

EUROPE

Overview 2024 Only

ANETTE WENDEL-MENKE

CHRISTOPHE MÉGUEULLE

FOR HONG KONG & TOURISM
DIRECTOR

UK & NORTHERN EUROPE

DIRECTOR

FRANCE & FRENCH-SPEAKING EUROPE

MARKET PERFORMANCE

2023 TOTAL ARRIVALS

UK 212K

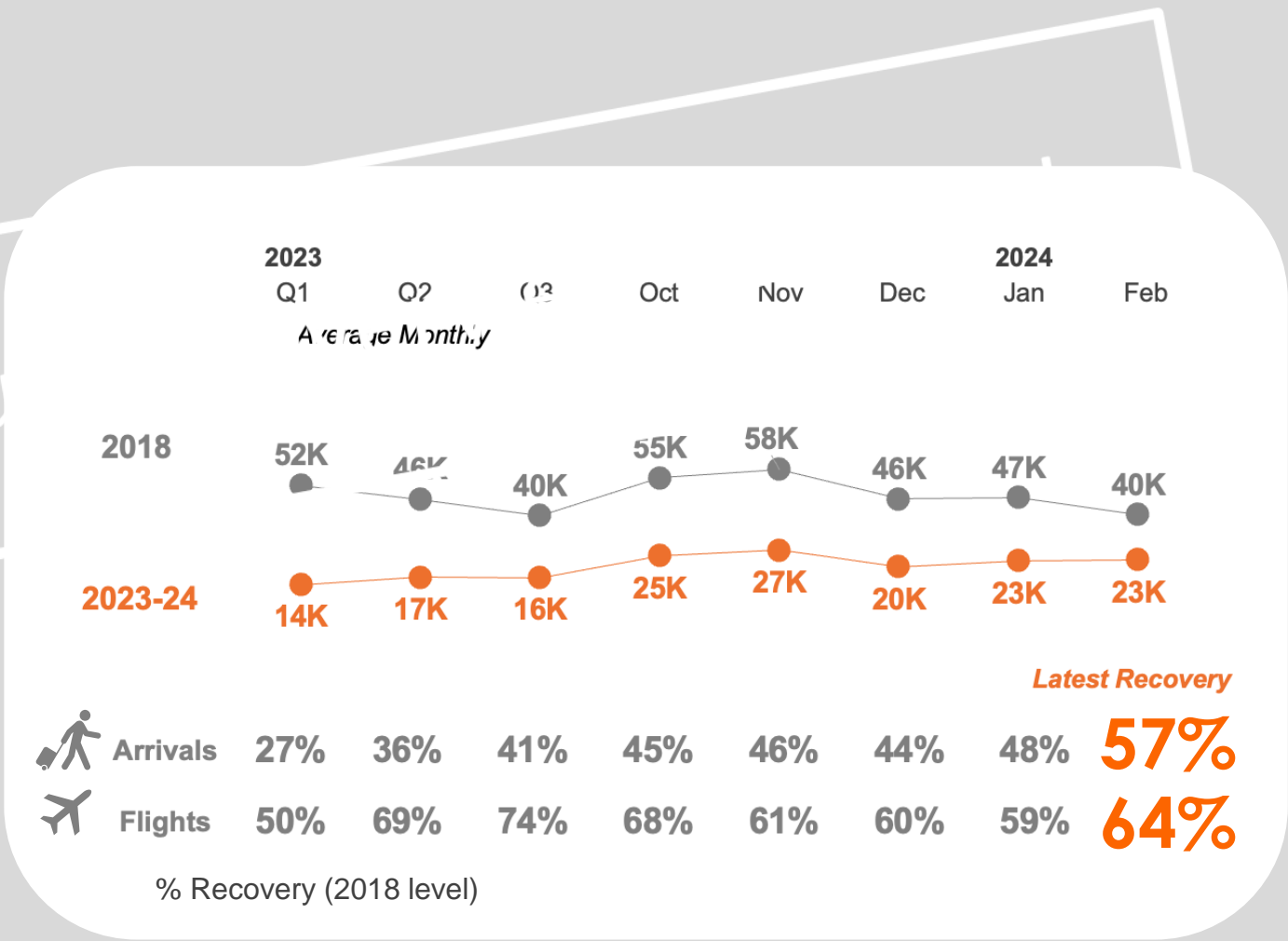
(37% recovery)

LENGTH OF STAY

23 H2 **5.4** nights

(2018 LOS at 4.4 nights)

For Hong Kong Tour



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

MARKET PERFORMANCE

2023 TOTAL ARRIVALS

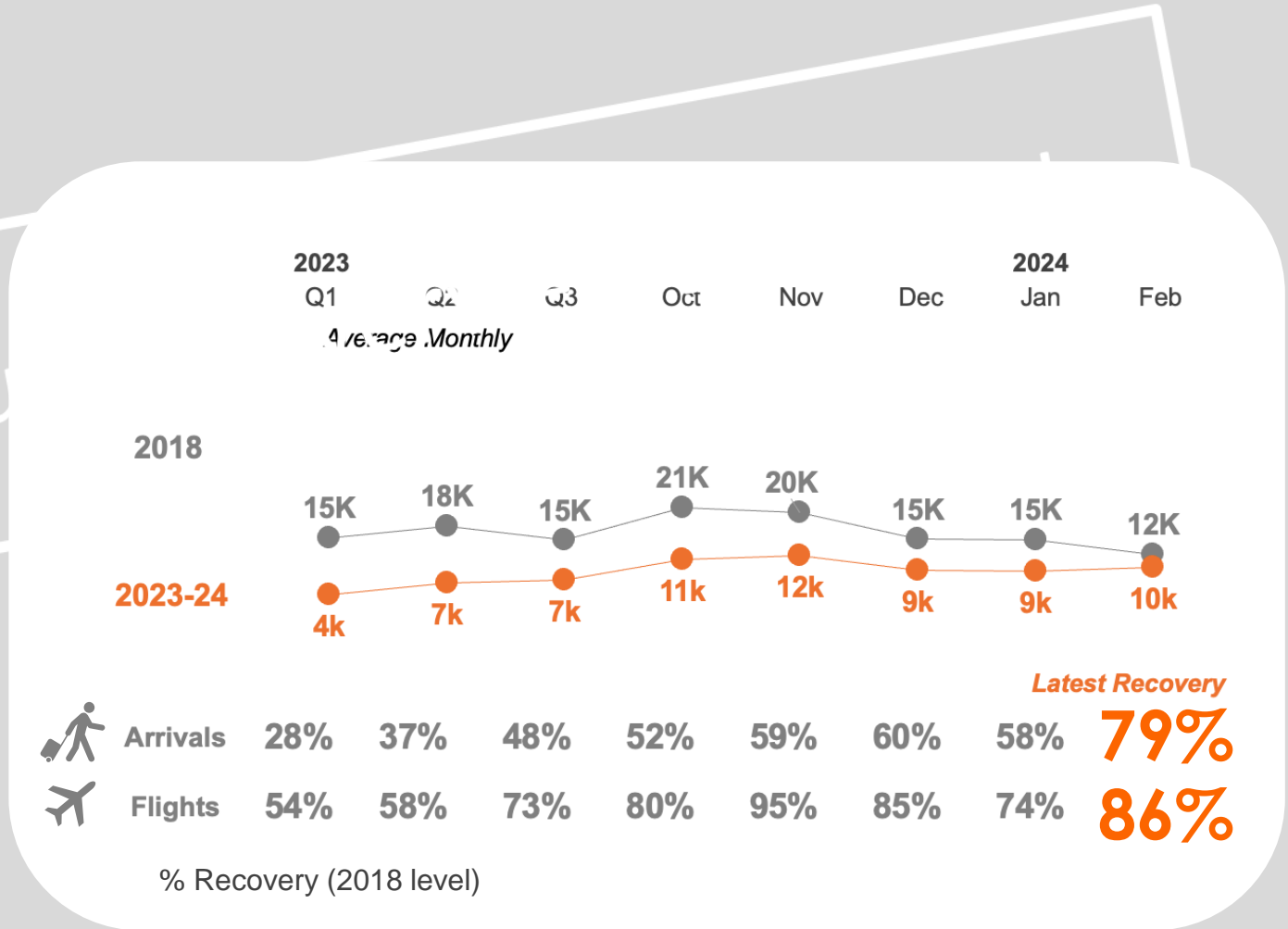
FRANCE 86K

(43% recovery)

LENGTH OF STAY

23 H2 **4.5** nights

(2018 LOS at 4.2 nights)



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

MARKET PERFORMANCE

2023 TOTAL ARRIVALS

GERMANY

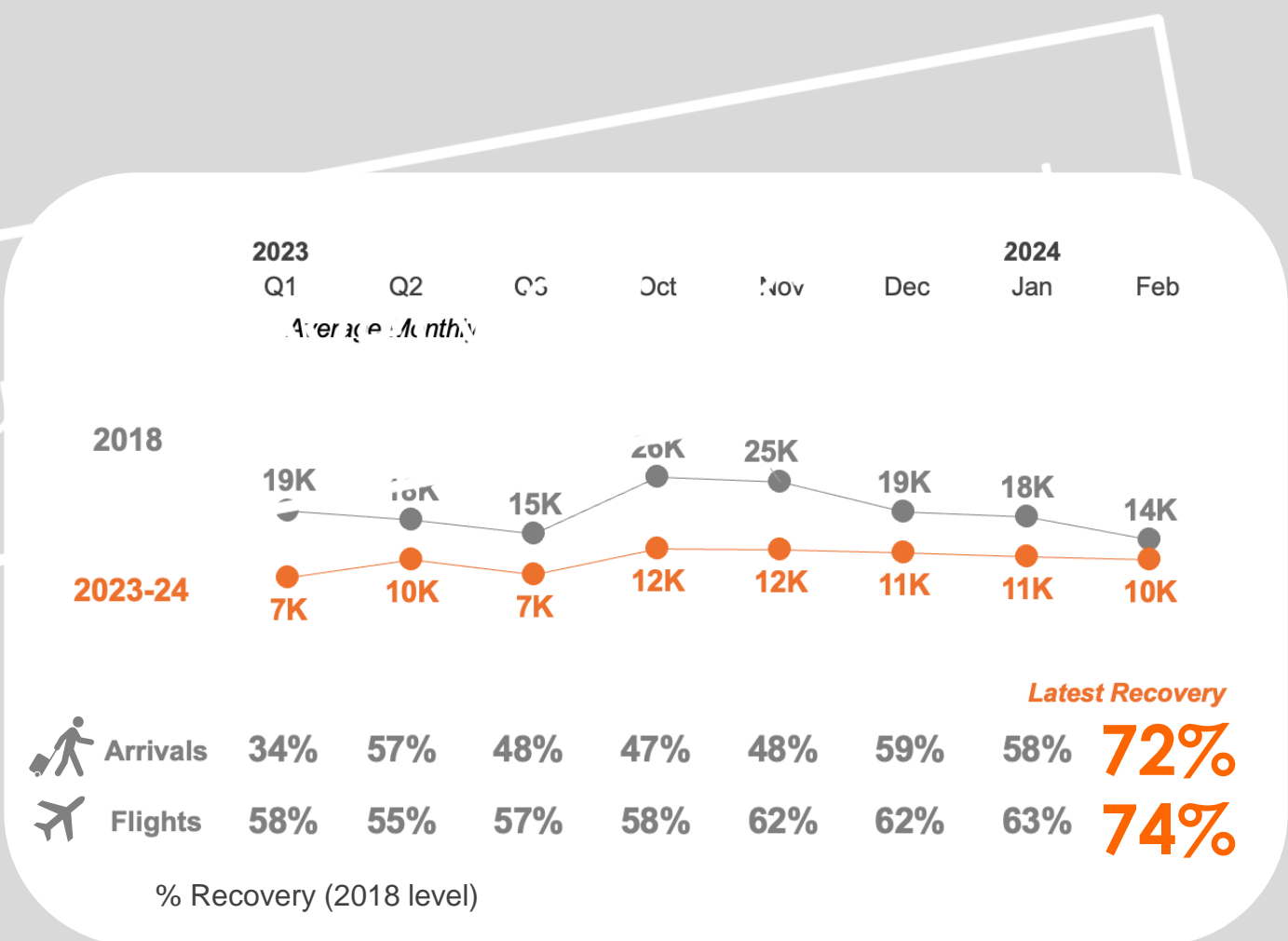
107K

(47% recovery)

LENGTH OF STAY

23 H2 **3.9** nights

(2018 LOS at 3.5 nights)



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

MAIN PURPOSE OF VISIT

UK

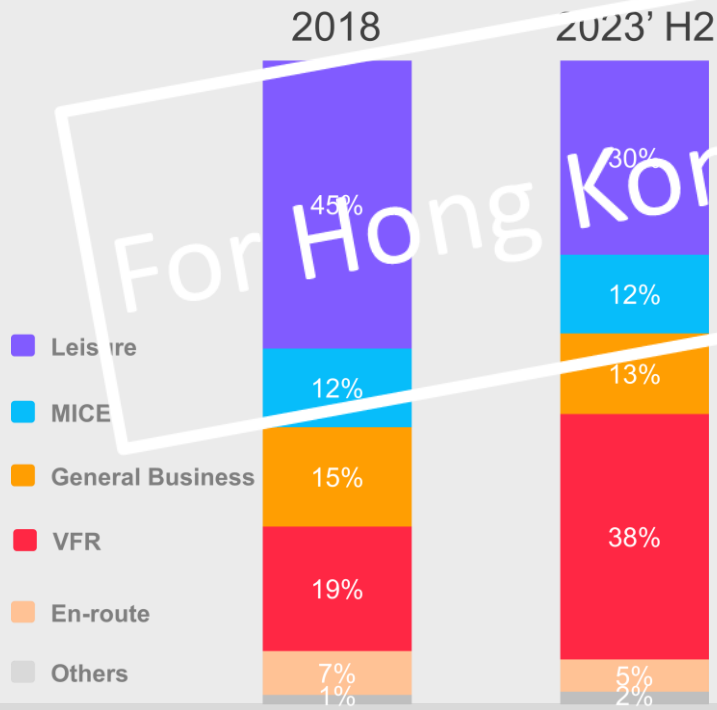
FRANCE

GERMANY

Overnight visitors

167K

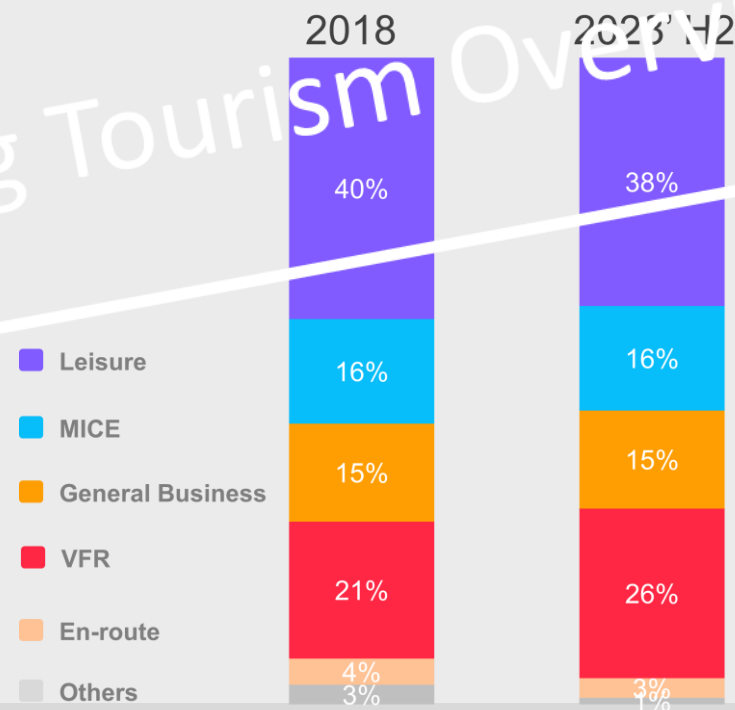
FY 2023
(37% recovery)



Overnight visitors

63K

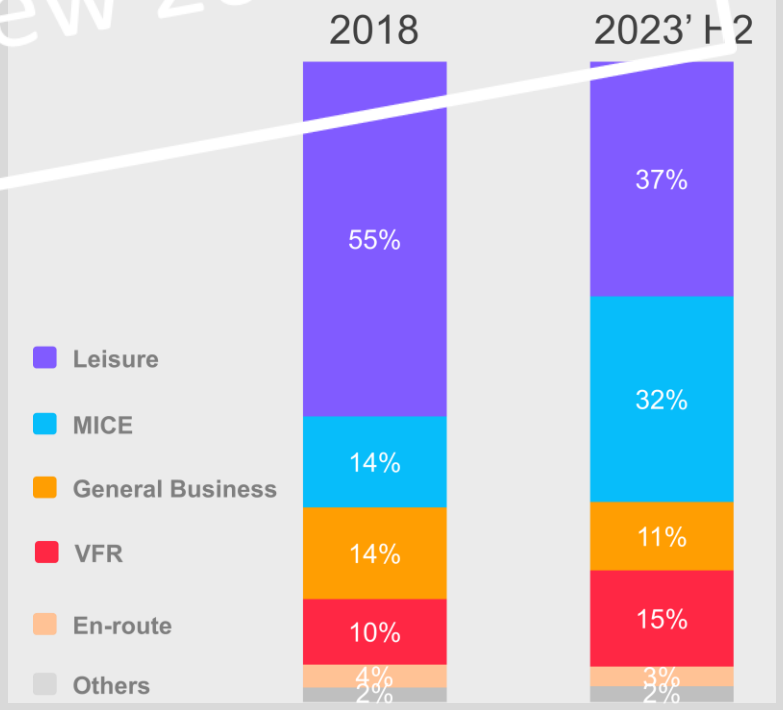
FY 2023
(72% recovery)



Overnight visitors

76K

FY 2023
(46% recovery)

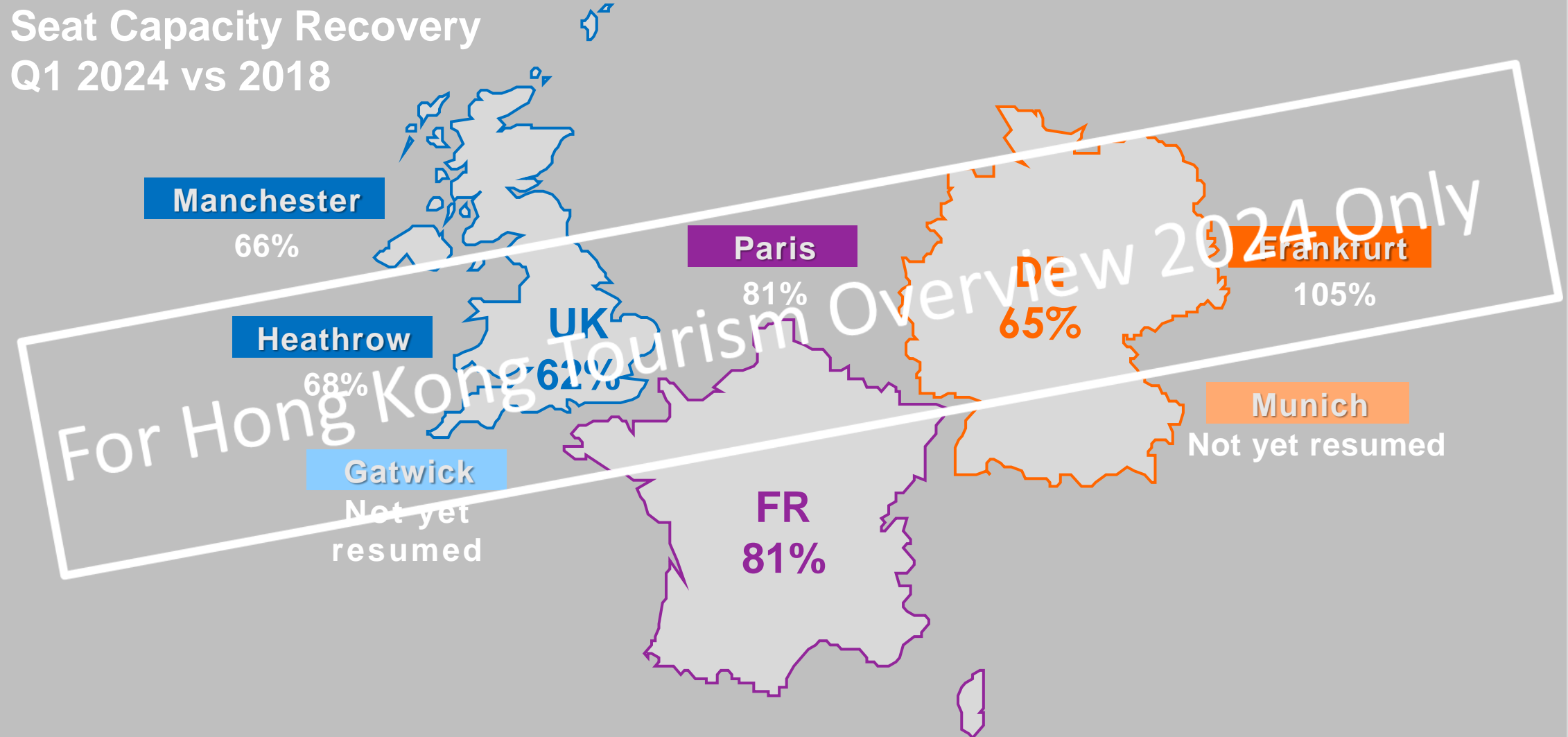


Source: HKTBD Departing Visitor Survey (DVS)

Note: Others include health/ medical care, banking/ personal investment, study/ examination/ education/ training (non-business)

AIR CAPACITY RECOVERY

Seat Capacity Recovery
Q1 2024 vs 2018



PAN EUROPE OUTLOOK

POLITICAL

- On-going conflicts in Ukraine and Middle East impacting on air capacity and flight times
- Upcoming US and UK elections may impact trading relations



ECONOMIC

- 0.8% GDP growth forecast in 2024 and 1.5% in 2025
- Inflation halving vs 2023
- Real wage growth



CONSUMER SENTIMENT

- Confidence rising
- Spending to increase, backed by strong labour market
- Holidays are top of mind for consumers



Despite uncertainty, signs of healthy recovery

TRAVEL & TRADE OUTLOOK



Promising outlook for 2024



International: +2% above 2019 levels



Asia Pacific: +9% versus pre-COVID levels



Hong Kong: Continual recovery to pre-COVID levels

STRATEGIC DIRECTIONS



For Hong Kong Tourism

1

BRAND:

- Create destination preference and stimulate consumer demand

2

CONVERSION:

- Foster Hong Kong and Multi-Destination through Win-win partnerships

Tourism Overview 2024 Only



INSPIRE & ENGAGE

Core Experiences

- Great Outdoors
- Gastronomy & Nightlife
- Arts & Culture
- Neighbourhoods

Mega Events

- Chinese New Year
- Arts Month
- Wine & Dine
- And More...



2024 Only

DRIVE CONVERSION



For Hong Kong Tourism



Integrated Marketing Campaigns

Tactical elements in all campaigns



Mitigating Air Capacity Constraints

Partner with non-stop and local carriers and air consolidators

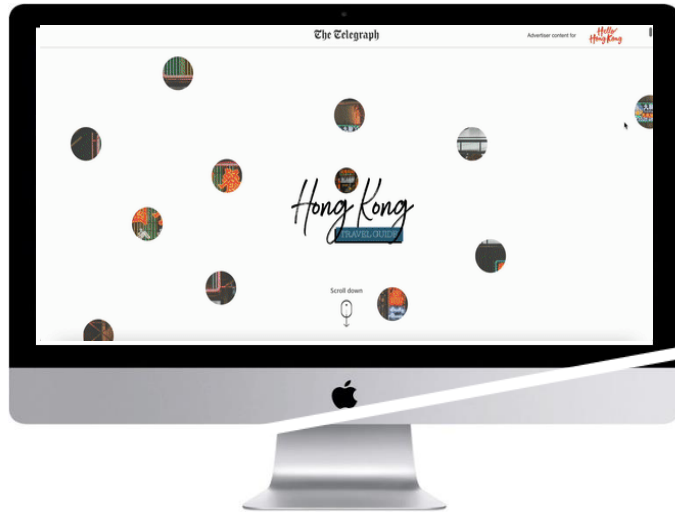


Leverage Opportunities

Mainland China's visa-free policy

Overview 2024 Only

INSPIRE & ENGAGE



**AFFORDABLE
LUXURY
CAMPAIGN**

**Key Media:
The Telegraph &
SKY TV**

**Volume Drivers:
Trailfinders
Flightcentre
DNATA**



EXCLUSIVE OFFER

**£150 saving on
Hong Kong packages**

Call the sales centre and quote HKG150

**HELLO
Hong Kong**

FIND OUT MORE

DRIVE CONVERSION

INSPIRE & ENGAGE



HONG KONG & BEYOND CAMPAIGN

Key Media Volume Drivers

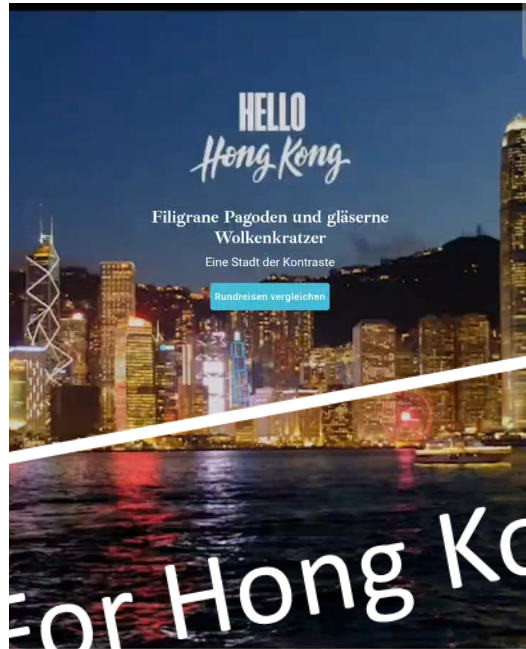
Tourism Overlay

FR



DRIVE CONVERSION

INSPIRE & ENGAGE



„Nach meiner Rundreise durch Hongkong fühle ich mich wie in einem faszinierenden Wirbelwind aus Kultur, Kontrasten und einzigartigen Marmeladenglas-M...“

Janina, reiste im Juli 2023

Inhaltsverzeichnis

- 1. Warum sollte ich eine Rundreise durch Hongkong unternehmen?
- 2. Die beste Reisezeit für deine Hongkong Rundreise
- 3. Welche Highlights sind besonders wertvoll auf deiner Rundreise durch Hongkong?

Hongkong: Zwischen Tradition und Moderne

Erlebe in Hongkong eine Welt voller faszinierender Kontraste. Tausche ein in das pulsierende Leben der Stadt, wo moderne Wolkenkratzer auf traditionelle Tempel treffen und westliche Einflüsse auf die lokale Kultur treffen. Spüre die Energie der Straßenmärkte und das Flair der lebendigen Viertel, während du gleichzeitig die Ruhe und Schönheit der natürlichen Landschaften erlebst. In Hongkong verschmelzen Vergangenheit und Gegenwart zu einer einzigartigen Atmosphäre, die di...

GATEWAY TO ASIA CAMPAIGN

Key Media:
Neusta Group

Tourism Overlay

Volume Drivers:

DE



jouraway berge & meer



DRIVE CONVERSION



For Hong Kong Tourism Overview 2024 Only

THANK YOU

KENNETH WONG

CHRISTOPHE MÉGUEULLE

CÉLINE REISS

ANETTE WENDEL-MENKE

LONDON

PARIS

FRANKFURT

For Hong Kong Tourism Overview 2024 Only