

EUROPE

Anette Wendel-Mentel

Director, Europe

TOURISM OVERVIEW 2025

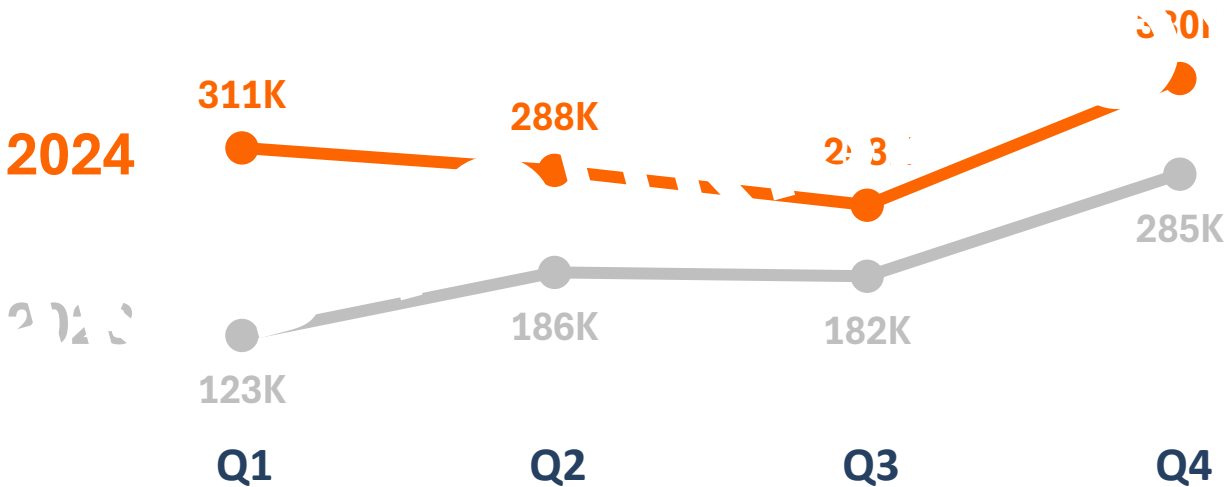
HKTb



MARKET PERFORMANCE

Total EUROPE Arrivals

1.2M
(↑ 59% YoY)



2018 FY = 2.0M

3 key markets

UNITED KINGDOM

294K (↑ 4% YoY)

GERMANY

168K (↑ 52% YoY)

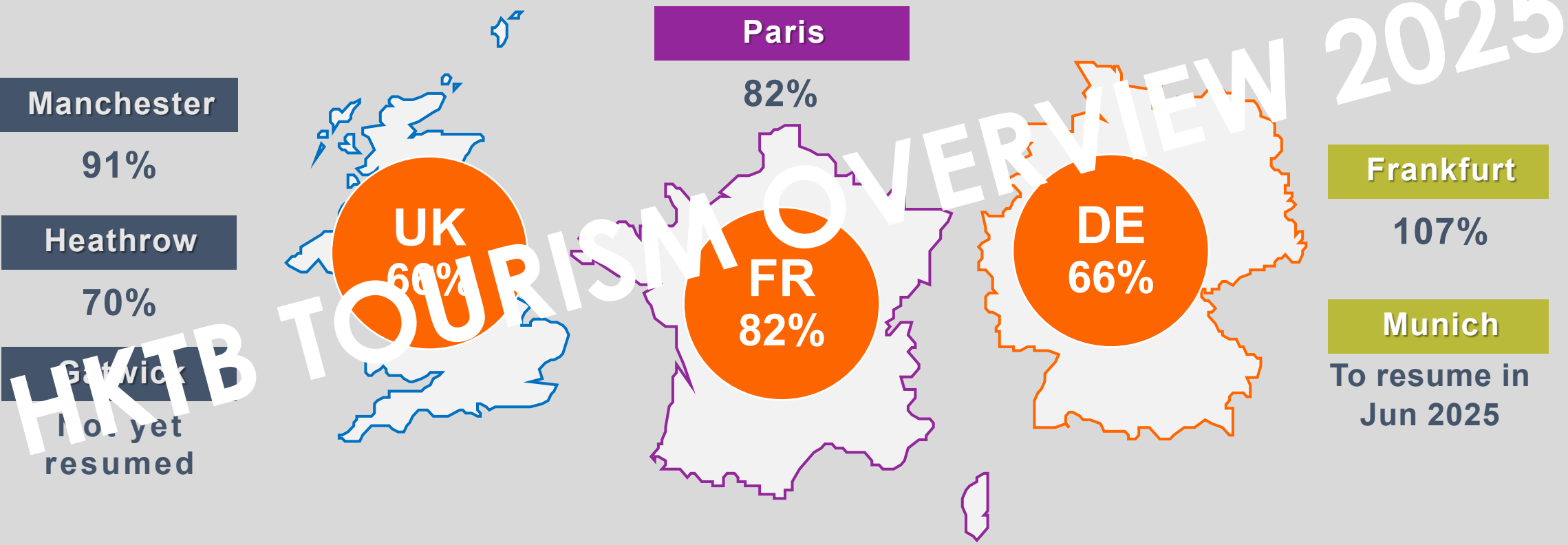
FRANCE

145K (↑ 55% YoY)

Over 600K visitors,
account for ~50% EUROPEAN visitors

AIR CAPACITY RECOVERY

Seat Capacity Recovery
Q1 2025 vs 2018



KEY PERFORMANCE INDICATORS

FY2024

UK

GERMANY

FRANCE

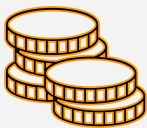


LENGTH OF STAY
Number of nights
vs 2018

4.8
+0.4

3.2
+0.3

4.0
-0.2



PER-CAPITA SPENDING
Overnight visitors
vs 2018

\$7.6K
+12%

\$6.1K
+11%

\$6.9K
+14%



MULTI-DESTINATION

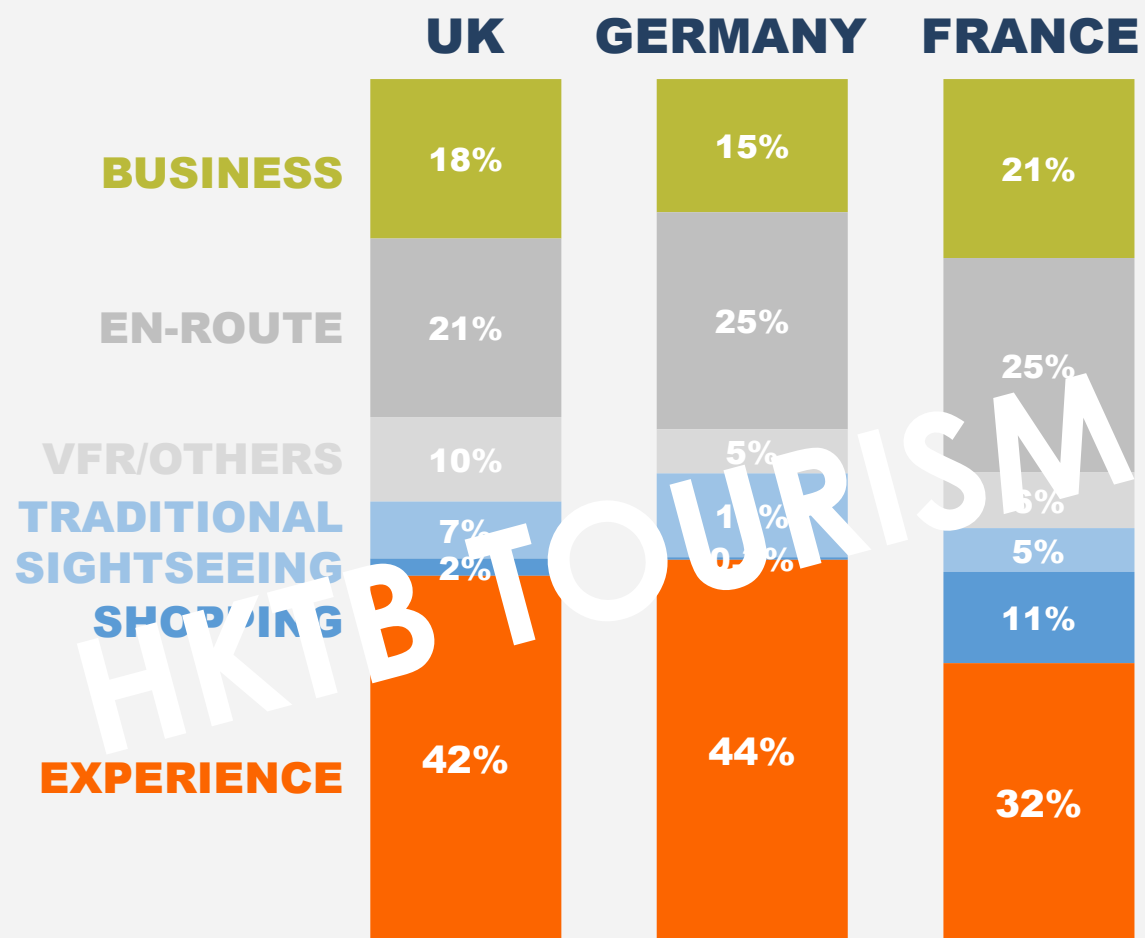
75%

85%

82%

TRAVEL BEHAVIOUR

VISIT HK FOR...



CITY EXPLORATION (PLACE VISITED)



OPEN-AIR MARKETS

Ladies' Market,
Temple Street



ARTS & CULTURE

West Kowloon
Cultural District,
Old Town Central



GREEN

Hiking, Beaches,
Outlying islands



2024 INTERVIEW 2025

HIGHLIGHTS

HKTG TOURISM

HKTb TOURISM OVERVIEW 2025

2024 Highlights

3 STRATEGIC FOCUS

1

Leverage HK's core experiences to elevate HK's image & destination appeal

2

Focus on driving conversion via **mono Hong Kong**, **multi-destination** & **stopover** itineraries

3

Cultivate **partnerships** to grow key markets and expand into high momentum markets

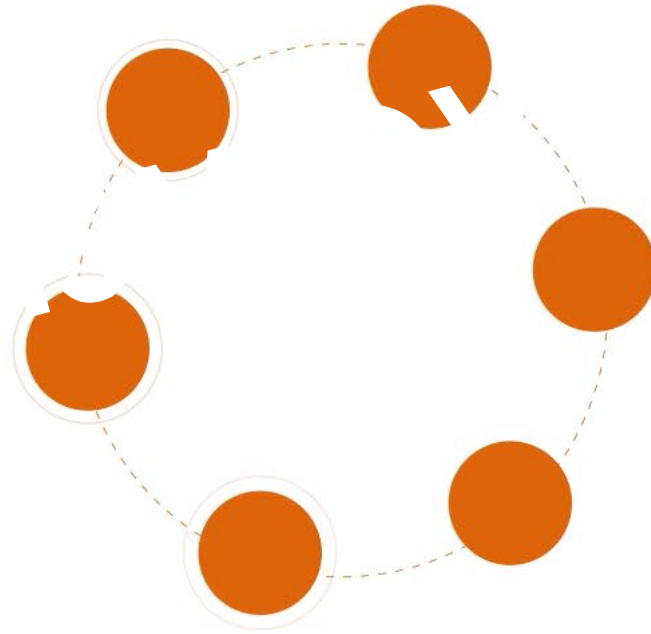
2025

2025/26 OVERVIEW 2025

PROGRAMMES

HKTb TOURISM

ITV JEREMY PANG INTEGRATED CAMPAIGN



Hong Kong Stories

Echappées Belles France5 TV

Multi-Inspirational 1h30 Show

HK unique contrasts
& diversity of experiences

Stories by HK people

Duke Ling pilot, Lion on Boat French Team, Hiking lovers, Petty-person Rating Master, Chef May Chow, Wing Chun Master, Lion Dance school, Happy Valley Jockey...

Impact & Amplification

Primetime > 1 Million viewers
Multiple broadcasts & Replay
Social Media and Digital promotion

Tactical

Echappées Belles Itineraries +
Package with Worldia



HKTb TOURISM OVERVIEW 2025

Year-round Fashion Designer Partnership

Inspiration Trip for CNY HK fashion collection

Media coverage by ICON magazine and TV

CNY Collection Launch Event

Media & Influencers

Digital Amplification

Banner campaign include luxury brands: Conde Nast, Vogue, GQ + Podcast + Social campaign

Tactical

With every CNY fashion piece bought, receive a discount on a HK Trip by tour operator Meier's Weltreisen



HKTB TOURISM OVERVIEW 2025

Culinary & Arts: KOLs' Book Launch – Multi-channel Promotions



Jeremy Pang

TV Celebrity Chef & "School of Wok" Culinary School Founder



Alexandra Unrein

German Street Art expert
based in Hong Kong



Davina Chang

Food KOL/photographer +
Paris-based cha chaan teng's owner

HKTB TOURISM OVERVIEW 2025

FOCUS MARKETS

HKTB TOURISM OVERVIEW 2025

KEY MARKETS:

UK

Germany

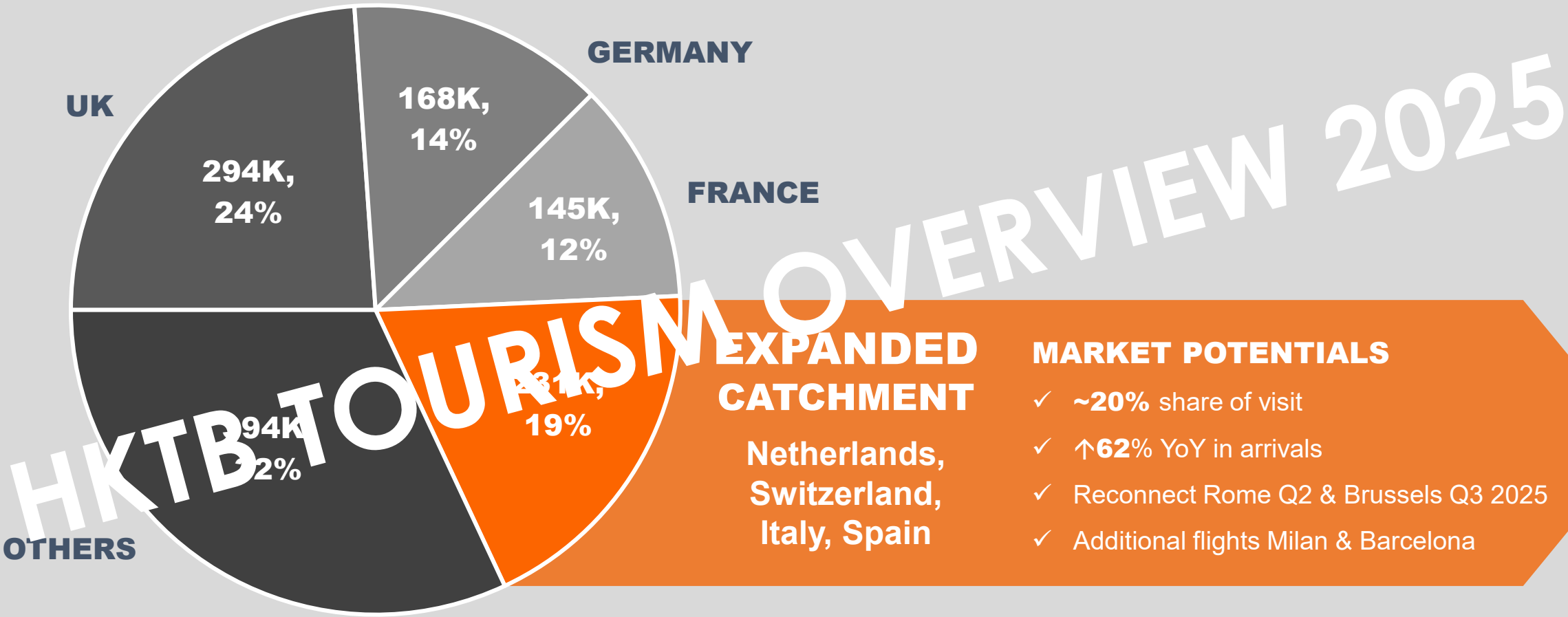
France

HKTb TOURISM OVERVIEW 2025

A stylized map of Europe is shown in dark blue. The United Kingdom, Germany, and France are highlighted in a bright orange color. The text 'HKTb TOURISM OVERVIEW 2025' is written diagonally across the map in a large, white, sans-serif font.

HIGH MOMENTUM MARKETS

Netherlands, Switzerland, Spain & Italy



Total EUROPE Arrivals in 2024

Source: Immigration Department, CX

HIGH MOMENTUM MARKETS

Netherlands, Switzerland, Spain & Italy



TOTAL ARRIVALS

231K

(+62% vs 2023)



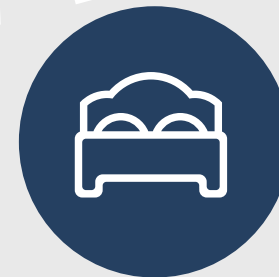
Per-capita spending
Overnight visitors

\$7.5k



Resumption of air
capacity (Q1 2025)

75%



Length of Stay

3.6 nights

HIGH MOMENTUM MARKETS

Netherlands, Switzerland, Spain & Italy

Achieved and ongoing/upcoming efforts to generate growth

Trade Workshops

>380 trained

Trade FAMs

>30 Participants

PR & Social Media

>25 Media FAMs

>12 KOL FAMs

Trade Shows

> 150 key partners met

TTG (Italy) Oct 2023-24 & 2025

FITUR (Spain) Jan2024-25 & 2026

Tactical co-ops

Bertour333/NRV/ITG/Travix/Odigeo (Netherlands)

Suisse/ Asia 365 (Switzerland)

Gattinoni / Alpitour / Glamour (Italy)

Catai / Nuba / Icarion (Spain)



HKTB TOURISM OVERVIEW 2025



HONG KONG

HKTb TOURISM OVERVIEW 2025

ITB Berlin, Germany

THANK YOU

ANETTE WENDEL-MENKE

HKTb TOURISM OVERVIEW 2025
DIRECTOR, EUROPE