

MAINLAND CHINA

ZOE LO

Regional Director, Mainland

TOURISM OVERVIEW 2025

HKT

ARRIVAL PERFORMANCE



**TOTAL
ARRIVAL**

24.1M

↑ 27%



**OVERNIGHT
ARRIVAL**

14.8M

↑ 20%



**LENGTH
OF STAY**

3.2 nights

↓ 0.3 nights



**PER CAPITA
SPENDING
(overnight)**

5.0K/capita

↓ \$1.5K/capita

ARRIVAL BY SEGMENT

Robust Growth of Gen Z, Family and First-Timers



GEN Z

↑ 26%



FAMILY

↑ 51%



FIRST-TIMER

↑ 41%



MICE

↓ 3%

ARRIVAL BY REGION

Increased Promotions in Non-Guangdong Regions Drove Market Growth

NORTH

+46%



北京 瀋陽
西安 哈爾濱

EAST

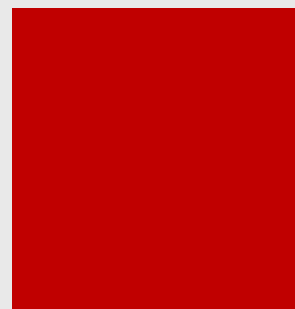
+39%



上海 杭州
南京 青島

CENTRAL & WEST

+36%



重慶 成都
武漢 貴陽

SOUTH

+24%



廣州 深圳
南寧 南昌

SHENZHEN IVS-MULTIPLE POLICY

Increments On Both Overnight & Same-Day Arrivals Are Encouraging

AVG. DAILY ARRIVALS

Shenzhen visitors travel with multiple-journey endorsement to Hong Kong (包括一週一行/ 一簽多行)

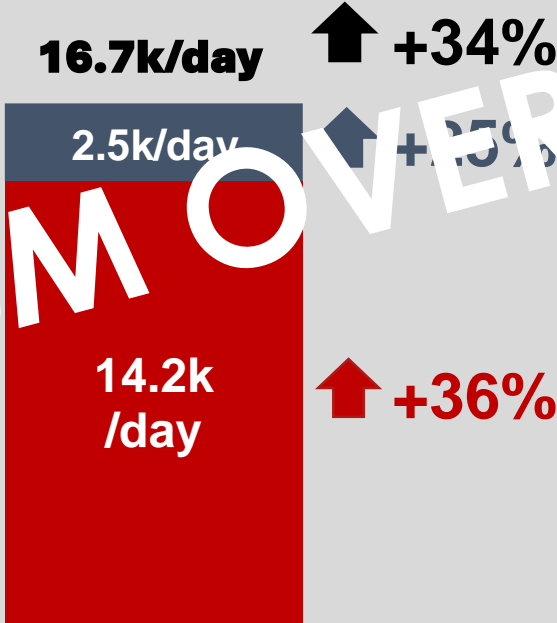
TOTAL

OVERNIGHT

SAME DAY



Dec'23 – Feb'24



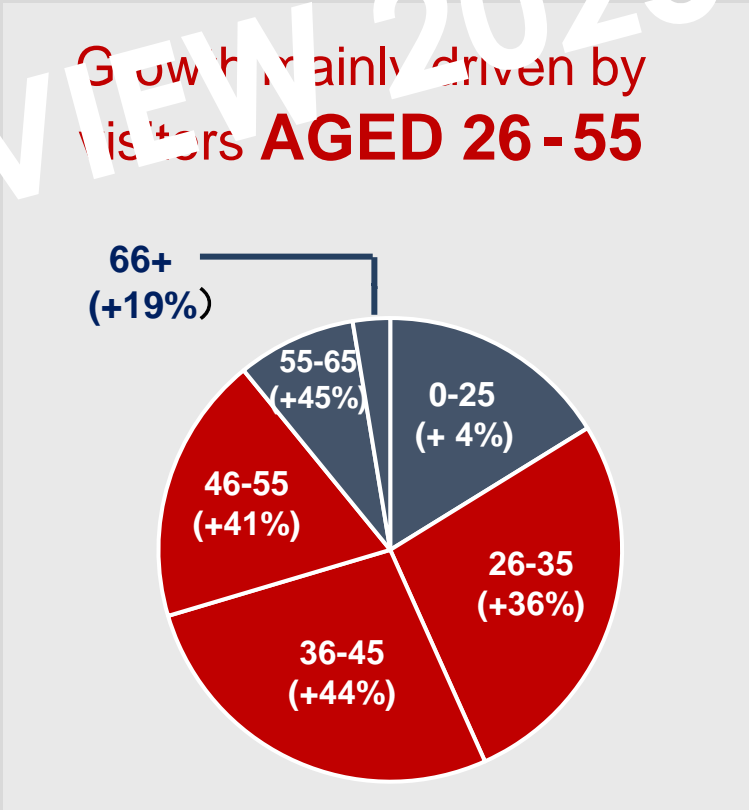
Dec'24 – Feb'25

Mainland
Avg. Daily Arrivals

101k/ day

106k/ day

↑ + 5%



MARKET OUTLOOK

POLITICAL



- China / US trade tensions & geopolitical challenges
- Growing no. of Belt & Road countries & projects
- Mutual & unilateral visa-free policies

ECONOMY



- 5% GDP Growth (vs 2023 5.2%)
- Challenges :
 - Deflationary pressures, sluggish domestic demand, property downturn & demographic crises
- Extensive trade-in schemes & vouchers to boost consumption

2025 & BEYOND



- AI-powered digital economy (43% of 2024 GDP)
- Delay retirement ages & boost silver economy
- Continue consumption / investment stimulus measures

MARKETING TREND

Consumer's Sports Passion Ignited by Gen Z Medalists

2025 National Games empowers Sports, Health & Fitness Economy



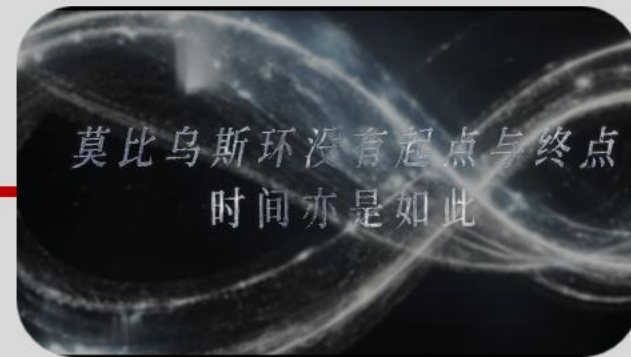
AIGC Appeals to Gen Z & Shapes the Future Trends

Cost-efficient, immersive, & highly engaging



Short Videos & Livestream are Mainstream

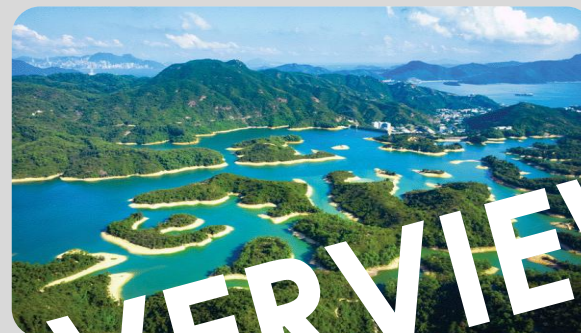
Key travel driver, AI-powered innovation



TRAVEL TREND

Positive Tourism Outlook

Visa-Free & Rebound in
Int'l Flights



+ Travel

Reflects Consumers'
Diverse Travel Needs

Outbound Expands Beyond Tier 1

Sinking Market Major
Consumption Force



Fragmented Sources of Info

Social & E-Commerce
Driving Conversion



CONSUMER PSYCHOGRAPHICS



Gen Z

- Tech-savvy, expressive & self-conscious
- Games, comics & metaverse
- Experience over material goods
- Want to travel; value-for-money

Outdoor | AIGC
Hidden Gems | Events



Family

- 1/3 income on education
- Family-oriented trips
- Learn diversity & inclusion
- Safety top priority
- 3rd tiers & beyond go for study tour

Arts & Culture
Study Tours | Theme Parks



Affluent

- Stellar services
- Personalised & premium experiences
- No specific travelling seasonality

Arts | Events
Luxury Hotels



Silver Hair

- 80M travelers by 2025
- Healthy, active, time-rich with purchasing power
- Stress-free lifestyle & opt for quality prod / services
- Visit iconic spots

Cruise
Low-Season Travel

CONSUMER BEHAVIOUR TREND

01

Rational &
Quality-Driven
Consumption
Choices



03

Travel Takes
Centre Stage in
Consumer
Spending



05

Growing KOC
Credibility in
Consumer
Decisions

02

Rise of Inner
Fulfillment &
Emotional
Well-Being

04

Consumers
Embrace
Comprehensive
Health



HKTb



TOURISM

OVERVIEW 2025

STRATEGIC FOCUS

01

Uphold HK's Int'l Position

Amplify destination's unique brand stories, cultural differences & Event Capital

02

Inspire Aspiration to Visit

Promote "+ Travel " that resonate with consumer interests



Pursue Quality Growth

Sustain & cultivate new consumer segments and expand new source markets

Drive 2025
VIEW Conversion
& Spend



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SOCIAL & DIGITAL

Year-round Precise Thematic Promotion Across Top Platforms

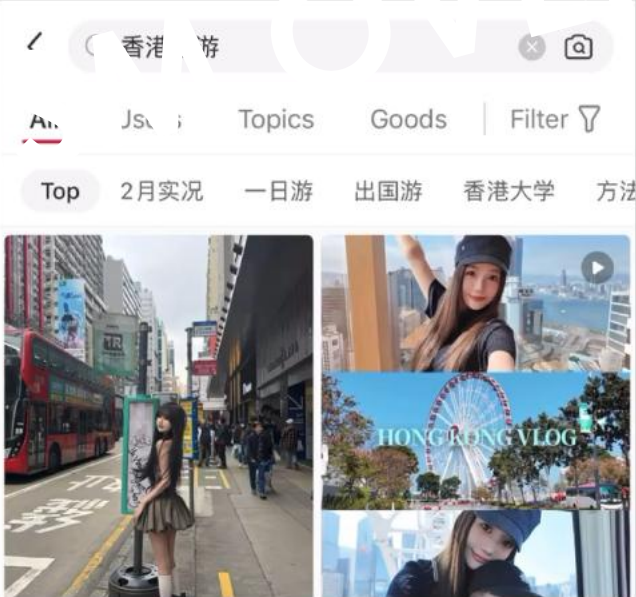
HKTB Owned Platforms

FULL JOURNEY
From Inspiration Down to Route



Xiaohongshu Partnership

MORE THAN KOL+
The Search Engine for Travel



Douyin Partnership

IDEAL COLLABORATION
1 + 1 > 2



CONTENT CO-OP

Creative Formats to Narrate Brand Stories to Refresh Perception

时差岛



快看!



腾讯视频

腾讯视频

2025

Foster Deeper
Consumer Understanding

- Fresh Perspectives of HK –
Past, Present and Future



Generate Young
Appeal & Preference

- HK Trip in Popular Comics &
Comics Show in Target Cities



Create Impact &
Mass Coverage

- Strong Visual Appeal to Enhance
HK Visibility & Engagement



CONSUMER ENGAGEMENT

Create Social Buzz & Amplify Brand Narratives with Quality PGC & UGC

HK Stories Through Different Lenses



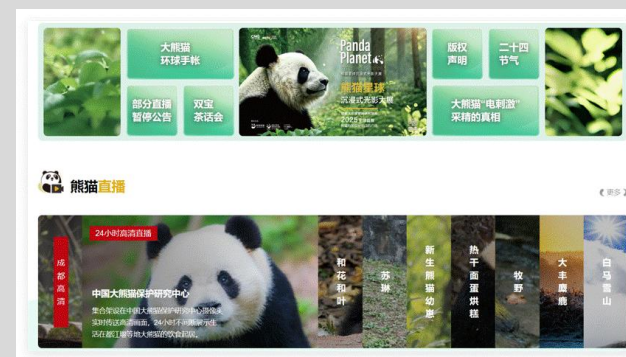
- PGC: #HKBeyondtheObvious
- UGC: #MyHKStory



The Beloved Panda Family



- Multi-platforms
- Rich formats



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+ TRAVEL

Develop Stories to Make HK Stand Out & Shape Consumer Travel Demand

SPORTS +

ARTS & CULTURE +

ENTERTAINMENT +

CUULINARY +



SPORTS + TRAVEL

Demonstrate HK's Vibrancy For Diverse Sports Appeal & Drive Travel Desire

Strategic Co-op with  keep
to Promote Destination Offerings



Vertical Channels to Promote CCG
National Games To Drive Conversion



ARTS & CULTURE + TRAVEL

Multi-media Showcase to Enhance HK's Positioning as Hub of Arts & Culture

Media Co-op



Demonstrate HK's Top-notch Arts Offerings & Cultural Diversity

KOL Advocacy



Talk Show Gurus to Create City Top-of-mind & Amplify Influence

Vertical Channels



艺术维
广州艺术维思文化有限公司
广东



Deeper Penetration to Drive Visits from GBA Arts Lovers

ENTERTAINMENT + TRAVEL

Leverage Unique HK Retro Style & Int'l Events to Arouse Target Interests

Media Co-op



Movies as HK's Cultural Icons to Arouse Resonance & Check-in

3rd Party Events



Reinforce HK as an Int'l City & ML's Strategic Gateway to the World

Trade Partnership



Drive Overnight Arrival with Various Package Combos

CULINARY + TRAVEL

Reinforce HK as the Culinary Capital of Asia for its World-Class Delicacies

Publicity Program



Showcase Diversity of Cuisines to
Solidify HK As a Food Paradise

Platform Promotion



Collaborate on 2025 Must-Eat
Awards & Hotel Offerings

Trade Partnership



Design Upscale Products to
Drive Overnight Stay & Spend

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Inspire Aspiration to Visit

Promote "+ Travel " that resonate with consumer interests



Pursue Quality Growth

Sustain & cultivate new consumer segments and expand new source markets

Drive 2025
Conversion
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SUSTAIN GBA & FIRST-TIER MARKETS

Amplify “無處不旅遊” & Consistently Create Reasons to Visit

National Coverage

Tencent 腾讯



Timely Activity Updates to Drive
Impulsive & Repeated Visits

Local Campaigns



Local TV / Social Accounts for
Deeper Seeding

Trade Partnership



Attractive Flight Deals / HSR
Discounts / Weekly Offers

CULTIVATE : HSR & IVS FIRST TIMERS

Build Awareness of HK Seasonal Events & Happenings in Lower-Tier Markets

Micro-Video Series



National Campaign to Generate Mass Reach

Regional Campaigns



Regional Coverage in High-Potential Markets to Beef Up Growth

Trade Partnership



Utilise OTA's Big Data for Precise Targeting

CULTIVATE: HIGH-SPEND SEGMENTS

Customised Premium Products & Services to Boost High-Spend Segments

AFFLUENT

Luxury Travel Experts with HNWI/Elite Members
& Customised Product Offerings



Robb Report
罗博报告

呷鹿旅游
CHARM DEER

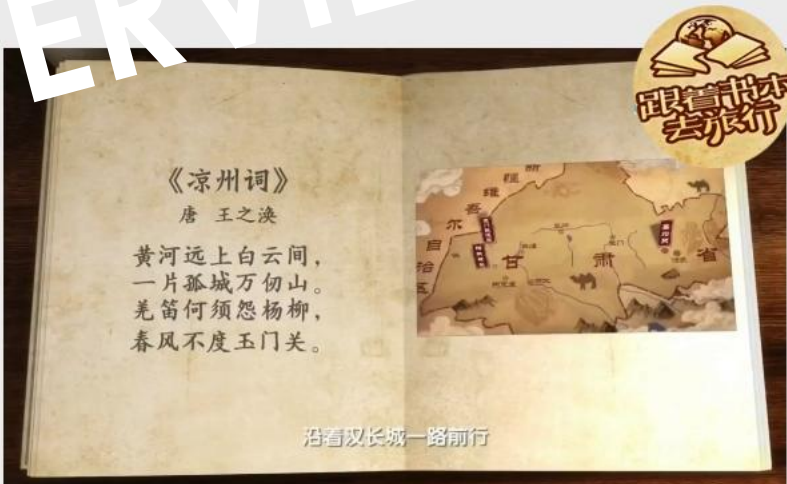
8 八大洲旅游

CATHAY

JD.COM

STUDY TOUR

Experiential Education Programs to Generate
Demand via Authoritative Channels



CCTV

中旅旅行
CTG TRAVEL
浙大求是教育
QIUSHI EDUCATIONAL SERVICE

WENZHI RAY
CULTURE 文之瑶

新东方
XDF.CN

碧山
WILDCHINA

CULTIVATE: LOW-SEASON TRAVEL

Targeted Integrated Promotions to Enhance Visits During Non-Peak Periods

FLEXI-TRAVELLERS

Capture Desired Targets via OTA & One-Stop Platform
For Full Journey Reach & Conversion



ACHIEVERS

Celebrities / Granfleurcer to Cross Brand O2O to
Promote Leisure & Cultural Experiences



MICE

Increase Exposure & Expand Market Penetration in Both Core & Potential Cities

Trade Enhancement



52 MICE partners “超級伙伴計劃”

**4,800+ Registered Users
on MICE Mini-Programme**

Corporate Expansion



**YUM CHINA 11,000 Pax
plus 15 Large Groups Totals 36,000+ Pax**

**40 Corporate Buyers FAM from
World Fortune 500 Companies**

GBA Penetration



**“潮起·灣區” Forum
Hong Kong as GBA MICE Hub**

**Drive GBA-Themed Events
& Post-Meeting Exchange Groups**

THANK YOU

ZOE LO

REGIONAL DIRECTOR, MAINLAND

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