

# SOUTHEAST

# ASIA

Tourist

Overview

2024 Only

For Hong Kong

**CJ LIEW**

REGIONAL DIRECTOR

SOUTHEAST ASIA

# Market Performance

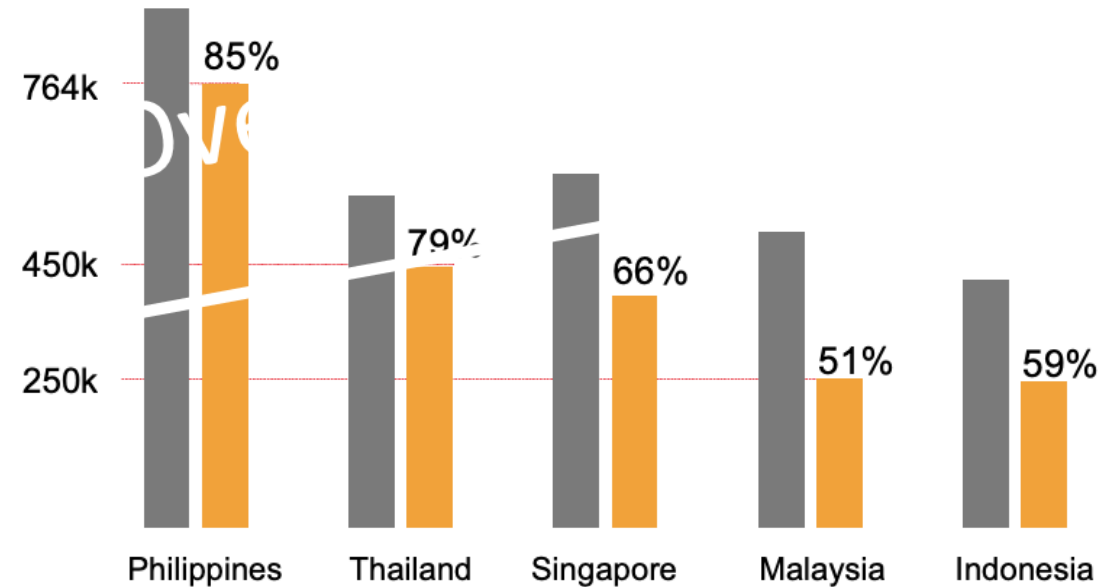
## TOTAL SEA ARRIVALS 2023

# 2.17M

(69% recovery)

For Hong Kong Tour

191K (129%)  
Feb 2024



■ 2018 ■ 2023

# Market Performance

## OVERNIGHT ARRIVALS

**1.85M**

For Hong Kong  
(73% recovery)



## LENGTH OF STAY

**3.7** nights

(2018 LOS at 3.4 nights)



# Market Performance

## The Philippines

**764K**

**(85% recovery)**

Nov & Dec 2023 surpassed 2018 arrivals

**150%**  
**Feb 2024**



**ALOS 3.5**  
**(+0.3)**



**Fastest growing**  
**economy across SEA**



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

# Market Performance

## Thailand

**450K**

**(79% recovery)**

Nov & Dec 2023 surpassed 2018 arrivals

**166%**

**Feb 2024**



**ALOS 3.8**  
**(+0.2)**



**Outbound travel**  
**will ↑ 10% in 2024**



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# Market Performance

## Singapore

**400K**

**(66% recovery)**

**95%**  
**Feb 2024**



**ALOS 3.8**  
**(+0.5)**



**Outbound travel**  
**surpass 100% recovery**



Tourism Overview 2024 Only

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

# Market Performance

## Malaysia

**258K**

**(51% recovery)**

**110%**  
**Feb 2024**



**ALOS 3.9**  
**(+0.5)**



**Weakening**  
**Ringgit**



For Hong Kong Tourism Overview 2024 Only

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

# Market Performance

## Indonesia

**252K**

**(59% recovery)**

**101%**  
**Feb 2024**



**ALOS 3.9**  
**(+0.6)**



**Weakening**  
**Rupiah**

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



# Air Capacity

Positive growth across all markets in Q1 2024 against 2018

## THAILAND

2023 : 63%  
Q1 2024 : 85%

## MALAYSIA

2023 : 46%  
Q1 2024 : 73%

## INDONESIA

2023 : 52%  
Q1 2024 : 63%

## THE PHILIPPINES

2023 : 70%  
Q1 2024 : 87%

## VIETNAM

2023 : 62%  
Q1 2024 : 84%

## SINGAPORE

2023 : 53%  
Q1 2024 : 71%



# Market Outlook

For Hong Kong Tourism Overview 2024 Only



# Market Outlook

## POLITICAL

- Mostly stable, unlikely to affect travel sentiments
- Closer bilateral relationship between China & ASEAN with mutual visa exemptions



## ECONOMIC

- Regional average GDP growth at +4.7%
- **Positive GDP Growth** especially in **The Philippines, Thailand & Vietnam**
- Inflation to ease



## TRAVEL

- Travel revenue continues into 2024
- Hong Kong is trending in SEA



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# Market Trends



For Hong Kong Tourism Overview 2024 Only

# Market Trends

## 1 RISE OF GEN Z



For Hong Kong Tourism

**NEXT BIG CONSUMER FORCE**



Overview 2024 Only

**INFLUENTIAL**

## Market Trends

# SOUTHEAST ASIAN GEN Z



**70%**

Want to explore new destinations in Asia



**90%**

Prefer to travel in groups



**54%**

Nature and outdoor adventures (59%)  
Theme parks (50%)  
Cultural offerings (51%)



**61%**

TikTok is the most popular social media platform



## Market Trends

# 2 RETHINK SPENDING



**Volatile economic outlook & inflation**

# Market Trends

## 3 SEEK MORE FOR LESS

Determining their best value in travel



For Hong Kong Tourism Overview 2024 Only



# Strategic Focus Areas

**1** Build Market Dominance



**3** Tap Into Growth Engines



**2** Maximize Conversion



Only

For Hong Kong Tourism Overview

# Build Market Dominance

01



BUILDING AFFINITY WITH GEN Z

02



*Under Parallel Skies*

Overview 2024 Only

TAP INTO SOFT POWER

For Hong Kong  
03



REACHING THE AFFLUENT

04



SPIRITUAL TOURISM

**Build market dominance**

# **BUILDING AFFINITY WITH GEN Z**

**Grow share of voice on Tik Tok**

- **#1 social media platform**
- **TikTok-centric marketing campaigns**
- **Build a community of Gen Z advocates**
- **Trend-jacking**



**Build market dominance**

# **BUILDING AFFINITY WITH GEN Z**



**Y2K Digicam  
Photography**

**Nightlife**

**Nature & Outdoor  
Adventures**

**Build market dominance**

# **BUILDING AFFINITY WITH GEN Z**

## **EVENT PARTNERSHIPS**

**Collaboration with lifestyle & travel brands that vibe with Gen Z**



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**Build market dominance**

# **TAP INTO SOFT POWER**

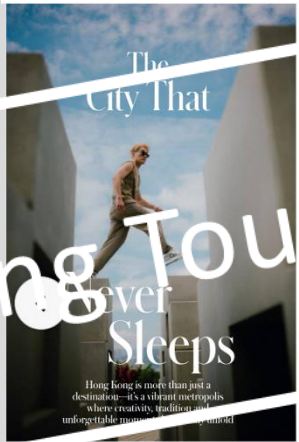


**Showcase Hong Kong creatively  
through movies & dramas to create destination hype**

# Build market dominance REACHING THE AFFLUENT



## PRESTIGE



spaces within seamlessly intertwine fashion, art and design, creating a rich mosaic of experiences. Like many others, Lim found himself captivated by the mall's centrepiece—a striking neon Gold Ball encased in carved glass panels. He also checked out an array of exclusive Hong Kong merchandise at the MOMA Design Store, from the A&A's largest, picking up one quirky souvenir along the way.

# For Hong Kong You Never Sleeps

Hong Kong is more than just a destination—it's a vibrant metropolis where creativity, tradition and unforgettable moments are intertwined.

As the director of Genting Group's Dream Cruise and the executive vice president of new ship designs, along with his role as Genting Malaysia senior vice president of hospitality and leisure, Loui Lim has become synonymous with his jet-setting lifestyle. Despite his global travels, Hong Kong holds a special place in Loui's heart, where he both grew up and worked in the city for more than a decade. Reflecting on his time here, he reminisces, "I miss the daily commute on the Star Ferry across Victoria Harbour to my work in offices, taking the beautiful trails and nature reserves, and the

vibrant energy of Lan Kwai Fong. Hong Kong offers so many diverse experiences that simply cannot be replicated in any other city. Now, during his brief return to Hong Kong alongside 'Taste of Malaysia' just as he has moved into the city's latest offerings, eager to uncover the unique experiences it continues to reveal.

**WHERE ART AND DESIGN CONVERGE**  
Located just steps away from Rosewood Hong Kong in Tian Sha Tsui, Kit Mueser stands as one of the city's must-visit malls. The



## MEGA



habitat, and ultimately inform the way we see and live in the world. Things Space, *Interiors* showcases 100 examples of furniture, architecture, graphic arts and other design objects—each an artistic statement. Within a walking distance, The Hong Kong Palace Museum becomes visitors with its striking facade. Offering a captivating glimpse into Chinese culture and art, history enthusiasts are in for a delightful treat exploring historical artifacts, exquisite paintings, and precious treasures. Lim was particularly captivated by the ongoing exhibition, *From Dances to Dots: Light in the Forbidden City*. This immersive journey into 16th-century court life traces the footsteps of emperors and empresses, providing a rare opportunity to witness the intricacies of ancient Chinese traditions. The museum is also one of the popular places to enjoy Hong Kong's magnificent sunset views.

**FAI DINING, REPEAT**  
Hong Kong is a renowned culinary Mecca, and Lim has many fond memories of dining out with his friends throughout the city. On

Check out the top left, Loui Lim getting a collection of traditional items at the Rosewood Chinese Craft Fair. The fair is a must-visit for anyone looking for authentic Hong Kong goods.

Bo, a long-time resident of Hong Kong, ranked among Asia's Best Bars for three consecutive years. Dark Side offers a curated selection of rare spirits, vintage cigars, classic cocktails and live jazz.

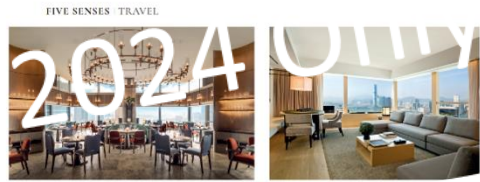
For those seeking accommodation, a central location is key. Rosewood Hong Kong, positioned near Kit Mueser and other attractions, provides Lim with an unparalleled five-star experience. With six guest rooms, a 60-metre-long pool and

covers both luxury and convenience. Among its highlights are bars and restaurants, including the flagship Cantonese restaurant, The Legacy House, helmed by chef Li Chi Wai. The restaurant pays tribute to Dr. Cheng Yu T'ung, the patriarch of the Rosewood Hotel Group's Cheng family.

Blending with culture, style and a diverse array of flavours, Hong Kong entices as a bustling metropolis, earning its reputation as the city that never sleeps.



## L'OFFICIEL



### THE JOURNEY UPWARD The Upper House – Hong Kong

WELCOME TO HONG KONG'S THE UPPER HOUSE, WHERE THE BENCHMARK FOR SERENITY, LUXURY AND SOPHISTICATION IS SET, MAKING IT AS MUCH A FAVORITE WITH DISCERNING LOCALS AS IT IS WITH VISITORS.

THE UPPER HOUSE PHOTOS COURTESY OF SWIRE HOTELS

Highlights follow in Chief Executive's residence, the Upper House and stayed at the super spacious Upper Suite with an expansive view of Hong Kong in all its glory. The Upper House is styled with timeless and elegant Asian elements where guests are able to relax in an oasis of luxurious natural materials and fabrics with sophisticated city views.

A haven of comfort, quality service and fine arts since 1969, it is commanding the upper floors of the renowned Pacific Place Historic complex in Admiralty, where the pulsating energy of Hong Kong is truly evident. Established by Swire Hotels Group, The Upper House was aptly named to symbolize an 'upward journey' to a retreat above the bustling city.

Each of the hotel's corners is a painstaking exploration of sophisticated Asian elegance. The man behind the brilliant design is more vibrant than André Fu. He became known overnight when his first redefined notions of hospitality with The Upper House, and has since gone on to create forward-thinking interiors for other leading brands around the world.

Natural materials, original sculpture installations

and seamlessly proportioned spaces are integrated to create a sophisticated and modern "Asian influence" residence. "With an intention to create a small luxury hotel reminiscent of a private residence, I have purposely captured a sense of cosiness throughout the design and ambience of the hotel," says André Fu. Displayed around the entire hotel are fascinating contemporary artworks and sculptures in stainless steels, marble and bronze, perfectly complementing Fu's over-riding concept of serenity.

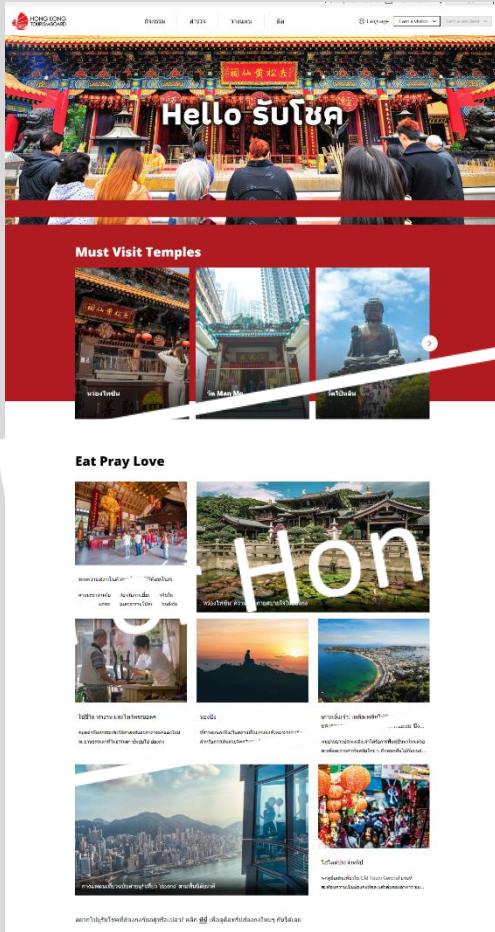
The highlights of the 'journey' is Level 40, which showcases the architecturally inspiring Sky Bridge. Infused with a skylight above a 40-metre high atrium, the Sky Bridge leads to the Sky Lounge and Saluerra restaurant. Crowning the top floor of the hotel with panoramic views of Victoria Harbour, the design of Saluerra represents a bold evolution for space with the introduction of curvy and bold colors of the Mediterranean, juxtaposing the striking geometry of the Hong Kong skyline. Rich colors of terracotta, orange, malachite, mineral blue, dusty turquoise and golden caramel create five distinct spaces.

The Upper House  
Pacific Place 99, Admiralty, Hong Kong  
TEL: +852 2948 1000

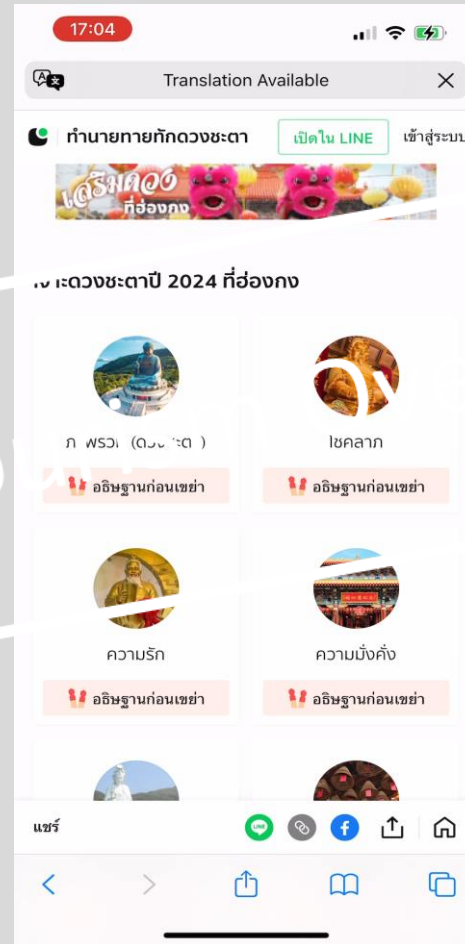
Profile arts and dining as key experiences through event partnerships, media FAMs and media co-ops

**Build market dominance**

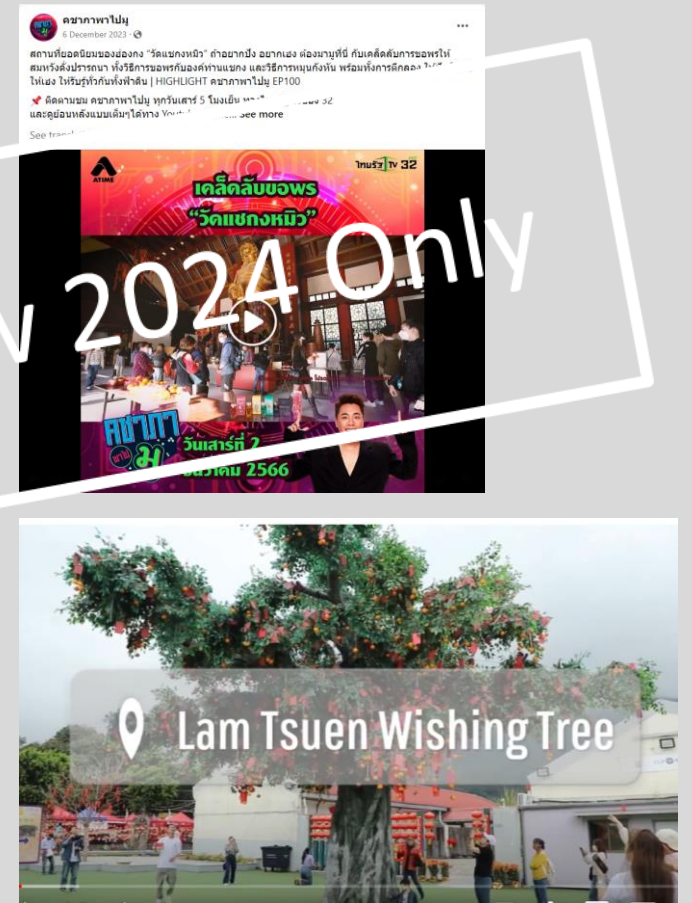
# **SPIRITUAL TOURISM**



**Hello Good Fortune  
DHK page**



**LINE - Interactive  
Fortune Sticks Campaign**



**Media Co-op**



Build market dominance

# SPIRITUAL TOURISM



**GREAT FORTUNE Hong Kong**

บริการของเดิม และบริการใหม่จะขอเข้าร่วม MICE ณ 6 Destination

เพิ่มโอกาสธุรกิจของคุณ

- 50% ของนักท่องเที่ยว
- 50% ของนักท่องเที่ยว
- 50% ของนักท่องเที่ยว
- 50% ของนักท่องเที่ยว

mehk

**พิเศษสำหรับกรุ๊ปทัวร์จากไทยเท่านั้น!**

เกณฑ์ในการรับสิทธิ์:

- มีสมาชิก 10 คนขึ้นไป
- พักที่ฮ่องกง อย่างน้อย 1 คืน
- เดินทางถึงฮ่องกง ก่อนวันที่ 31 มีนาคม 2567

สิทธิพิเศษจาก MEHK:

- 10+ พัก 1 คืนในโรงแรมพรีเมียม
- 21+ พัก 1 คืนในโรงแรม
- 51+ พัก Mini Workshop เชิงสร้างสรรค์ จากผู้เชี่ยวชาญ
- 400+ เสริมสิทธิพิเศษที่จองมาได้

Trade Partnership

Master Katha at Media FAM and TITF Travel Fair

Enhanced MICE Great Fortune Hong Kong

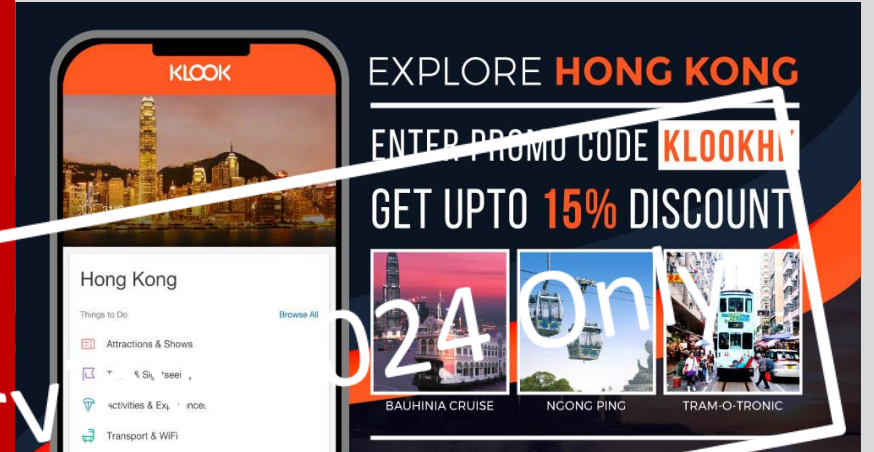
# Maximise conversion

01



AIRLINES

02



ONLINE TRAVEL AGENTS

For Hong Kong  
03



MAJOR TRAVEL AGENTS

04



BANKS

# Maximise Conversion

# AIRLINES

## Cathay Pacific (SEA)

**Hello Hong Kong**

Dapatkan harga spesial ke Hong Kong di Cathay Pacific Travel Fair

Main Atrium Senayan City, Jakarta dan Tunjungan Plaza 6, Surabaya

4 - 6 Agustus 2023

**For Hong Kong Tourism Overview**

Explore Now  
9 The Peak, Hong Kong

HONG KONG TOURISM BOARD  
#discoverhongkong

## Singapore Airlines (SG / ID)

Fly to Hong Kong with Singapore Airlines

**HELLO Hong Kong**

Watch on YouTube

The great roaring dragon of Asia, Hong Kong is a bustling destination for both business and leisure. It is a city-state, steeped in rich culture and history, with much to offer from mouth-watering dim sum to breathtaking skylines. Away from the hustle and bustle of city life, Hong Kong also offers serene hiking trails and sunny beaches.

**Promotional Fares to Hong Kong**

Sale period: Between now and 21 February, 2024\*  
Outbound travel period: Between now and 13 November, 2024\*  
\*Selected periods only. Blackout periods apply.

Destination	Business Class fare from	Premium Economy Class fares from	Economy Class fares from
Hong Kong	SGD1558	SGD898	SGD318

## Garuda (ID)

**Garuda Indonesia**

Sambut Tahun Baru Imlek dengan Penerbangan Menuju Hong Kong bersama Garuda Indonesia!

Rencanakan perayaan Tahun Baru Imlek Anda dengan penawaran khusus Garuda Indonesia untuk rute Jakarta - Hong Kong mulai dari Rp4,6 juta\*

**Promo Tahun Baru Imlek Jakarta-Hong Kong**

Periode pembelian: 1 - 15 Februari 2024  
Periode penerbangan: 1 Februari - 31 Desember 2024

Harga pergi-pulang  
Mulai dari **Rp. 4,6 Jutaan\***

**5-STAR AIRLINE**

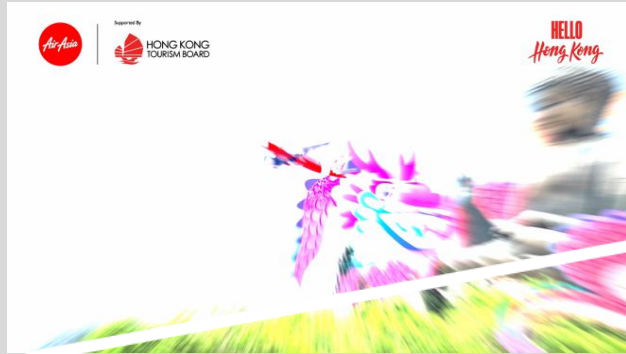
\*Syarat dan ketentuan berlaku

**Constant renewal of content to entice airlines customers**

# Maximise Conversion

# AIRLINES

Air Asia (TH / MY)



Scoot (SG)

A promotional banner for Scoot featuring three images: a cable car, a street scene, and a night view of the city. The text 'HELLO Hong Kong' is written in a stylized font across the images. Below the images, it says 'ESCAPE HONG KONG - A CITY FULL OF ADVENTURES AND ENDLESS POSSIBILITIES!'. At the bottom, it says 'FILL UP ON ADVENTURES FROM \$130\*' and 'Book now'. Logos for Scoot and the Hong Kong Tourism Board are also present.

HELLO Hong Kong

ESCAPE HONG KONG - A CITY FULL OF ADVENTURES AND ENDLESS POSSIBILITIES!

FILL UP ON ADVENTURES FROM  
**\$130\***

Book now

\* One way, taxes included. Terms apply. Travel period: 27 Feb - 14 Nov 2024

Cebu Pacific (PH)

A promotional banner for Cebu Pacific featuring three images: a city skyline, Temple Street, and Avenue of Stars. The text 'Hong Kong adventures await!' is written in a stylized font. Below the images, it says 'For as low as P1,299 ONE-WAY BASE FARE exclusive of fees and surcharges. Excludes Hong Kong routes!'. At the bottom, it says 'Sale Period: Feb 20 - 22, 2024' and 'Travel Period: Apr 1 - Jul 31, 2024'. Logos for the Hong Kong Tourism Board and Cebu Pacific are also present.

Hong Kong adventures await!

For as low as **P1,299**  
ONE-WAY BASE FARE  
exclusive of fees and surcharges  
Excludes Hong Kong routes!

Victoria Harbour

TEMPLE STREET

Avenue of Stars

Sale Period: Feb 20 - 22, 2024

Travel Period: Apr 1 - Jul 31, 2024

Supported By  
HONG KONG TOURISM BOARD

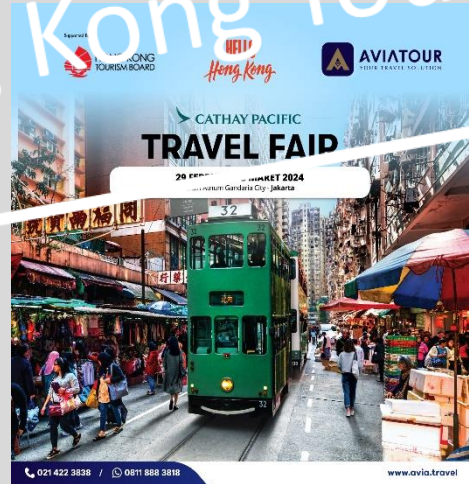
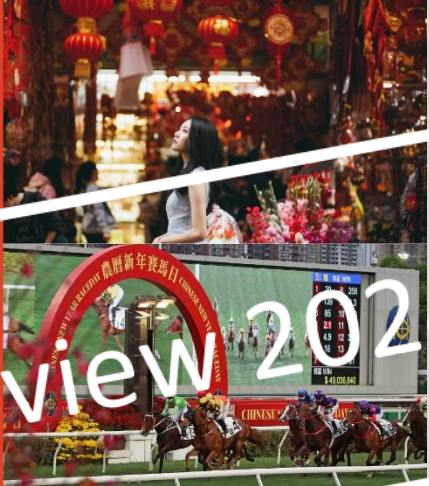
cebu pacific  
Let's fly every Juan

Terms and Conditions apply. CAB Approval Nos. 1405-02-08-s.2024. ASC Reference Code: C00411022024C

Strong events calendar work well for tactical push

# Maximise Conversion

# TRAVEL AGENTS

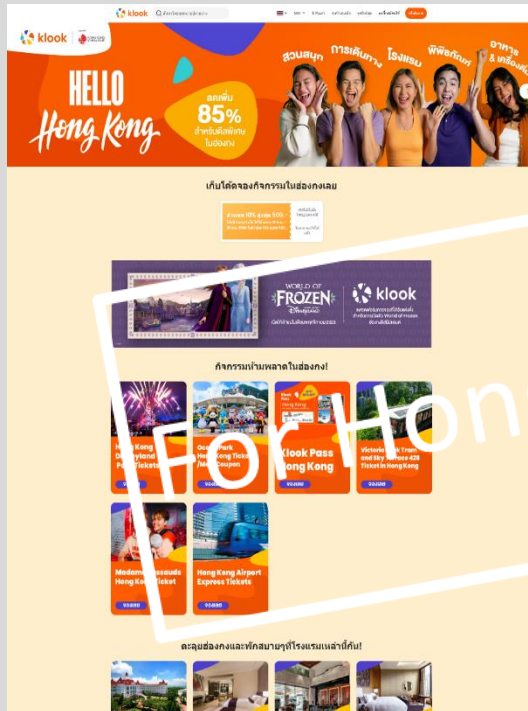


Establish Hong Kong as top of mind destination

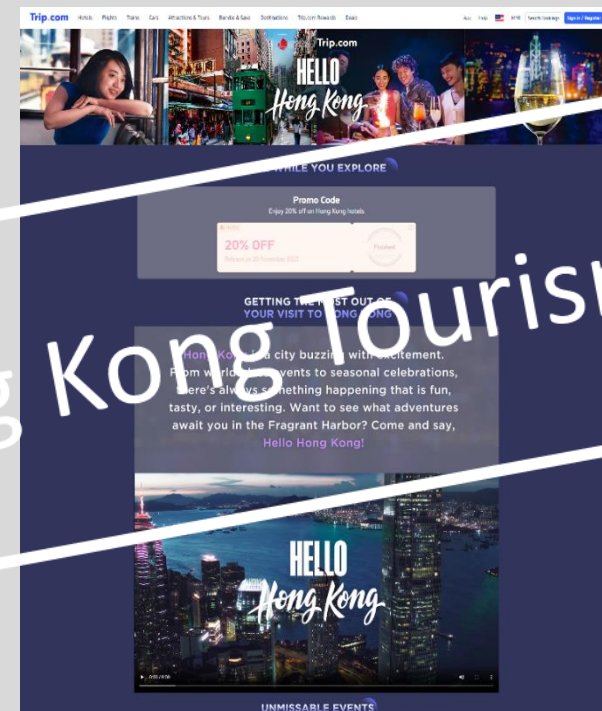
# Maximise Conversion

# ONLINE TRAVEL AGENTS

## Klook



## Trip.com



## Traveloka



## Tiket.com



Hong Kong Tourism Overview 2024 Only

Leverage reach of online travel platforms to amplify drive to conversion

# Maximise Conversion

# BANKS

## BCA (ID)

HELLO Hong Kong

Discover the Magic of Hong Kong

Discover the Magic of Hong Kong

HELLO Hong Kong Discover the Magic of Hong Kong

- INDONG PING 360 - Save 15%
- BIG BUS TOURS - Save up to 15% per person
- Ticket & Retail - Save 10%
- SKY100 - Save 20%
- MONOPOLY DREAMS - Save 20% Admission...
- WATER WORLD - Save 10%
- OCEAN PARK - Save up to 25%

## KTC (TH)

WORLD HELLO Hong Kong

รวมโปร 8 ที่พักในฮ่องกง กับบัตรเครดิต KTC จองที่ KTC WORLD

เริ่มต้น 3,000 บาท

เริ่มต้น 1,800 บาท

เมื่อมียอดใช้จ่ายผ่านบัตรฯ ตามที่กำหนด

ส่วนลด 6 เดือน

อัตราดอกเบี้ย 0% เมื่อลูกค้าชำระเต็มจำนวน ภายในวงรับที่กำหนดชำระ: จอง 1 ก.พ. 67 - 31 มี.ค. 67 เดินทาง 1 ก.พ. 67 - 31 ส.ค. 67 ใช้ทำจำนวนการจองตามที่ระบุจำนวนการจอง จะไม่ใช้ยอดเฉลี่ย 18% ต่อปี

## Krungthai (TH)

T1 CENTRAL The1 CREDIT CARD

Trip.com

จองตั๋วเครื่องบินสู่ฮ่องกง

รับส่วนลด 400 บาท\*

เมื่อใส่โค้ด KSCFLYHK

สำหรับยอดจองตั้งแต่ 4,500 บาทขึ้นไป / หมายเลขการจอง

ระยะเวลาการจอง: 25 ต.ค. 66 - 31 มี.ค. 67 | ระยะเวลาเดินทาง: 25 ต.ค. 66 - 30 มิ.ย. 67

## UOB (SG)

2024 Only

HELLO Hong Kong!

From stunning skylines to picturesque islands, Hong Kong offers a wide range of attractions for every type of traveler. Be enchanted in Disneyland, visit the Big Buddha on Lantau island, or get lost in the bustling streets of Mong Kok. For a taste of Hong Kong's rich culture and history, be sure to visit the Victoria Peak, the Ten Thousand Buddhas Monastery, and the historic Kowloon Walled City Park.

And of course, no trip to Hong Kong would be completed without indulging in some of the city's world-famous cuisine, from dim sum to street food delights. So, pack your bags, book your ticket and get ready for an unforgettable adventure in one of the world's most exciting destinations.

Incentivise cardholders to make bookings with their preferred banks

# Growth Engines

01

For Hong Kong

MUSLIM TRAVEL DEVELOPMENT



02

rism Overview

NEW MARKET VIETNAM



03

MICE



2024 Only



# Growth Engines



For Hong Kong Tourism Overview 2024 Only

# Maximise Conversion

# SEGMENT POTENTIAL



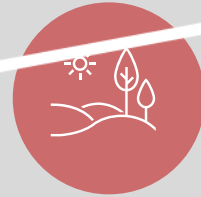
**270M Muslim  
community in SEA**



**Indonesia – 231M  
Malaysia – 20M**



**Steady recovery,  
forecast 220M  
arrivals by 2028**



**Actively pursued by  
competitor  
destinations**



## Maximise Conversion

# MUSLIM TRAVEL CAMPAIGNS

- Create Muslim-centric visuals and content
- Grow SEA Muslim KOLs & content creators
- Strengthen connections with trade & media partners
- Roll out Muslim-centric travel campaign

Overview 2024 Only



# Growth Engines



For Hong Kong Tourism Overview 2024 Only

NEW MARKET : VIETNAM

**Maximise Conversion**

# **VIETNAM MARKET POTENTIAL**



**For Hong Kong Tourism Overview 2024 Only**



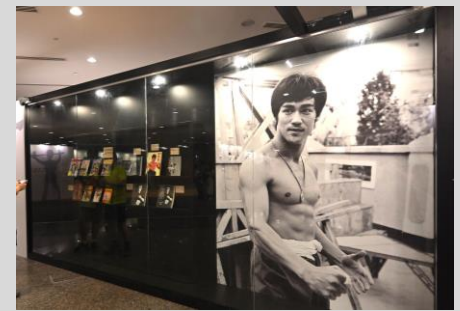
**Outbound  
Potential**



**Visa  
Relaxation**



**Air  
Connectivity**



**Affinity to  
Hong Kong**

# Maximise Conversion

# INSPIRE DEMAND



**Mass  
Affluent**



**“Old-Meets-New”  
Affinity**



**Creative Content  
Creation**



**Travel  
Deals**

# Growth Engines



**MICE Connect Hong Kong**



**Team Building Activities**

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# Growth Engines

## SEA Performance

- 124,000 pax M&I arrivals
- 24,000 received Hong Kong Rewards



### **MICE Mega FAM**

First-hand experiential itineraries



### **Trade & Corporate Events**

Programme updates and destination highlights



### **MICE Trade Shows**

Business networking



### **Great Fortune Hong Kong**

Customised temple programs for Thailand

Continuous efforts to pursue M&I arrivals through targeted outreach and enhanced experiences





For Hong Kong Tourism Overview 2024 Only



# THANK YOU

Overview 2024 only

For Hong Kong

TERIMA KASIH · SALAMAT PO · CẢM ƠN · ขอบคุณ