

# Hong Kong Tourism Board 2024/25 Business Update

For Hong Kong's Tourism Overview 2024 Only

# 2023

## Year of Reconnection

For Hong Kong Tourism Overview 2024 Only

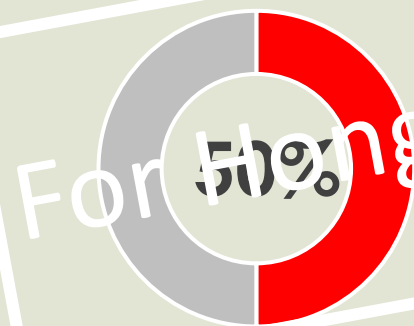
# 2023 TOURISM PERFORMANCE



2023 Received

**34 Million** visitors

Only



Half of visitors  
stayed overnight



Mainland & SEA  
are major markets



Strong Momentum  
of MICE Arrivals



# STRONG MICE RECOVERY



No. of MICE Visitors in 2023

**1.3 Million**

Per-capita Spending (2023)

**\$8,944**

vs 2018 **1.97 Million**

**\$8,218**

# OVERALL SATISFACTION

## Satisfaction



8.6  
2018

8.7 out of 10  
2023

## Revisit intention



92%  
2018

93%  
2023

## Recommendation

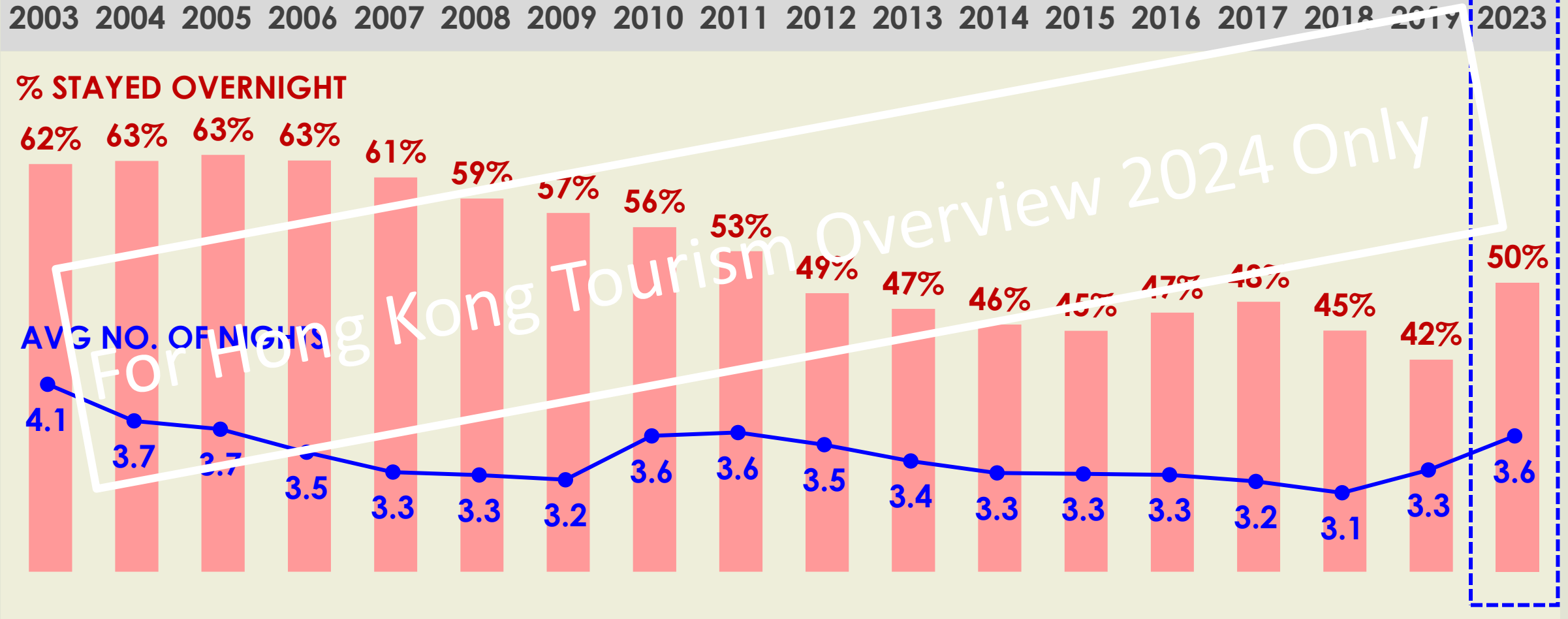


92%  
2018

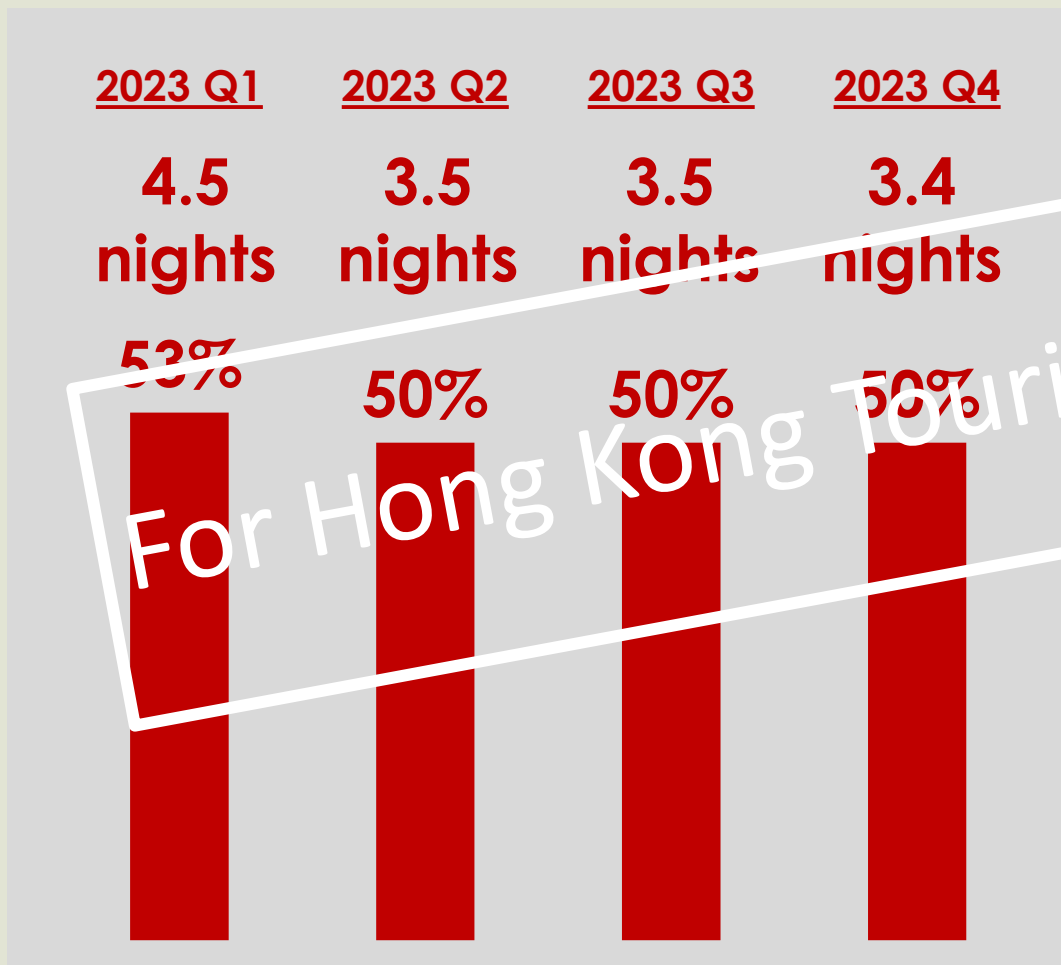
94%  
2023

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# 50% VISITORS STAYED OVERNIGHT



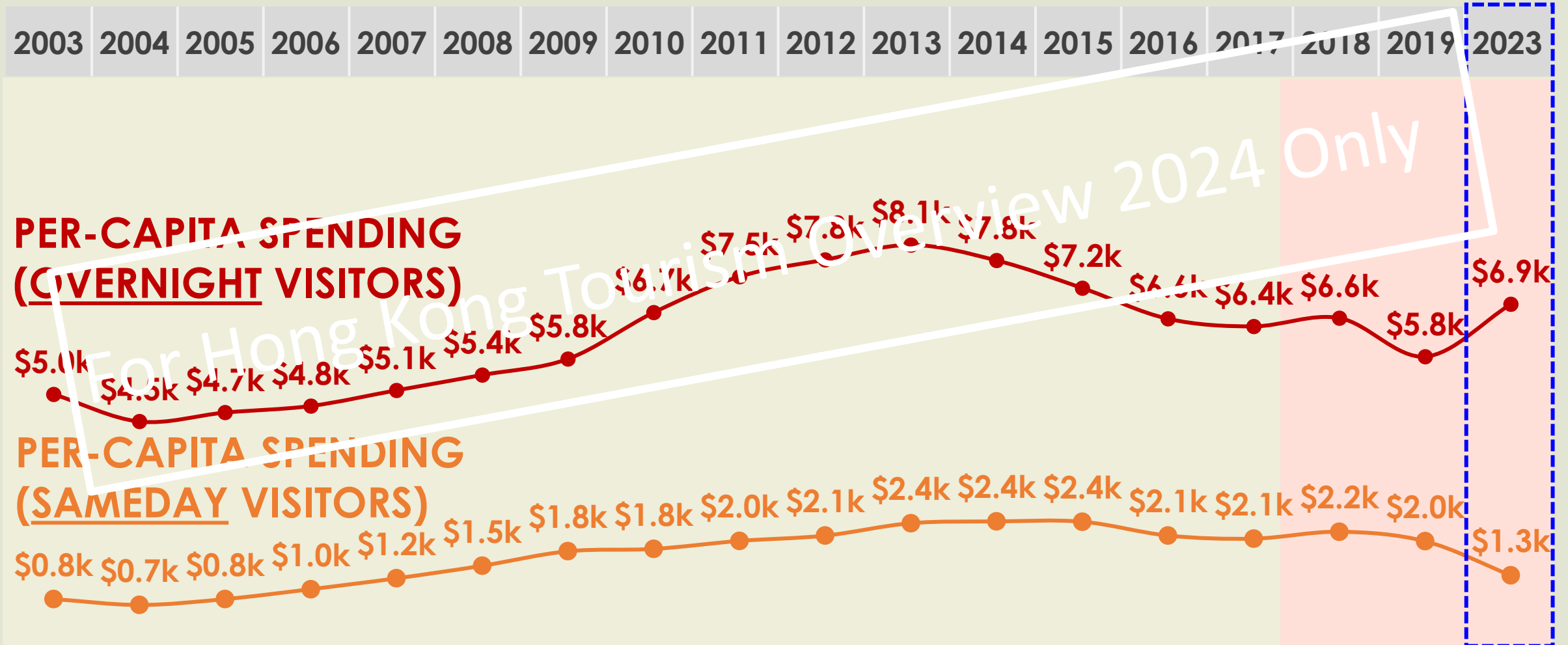
# LENGTH OF STAY



## Length of Stay (Nights)

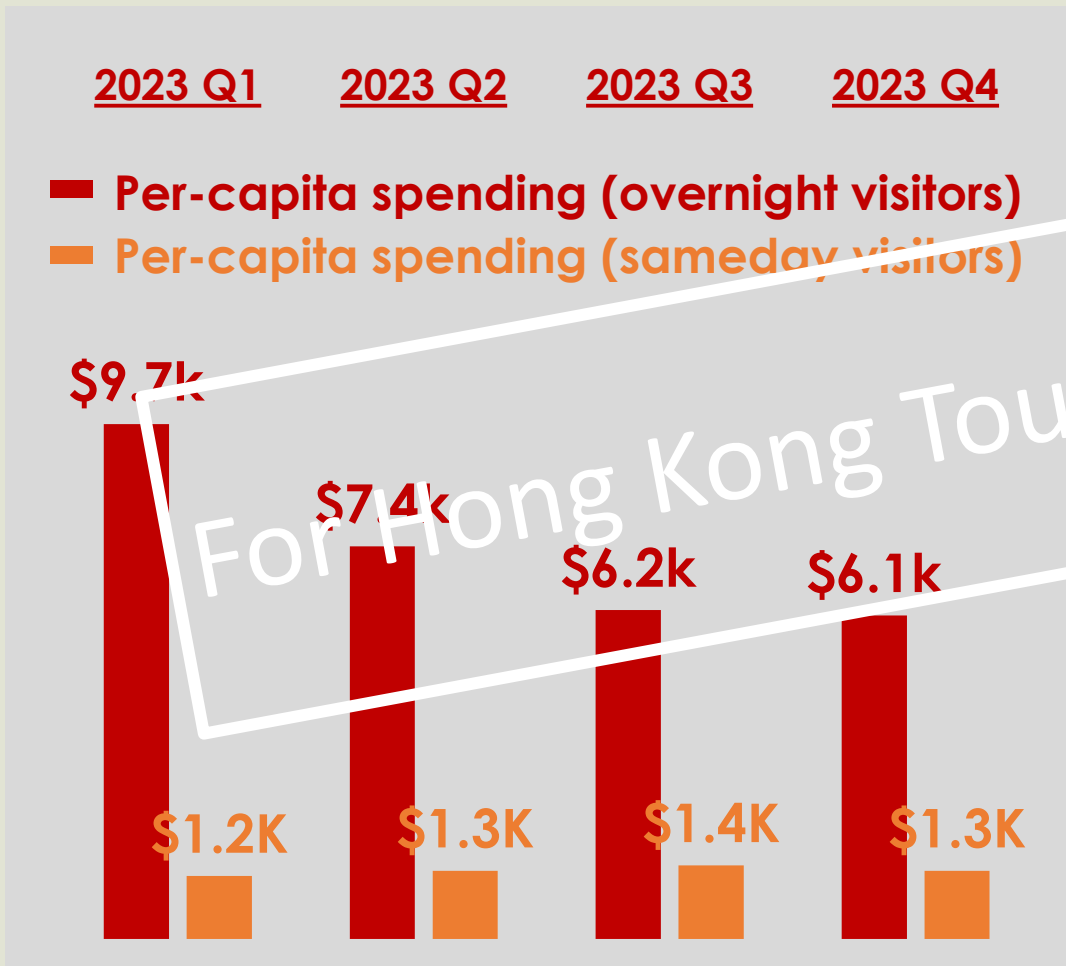


# OVERALL SPENDING





# SPENDING AFFECTED BY MULTIPLE FACTORS



	2018 avg.	2019 avg.	2023 avg.	2024 forecast
<b>OVERNIGHT VISITORS</b>	\$6.8k	\$5.8k	<b>\$6.9k</b>	<b>\$5.8k</b>
<b>SAMEDAY VISITORS</b>	\$2.2k	\$2.0k	<b>\$1.3k</b>	<b>\$1.3k</b>

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**STRONG  
HKD**



**UNCERTAIN  
OUTLOOK**



**BEHAVIOUR  
AL CHANGE**

Source: HKTB Departing Visitor Survey (DVS)

# ART, CULTURE, NATURE GROWN AS A DRAW CARD



## ART & CULTURE



A melting pot of Eastern & Western culture, very special  
Very good museums



## NATURE GREEN



Beautiful nature, beaches, and hiking trails  
The best thing about HK's nature is its proximity to the town centre

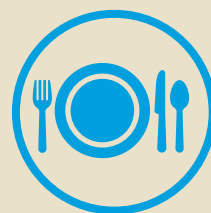


## CITY WALK

來中環體驗各類西式建築群和大大小小的藝術小店，簡直戳中文青的心！



## SHOPPING

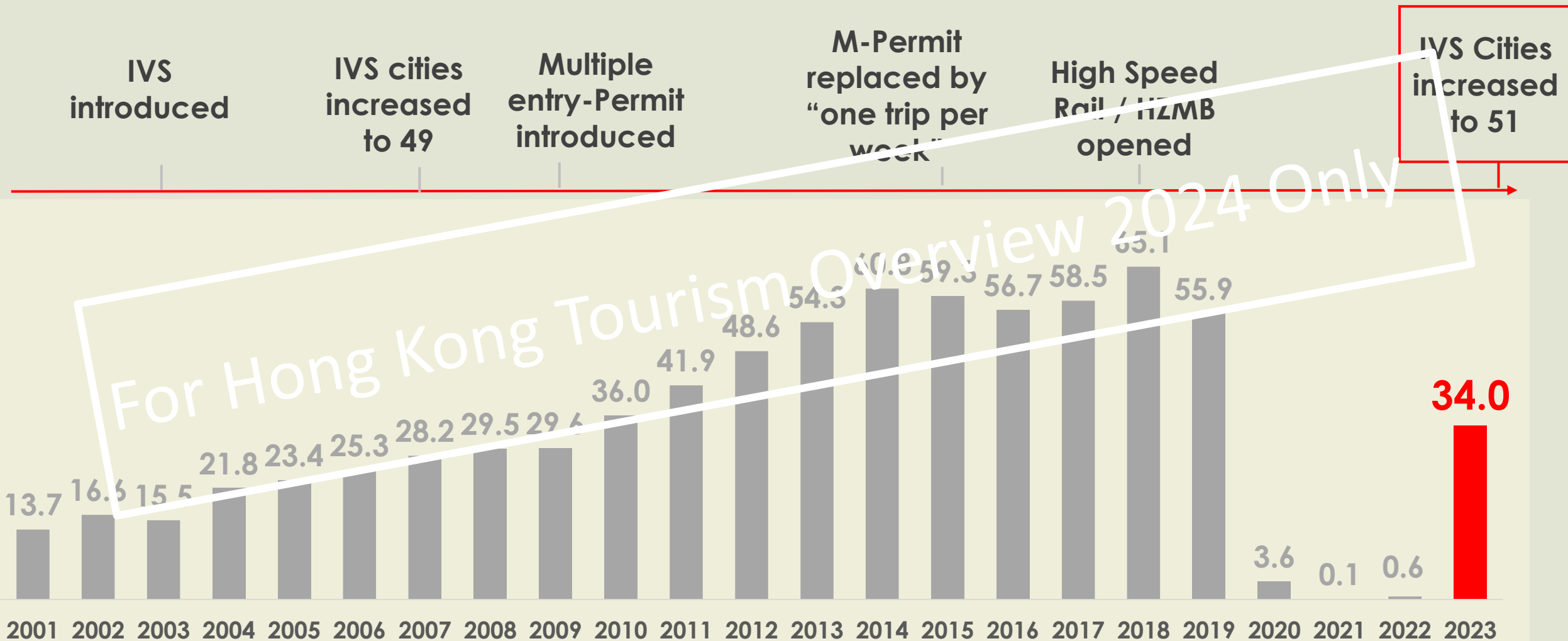


## DINING

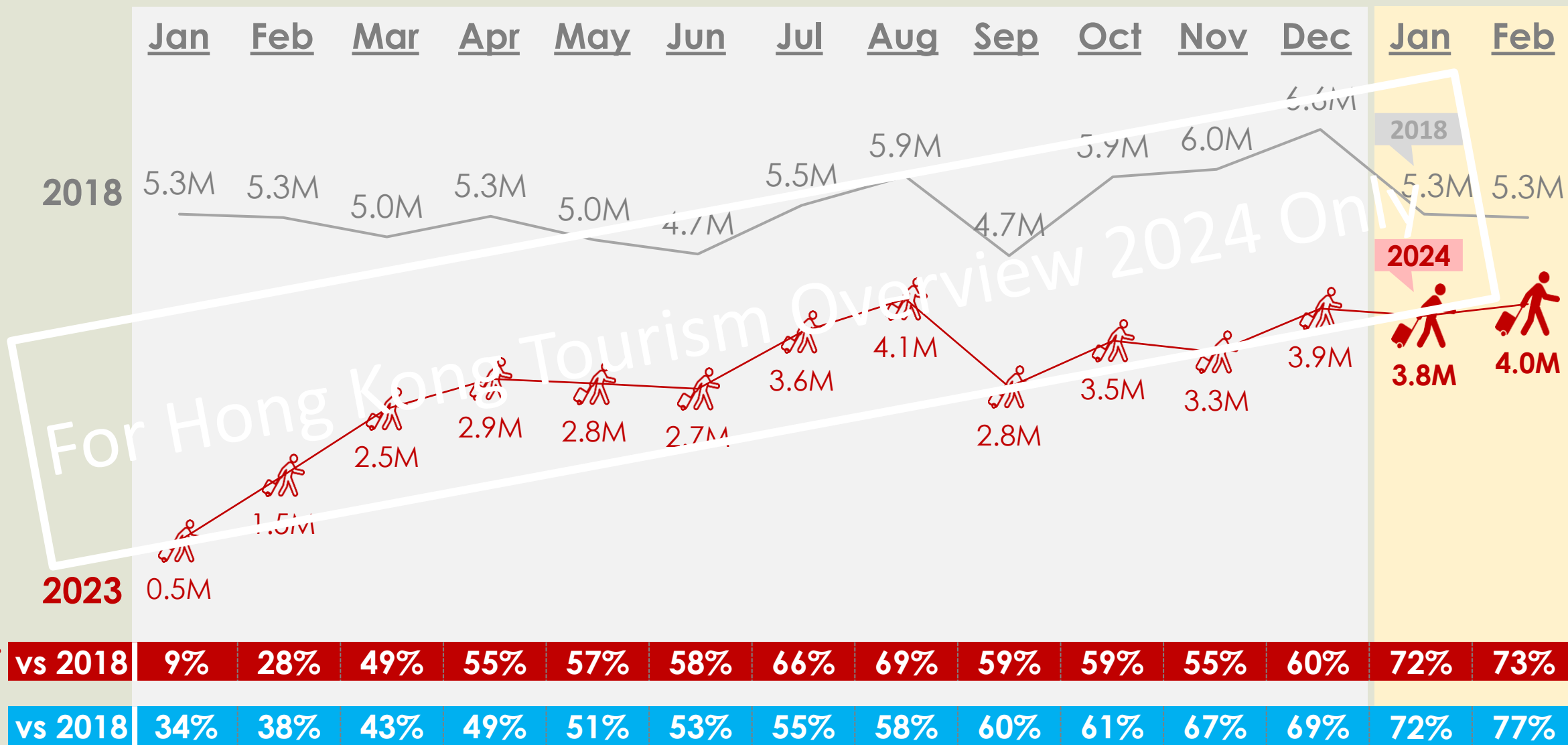


## THEME PARKS

# LATEST VISITOR ARRIVALS



# MOMENTUM CONTINUES



Source: Immigration Department, Cirium  
Note: Provisional figures for Feb'24 based on arrivals by Nationality

# ARRIVALS BY MARKET

PROVISIONAL DATA

**MAINLAND**  
2023 Sep-Oct   2023 Nov-Dec   2024 Jan-Feb

**SEA**  
2023 Sep-Oct   2023 Nov-Dec   2024 Jan-Feb

**S.KOREA, TAIWAN**  
2023 Sep-Oct   2023 Nov-Dec   2024 Jan-Feb

**JAPAN**  
2023 Sep-Oct   2023 Nov-Dec   2024 Jan-Feb

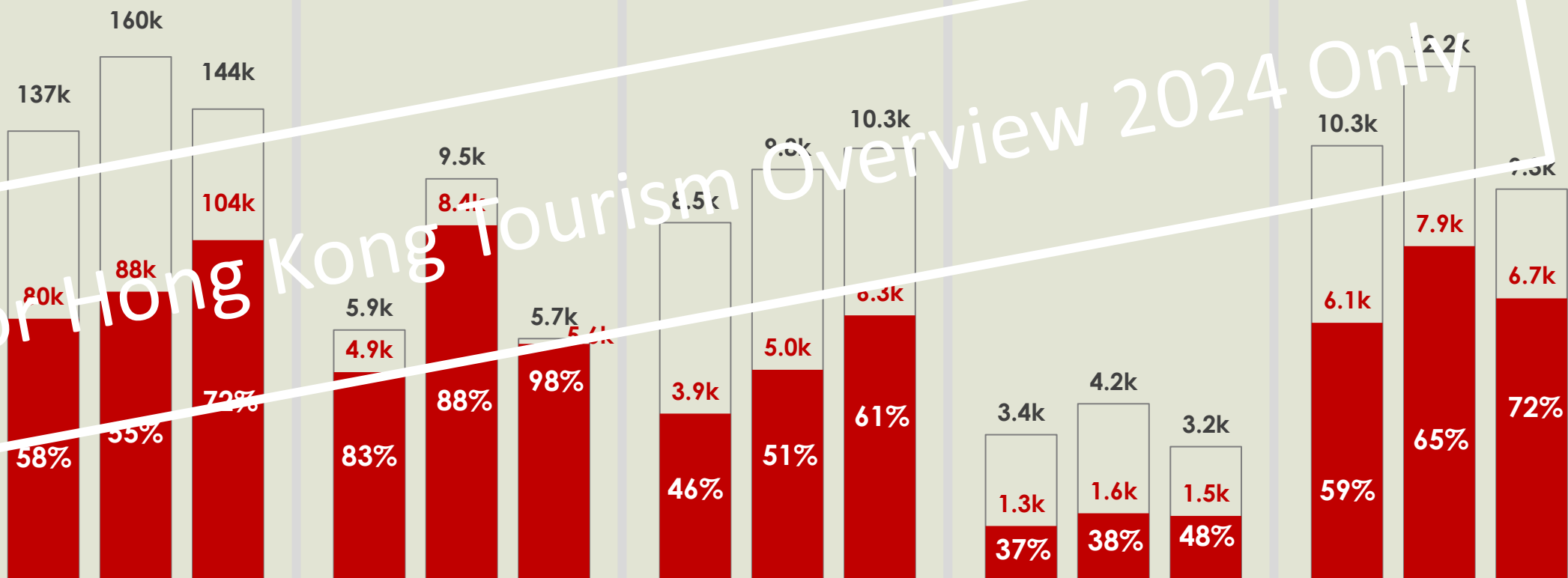
**LONG-HAUL**  
2023 Sep-Oct   2023 Nov-Dec   2024 Jan-Feb



**DAILY ARRIVALS**

2018

2023-2024



**AIR SEATS**

66%   70%   72%   66%   72%   80%   54%   72%   73%   79%   87%   94%   53%   58%   61%

Source: Immigration Department, Cirium

Note: Provisional figures for Feb'24 based on arrivals by Nationality

# MAINLAND

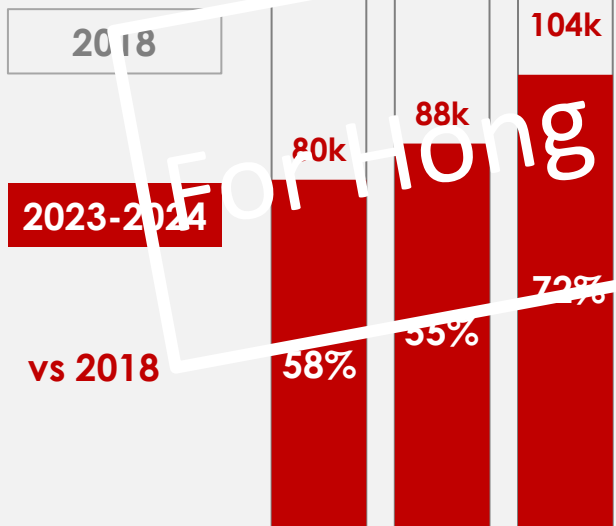
## MAINLAND

PROVISIONAL  
DATA

2023 Sep-Oct    2023 Nov-Dec    2024 Jan-Feb



DAILY  
ARRIVALS



vs 2018



AIR  
SEATS

66%    70%    72%



OVERNIGHT  
ARRIVALS

% share of overnight visitors

39% (2018) → **45%** (Jan - Feb 2024)



ARRIVALS FROM  
NON-GUANGDONG

% non-Guangdong visitors

21% (2018) → **28%** (Jan 2024)



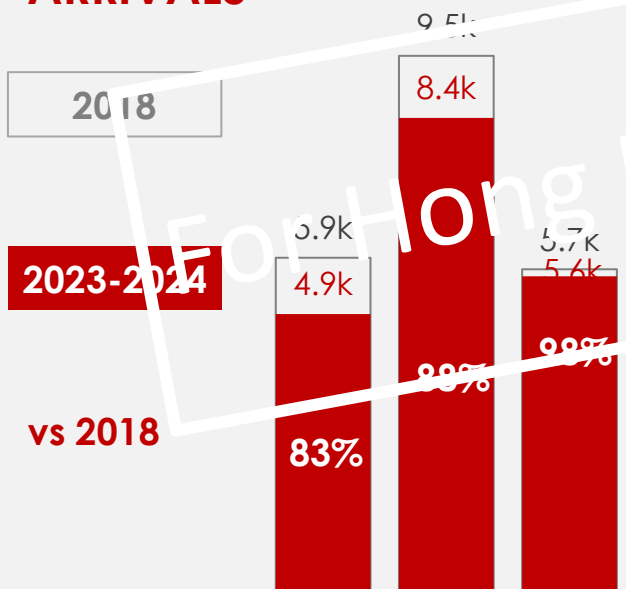
# SOUTHEAST ASIA

PROVISIONAL  
DATA

SEA		
2023 Sep-Oct	2023 Nov-Dec	2024 Jan-Feb
5.9k	8.4k	5.7k
83%	88%	99%
66%	72%	80%



**DAILY  
ARRIVALS**



vs 2018



**AIR  
SEATS**

66% 72% 80%



## THEME PARKS AS A DRAW CARD

Theme parks as main purpose  
of visiting Hong Kong  
(among vacation travellers)

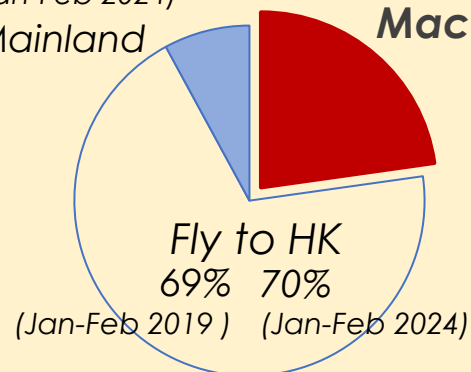
25% (2018) → 35% (Nov 2023 – Jan 2024)



## HK + MACAO COMBO

14% (Jan-Feb 2019) → 8% (Jan-Feb 2024)  
Entered from Mainland

Entered from  
Macao



17% (Jan-Feb 2019) → 23% (Jan – Feb 2024)

# SOUTH KOREA & TAIWAN

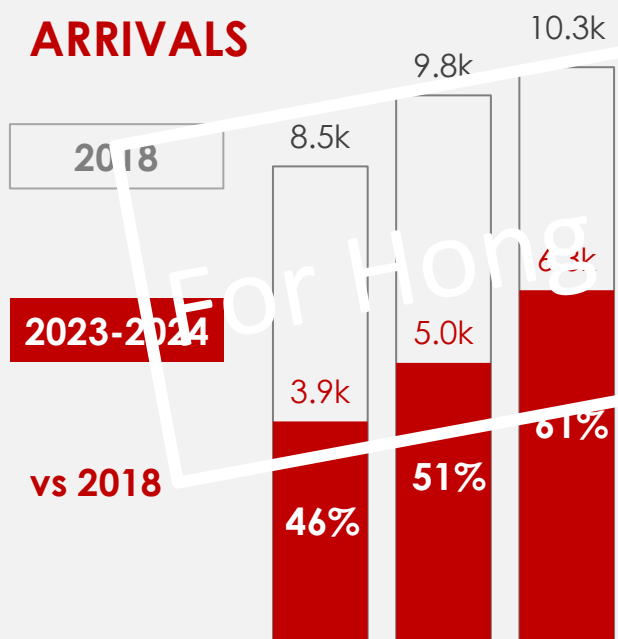
## S. KOREA, TAIWAN

PROVISIONAL  
DATA

2023 2023 2024  
Sep-Oct Nov-Dec Jan-Feb



DAILY  
ARRIVALS



vs 2018



AIR  
SEATS

54% 72% 73%



## AIR CAPACITY IS IMPROVING

% recovered vs 2018 same period

KR → HK

42%  
(Q3 2023)



71%  
(Feb 2024)

TW → HK

54%  
(Q3 2023)



76%  
(Feb 2024)

# LONG-HAUL

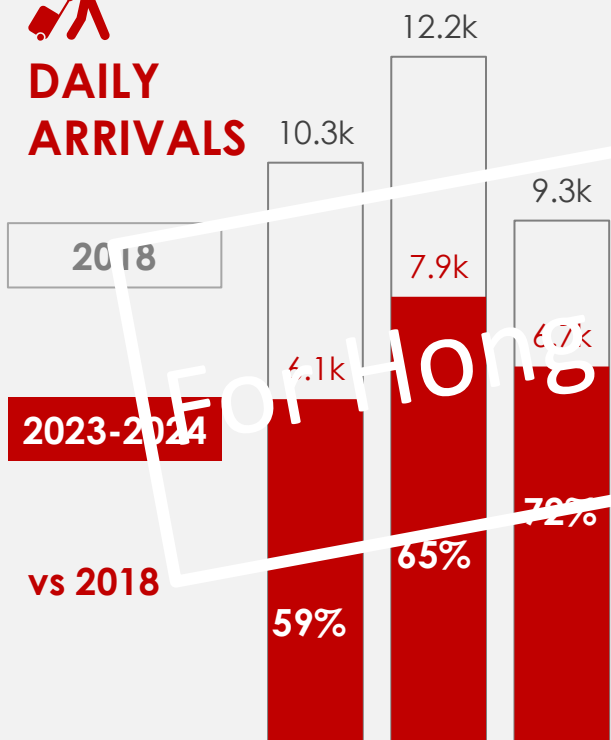
## LONG-HAUL

PROVISIONAL  
DATA

2023 Sep-Oct    2023 Nov-Dec    2024 Jan-Feb



DAILY  
ARRIVALS



## LEISURE TRAVELLERS ARE RETURNING

% share of leisure travellers

39%  
(2018 average)

24%  
(Sep-Oct 2023)

32%  
(Nov-Dec 2023)

41%  
(Jan 2024)



AIR  
SEATS

53%    58%    61%

Source: Immigration Department, Cirium, HKTB Departing Visitor Survey (DVS)

Note: Provisional figures for Feb'24 based on arrivals by Nationality

# 2023

Year of Reconnection

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# 2024

Year of  
Conversion

# OUR GOALS



**Upholding HK's  
International  
Position**



**Promoting HK as  
a Tourism Hub**



**Pursuing Quality  
Growth**

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# DRIVING CONVERSION





# KEY STRATEGIC FOCUSES

1



**Stage & Support  
World-Class Events**

2



**Develop Diverse &  
Immersive  
Experiences**

3



**Step Up Promotions  
in Source Markets**

4



**Enhance Service  
Quality &  
Support Trade**

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# KEY STRATEGIC FOCUSES

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Experiences

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in Source Markets

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Enhance Service  
Quality &  
Support Trade

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# 1 STAGE & SUPPORT WORLD-CLASS EVENTS



Stage HKTB Signature Events



Support City Events



Elevate Tourism Appeal of Festivals



Drive MICE Events

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# 1 STRENGTHEN EVENT COORDINATION

## The Mega Events Coordination Group headed by DFS



### Mega Event Development & Advancement (MEDA) – The First Point of Contact

Overview 2024 Only



HONG KONG  
TOURISM BOARD

EVENTS

EXPLORE

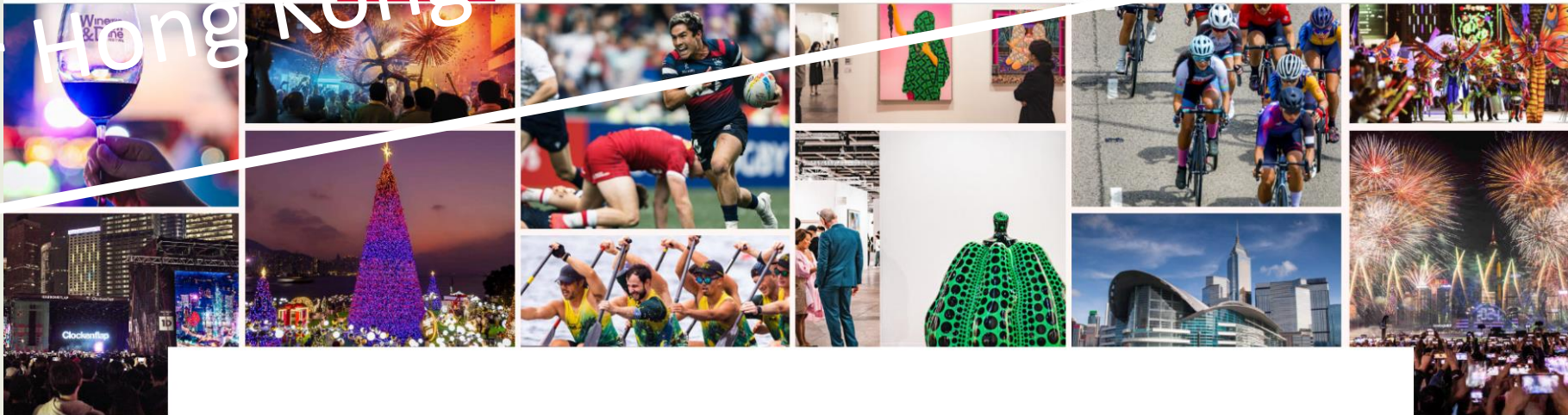
PLAN

DEALS

Language

I am a visitor

I am a resident



Hong Kong — The Premier Hub for Mega Events

# 1 MEGA EVENT

## 3 Key Considerations



**Attractiveness for  
Public & Visitor  
Participation**



**Ability to Generate  
Positive Global  
Publicity**



**Demonstration of  
Hong Kong's  
Strategic Positions**

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1

# “EVENT+”: CONVERSION TO VISIT



西九藝文賞不盡  
中環藝猶未盡逛不停

ARTS IN HK 西九藝術遊 香港瑰麗酒店1晚+香港半島酒店1晚+西九文化區各類門票 贈送 價格低至10899元/人起

費用說明 產品詳情 購買30次

費用說明

住 香港瑰麗酒店1晚+香港半島酒店1晚 含計劃在內

食 入住次日免費早餐

15,999起

立即購買

以藝文為名 尋味香港  
童趣藝術家 炫彩香港

香港 童趣藝術家 畅玩迪士尼

香港 以藝文為名 尋味香港 至尊奢享

¥26,999起/人起

¥37,800起/人起

每日行程 費用說明 預訂詳情

設計師寄語

作為东西方文化藝術交流中心的香港，因其獨特的安樂與

設計師寄語

香港海濱—靜思地鐵港島，歡迎您親臨，正在每一刻

尊享頂級藝聚遊香港  
香港藝文賞不停

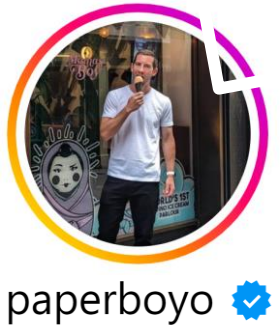
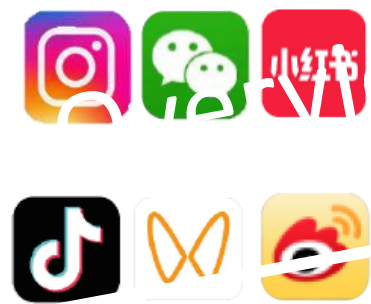
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# 1 “EVENT+”: CONVERSION TO VISIBILITY



Explore the Coolest Art Experiences Along Hong Kong's Victoria Harbour This Spring



It's that time of year again! Hong Kong is gearing up to host an array of creative experiences this spring. From a mesmerising new team.lab installation to much-anticipated annual events like Art Basel Hong Kong, travellers will be immersed in on the banks of Victoria Harbour.



今春、香港のビクトリア・ハーバー沿いで様々なアートイベントが開催

香港のビクトリア・ハーバー沿いではこの春、様々なアートイベントが開催されます。チームラボによる最新インスタレーションから、アート・ベースル・香港のような注目度の高いイベント、4年ぶりにセントラル・ハーバーフロントに戻ってきたアート・セントラルまで、アートに誘われる旅を楽しむことができます。

# 1 “EVENT+”: CONVERSION TO SPENDING

- Line up with Trade Partners to devise Product Offerings coinciding with selected Mega Events to enhance ambience and stimulate spending

- Consolidate Offers for Event Participants via HKTB e-solution Platform:

- Hotels
- Transportation
- Attractions
- Dining
- Retail
- Shopping Malls
- Tours/ Workshops
- And More...



人氣  
VISITS

名氣  
VISIBILITY

財氣  
FORTUNE



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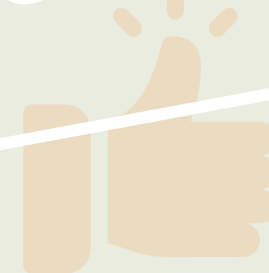
# KEY STRATEGIC FOCUSES

1

2

3

4



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Stage & Support  
World-Class Events

**Develop Diverse &  
Immersive  
Experiences**

Step Up Promotions  
in Source Markets

Enhance Service  
Quality &  
Support Trade



# 2 CRAFT IN-DEPTH EXPERIENCES

HK Neighbourhoods

Arts-in-HK

HK Great Outdoors



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2

# PYRO & DRONE SHOWS

## >> REVAMP A SYMPHONY OF LIGHTS





# 2 THEMED PRODUCTS FOR VISITORS



Deluxe Hotel Experience



High-end Dining



Customised Tours



Private Workshop



Behind-the-Scene Visits

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# KEY STRATEGIC FOCUSES

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2

3

4

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Stage & Support  
World-Class Events

Develop Diverse &  
Immersive  
Experiences

**Step Up Promotions  
in Source Markets**

Enhance Service  
Quality &  
Support Trade



3

# BUILD HK AS MUSLIM-FRIENDLY DESTINATION



Halal Guidelines &  
Travel Glossary



Seminars



Practical  
Recommendations to  
Enhance Friendliness



Publicity



# 3 EMERGING MARKETS & SEGMENT

GCC

Vietnam

India



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Stepping Up of Brand Presence & Marketing Activities

Strong Recovery of Incentive Travel



3

# MULTI-DESTINATION PROMOTIONS





# 3 STEP UP CRUISE PROMOTION

**173** Ship Calls  
from **28** Cruise Brands

Offering Wide Variety  
of Products

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# KEY STRATEGIC FOCUSES

1

2

3

4

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World-Class Events

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Immersive  
Experiences

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**Enhance Service  
Quality &  
Support Trade**



# 4 ENCOURAGE EVERYONE TO "BE A GOOD HOST"



Trade

Community

Public



Mar

Apr

By Jun

# 4 REALITY SHOW & TRAINING VIDEO



## TV Reality Show

## Training Videos



### 「臥底服務團」

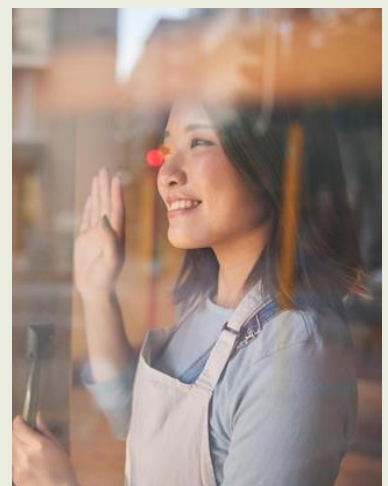
3 Mar – 21 Apr 2024, Every Sunday  
at 9pm- 10pm



# 4 PUBLIC PROMOTIONS

## Every Little Gesture Counts!

- A Small Gesture Can Make A World Of Difference
- Beyond Service Sector
- Everyone Can Be A Good Host
- Tone: Light-hearted, Approachable





# 4 TRADE SUPPORT PROGRAMMES



Matching Fund for  
Attractions



Participation Fee  
Waiver for HKTB Events



Renewal Fee Waiver  
for QTS Merchants



Funding Support for  
MICE



Trade Familiarisation Trips



Travel Missions



Travel Shows

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# KEY STRATEGIC FOCUSES

1



## Stage & Support World-Class Events

- 1 Stage HKTB Signature Events
- 2 Support City Events & MICE Events
- 3 Act as “First Point of Contact”
- 4 Drive “Event +”

2



## Develop Diverse & Immersive Experiences

- 5 Enrich “Hong Kong Neighbourhoods”,
- 6 Step up Arts-in-HK & Hong Kong Great Outdoors promotion
- 7 Revamp “A Symphony Of Lights”
- 8 Foster Development of Themed Products

3



## Step Up Promotions in Source Markets

- 9 Build HK as a Muslim-friendly Travel & Develop Emerging Markets
- 10 Promote Multi-Destination Tourism

4

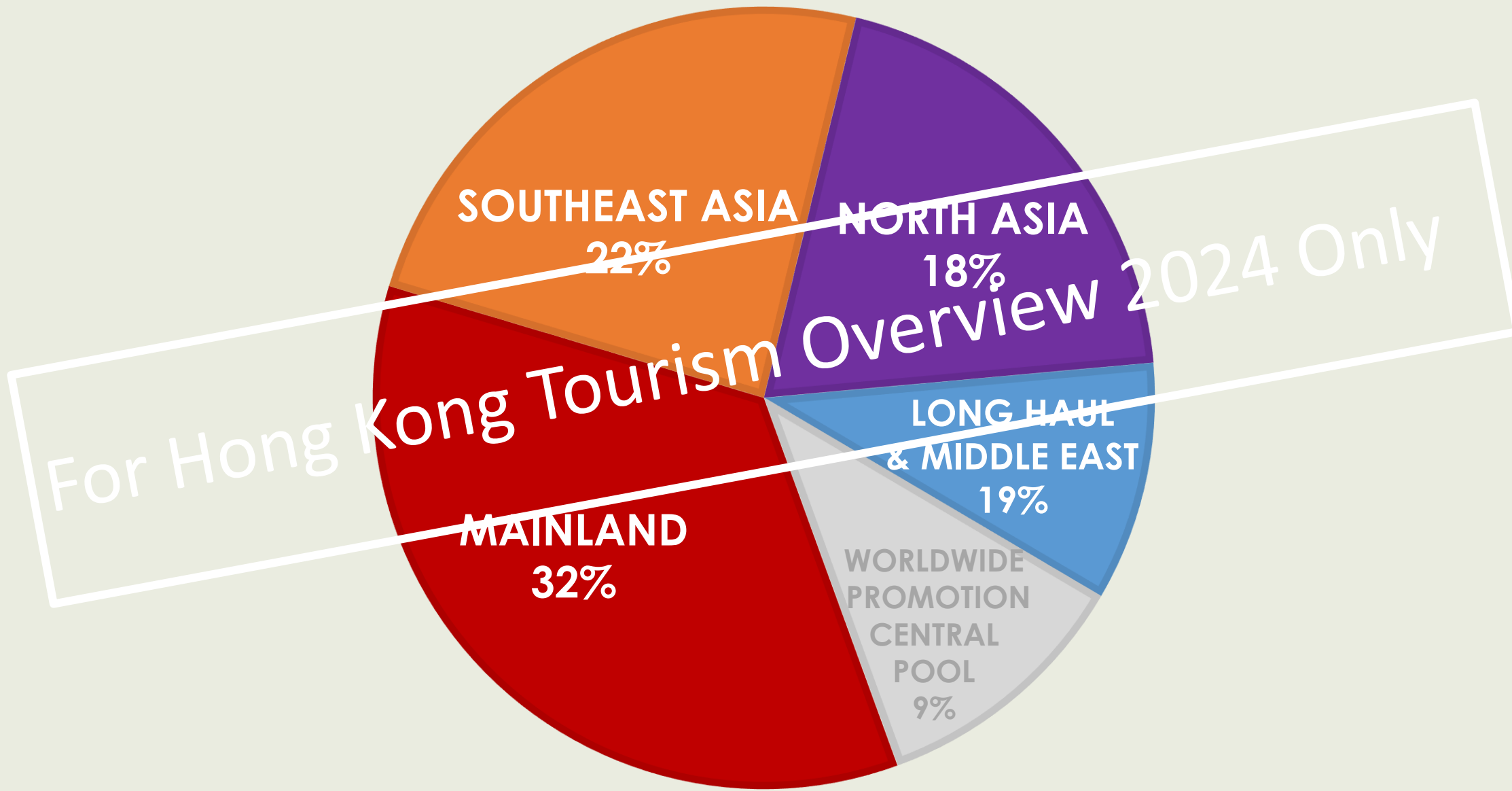


## Enhance Service Quality & Support Trade

- 11 Launch Hospitality Campaign
- 12 Continue Trade Support Programmes

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# MARKET INVESTMENT



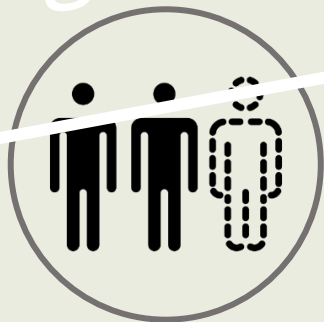
# CHALLENGES



**Uncertain Global Economy**



**Currency Depreciation  
against US / HK Dollars**



**Labour Shortage & Rising Cost**



**Intensifying Competitions**

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# EDGES & OPPORTUNITIES



**Unique Position**



**Rich Diversity**



**Policies Support**

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**New Infrastructure**

# FORECAST FOR 2024



**46 Million**



**35%** of 2023



**75%** of 2018 in Q4 2023

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Length of Stay (Nights)

**3.2**

2018: 3.1



Per Capita Spending of  
Overnight Visitors (\$)

**5,800**

Similar to 2019



Satisfaction Rate

**8.7/10**

2018 : 8.6



Driving Success Together, as ONE

凝聚力量 同創共贏

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