



For Hong Kong Tourism Overview 2024 Only

**JAPAN**

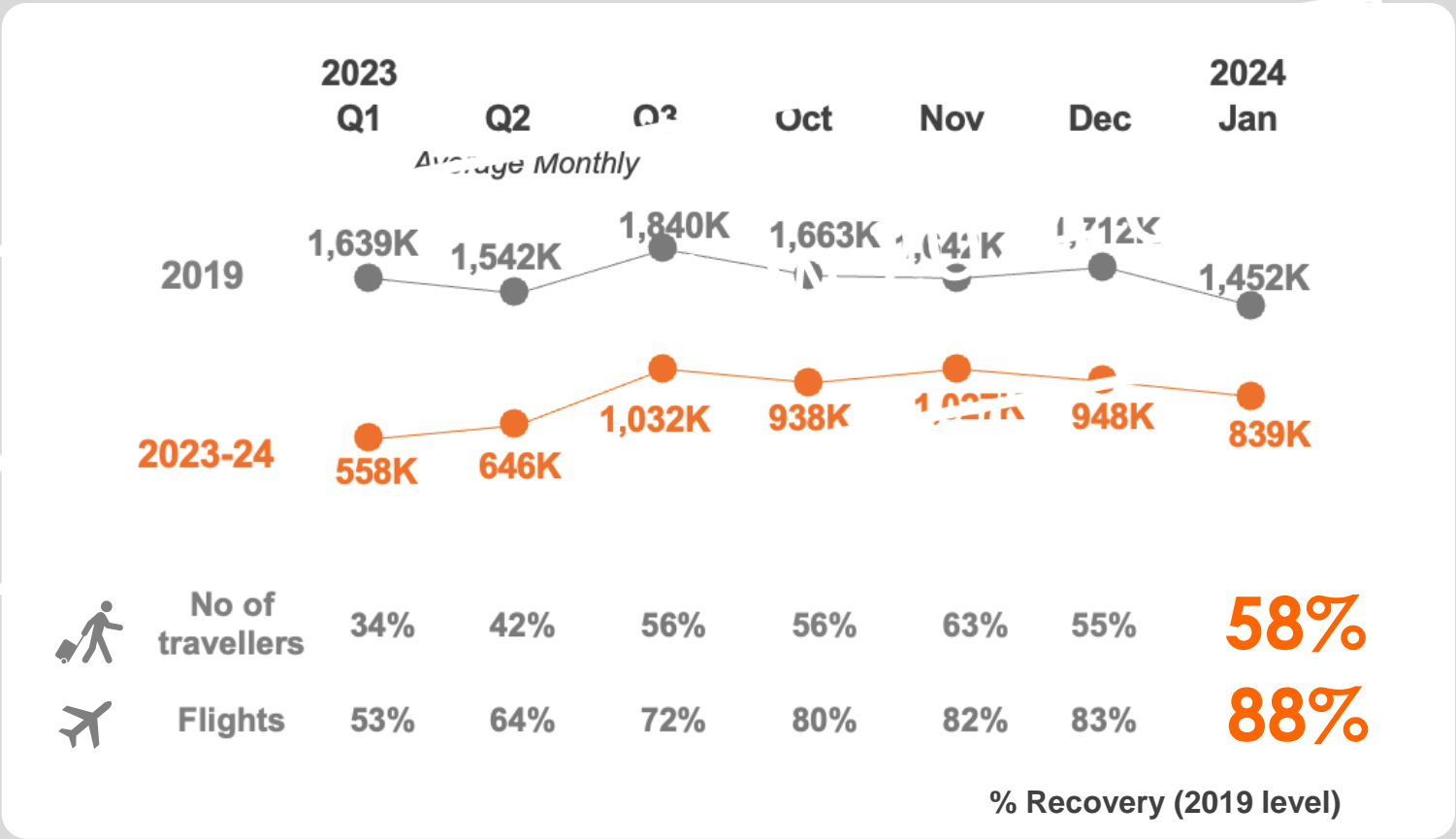
**KAZUNORI HORI**

REGIONAL DIRECTOR, JAPAN

# MARKET PERFORMANCE

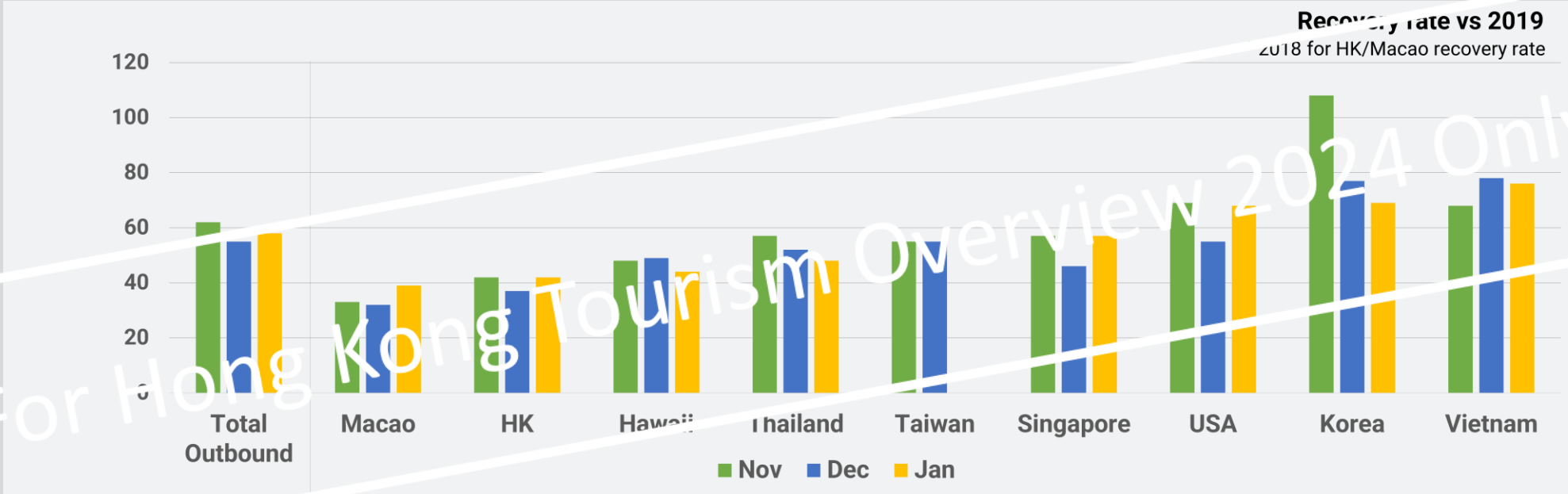
## 2023 TOTAL JAPANESE OUTBOUND

9,624K For Hong Kong  
(48% recovery)



Source: Cirium, Japan National Tourism Organisation (JNTO)

# RECOVERY RATES OF OTHER POPULAR DESTINATIONS (Nov 2023 - Jan 2024)



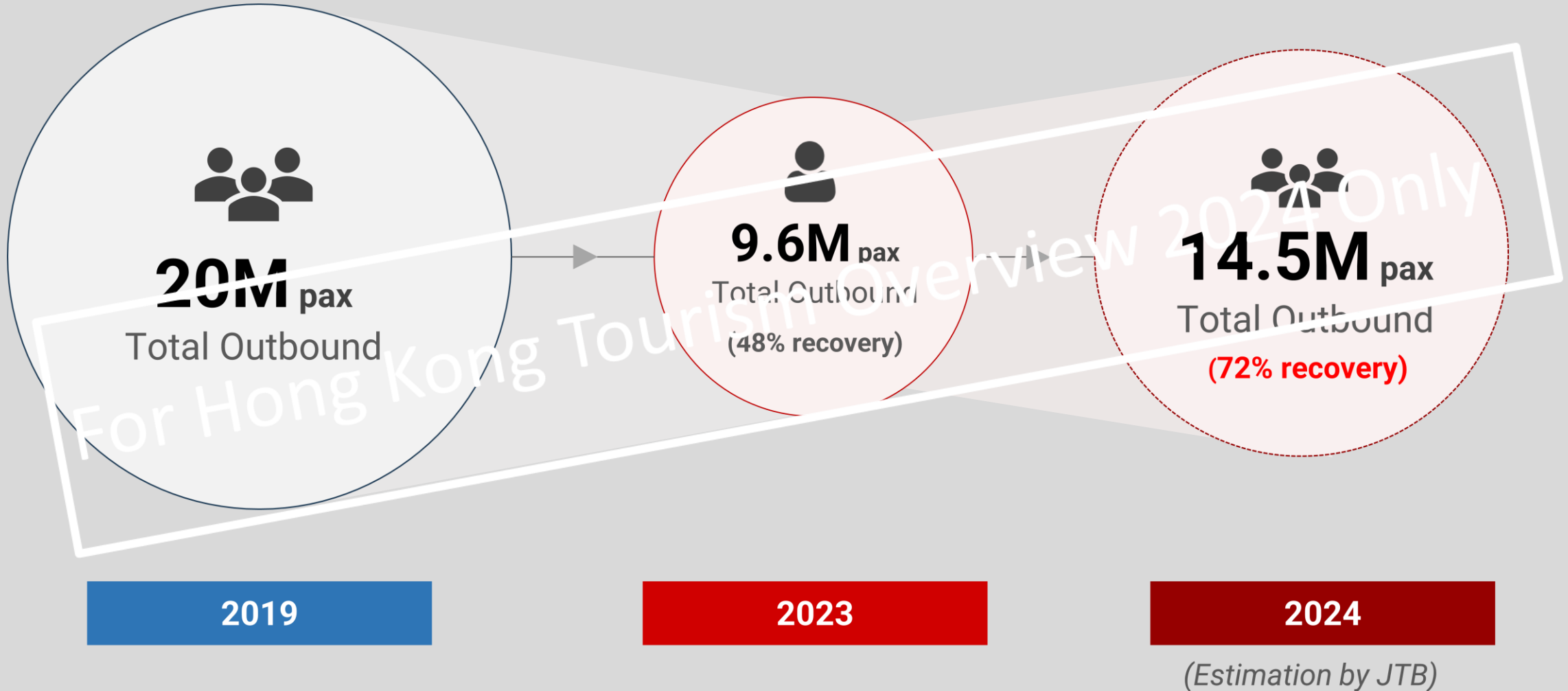
| (%)     | Total Outbound | Macao | Hong Kong  | Hawaii | Thailand | Taiwan | Singapore | USA  | Korea | Vietnam |
|---------|----------------|-------|------------|--------|----------|--------|-----------|------|-------|---------|
| Nov     | 62             | *33   | <b>*42</b> | 48     | 57       | 55     | 57        | **69 | 108   | 68      |
| Dec     | 55             | *32   | <b>*37</b> | 49     | 52       | 55     | 46        | **55 | 77    | 78      |
| Jan '24 | 58             | *39   | <b>*42</b> | 44     | 48       | N/A    | 57        | **68 | 69    | 76      |

\*\* USA excluding Hawaii/Guam

Source: Respective NTOs/International Trade Administration, US Dept of Commerce

Source: Various NTOs, International Trade Administration, US Dept of Commerce

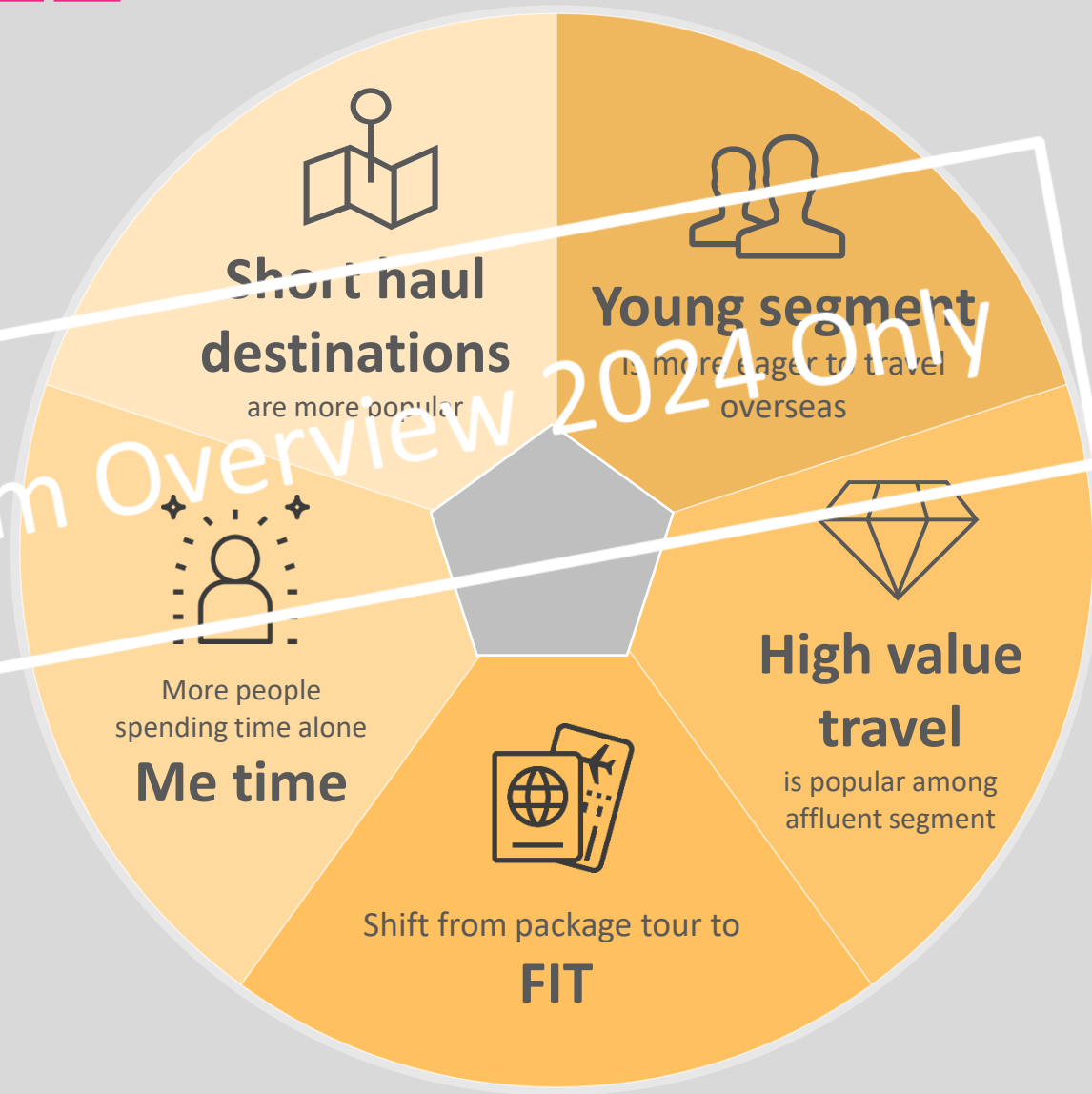
# JAPANESE OUTBOUND OUTLOOK



# OUTBOUND TRAVEL

## CONSUMER TREND

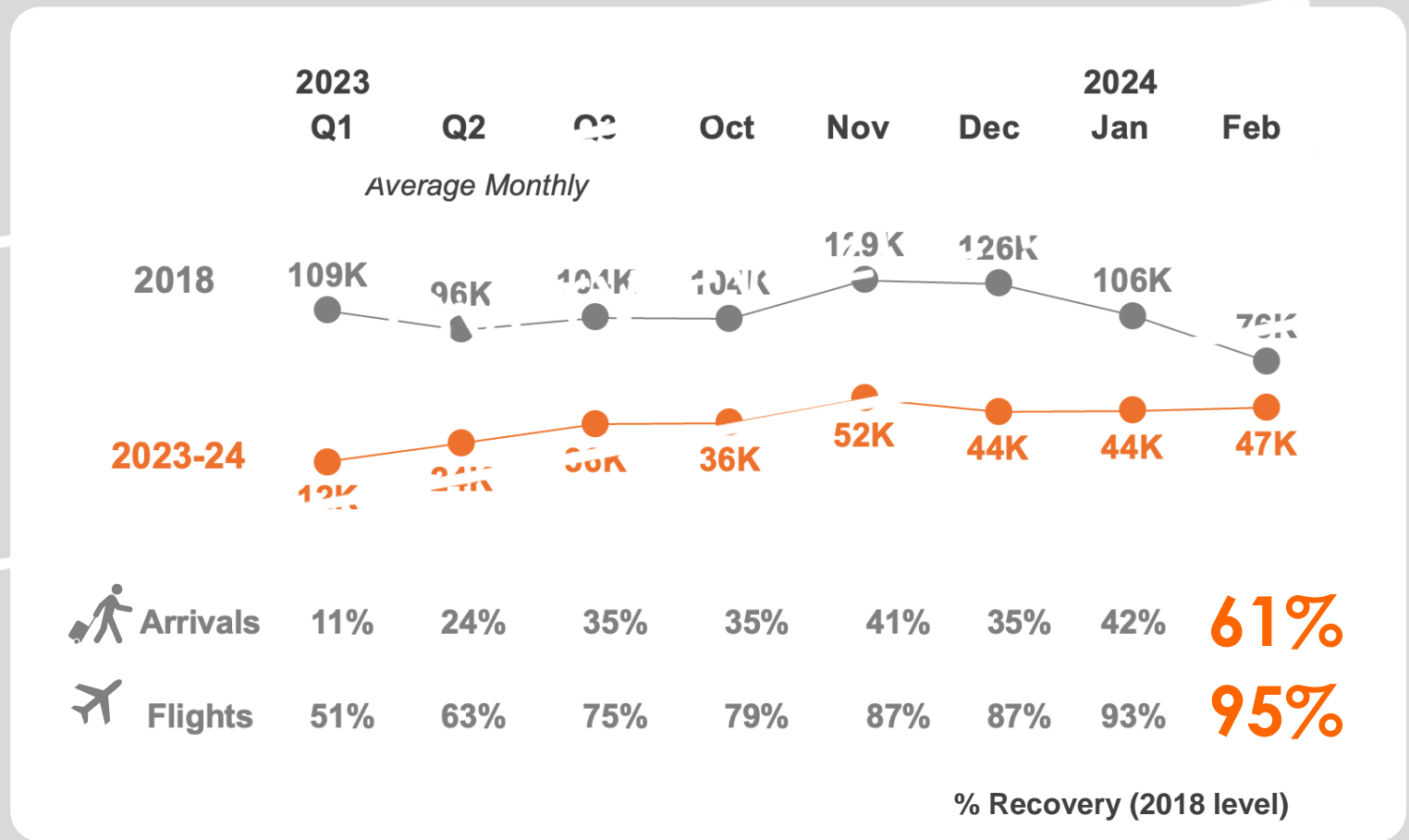
5 key consumer trends arising after the pandemic are identified, which are crucial for us to plan and lay out our strategy for the upcoming year



# MARKET PERFORMANCE

## 2023 ARRIVALS

**JP 346K**  
 (27% recovery),  
 For Hong Kong



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

# MARKET PERFORMANCE

## 2023 OVERNIGHT ARRIVALS

**JP 238K**

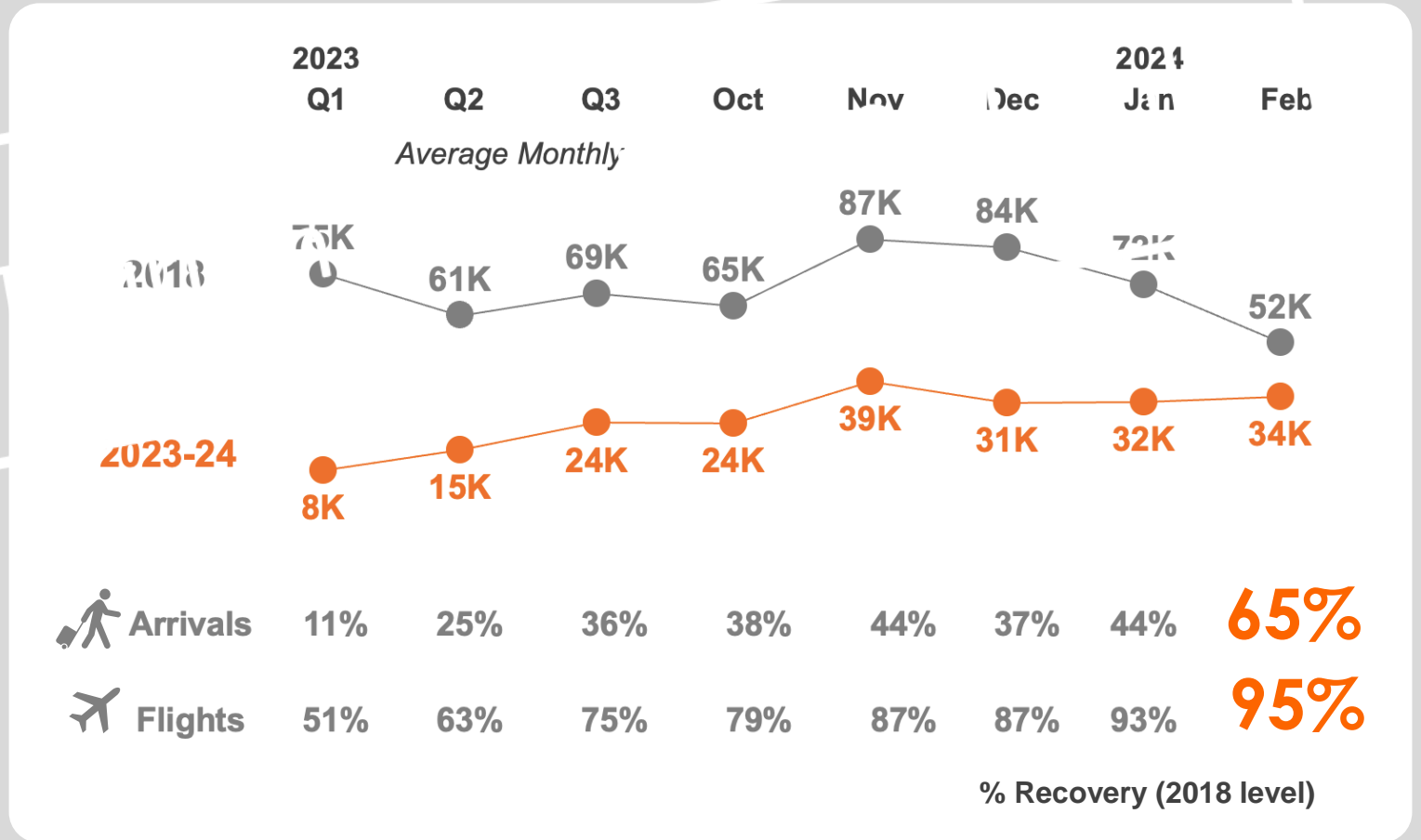
(28% recovery)

LENGTH OF STAY

23 H2

**2.6** nights

(2018 LOS at 2.2 nights)



Source: Immigration Department, Cirium

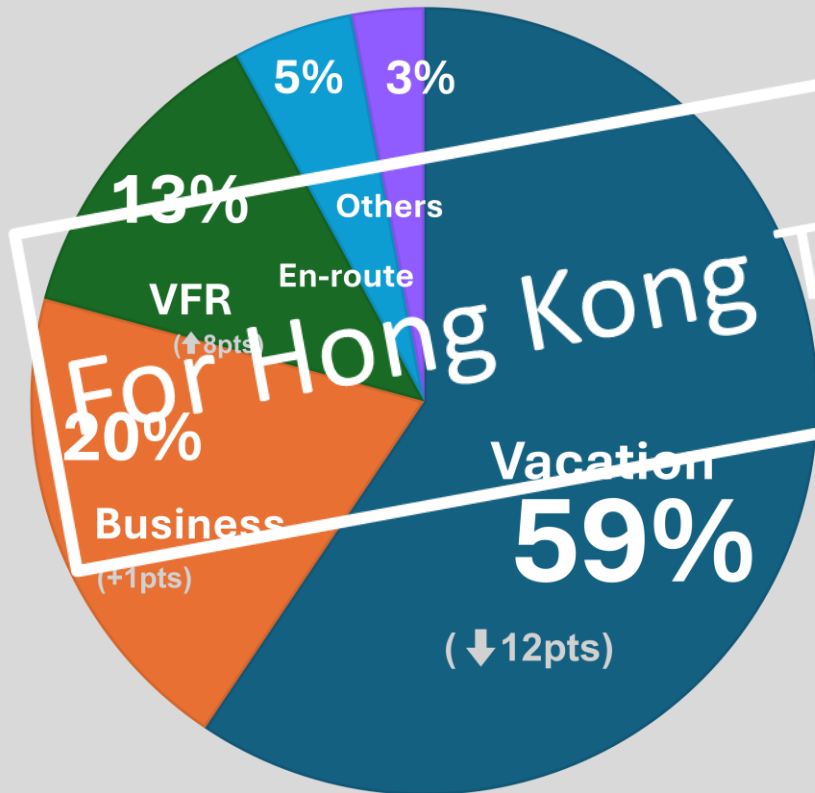
Note: Provisional figures for Feb '24 based on arrivals by Nationality

# VISITOR PROFILE

(OVERNIGHT - 2023 H2 VS 2018 FY)



## Purpose of Visit



## Party Size

**1.8 pax**

(↓ 2.2 pax)

► Solo Traveler 53% (↑21pts)

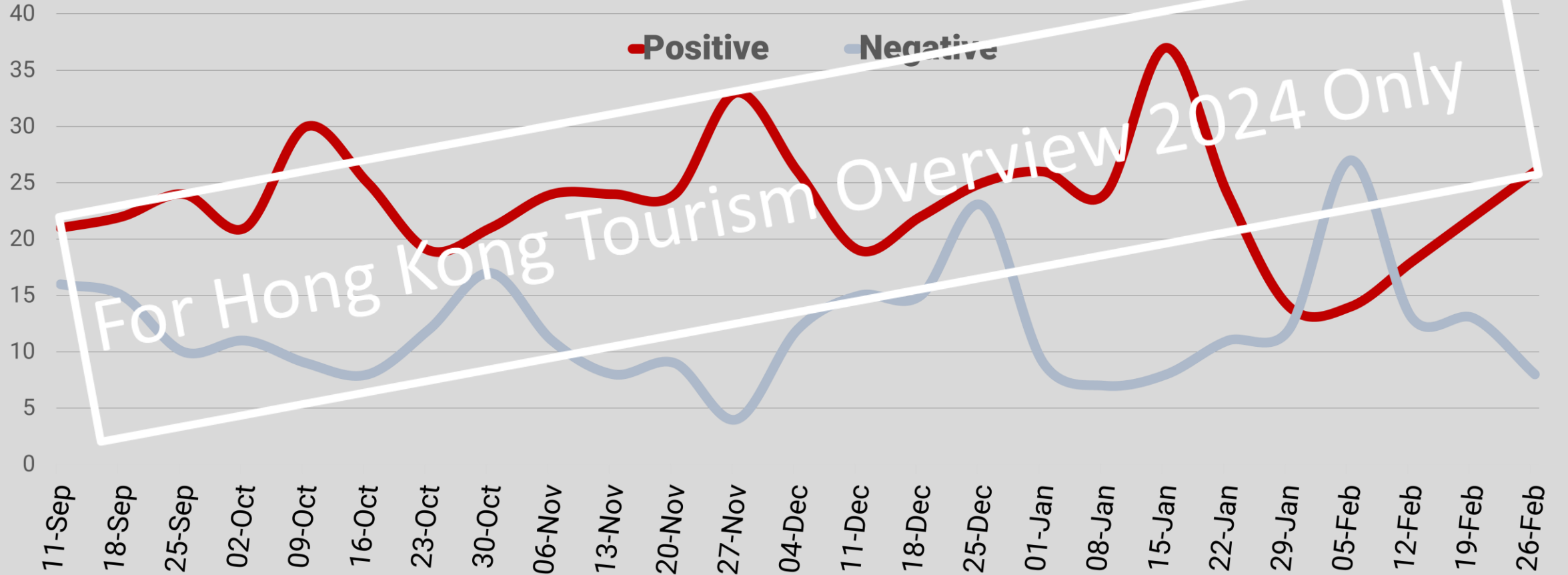
## Per-capita Spending (Overnight)

**HK\$5,300** (↑24%)



# SENTIMENTS TOWARDS HONG KONG

Weekly



# MARKET CHALLENGES



## Perception of Hong Kong

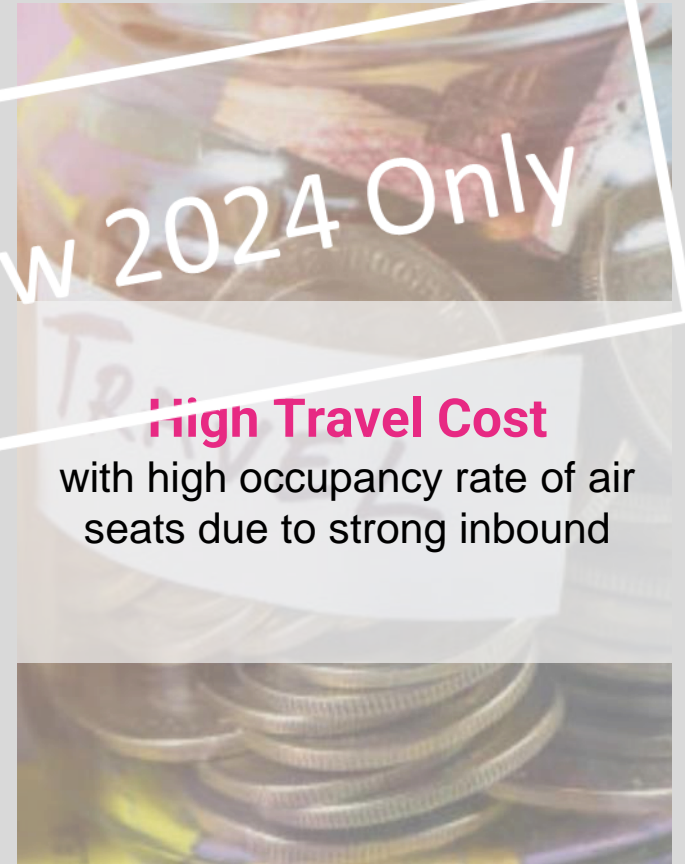
Gap between image and reality



## Depreciation of Yen

against HKD

36%



## High Travel Cost

with high occupancy rate of air seats due to strong inbound

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# 5 STRATEGIC FOCI

01

Showcase Hong Kong's vibrant image through media exposure

03

Co-op with key trade partners to enhance conversion

05

Enhance engagement with key trade partners

02

Appeal to the Millennial segment

04

Seek opportunities to generate incremental business

For Hong Kong Tourism



**Confidence Building**

+

**Conversion**



# 01 SHOWCASE HONG KONG'S VIBRANT IMAGE THROUGH MEDIA EXPOSURE

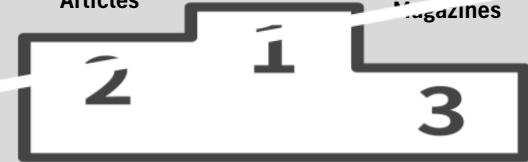
**Gen Z**  
(20 – 27 years old)



**Millennials**  
(28 – 43 years old)



**Middle Age and Over**  
(44 years old +)



Generate continuous TV exposure



Work with influencers for Instagram and YouTube content creation



Complement with outdoor advertising to reach wider audience

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# 02 APPEAL TO THE MILLENNIAL SEGMENT

|                     | Middle Age and Over<br>(44 years old +)  | Millennials<br>(28 – 43 years old) |
|---------------------|--|------------------------------------|
| Born When           | Before the handover                      | After the handover                 |
| Travel to Hong Kong | Many repeaters                           | First timers                       |
| Social Media Posts  | Comparison before/<br>after NSL (biased) | <b>No bias and fresh angle</b>     |



Run consumer engaging social media campaign



Work with influencers who have many millennial fans

# 03 CO-OP WITH KEY TRADE PARTNERS TO ENHANCE CONVERSION

## Legacy Travel Agencies

- Mass volume
- Strong consumer trust

## Emerging OTAs

- Flexible tour products
- Quick response to consumer needs



# 04 SEEK OPPORTUNITIES TO GENERATE INCREMENTAL BUSINESS

## Affluent Travellers

Promote Hong Kong's luxurious offerings and high-end facilities



## Special Interest Tours

Leverage Hong Kong's year-round events and happenings, develop tailored tour products for groups with special interests



## Solo Travellers

Promote with the guidebook for solo travellers “ひとりっぶ” through their consumer event



# 05 ENHANCE ENGAGEMENT WITH KEY TRADE PARTNERS

2024 JATA Tourism Expo Japan

Tokyo Big Sight  
26 – 29 September

Mega Fam  
December (TBC)

Seminar Series

- Tokyo, Nagoya, Osaka, Fukuoka
- Individual seminars for major travel agencies





# KEY TRADE PARTNERS

## Airlines



## Package Tour

### Wholesaler



## FIT

### OTA



### Local Tour



## Group Tour

### M & I / School





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**THANK YOU**

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