, including Auckland, Brisbane, Seoul, Taipei and Wellington, in the overall ranking.
 - Wealthy Adelaide falls in the one-star category, dragged down by low scores for quality of food and beverage and opportunity for cultural experiences.

Figure I. Turning Japanese

Asia's top cities for business and leisure travel (scores and stars out of five)

Rank	City	Score	Stars
1	Tokyo	4.12	★★★★★
2	Singapore	4.05	★★★★★
3	Sydney	4.04	★★★★★
3	Hong Kong	4.04	★★★★★
5	Melbourne	4.01	★★★★★
6	Shanghai	3.97	★★★★
7	Beijing	3.96	★★★★
8	Osaka	3.90	★★★
9	Perth	3.89	★★★
10	Seoul	3.88	★★★
11	Taipei	3.84	★★
11	Guangzhou	3.84	★★
13	Kuala Lumpur	3.83	★★
13	Mumbai	3.83	★★
15	Wellington	3.82	★★
16	Brisbane	3.81	★★
16	New Delhi	3.81	★★
18	Auckland	3.80	★★
19	Bangkok	3.78	★
20	Adelaide	3.77	★
20	Shenzhen	3.77	★
22	Jakarta	3.72	★
23	Ho Chi Minh City	3.69	★
24	Colombo	3.67	★
25	Hanoi	3.65	★
26	Manila	3.60	★

■ Five stars
 ■ Four stars
 ■ Three stars
 ■ Two stars
 ■ One star

Source: The Economist Intelligence Unit

- Ease of transportation is the top urban factor in a successful business trip.** Other key aspects include street safety and quality of business venues, according to our survey. Regional differences emerge in these findings, with Asian executives prioritising transportation, while Europeans are less concerned about safety than those hailing from elsewhere.
- Dining out and enjoying local heritage are the chief ways busy business travellers unwind.** These two factors rank well ahead of the third-place finisher, visiting an art museum or gallery. Regional nuances crop up here too: Asian executives are less likely to frequent the local drinking scene and more inclined to visit an amusement park.



Introduction. The utility of bleisure in the modern era

For the modern business traveller, the mantra of “all work and no play” is quickly giving way to a greater equilibrium between the two. Companies are recognising the utility of relaxation and fun amid busy working trips, while technology is helping travellers find opportunities for leisure more readily. Experiencing a city—particularly an unfamiliar one—as a leisure tourist and as a business traveller can be different yet complementary; combining them can open up avenues and opportunities that one alone cannot. According to Jessica Lichy of France's IDRAC Business School: “[Bleisure] helps us to be boundary spanners, it gives us skills that we might not have used frequently when we're working in our home country, and it puts us in a position where we are testing our responses to normal, routine activities.”



Bleisure helps us to be boundary spanners.

Jessica Lichy, IDRAC Business School

Bleisure is hardly a niche phenomenon: one 2018 survey found that 60% of business trips among US-based executives incorporated a bleisure element, up from 43% in 2016.¹ The term itself may look odd at first glance, but we have utilised it for this study out of both convenience and the fact that it has become a well-accepted part of the travel industry lexicon. As the lines between business and leisure blur ever further, particularly for younger travellers keen on maintaining a stronger work-life balance than their predecessors, how cities leverage bleisure could help them differentiate among an increasingly crowded market for urban tourism.

¹ *Unpacking Bleisure Traveler Trends*, Expedia Group Media Solutions, January 2018



Chapter 1. Work and play in the urban jungle: Asia's five-star bleisure destinations

In concert with the globalisation of business over the past several decades, corporate travel has seen startling growth. According to Jessica Collison of the Global Business Travel Association, business travel spending hit US\$1.33trn globally in 2017, a 5.8% boost over 2016, with Asia-Pacific contributing 43% of this.² This momentum is giving Asia's major urban hubs greater impetus to improve infrastructure, enhance their international flavour and better integrate avenues for executives to take advantage of leisure activities in their destination cities.

Some Asian metropolises are already world leaders in this regard. The five-star cities in our bleisure barometer span the gamut of geography, cultural context and urban layout, but all are highly developed financial centres with global tourism appeal. They occupy the top spots in both the business and leisure categories of our bleisure scale, though Shanghai joins them in the five-star tier for ease of doing business, while Singapore falls out of the five-star bracket in the leisure field.

Figure II. Some work, some play

Asia's five-star cities in each of the business and leisure travel categories (raw scores out of five)

Business	
City	Score
Tokyo	4.14
Singapore	4.14
Hong Kong	4.07
Sydney	4.04
Shanghai	4.01
Leisure	
City	Score
Tokyo	4.16
Hong Kong	4.10
Sydney	4.06
Melbourne	4.05

Source: The Economist Intelligence Unit

² Data provided directly from Ms Collison and available in *GBTA BTI Outlook—Annual Global Report & Forecast: Prospects For Global Business Travel 2018-2022*, Global Business Travel Association, 2018, p37

Best in bleisure

In addition to occupying the number-one spot in the final ranking and both sub-categories, Tokyo earns top scores for three individual barometer indicators—quality of international links, availability of consumer goods and services, and opportunity for cultural experiences—and its overall leisure appeal (separate questions were asked to encompass other leisure and business factors not addressed by the individual indicators). Melbourne and Sydney tie for first in the single most heavily weighted question of bleisure more broadly, which is meant to address how well cities integrate the two pillars of business and leisure (see figure III for question wording).



Figure III. Aussie advantages

How would you rate your entire bleisure experience(s)—including both ease-of-doing-business as well as quality of leisure activities—in the below cities? (Scores out of five; overall five-star cities indicated in bold.)

Rank	City	Score
1	Melbourne	4.05
1	Sydney	4.05
3	Tokyo	4.04
4	Shanghai	3.98
5	Beijing	3.97
6	Singapore	3.95
7	Hong Kong	3.93
8	Perth	3.91
9	Seoul	3.88
10	Guangzhou	3.86
11	Wellington	3.85
12	New Delhi	3.83
12	Kuala Lumpur	3.83
12	Mumbai	3.83
15	Brisbane	3.82
16	Osaka	3.80
17	Auckland	3.78
18	Taipei	3.77
19	Colombo	3.76
20	Adelaide	3.75
21	Ho Chi Minh City	3.73
22	Shenzhen	3.67
23	Bangkok	3.66
24	Jakarta	3.65
25	Manila	3.64
26	Hanoi	3.52

Source: The Economist Intelligence Unit

In the safety indicator, which was not included in either individual business or leisure categories but was included in the final ranking, Singapore claims the top spot. The city-state also sits atop the league tables for transportation, food and beverage, and overall business aspects. Hong Kong, although a strong performer across the board, nabs the number-one spot in only one field, digital connectivity.

Five-to-one

Many cities outperform in certain aspects of the bleisure experience. Beijing and Shanghai, the only two four-star cities in the list, have benefitted from China's rapid infrastructure development in providing a more amenable environment for business travellers. Indian cities receive high marks for their cultural capital, despite relatively low overall scores.

Similarly, there are surprising laggards. Outside of Sydney and Melbourne, Australian cities underwhelm, with Brisbane ranking below average for transportation, regional/international links, and availability of consumer goods and services, and dead last for opportunity of cultural experiences. The only categories where Adelaide, by far the wealthiest one-star city in our list, ranks above average are in safety and transportation. New Zealand cities also disappoint: akin to Adelaide, Auckland falls below average in every category except safety and transport, with Wellington also making an underwhelming showing. This is despite these

cities' long-standing reputations as the world's most liveable (see box on page 13).

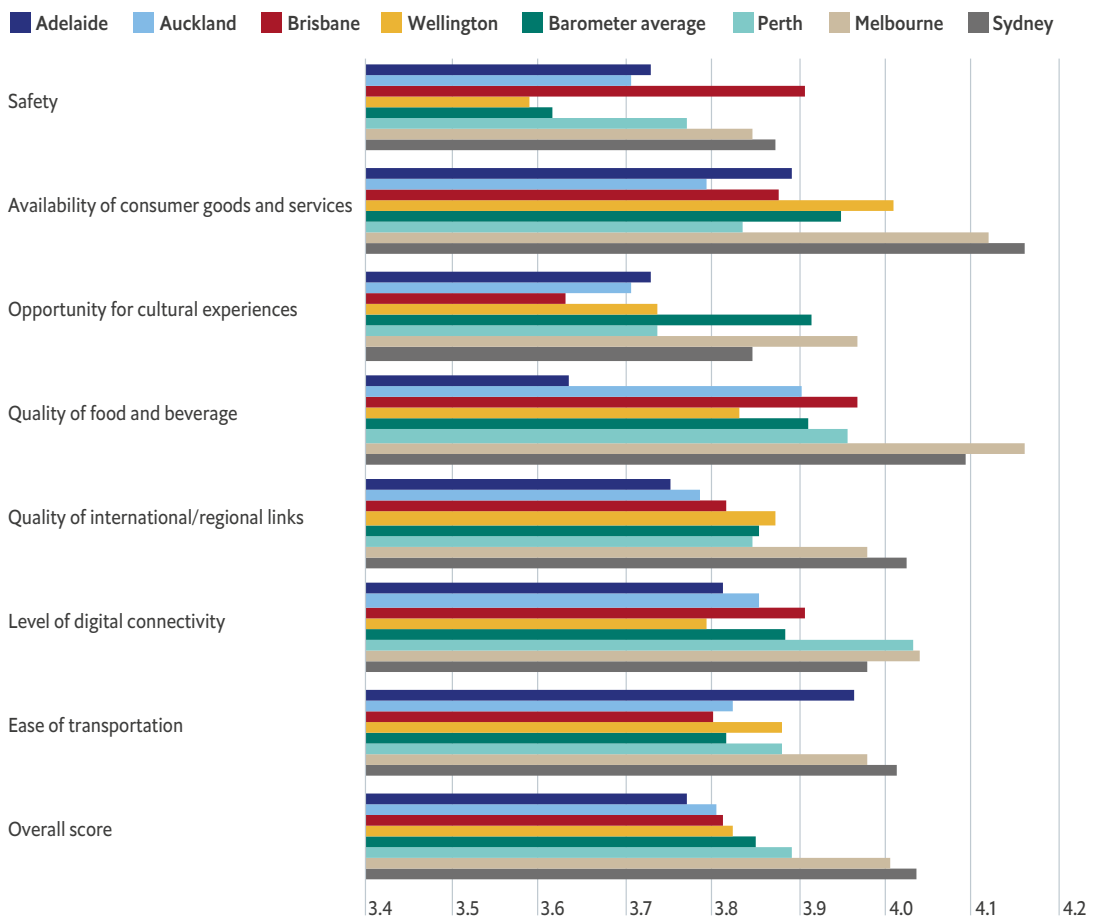
Brian King of the School of Hotel and Tourism Management at Hong Kong Polytechnic University is unsurprised by these findings. "There's a reputation in Asia that second-tier Australian cities are provincial and lack a feeling of hustle-bustle," he says.





Figure IV. Stunner down under

Bleisure barometer performance, Australia and New Zealand cities v Asia-Pacific average (scores out of five)



Source: The Economist Intelligence Unit

Even our five-star cities are hardly five-star in every aspect. Culture in particular holds some back; both Singapore and Sydney fall below average in opportunity for cultural experiences, with Melbourne ranking only

slightly above average. On the other hand, gritty Hanoi and New Delhi both reach five-star status in this indicator; to Western travellers especially, their cultural appeal is often bold and immediate.

Figure V. Culture clash

Barometer scores, opportunity for culture experiences indicator (scores out of five; overall five-star cities indicated in bold)

Rank	City	Score
1	Tokyo	4.19
2	New Delhi	4.11
2	Hanoi	4.11
2	Beijing	4.11
2	Hong Kong	4.11
6	Mumbai	4.07
6	Shanghai	4.07
8	Seoul	4.03
9	Taipei	4.01
10	Guangzhou	3.99
11	Melbourne	3.97
12	Osaka	3.96
13	Bangkok	3.95
14	Jakarta	3.93
	Barometer average	3.91
15	Manila	3.90
16	Kuala Lumpur	3.87
17	Sydney	3.85
18	Ho Chi Minh City	3.81
18	Singapore	3.81
20	Wellington	3.74
20	Perth	3.74
22	Adelaide	3.73
23	Auckland	3.71
24	Colombo	3.70
25	Shenzhen	3.65
26	Brisbane	3.63

Source: The Economist Intelligence Unit

Bleisure v liveability: Key comparisons*

The old adage that “it’s a nice place to visit, but I wouldn’t want to live there” is thrown into stark relief by our study. Often, however, the reality is the opposite: aspects of cities that are amenable to full-time residents may prove difficult for travellers. In constructing our bleisure barometer, we found inspiration from several indicators in our Global Liveability Index, leveraging the fact that many aspects of full-time residency overlap with those of transient visits.

Many cities in South and South-east Asia outperform on the bleisure barometer versus liveability on culture and transport indicators. The culture discrepancy may result from the novelty of experiencing an “exotic” destination for the first time, rather than sheer diversity or the amount of cultural opportunities that may characterise a more liveable city (see chapter 1 for more on culture). When it comes to transport, cab-taking business travellers may be shielded from issues with public transit that bedevil full-time residents regularly.

Conversely, as noted in chapter 1, cities in Australia and New Zealand perform worse on the bleisure barometer than their liveability scores suggest. Brian King of the School of Hotel and Tourism Management at Hong Kong Polytechnic University says quantifying a city’s appeal as a travel destination—and thereby boosting it—can be difficult, even for highly liveable places. “When I was working on Melbourne tourism, we were trying to unlock issues of what we initially called ‘visitability’ and then ‘lovability,’” he says. “[Smaller

Australian cities] are trying to do that too, but it can be hard to build scale for a business travel sector in places that lack large corporate headquarters.”

“It can be hard to build scale for a business travel sector in places that lack large corporate headquarters.”

Brian King, Hong Kong Polytechnic University

The full table with bleisure and liveability scores for each city can be found on the next page; for comparability, scores for bleisure were rounded to the nearest tenth of a decimal point. As the final scores in both measures include other factors in addition to those presented here, we do not include aggregate scores. In addition, liveability scores for transport are presented as the average of two discrete indicators (quality of road network and quality of public transport); those for safety are also presented as an average, of prevalence of petty crime and prevalence of violent crime. See www.eiu.com/topic/liveability for more on the Liveability Index.

*The use of “liveable/liveability” as referenced in this box is meant to refer specifically to the results of our Global Liveability Index; its use elsewhere throughout the report is meant in a more general sense

Figure VI. It's a nice place to live, but I wouldn't want to visit

Bleisure barometer v liveability scores, individual indicators (scores out of five)

City	Ease of transportation		Level of digital connectivity		Quality of international/regional links		Quality of food and beverage		Opportunity for cultural experiences		Availability of consumer goods and services		Safety	
	Bleisure	Liveability	Bleisure	Liveability	Bleisure	Liveability	Bleisure	Liveability	Bleisure	Liveability	Bleisure	Liveability	Bleisure	Liveability
Adelaide	4.0	5	3.8	5	3.8	5	3.6	5	3.7	4	3.9	5	3.7	4.5
Auckland	3.8	4	3.9	5	3.8	5	3.9	5	3.7	4	3.8	5	3.7	4.5
Bangkok	3.6	2.5	3.9	4	3.8	4	3.8	5	4.0	4	4.0	5	3.6	3.5
Beijing	3.8	4	4.1	5	4.0	5	3.9	5	4.1	5	4.1	5	3.8	3.5
Brisbane	3.8	4	3.9	5	3.8	5	4.0	5	3.6	5	3.9	5	3.9	4.5
Colombo	3.7	2	3.5	4	3.7	3	3.8	4	3.7	2	3.6	5	3.3	3
Guangzhou	3.8	4	3.8	4	3.8	4	3.9	5	4.0	3	4.0	5	3.5	3.5
Hanoi	3.6	2.5	3.7	4	3.7	3	3.7	4	4.1	2	3.7	5	3.3	3
Ho Chi Minh City	3.5	2.5	3.9	4	3.4	3	3.7	4	3.8	2	3.9	5	3.3	3
Hong Kong	3.9	5	4.1	5	4.1	5	4.1	5	4.1	4	4.2	5	3.8	4.5
Jakarta	3.5	2.5	3.7	4	3.6	4	3.9	4	3.9	3	4.1	5	3.4	3
Kuala Lumpur	3.8	3.5	3.8	5	3.9	4	4.0	5	3.9	4	3.9	5	3.5	3.5
Manila	3.6	2.5	3.5	4	3.4	4	3.8	5	3.9	4	3.7	5	3.2	3.5
Melbourne	4.0	5	4.0	5	4.0	5	4.2	5	4.0	4	4.1	5	3.8	4.5
Mumbai	3.7	1	3.8	4	3.8	5	3.9	5	4.1	3	3.9	4	3.5	3
New Delhi	3.7	2	3.7	4	3.7	4	3.9	4	4.1	2	3.9	4	3.4	3
Osaka	4.0	5	4.0	5	3.9	5	3.9	5	4.0	5	4.1	5	3.8	5
Perth	3.9	5	4.0	5	3.8	5	4.0	5	3.7	4	3.8	5	3.8	4.5
Seoul	3.9	4	4.0	5	3.9	5	3.8	5	4.0	5	3.9	5	3.7	4.5
Shanghai	3.9	3.5	4.1	4	4.1	5	4.0	5	4.1	5	4.0	5	3.6	3.5
Shenzhen	3.9	4	3.9	4	4.0	5	3.7	4	3.7	3	3.9	5	3.6	4
Singapore	4.1	5	4.1	5	4.2	5	4.2	5	3.8	4	4.1	5	4.0	5
Sydney	4.0	5	4.0	5	4.0	5	4.1	5	3.8	5	4.2	5	3.9	5
Taipei	3.7	4	3.9	5	3.9	5	4.0	5	4.0	4	3.8	5	3.6	4.5
Tokyo	4.1	5	4.1	5	4.2	5	4.1	5	4.2	5	4.3	5	3.9	5
Wellington	3.9	4.5	3.8	5	3.9	4	3.8	5	3.7	4	4.0	5	3.6	4.5

Source: The Economist Intelligence Unit

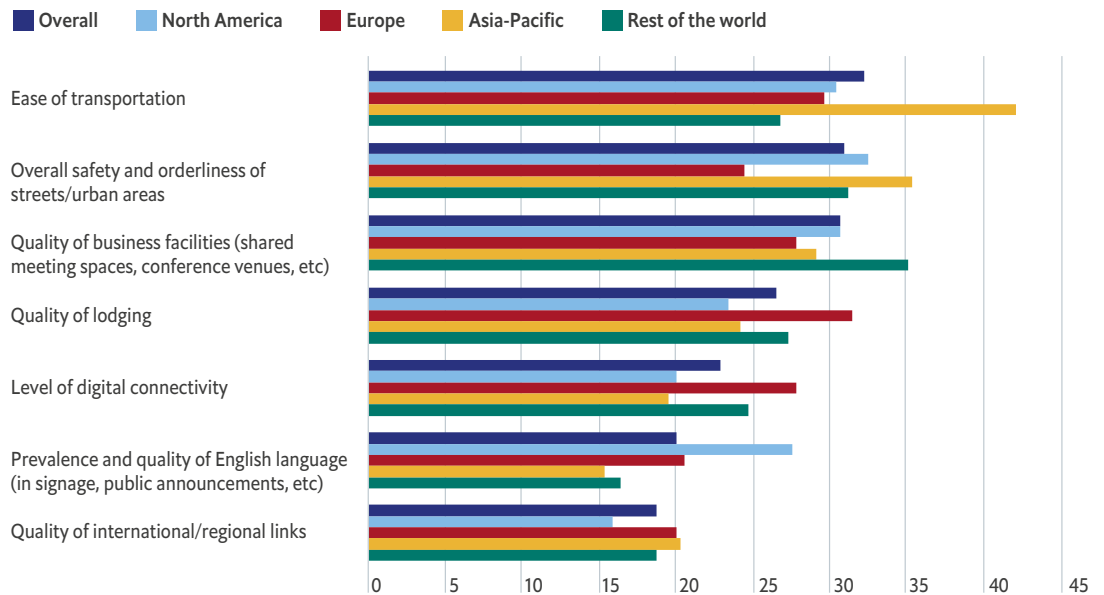
Chapter 2. Assessing the ingredients and impact of bleisure

In addition to asking about individual cities, our study looked at what contributes to bleisure, from both individual and broader perspectives. In particular, one of our questions explored urban factors that make for a successful business trip—the first half of the bleisure equation. Out of seven options, ease of transportation garnered the most responses, with Asian travellers rating it as more important than those from elsewhere

(42% v 32% on average). Safety and quality of business venues ranked second and third, respectively, although European executives tend to de-emphasise safety; rather, they are keener toward quality of lodging and level of digital connectivity. Prevalence of English ranked second-to-last, though perhaps unsurprisingly, North Americans assessed it more highly than those from other regions.

Figure VII. Life on the road

Thinking about your most recent business trips, which of the following urban factor(s) played the most significant role in making sure the experience was successful from a business perspective? (% of respondents, overall and by geographical origin)



Source: The Economist Intelligence Unit

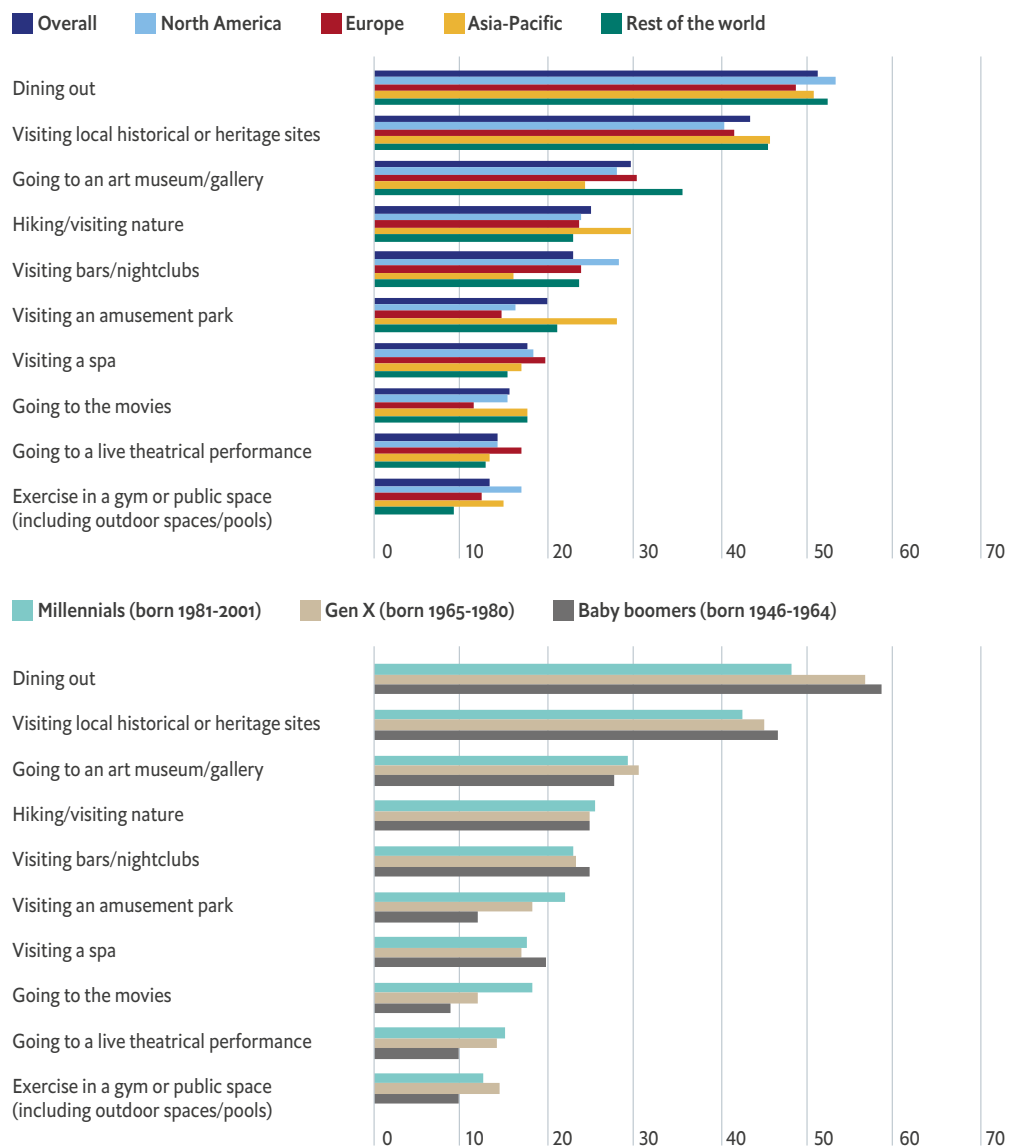
On the leisure side, we asked our respondents what they look for in their diversions. Dining out took the top spot, followed by visiting local historical or heritage sites. These two options well outpaced the third-place option, going to an art museum/gallery (51% and 43%, respectively, v 30%). Asian business

travellers tend to eschew bars in exchange for amusement parks, while millennials (classified as those born between 1981-2001) are more likely to go to the movies and less likely to dine out than their older counterparts—perhaps a reflection of the relative cost-sensitivity of this cohort.



Figure VIII. Letting it all hang out

Thinking about your most recent business trips, which of the following leisure activities have you most commonly engaged in, where the primary purpose of the activity was relaxation/enjoyment? (% of respondents, overall and by geographical origin and age cohort)



Source: The Economist Intelligence Unit

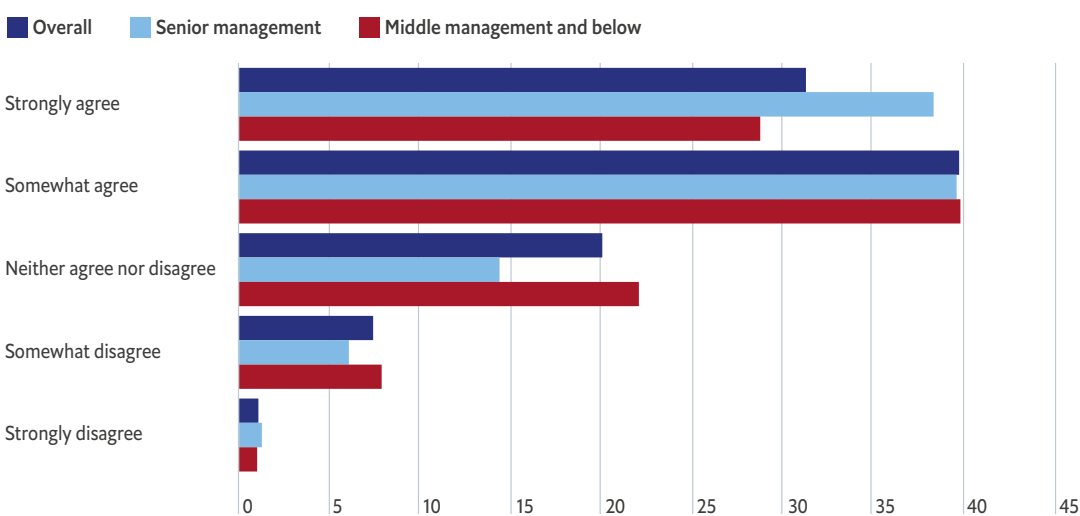
Doing bleisure well

Our survey respondents agree to a high extent that the best cities for leisure are also the best for business (71%), though senior management is more inclined toward this view than others (78% v 69%). This suggests that company senior leaders may be enjoying the fruits of bleisure more than their more junior counterparts, possibly because they are more likely to have the means to do so—companies rarely allow personal side-trips onto expense accounts, especially for those lower down the ladder. “Older, more established executives feel more confident [about taking time for leisure] and can extract the best that these cities have to offer,” says Mr King.

Our respondents agree that they are more productive when they incorporate leisure activities into their business trips (80%), with women more likely than men to strongly agree (44% v 36%). Those surveyed also have a high opinion of ratings websites and apps, with 78% saying they use them regularly to find leisure activities while on business trips. Interestingly, each age cohort is equally likely to use them, with no major differences between ostensibly more “wired” millennials and older travellers.

Figure IX. Bleisure like a boss

Agree or disagree: the best cities for leisure are also typically the best cities for business. (% of respondents, overall and by job seniority)



Source: The Economist Intelligence Unit

Conclusion. The blest of both worlds

Until recently, bleisure has largely been overlooked as a serious trend in both tourism and business travel. "People still tend to see it as having an international jolly," says Mrs Lichy. Yet with the growing notion that finding space for fun can be beneficial to one's working life, the bleisure phenomenon is quickly gaining steam. As cities in Asia jostle for a slice of the growing global business travel market, they may benefit from facilitating greater overlap in the business and leisure ends of the travel spectrum.

"If you're travelling to a city for work and you have someone from the city helping you find leisure opportunities, that can definitely make you want to extend your trip or go back for vacation," says Ms Collison. In this way, cities offering the best of this unique combination may be poised to succeed as top tourism destinations in the years and decades ahead.

Appendix I. Barometer and scoring methodology

The bleisure barometer is based on a survey of 1,500 business travellers, asking them to assess the quality of bleisure experience—including both ease of doing business and quality of leisure activities—across 34 cities in Asia-Pacific (see full list below). Cities receiving fewer than 50 responses were excluded from the final analysis, resulting in 26 cities in the final list. Cities were scored out of five stars.

Survey respondents must have met the following criteria:

- Engaged in full-time employment
- Have travelled to at least one of the candidate cities on a business trip at least once in the past three years
- Incorporated leisure activities into at least one of their business trips

City list

- Adelaide
- Auckland
- Bangkok
- Beijing
- Brisbane
- Colombo
- Dalian*
- Dhaka*
- Guangzhou
- Hanoi
- Ho Chi Minh City
- Hong Kong
- Jakarta
- Karachi*
- Kathmandu*
- Kuala Lumpur
- Manila
- Melbourne
- Mumbai
- New Delhi
- Osaka
- Perth
- Phnom Penh*
- Qingdao*
- Seoul
- Shanghai
- Shenzhen
- Singapore
- Suzhou*
- Sydney
- Taipei
- Tianjin*
- Tokyo
- Wellington

*Indicates city was not included in the final analysis

Categories and weights

The quality of the bleisure experience was based on the following indicators:

Indicator	Weight
1. Ease of transportation within the city	1.0
2. Level of digital connectivity within the city	1.0
3. Quality of international/regional links (referring to frequency and convenience of flights, trains, etc)	1.0
4. Overall business aspect—including factors listed above (Q1-3) and any others related to ease of doing business	1.5
5. Quality of food and beverage	1.0
6. Opportunity for cultural experiences	1.0
7. Availability of consumer goods and services	1.0
8. Overall leisure aspect—including factors listed above (Q5-7) and any others relating to leisure	1.5
9. Overall safety, including concerns relating to petty crime and violent crime	1.0
10. Entire bleisure experience—including both ease of doing business and quality of leisure activities	2.0

Respondents were asked to rate the quality of each indicator in each city visited, based on the following point system:

How would you rate the following...?	Score
5 (excellent)	5
4	4
3 (adequate)	3
2	2
1 (unsatisfactory)	1
Don't know	0

Scoring calculations

- A weighted average score of each indicator was calculated for each city as follows:

$$\frac{[\sum(\text{number of respondents} \times \text{score})]}{\text{total number of respondents}}$$

- Indicators that measured “overall” experience, ie, Q4, Q8 and Q10, were assigned a higher weight as follows:

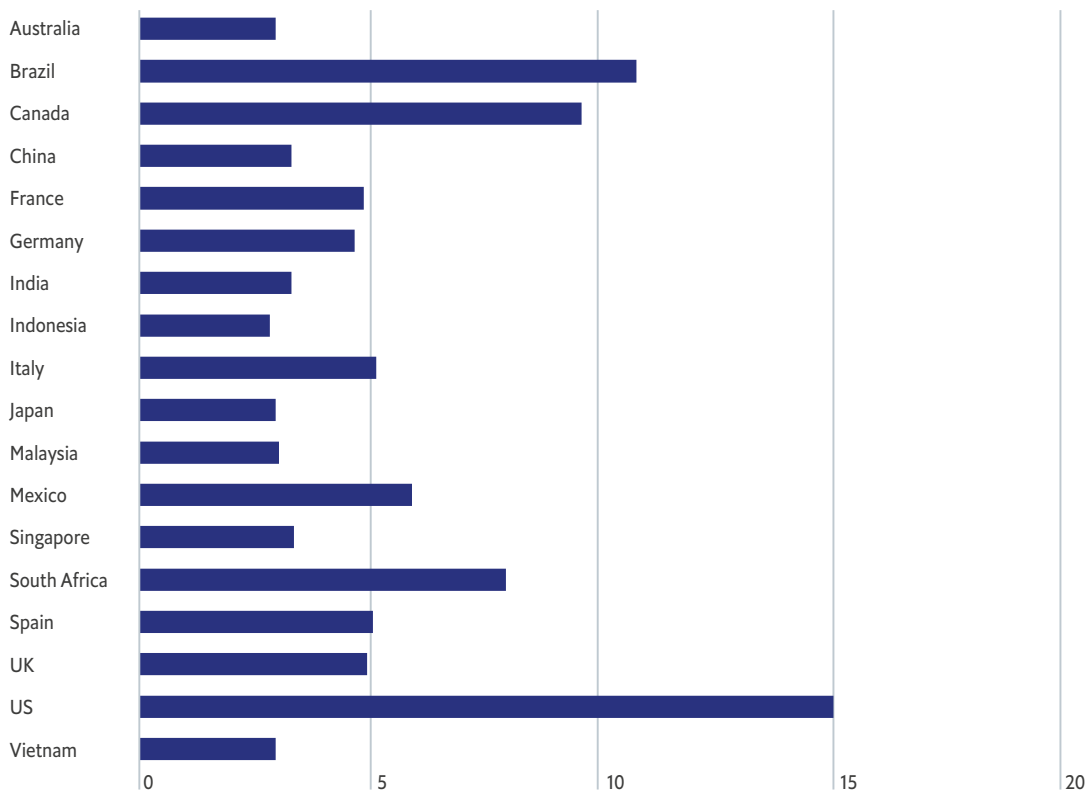
$$\frac{[\sum(\text{weighted average score} \times \text{weight})]}{\text{sum of weights}}$$

- The weighted average was then standardised as follows to achieve the final star ranking:

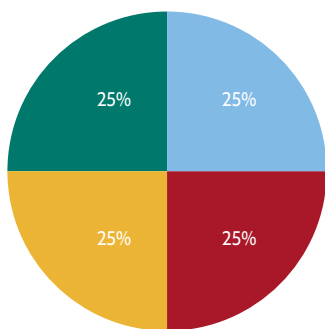
Stars	Standard deviation from the mean
5	1
4	0.5
3	Mean
2	-0.5
1	-1

Appendix II. Survey demographics*

D1. In what country are you personally located?



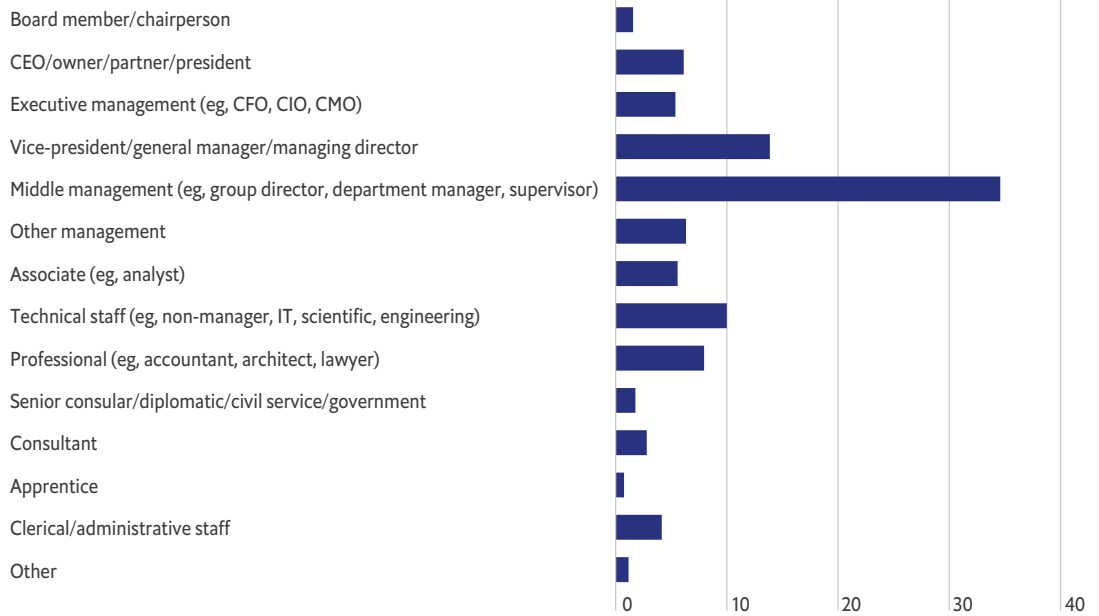
North America Europe Asia-Pacific Rest of the world



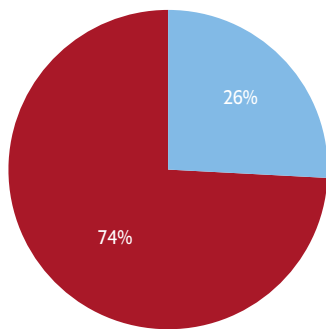
*Figures represent % of respondents and may not add up to 100 due to rounding.



D2. Which of the following best describes your job title?

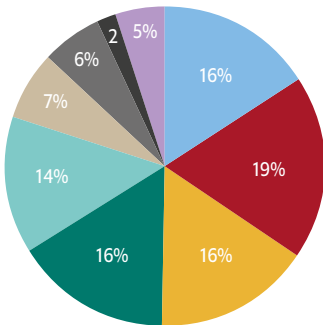


■ Senior management ■ Middle management and below

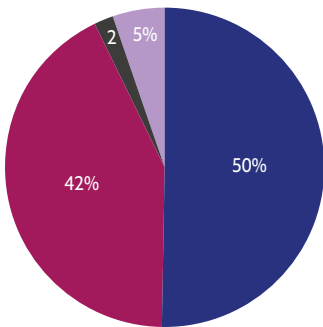


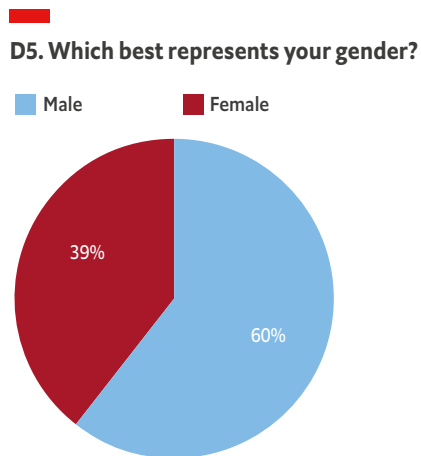
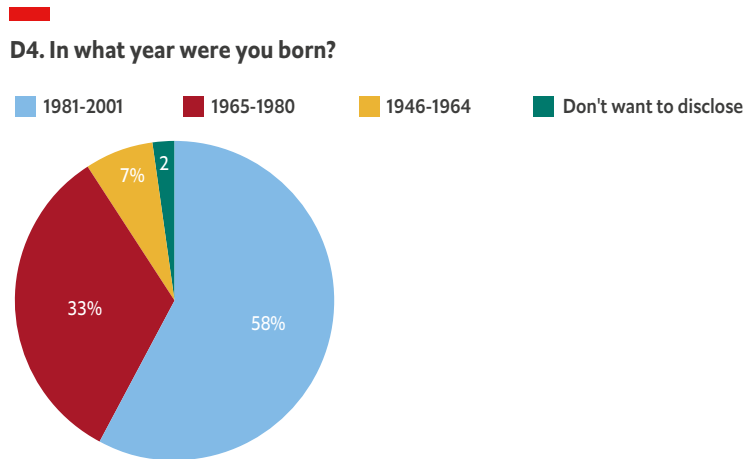
D3. What is your company's annual global revenue?

- Less than US\$50m
- US\$50m to less than US\$100m
- US\$100m to less than US\$500m
- US\$500m to less than US\$1bn
- US\$1bn to less than US\$5bn
- US\$5bn to less than US\$10bn
- US\$10bn or more
- Not applicable
- Don't know



- Less than US\$500m
- More than US\$500m
- Not applicable
- Don't know





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