

AUSTRALIA & NEW ZEALAND

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TOURISM OVERVIEW 2025

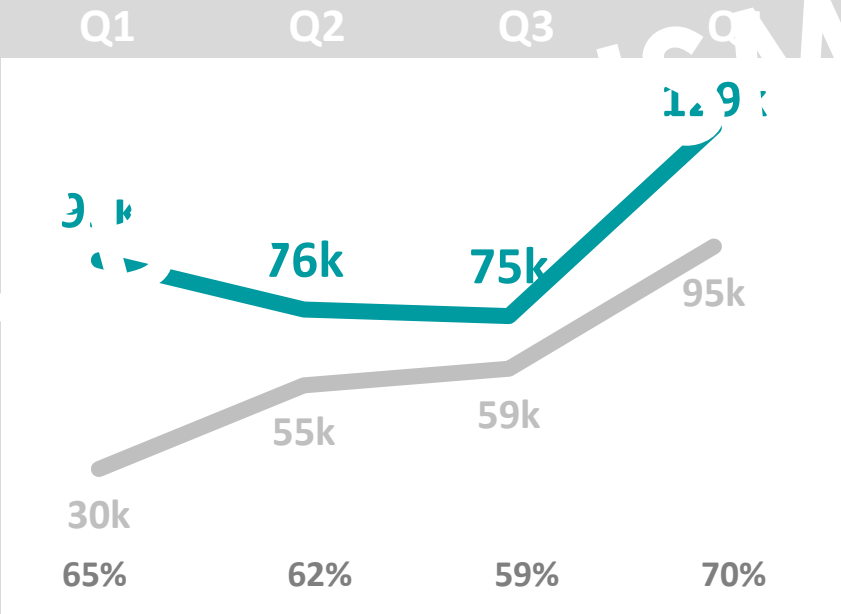
HKTB

MARKET PERFORMANCE

2024 Total Arrivals

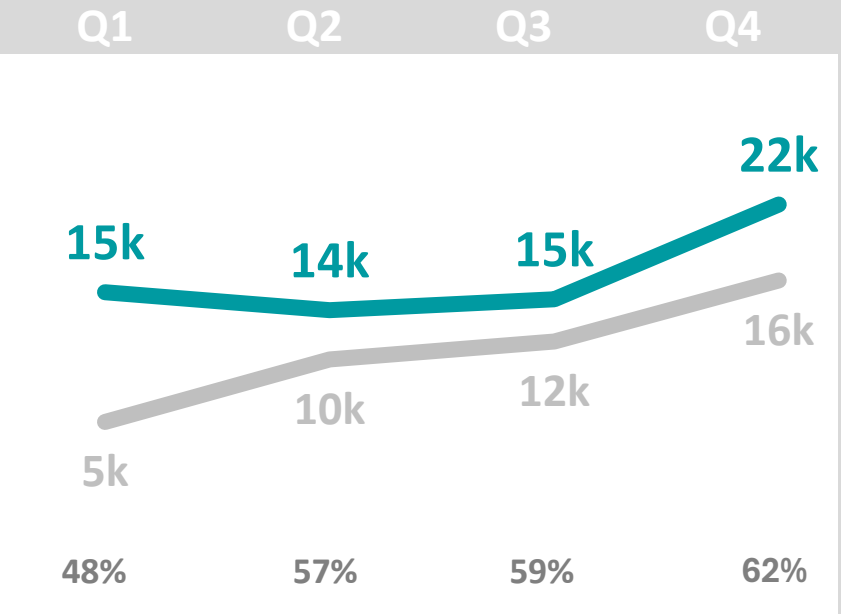
AUSTRALIA

371K **+55%**
vs 2023



NEW ZEALAND

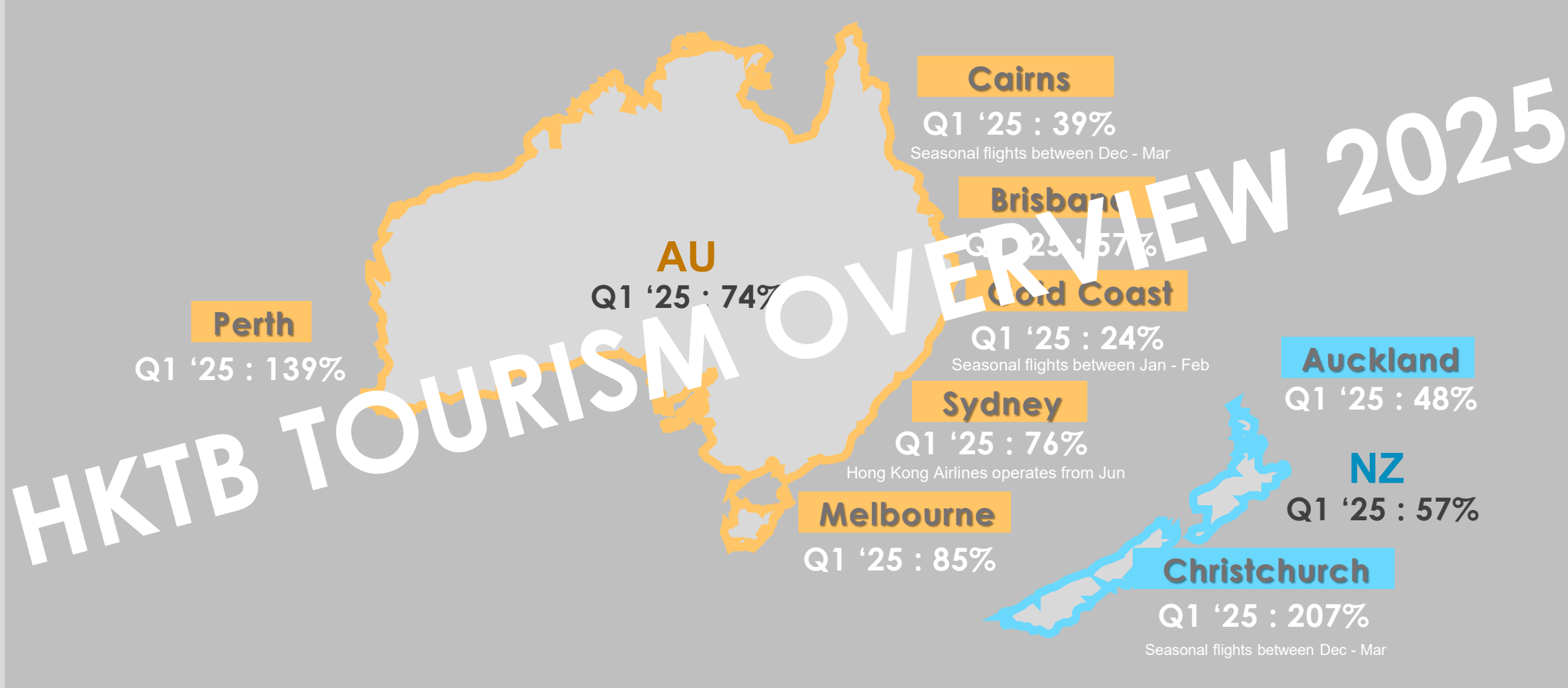
66K **+53%**
vs 2023



Source: Immigration Department, OAG/IATA

AIR CAPACITY

Seat Capacity Recovery Against 2018



Source: OAG/IATA

ARRIVAL BY SEGMENT

Multi-Destination Travellers & Repeaters Remain the Majority
Increase of Solo Travellers & Family Segment

 **MULTI-
DESTINATION**

AU

77%

NZ

85%



REPEATERS

AU

76%

NZ

70%



SOLO

AU

51%

(38% in 2018)

NZ

51%

(41% in 2018)



FAMILY

With kids 0-15

AU

16%

(12% in 2018)

NZ

15%

(12% in 2018)

KEY PERFORMANCE INDICATORS



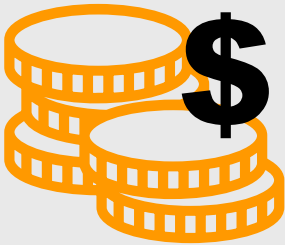
Length of Stay

AU

4.0 nights
+0.2 nights vs 2018

NZ

3.7 nights
+0.3 nights vs 2018



Per Capita
Overnight Spending

AU

\$7.6K (+10%)
2018 PCS: \$6.9K

NZ

\$7.1K (+29%)
2018 PCS: \$5.5K

Spending on...



\$2.4K

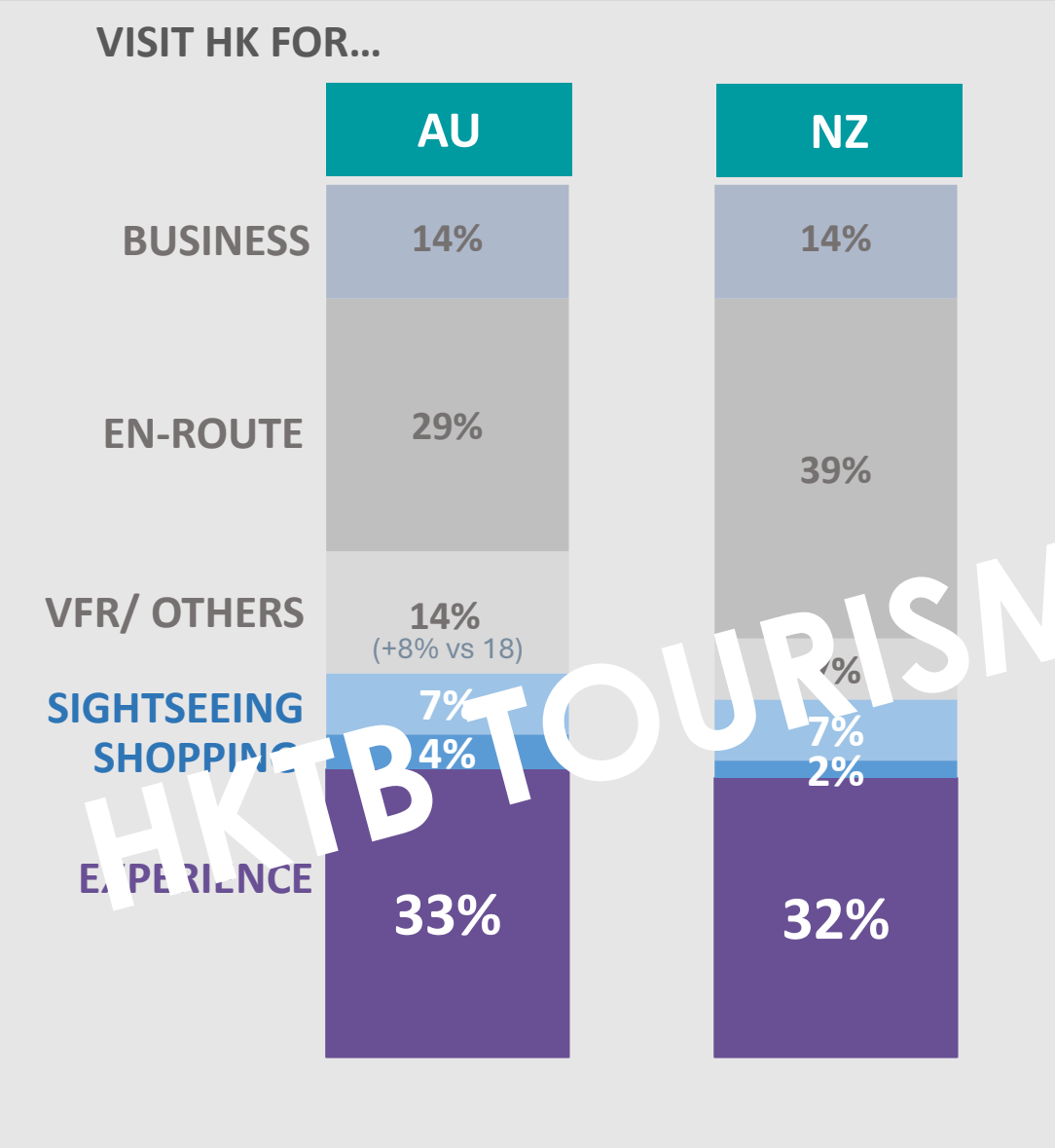
From \$1.2-1.4K




\$1.5K

From \$1.0-1.3K

TRAVEL BEHAVIOUR IN HK




THEME PARKS




~1/2 TRAVEL WITH FAMILY VISIT
THEME PARK DURING THE TRIP

CITY EXPLORATION


AU: 28% NZ: 25%



OPEN-AIR
MARKETS



ARTS & CULTURE



GREEN

Source: HKTB Departing Visitor Survey (DVS)



MULTI-DESTINATION - AUSTRALIA

77% MULTI-DESTINATION

EMERGING TREND

Visa-free to MAINLAND since 2024:

**HK +
MAINLAND**

28%

(vs '18 +4%)

**HK +
GBA CITIES**

19%

(vs '18 +3%)

**HK +
EURO**

12%

**HK +
ASIA MARKETS**

**JAPAN, SEA (TH,
VN, SG), TW**

CONTINUE TO BE THE HUB FOR



MULTI-DESTINATION - NEW ZEALAND

85% MULTI-DESTINATION

EMERGING TREND

Visa-free entry to Mainland since 2024:

**HK +
MAINLAND**

29%

(vs 2018 +12%)

**HK +
GBA CITIES**

19%

(vs 2018 +9%)

CONTINUE TO BE THE HUB FOR

**HK +
EURO**

21%

(vs 2018 +9%)

**HK +
ASIA MARKETS**

**JAPAN, SEA (TH,
VN, SG), TW**

Short-term boosted by better air supply to Guangzhou



SEAT CAPACITY
(24 vs 18)

NZ <> CAN : ~80%
NZ <> HKG : ~55%



AVG. AIR FARE
(2024)

**~30% more
expensive than
tickets to GZ**

MARKET OUTLOOK

ECONOMIC



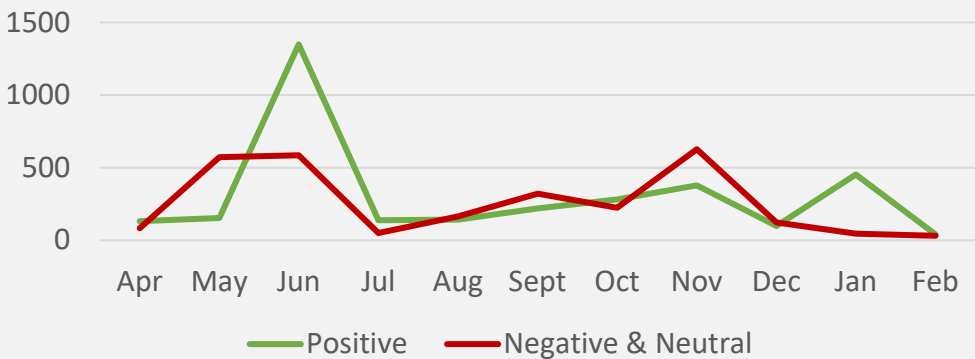
- GDP 0.3%
- Unemployment 4.1%
- Inflation 2.4%
- AUD 4.92 to HKD

MEDIA

Positive Hong Kong Coverage Growth Y/Y

+218%

2024/25 Coverage Comparison



MARKET OUTLOOK

TRAVEL IS A MUST – 43% will travel more in 2025

- Outbound recovery now at 103% vs 2019
- Asia Mania continues JP +74% | VN +60% | TH +50% | IN +41% | ID +20%
- Inbound travel to Australia still recovering reaching 87% vs 2019
- Cruise sector is up 206% vs 2019
- Peak time to travel is Jul-Sep
- Average time away 17.7 days | Visit 3.1 countries
- Corporate and SME travel growing
- Airfares declining resulting in lower TTV for agents
- Cost of living starting to impact some travel



CONSUMER TREND

Passion-Led Travel

Australians favour immersive travel driven by personal passions like sports, food and art. Travellers seek experiences that resonate with their interest, not just relaxation.

Stopover

A rise in stopover travel for Aussies who want a chance to "double dip" or "triple dip" to get bang for their buck and ticking off the bucket list.

AI-driven personalised planning is changing the way we book travel, by optimising itineraries and predicting the best times to visit destinations.



SOCIAL OUTREACH



STRATEGIC FOCUS

01

Amplify

Visibility in special interest target segments and products to convert incremental visitors



03

Maximise

Market penetration through partnership collaborations and initiatives to pursue quality growth.



02 Expand

Capitalise on increased air capacity to fuel travel momentum

HKTB TOURISM OVERVIEW 2025

PROGRAMMES



Tactical Co-ops

Leverage key partners to drive quality conversions through strong brand loyalty and trust



Airline Partnerships

Bespoke campaigns that focus on filling increasing and new air capacity to extend reach and maximise conversion



Stopover & Multi-D

40% of travelers want to break their journey and capitalise on lower airfares for indirect travel - 2 holidays in 1



Trade Engagement

Continue image building "seeing is believing", increase destination awareness and agent education



Media Partnerships

Target the right audience with the right media through multiplatform content, broadcasts and KOLs

2025

PROGRAMMES - Tactical Co-op

Drive quality conversions via partners with strong brand loyalty and trust

Key Target Segments

- **Cruise:** FlyCruise co-ops and new opportunities
- **Multi-gen:** Products and experiences that appeal to family
- **Luxury:** Campaigns with luxury offers and value-adds

Special Interest

Capitalise on trend of travelling for concerts and specialised events:

- Sports
- Culinary
- Seasonality

New Target Segments

Bespoke products, tours and offers that appeal to these travellers

- Young Adventurer
- Solo Travel
- Accessible Tourism

HELLO Hong Kong
COLOURS OF HONG KONG
PERFECTLY PACKAGED CRUISE AND TOUR

18 NIGHT FLY, CRUISE, RIDE, WITH UP TO \$100 BONUS VALUE

Includes: 18-night fly to Singapore, returning from Hong Kong; 18-night luxury hotel stay to explore Singapore with breakfast daily; 18-night luxury voyage from Singapore to Hong Kong onboard; 18-night overnight stays onboard in Singapore, Bangkok, Saigon and Hong Kong.

EXCLUSIVE OFFER FROM \$7990

MyCruises.com.au | 1300 829 790

Hong Kong Sevens
6 Night Rugby, Racing & Macau Package

FROM \$3,495 PER PERSON twin share

AWAKEN YOUR SENSES IN HONG KONG
ON SALE NOW!

HONG KONG IS CALLING YOUR NAME!
From the glittering skyline and neon lights to the mouthwatering dim sum and bustling street markets, there's always something exciting around every corner. Whether you're hiking up Victoria Peak, hopping between chic cafes, or shopping in colourful street markets, Hong Kong effortlessly blends modernity with tradition in a way that'll leave you in awe. Plus, who can resist the charm of a city that's always awake and always on the go?

HARBOUR PLAZA NORTH POINT
FLIGHTS, 4 NIGHTS, BREAKFAST & SIGHTSEEING FROM \$2185

PARK HOTEL HONG KONG
FLIGHTS, 4 NIGHTS, BREAKFAST & SIGHTSEEING FROM \$2455

ASIA SALE
HONG KONG HOLIDAY SALE

LUXE HONG KONG ESCAPE
\$459 BONUS VALUE
\$945

3-night stay at Harbour Grand Hong Kong
3 Adults 3 Adults 3 Adults

WHY YOU'LL LOVE IT
✓ Bonus room upgrade to Deluxe Harbour View
✓ Symphony of Lights traditional junk boat cruise
✓ General stay in walking distance to Victoria Park

ULTIMATE HONG KONG EXPLORER
BONUS 1 FREE NIGHT
\$1399

4-night stay at Kowloon Harbourfront Hotel
4 Adults 4 Adults 4 Adults

WHY YOU'LL LOVE IT
✓ Luxurious 2-bedroom suite with harbour views
✓ Hong Kong Explorer pass including Disneyland & more!
✓ Make a splash in the hotel's tropical-inspired lagoon pool

PROGRAMMES

Airline Partnerships

- **Launch** new services to SYD (HKA)
- **Implement** year-round consumer and digital activities
- **Utilise** strong owned assets
- **Targeted** media and trade FAM program
- **Integrate** tactical co-ops to drive conversions
- **Promote** key themes and events

Discover Hong Kong and save \$75

Enjoy \$75 off return flights to Hong Kong, departing from anywhere in Australia (via Sydney or Melbourne direct), when you use the code TAKEOFF75. Hurry, offer ends 11.59pm (AEST) 30 September 2024.*

DISCOVER MORE AND BOOK NOW

REVIEW 2025

Hong Kong
economy from
\$698
one way

Hong Kong

From Auckland, Wellington & Christchurch.
Card payment fee of \$22.60pp applies.

Air New Zealand
Sponsored · 48

We've got your ticket to remarkable sights with Hong Kong on sale. From sailing on an iconic junk boat, to boutique shopping... see more

Hong Kong
on sale

airnewzealand.co.nz
Ends midnight 19 August 2024

Book now

Like · Comment · Share

Hello Hong Kong!

Gold Coast ✈️ Hong Kong
From 17 January to 15 February 2025

Book now



HONGKONG AIRLINES
香港航空

HONG KONG
TOURISM BOARD

PROGRAMMES -Stopover Multi-D

Maximise conversion by ensuring Hong Kong is included as part of any trip

Airline

- CX new integrated search panel on homepage promoting Hong Kong Stopover
- Indirect carriers for Multi-Destination (MLC)
- Partner with NTOs (Asia and UK/EUR)

Trade

- OTA/Wholesale package offers
- GBA leverage Visa-free to China
- Push Fly/Cruise
- Value added multi-Destination experiences
- Themed stop-over packages

Consumer/PR

- Media FAMs
- Content partnerships
- Social media
- Itinerary examples

The screenshot shows the Cathay Pacific website with a banner for 'Stopover in Hong Kong'. Below the banner, there is a section titled 'Add a Hong Kong stopover to your journey' with a subtext: 'Include "Hong Kong" in your itinerary. If you plan to stay or transit in Hong Kong for less than 24 hours, exclude it from your search.' Below this, there is a flight search form with a 'Flight 1' tab. The form has a dropdown menu for 'Where would you like to go?' with 'Sydney (SYD)' selected. There is also a 'Going to' field and a 'Select dates' button.

The advertisement features a red banner at the top that reads 'Enjoy our Hong Kong Glimpses 2 night stopover for FREE! when booked in conjunction with selected Wendy Wu Tours group tours*'. Below the banner, there is a section for the 'HONG KONG TOURISM BOARD' with a night view of the Hong Kong skyline. To the right, there is a section for 'CELEBRATING our 2025-26 China Brochure Launch with Early Bird discounts of up to \$1,000pp - BOOK NOW!' featuring a brochure for 'CHINA'. At the bottom, there is a blue banner that reads 'Offer available when booking any group tour of 12 days or more, flying Cathay Pacific or Air New Zealand'. The Wendy Wu Tours logo and phone number '0800 936 3998' are at the bottom.

Travel Advice

World's best bang-for-buck stopover cities

Want to squeeze as much value as possible out of your holiday? A jam-packed, multi-day stopover could be just the ticket.

THE AUSTRALIAN Financial Review Magazine

Life & Luxury Travel Highflyer

How to nail a Hong Kong stopover

Many find the Middle Eastern stopover cities a tad too futuristic. But Hong Kong still charms. From the February 28 edition of Highflyer magazine.

Travel Advice > Air Travel Tips

Online trick to booking yourself an excellent flight stopover

Make the most of your holiday by squeezing in a cheeky extended stopover. Here's how to DIY (without involving a travel agent).

PROGRAMMES -Trade Engagement

Continue image building 'seeing is believing' and agent education

Be Present

- MICE/Cruise/Trade conferences
- Webinars and F2F training
- Events & meetings for business leaders
- Hotelier & retail symposiums
- Travel group conferences HKG

Focus on the Unique

- Disneyland's 20th anniversary
- Ocean Park's pandas
- Events and festivals

Connect to the Retail Agent

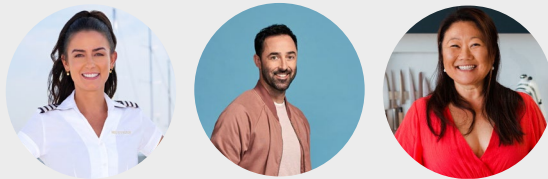
- Mega fam opportunity
- Sales mission
- Sales incentives offers



PROGRAMMES – Media Partnerships

Partner with mass market and special interest media to increase SOV and target untapped market segments

 **TikTok**



Instagram

Always On Creators & Advocates

Continue our Always On creator strategy to produce locally relevant content and highlight what's viral worthy in Hong Kong.

**GOOD FOOD
& WINE SHOW**



**STRAWBERRY
DISNEY JULY**

Brand Partnerships

Leverage brand recognition and loyalty to expand reach and target new and highly engaged niche target segments.

News
good food
DMARGE
InStyle

Content Campaigns

Partner with mass media and special interest publications to increase SOV and promote core themes to relevant audiences.

PROGRAMMES – Broadcast

Target motivated special interest audiences including wine & dine, sports and luxury



Everyday Gourmet

Justine Schofield, one of Australia's favourite home cooks will be joined in Hong Kong by an array of amazing guests, including celebrity chefs and local food specialists.



Sky Racing Dreams



Viewers will go inside Hong Kong's horse-racing scene with exclusive access to renowned trainers, owners and jockeys while highlighting must-do destination experiences along the way.



Luxury Escapes TV

Two Australian celebrities will discover Hong Kong's most luxurious hotels, great places to eat, drink and explore. The best part? Onscreen experiences are bookable on Luxury Escapes.

PROGRAMME PARTNERS

RETAILER	AIRLINES	OTAs	WHOLESALE	E-RETAILER
    	    	      	    	   

ANZ 2024 REVIEW 2025

HKTB TOURISM 60% Early Wrap

THANK YOU

KAREN MACMILLAN

**DIRECTOR, AUSTRALIA,
NEW ZEALAND AND SOUTH PACIFIC**

HKTBT **TOURISM OVERVIEW 2025**