

AUSTRALIA NEW ZEALAND

KAREN MACMILLAN

2024 Only

For Hong Kong Tourism Overview
DIRECTOR
AUSTRALIA, NEW ZEALAND & SOUTH PACIFIC



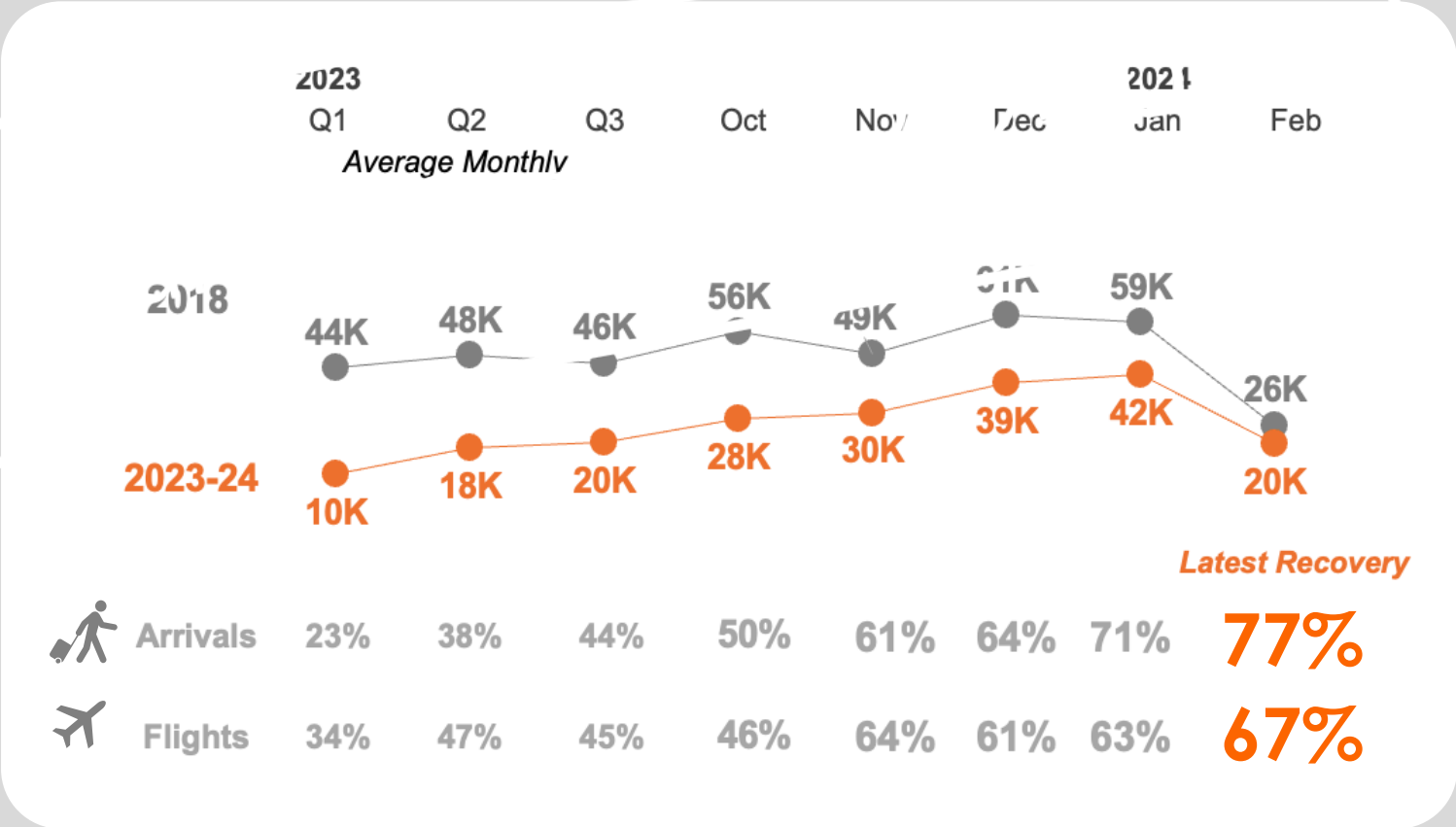
MARKET PERFORMANCE

2023 TOTAL ARRIVALS

AU 241K

(42% recovery)

For Hong Kong



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

% Recovery (2018 level)

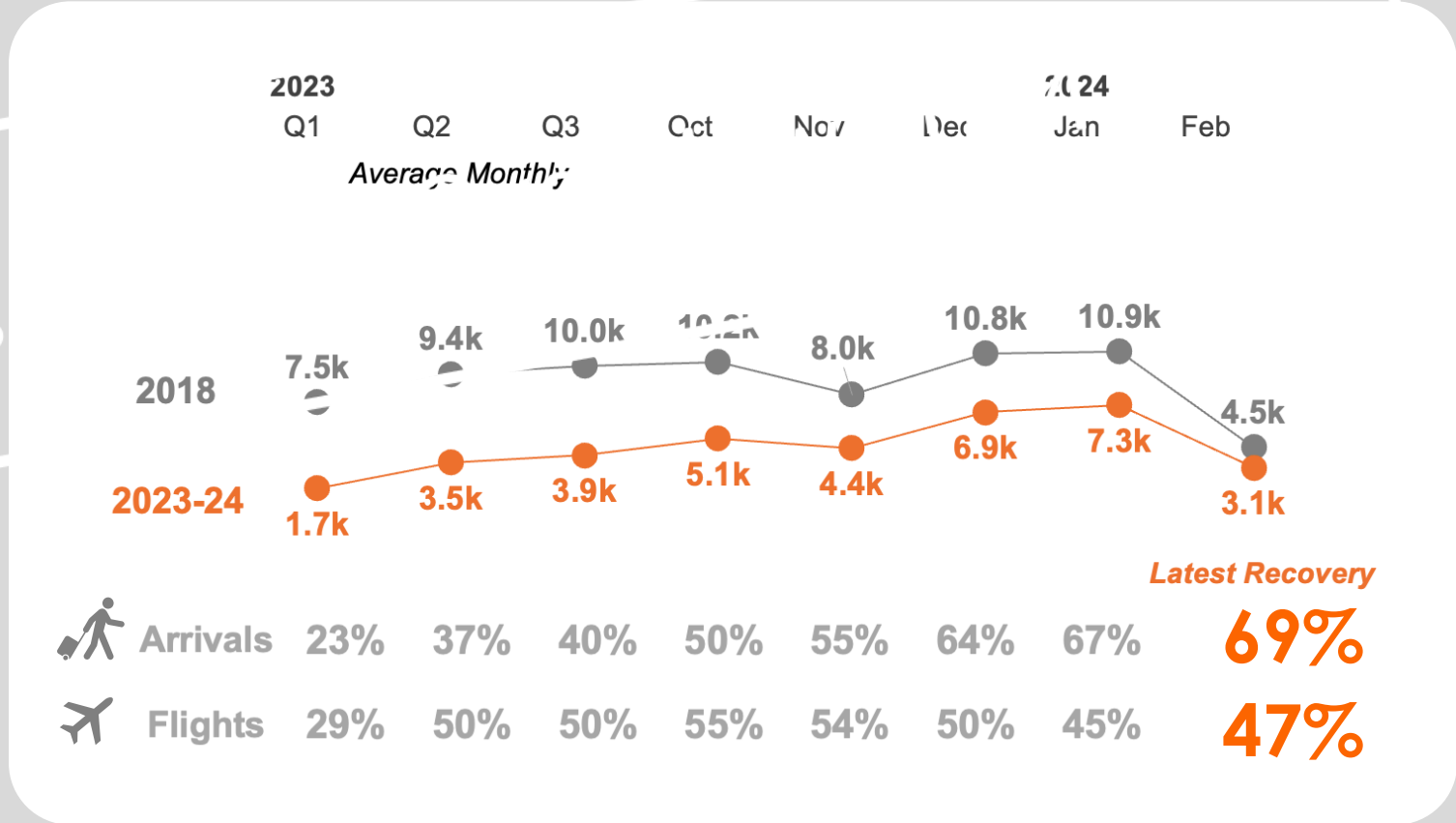
MARKET PERFORMANCE

2023 TOTAL ARRIVALS

NZ 44K

(40% recovery)

For Hong Kong



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

% Recovery (2018 level)

MARKET PERFORMANCE

Australia Overnight visitors

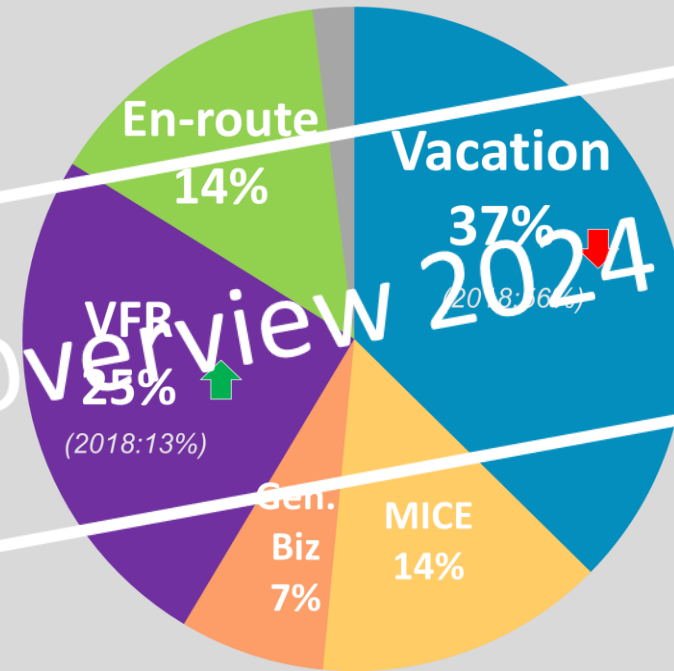
179K FY 2023
(41% recovery)

LENGTH OF STAY

23 H2 **4.5** nights

(2018 LOS at 3.8 nights)

2023 H2



- ▶ Leisure visitors improving
- ▶ Recovery of MICE visitors is faster than 2018
- ▶ VFR is the second main purpose of the visit

MARKET PERFORMANCE

New Zealand Overnight visitors

31K FY 2023

(42% recovery)

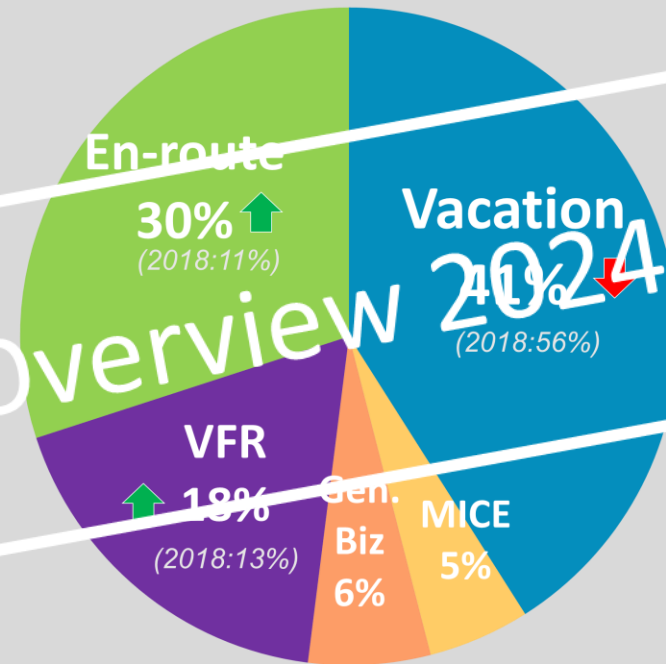
LENGTH OF STAY

23 H2 **3.9** nights

(2018 LOS at 3.5 nights)



2023 H2

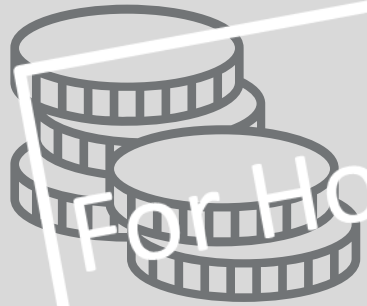


2024 Only

- ▶ Leisure visitors gaining ground
- ▶ Recovery of VFR and stopover visitors is faster
- ▶ Business travel on par as 2018

MARKET PERFORMANCE

Australia Overnight visitors



SPENDING

More on **F&B**



SATISFACTION:

8.8 / 10pts



(total)

AVE AGE: 39.7

-2.2y.o.

Gender: M55%/ F45%



REPEATERS:

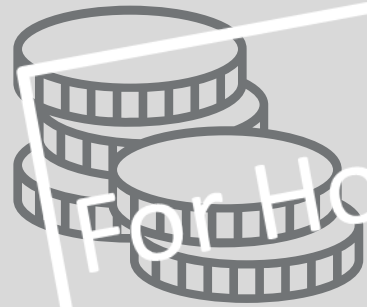
87% +17%

Note: recovery is 2018 vs H2 2023

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

MARKET PERFORMANCE

New Zealand Overnight visitors



SPENDING ON

**More on
Entertainment**



SATISFACTION:

8.9 / 10pts



(total)

AVE AGE: 39.6

-2.y.o.

Gender: M55%/ F45%



REPEATERS:

71% +5%

Note: recovery is 2018 vs H2 2023

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

AIR CAPACITY

Seat Capacity Recovery Against 2018



MARKET OUTLOOK

ECONOMIC

- ▶ **4.1% Unemployment: slightly increasing**
- ▶ **4.1% CPI Inflation: steady and easing**
 - **Food, housing and insurance costs are driving inflation**
 - **Holiday travel and accommodation (-7.1%)**
- ▶ **Low consumer confidence with reduced spending on household goods**
- ▶ **1.4% GDP lowest annual growth rate since the COVID-19 pandemic**
- ▶ **AUD remains sluggish against USD/HKD at USD\$0.65 and HKD5.10**



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MARKET OUTLOOK

TRAVEL

- ▶ Outbound travel recovered to 88% of 2019 levels, with overall air capacity at 92%
- ▶ Indonesia overtakes New Zealand as the top travel destination
- ▶ Top 5 destinations: Bali, New Zealand, US, UK, Japan
- ▶ Inbound travel to Australia had a slower recovery reaching 76% of 2019 levels
- ▶ Spending on overseas holidays fell 9%
- ▶ Shorter booking window for flights to Hong Kong
- ▶ Travel is a priority



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MARKET OUTLOOK

MEDIA

- ▶ Positive destination coverage up by 117%
- ▶ Ongoing focus on political news
- ▶ Australia's news dominated by 3 publishing houses, limiting high-reaching outlets
- ▶ Growing popularity of independent media for unbiased news agendas
- ▶ Key Media Houses



News Corp Australia



CONSUMER TREND

AI-driven personalised planning, sustainability and reprioritisation of travel budget to continue.

Personalised experiences will remain a focal point, with solo travel continuing to gain popularity.



4 STRATEGIC FOCI

Maximise

Market penetration and increase visibility through mass media, trade & tactical activities

02

Leverage

Key partners' brand recognition and loyalty to extend reach and drive momentum.

04

01

For Hong Kong



03



Target

RIGHT audience/ channel/ key themes/ time

Conversions

Pursue quality growth

TARGETED KEY THEMES



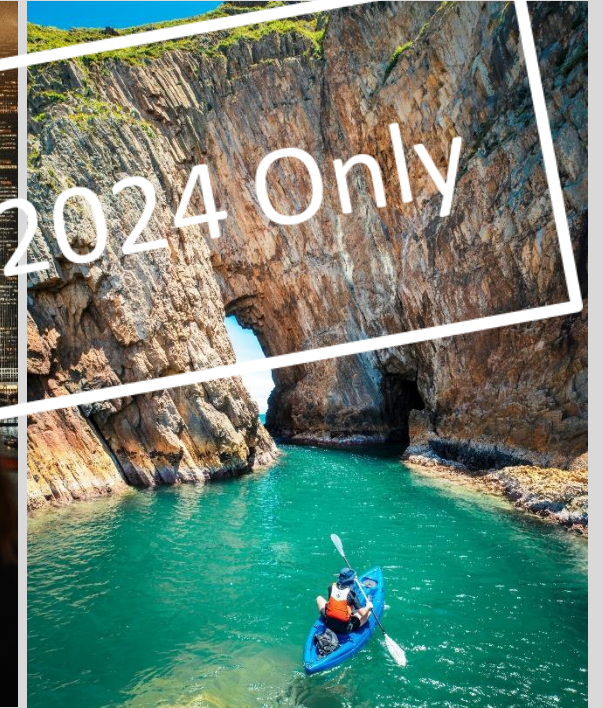
Sporting and Mega Events



Dining, Shopping and Night Vibes



Affordable Luxury



Great Outdoors

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PROGRAMMES

01

Tactical Co-ops

Quality growth and conversions

02

Broadcasts

Increase visibility & mass market appeal

03

Stopover & Multi-Destination

Extend reach & drive momentum

04

Airline Partnerships

Extend reach and maximise conversion

05

Media Partnerships

Target the right audiences with the right content at right time

For Hong Kong Tourism Overview 2024 Only

PROGRAMMES

01

For Hong Kong

Tactical Co-ops

Strategic Focus: Pursue quality growth and conversions

- Leverage key retail partners owned assets to inspire with HKTB content to convert
- OTAs, e-retailers and cruise wholesalers to provide best deals
- Showcase products & value adds
- Targeted luxury travel campaigns offering bespoke product and distribution channels



PROGRAMMES



Broadcasts

Strategic Focus: Increase visibility and mass market appeal

02



- Eight half-hour in destination episodes
- Every episode will include an exploration of Hong Kong with a particular focus on its food culture
- Series Reach: 800K+

- One 60-minute in destination episode
- The episode will showcase up to 12 activities and experiences provided in Hong Kong
- No. 1 travel show in Australia
- Episode Reach: 1M+

- Three 45-60 minute in destination episodes
- Every episode will showcase a different experience in Hong Kong
- Broadcasted in over 180 countries
- Series Reach: 11.2M+

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PROGRAMMES

03

For Hong Kong

Stopover & Multi-Destination

Strategic Focus: Extend reach and maximise conversion by ensuring Hong Kong is included as part of any trip to Asia

- Fly Cruise partnerships
- Themed stopover packages (foodie, family, shopping, great outdoors)
- GBA/Corporate – ‘Bleisure’
- Joint activity with Asian TBs and NTOs
- Value added multi-destination experiences
- Affordable Luxury

The collage features several promotional elements:

- Wendy Wu Tours Brochure:** Promotes a 2-night stopover in Hong Kong for just \$75pp. It lists various tour packages such as 'Majestic Yangtze', 'Wonders of China', 'Magnificent China', and 'Grand Tour of China'. Each package includes details on duration, highlights, and pricing. A '5 Star Quality' badge is also present.
- ASIA ON SALE:** A banner for 'Discover Hong Kong' with a 'FLIGHT CENTRE' logo and a phone number (131 600).
- CATHAY Website Screenshot:** Shows the 'Multi-city / Stopover' section of the Cathay website, with a navigation bar including 'Flights', 'Holidays', 'Shopping', 'Wellness', 'Dining', 'Payment', and 'Membership'.

PROGRAMMES

04

Airline Partnerships

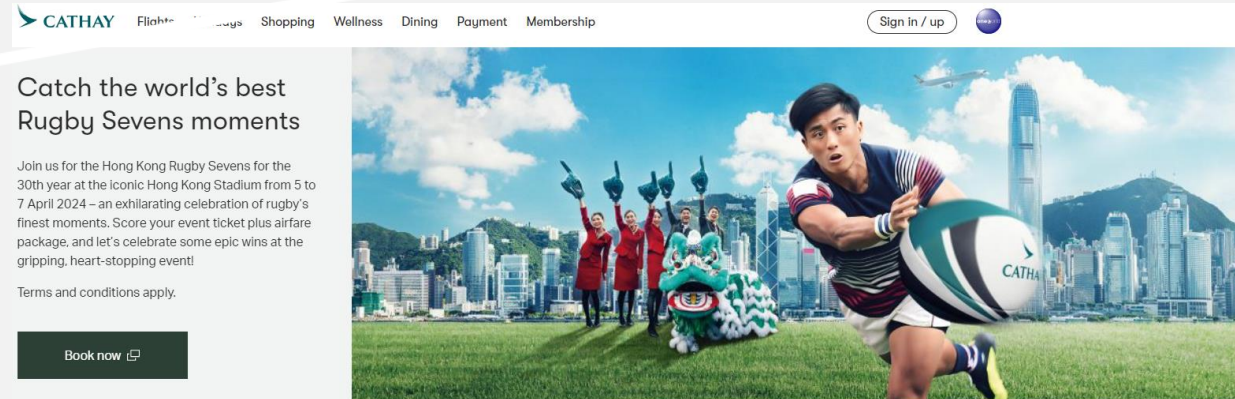
Strategic Focus: Use partners' brand recognition and loyalty to extend reach and drive momentum

Airline

- Implement year-round consumer and digital activities
- Utilise strong owned assets
- Comprehensive and targeted media and trade FAM program
- Coordinate integrated tactical co-ops to drive conversions
- Promote key themes and events



For Hong Kong Rugby Sevens



PROGRAMMES

05

For Hong Kong

Media Partnerships

Strategic Focus: Target right audiences with right content promoting key themes at right time

KOLs

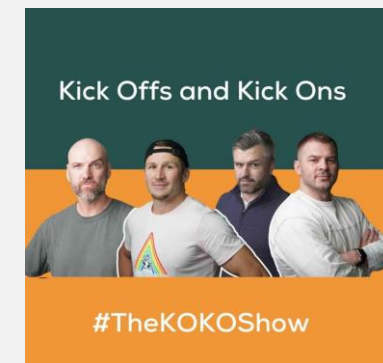
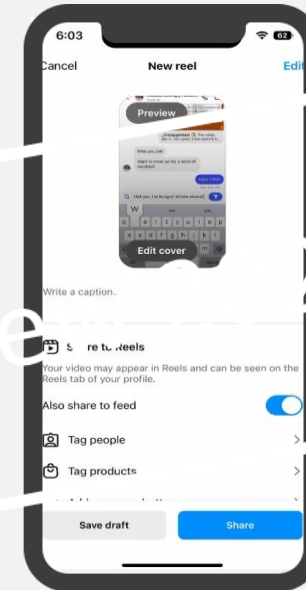
- Strategic collaborations with influential content creators Target key themes: Events, Food, Great Outdoors, Affordable Luxury

Media

- Establish dynamic partnerships for comprehensive, multi-channel content campaigns aimed at spotlighting key themes, events, and programmes

Digital Always On

- Content campaigns, social media, SEM, display



PROGRAMMES

RETAILER	AIRLINES	OTAs	WHOLESALE	E-RETAILER
 FLIGHT CENTRE™	 CATHAY PACIFIC	 webjet.com.au	 Wendy Wu Tours	 LUXURY ESCAPES THE WORLD'S BEST HOLIDAYS
 TRAVEL ASSOCIATES™	 AIR NEW ZEALAND	 Expedia	 Infinity Holidays	 Trip a Deal
 ignite travel group	 QANTAS	 KAYAK	 INSPIRING VACATIONS	
 helloworld TRAVEL THE TRAVEL PROFESSIONALS	 FIJI AIRWAYS	 klook		
 TravelManagers As individual as you are travelmanagers.com.au		 Trip.com		



THANK YOU

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