



INDIA AND MIDDLE EAST

Tourism Overview 2024 Only

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SOUTH ASIA AND MIDDLE EAST

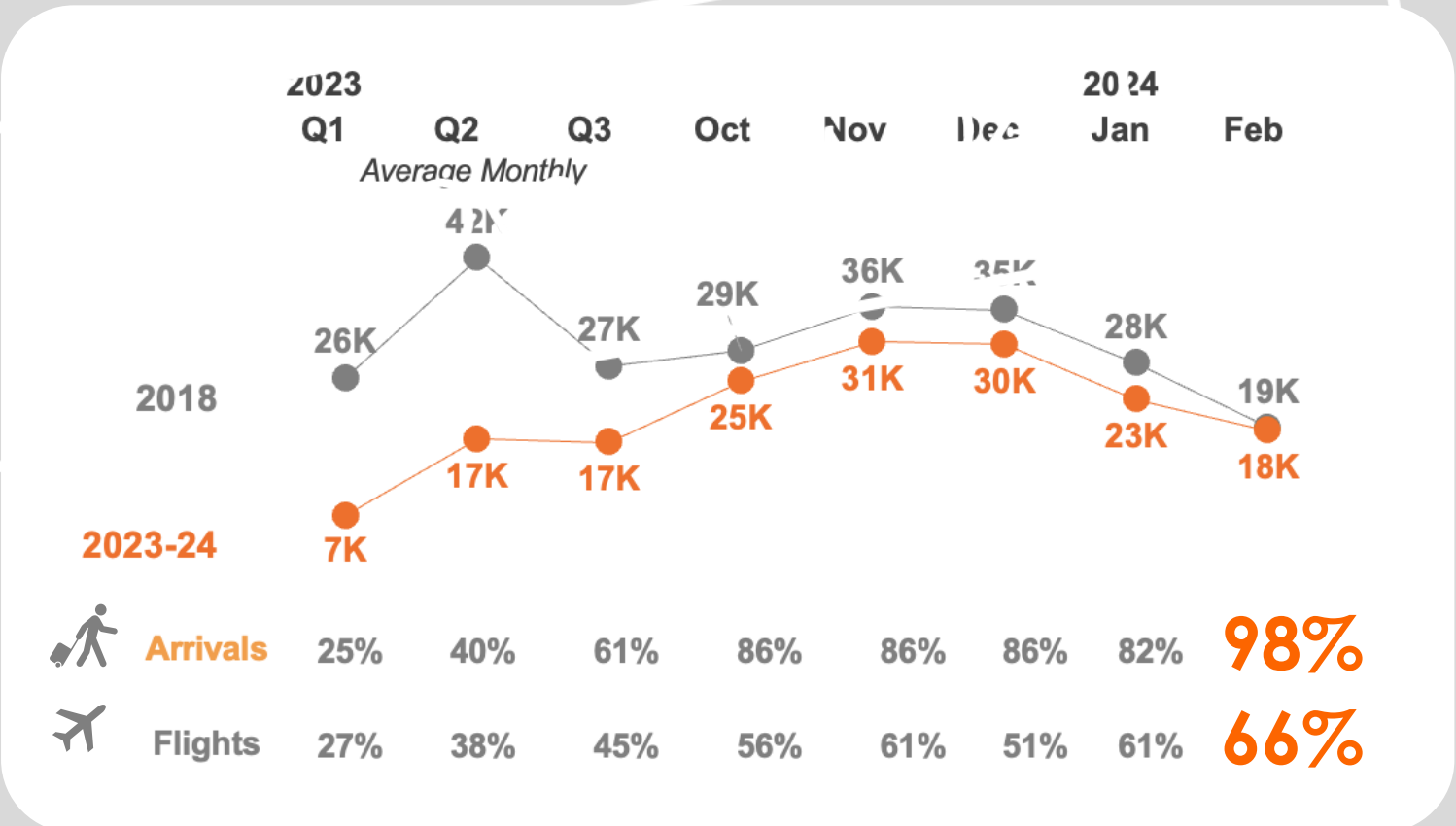
For Hong Kong Tourism

MARKET PERFORMANCE

**2023
ARRIVALS**

INDIA 208K
(54% recovery)

For Hong Kong



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

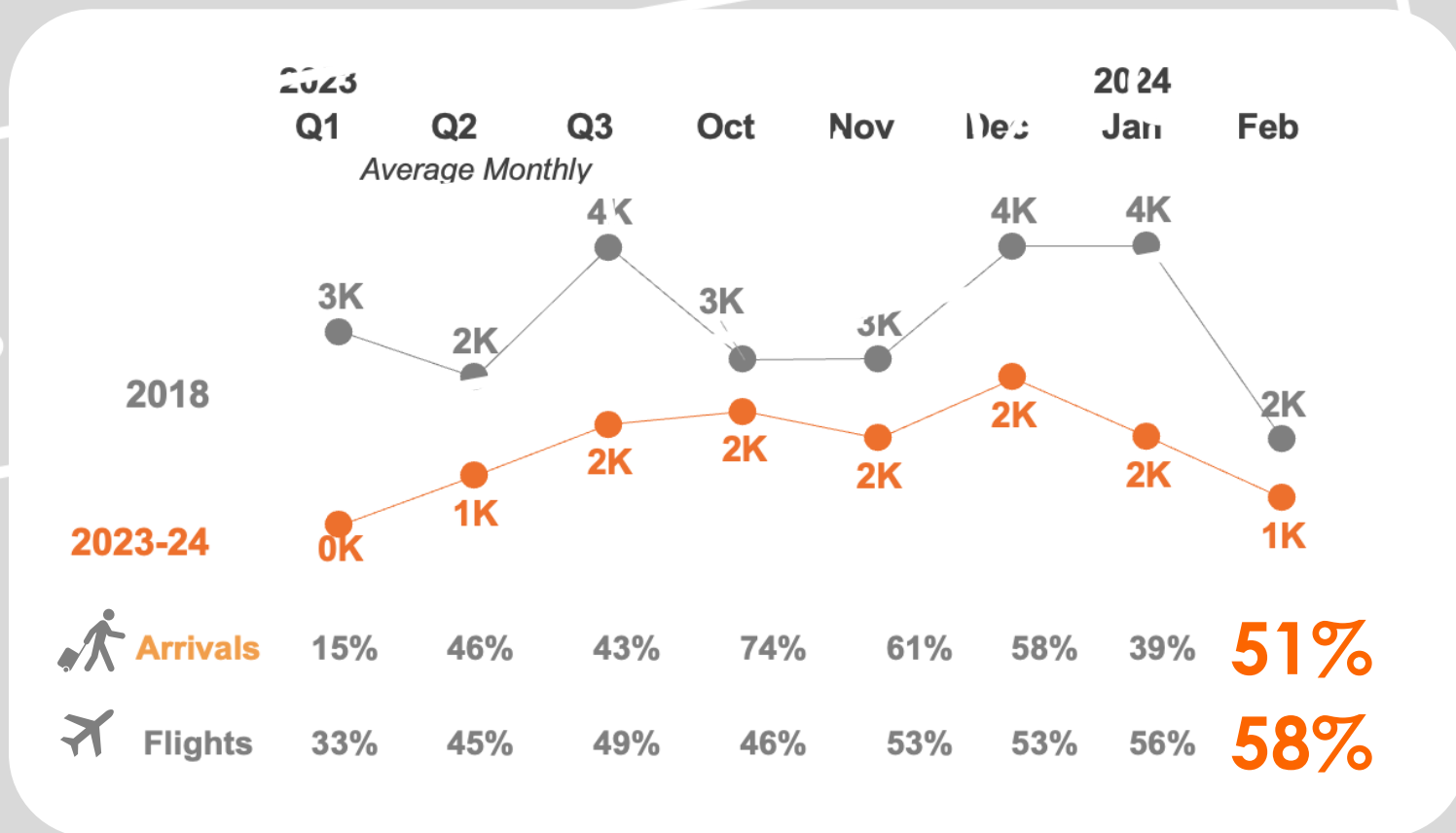
MARKET PERFORMANCE

2023 ARRIVALS

GCC 16K

(42% recovery)

For Hong Kong



Source: Immigration Department, Cirium

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

MARKET PERFORMANCE

PER-CAPITA SPENDING

\$8.3K

VS. 2018 \$6.0K

Overnight: 2023 H2 vs FY18

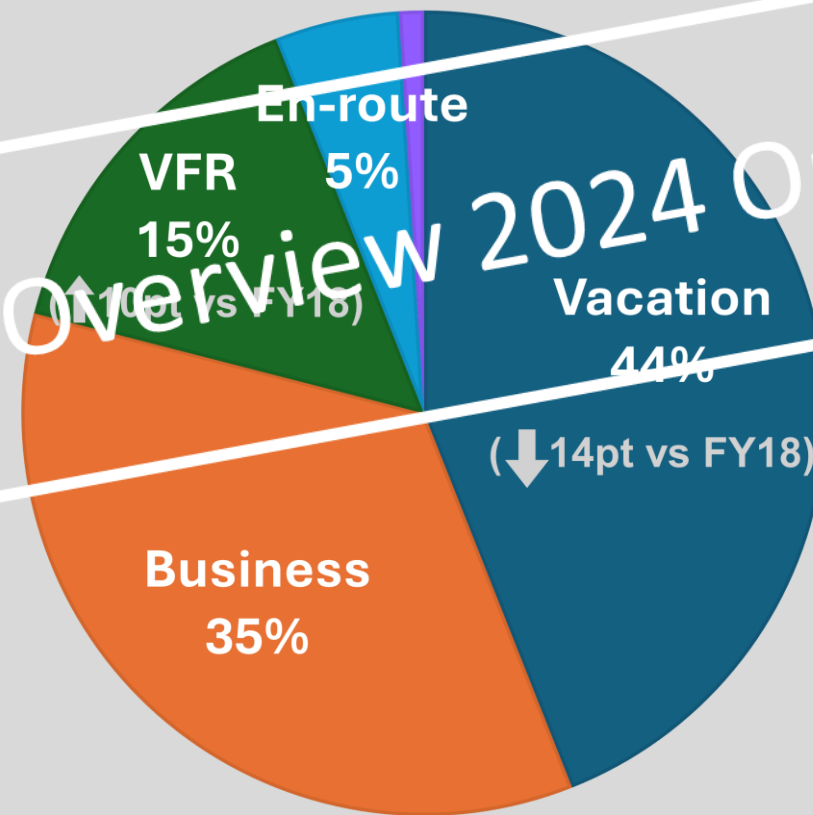
LENGTH OF STAY

23 H2 **4.6** nights

(2018 LOS at 3.8 nights)

Overnight: 2023 H2 vs FY18

PURPOSE OF VISIT



Overnight: 2023 H2 vs FY18

MARKET PERFORMANCE


PER-CAPITA SPENDING

\$11.3K **+34%**
(Per Day Spending)

VS. 2018 \$8.8K

Overnight: 2023 H2 vs FY18

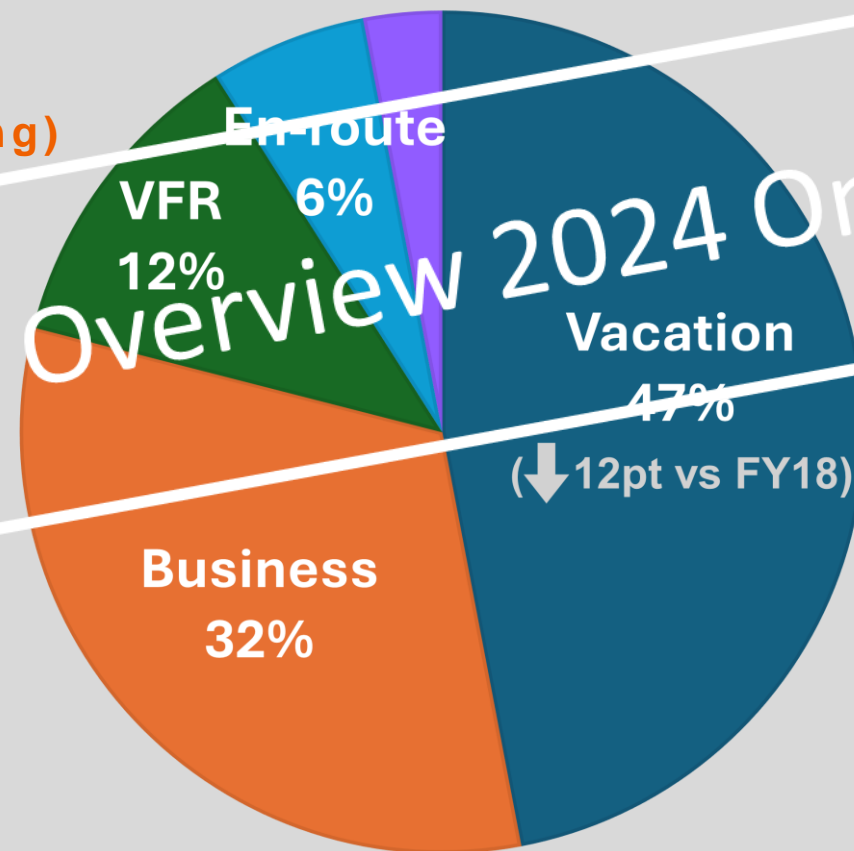
LENGTH OF STAY

23 H2 4.1  **nights**

(2018 LOS at 4.3 nights)

Overnight: 2023 H2 vs FY18

PURPOSE OF VISIT



Overnight: 2023 H2 vs FY18

AIR CAPACITY

Seat Capacity Recovery Q1 2024 vs 2018

INDIA
64%

GCC
56%

Delhi
106%

Mumbai
47%

Bengaluru
57%

Chennai
31%

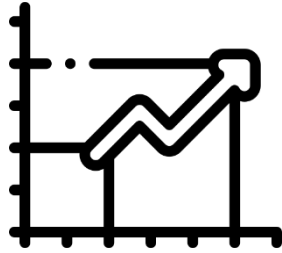
Qatar
104%

UAE
62%

Seat Capacity recovery – Q1 2024 vs. Q1 2018

0% Recovery for Kolkata / Hyderabad in India and Saudi Arabia in GCC

MARKET OUTLOOK: INDIA



6.8%

GDP Growth

Fastest growing major
economy in the world



100M

Affluent Class

I.e. earnings of more than
\$10,000 to be reached over
next 3 years



27M

Outbound travellers

In 2023, signalling revival of
tourism and positive
consumer spending

Key Takeaway: More Indians are turning affluent with increased discretionary income – and willing to spend on travel

CONSUMER TREND

INDIA

- ▶ Number of Indians travelling abroad to treble by 2025
- ▶ Spreading of demand to Tier 2 and Tier 3 cities – consumption no longer centered in metros
- ▶ Largest cohort of Millennials and Gen Z audiences globally
- ▶ Exposure to exotic Bollywood shoot locales and international media creating desire for more curated, experiential travel



5 STRATEGIC FOCI

INDIA

01

Key Message

Plan repeat visits to HK to savour a range of Events, Outdoors, Arts and GBA



Core TG

Affluent Millennials and Gen Zs

03

Key Channels

Social media, Bollywood Celebs, CTAs and local brands with strong following



High Visibility

High impact campaign to raise destination profile

04



Additional Opportunity

Stimulate and sustain MICE demand and growth

05



02



For Hong Kong Tourism Overview 2024

MARKETING PROGRAMMES

INDIA

HERO BRAND CAMPAIGN

BOLLYWOOD-LED BRAND FILM



Bollywood star creates a culturally resonant brand film + shorter cuts which can be amplified by social media/ PR

OOH



Instagrammable Hong Kong themed installations at major hubs like Tier 1 city airports and malls

SUSTENANCE

REDISCOVER HONG KONG CAMPAIGN



Create repeat reasons to visit with quarter-wise themes anchored around Mega Events and GBA, amplified through social media, media buys, PR and OTA partnerships selling themed packages

CONVERSION PROGRAMMES

INDIA

OTA SALE SPONSORSHIP



Association with major travel sales of leading OTAs like Nation on Vacation by Cleartrip or Summer Travel Sale by Make My Trip

CO-BRANDED PARTNERSHIP



Work with an airline brand to co-create content and packages, including FAM trips and video productions

B2B PROGRAMMES

INDIA

01

HKTB India Travel Mission

Covering four Indian Cities (Delhi, Mumbai, Chennai, Ahmedabad) in **August 2024**



Incentive Planner Workshops

Trade launch of MEHK's New Incentive Playbook in Delhi & Mumbai in **Q2 2024**



03

Contract Hong Kong

On the sidelines of HKTB's FAM trips for Product Development Managers & Business Owners



04

B2B Trade Show

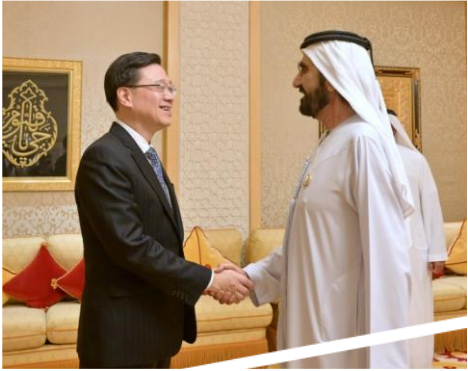
HKTB's Pavilion at SATTE (19-21 February 25) to meet pan-India trade buyers



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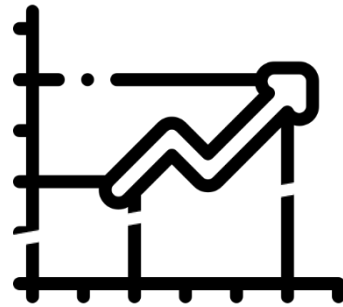
02

MARKET OUTLOOK: GCC



Strong Bi-lateral ties

For trade and investment being established between Hong Kong and GCC countries



4.9%

Non-oil GDP growth

Diversification of economic activities securing growth stability



New Travel Segments

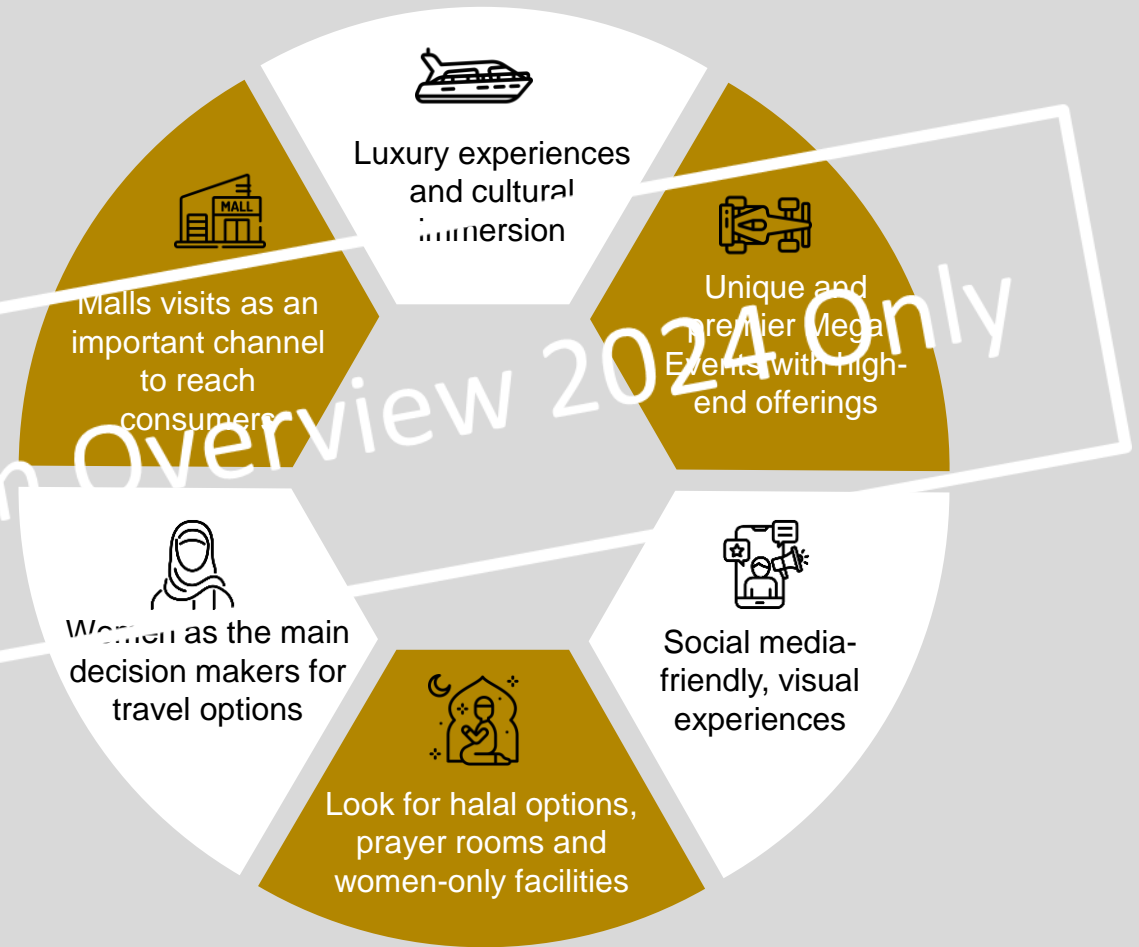
With KSA opening up and increased freedom of travel to women and families

Key Takeaway: The highly affluent GCC nationals are looking to travel abroad, and Hong Kong, with growing economic ties is well poised to attract them

CONSUMER TREND

GCC

- ▶ Growing interest of GCC nationals to travel to non-MENA and European destinations
- ▶ ~90% social media penetration
- ▶ New travel cohorts from KSA and more conservative GCC geographies



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5 STRATEGIC FOCI

GCC

01

Key Message

HK offers differentiated cultural, luxury and outdoor experiences



Core TG

Affluent Arabic speakers, couples and families

03

Muslim Readiness

Promote Muslim friendliness and work parallelly to expand facilities.



High Visibility

High impact campaign to raise destination profile

04



GBA Gateway

Cross promote HK, GBA and Mainland to attract long haul travelers

05



02



For Hong Kong Tourism Overview 20

MARKETING PROGRAMMES

GCC

HERO BRAND CAMPAIGN

MALL ACTIVATIONS/ OUTDOOR EXPERIENCES



The Discover Hong Kong maze – signature mall activation at Dubai Mall



Harness the food truck trend in Dubai create a HK food led food truck at high footfall areas

SUPPLEMENTARY CAMPAIGN

MUSLIM FRIENDLY HONG KONG



OTA supported video production in HK showcasing myriad options for Muslim travellers, supplemented by PR, social media and media partnerships

CONVERSION PROGRAMMES

GCC

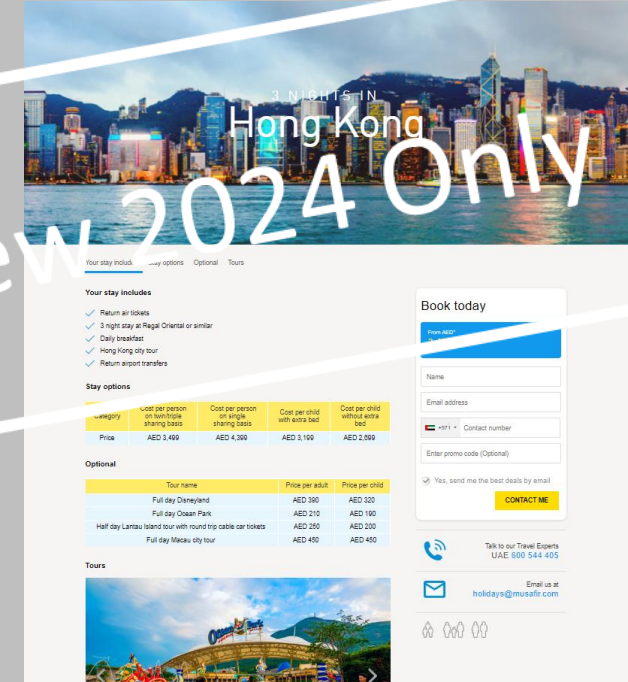
AWARENESS



CONSIDERATION



CONVERSION



For Hong Kong Tourism Overview

Work with content partners like Wego to build awareness about how easy it is to plan a trip to Hong Kong

Create destination excitement through immersive video content

Partner with local travel trade to develop and sell custom packages for Hong Kong and GBA

B2B PROGRAMMES

GCC

PARTICIPATION IN ATM/ MALT/ KBLT



Engage local trade and increase contacts through participation in major trade shows.

EMIRATES CO-BRANDED PARTNERSHIP



Emirates Airline partnership to include Trade, Media and KOL FAMs along with destination promotion and content creation



THANK YOU

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For Hong Kong

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