



# INDIA & MIDDLE EAST


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# TOURISM OVERVIEW 2025

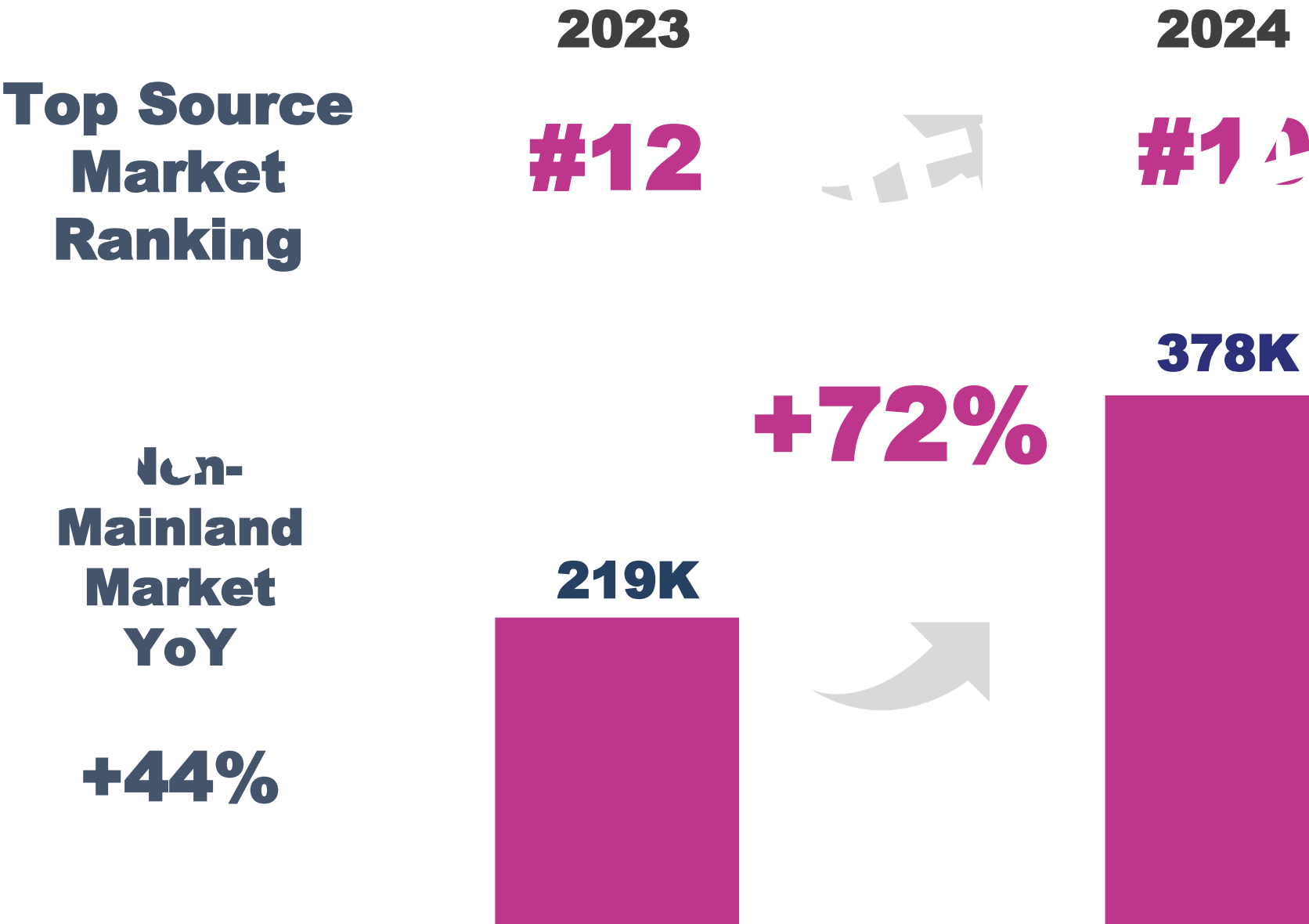
**HKTb**



# MARKET PERFORMANCE INDIA

**Total Arrivals**   
**378K**  
(+72% vs 2023)

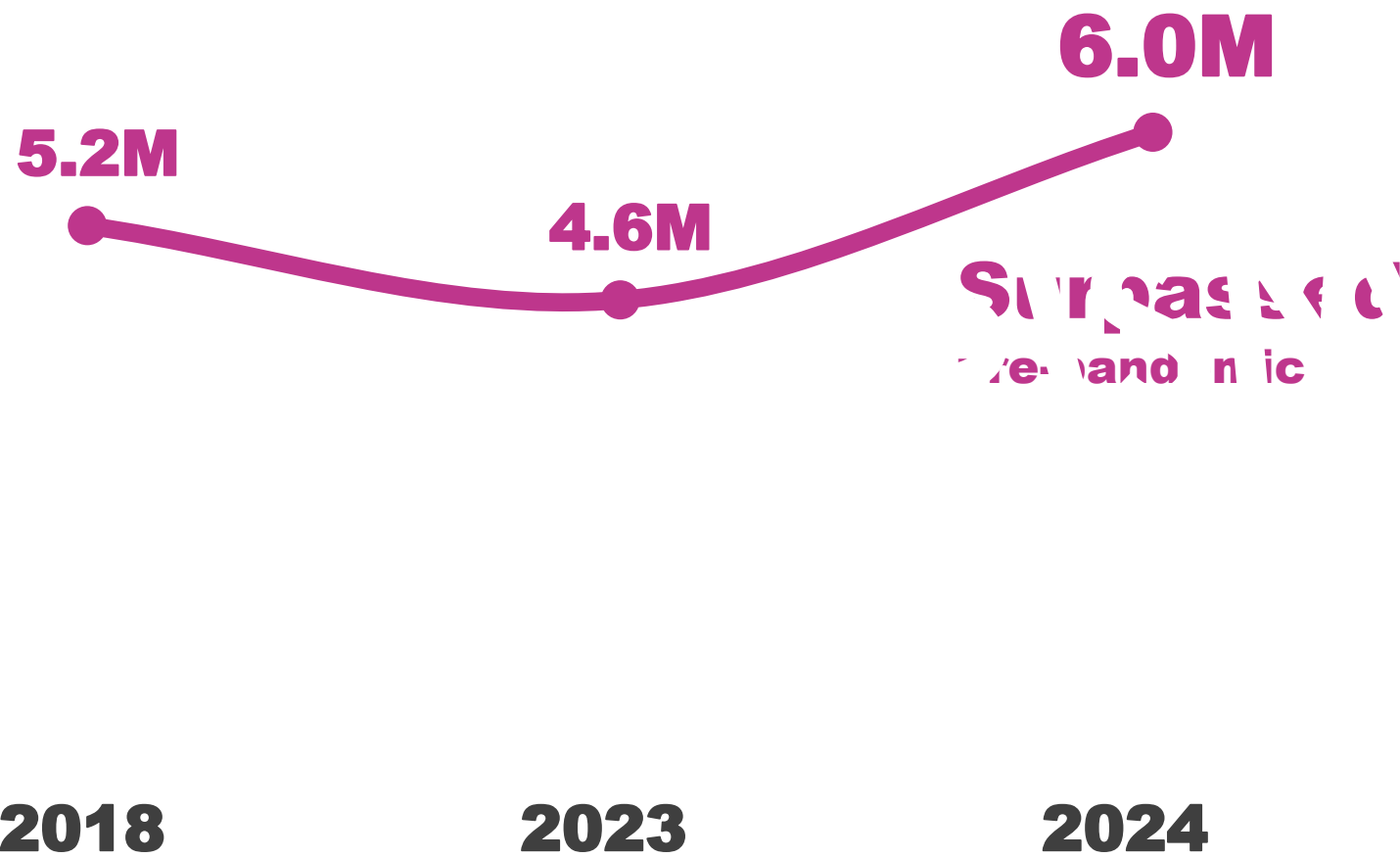
**Seat Capacity**  
**63%**  
Q4'24 vs Q4'18



# OUTBOUND MOMENTUM

## INDIA OUTBOUND


### Outbound to Asia\*



## TOP ASIA DESTINATIONS

Ranked by  
INDIA FY24  
outbound

### Destination

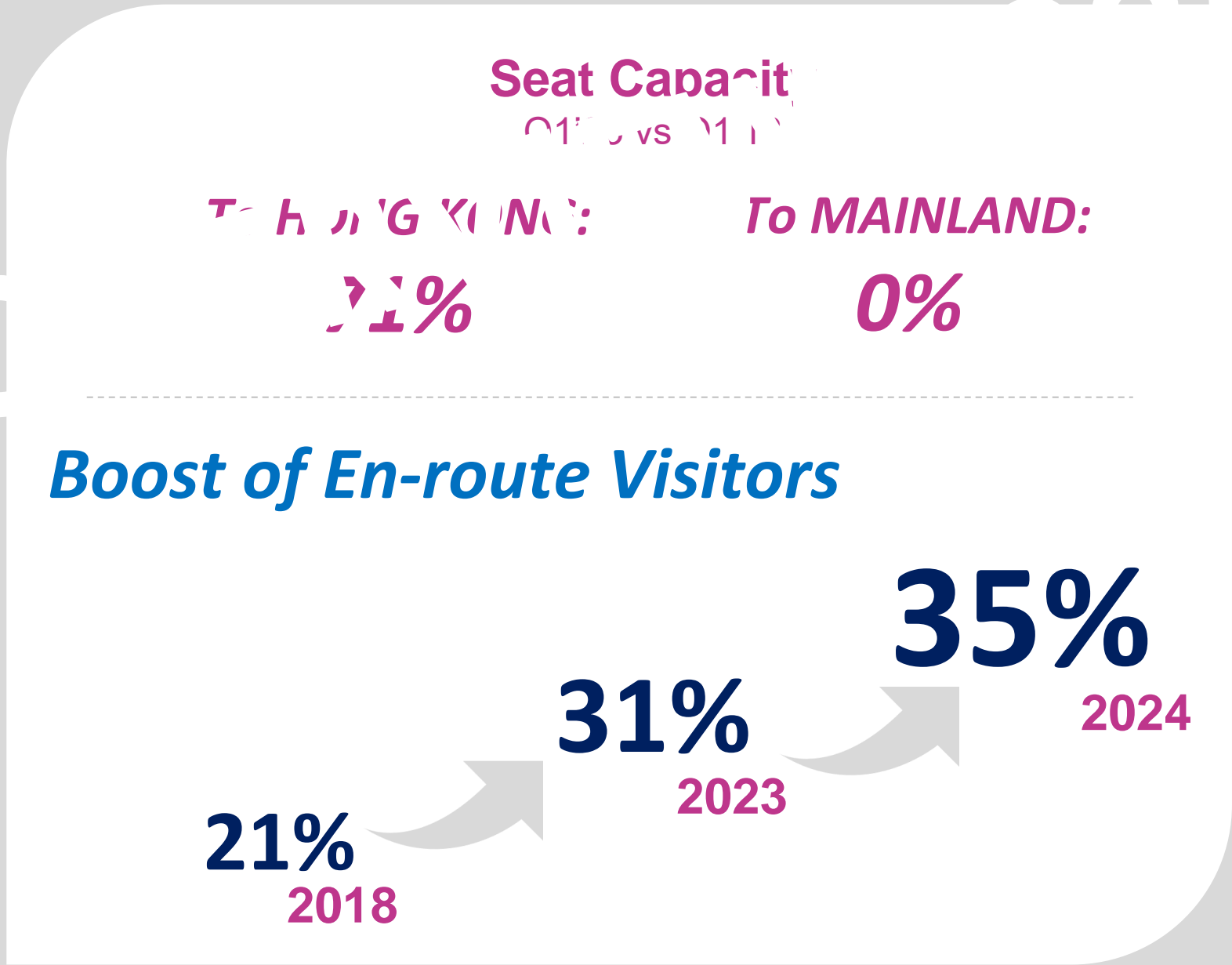
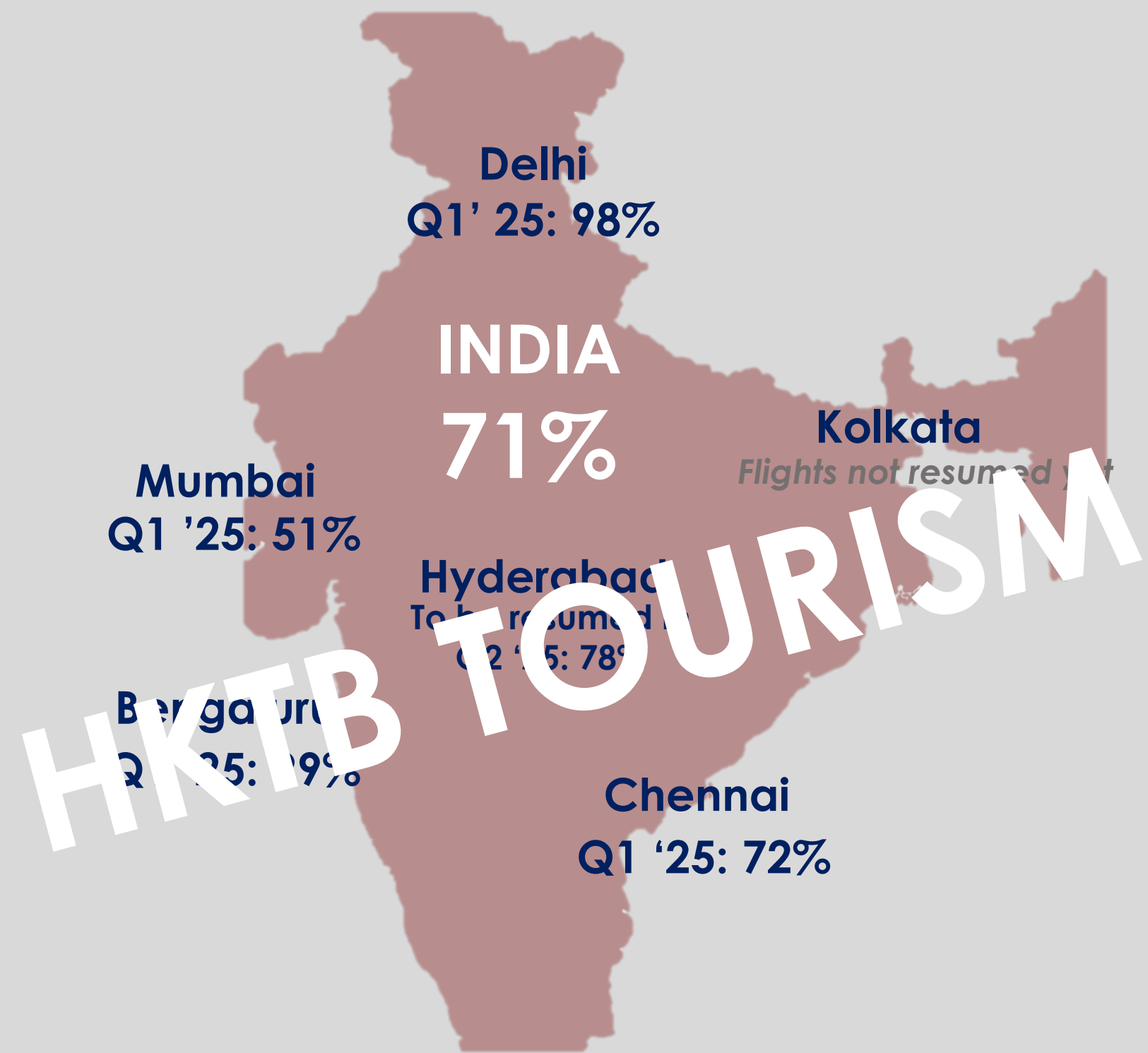
 Seat Cap  
FY23 vs FY24

#1	Thailand	157%
#2	Singapore	122%
#3	Malaysia	113%
#4	Indonesia	93%
#5	Hong Kong	71%
#6	Japan	92%

\*Note: Outbound to Asia include arrivals to key Asia destinations (Indonesia, Japan, Taiwan, Philippines, Singapore, South Korea, Malaysia, Thailand, Vietnam, Macao, Hong Kong), excluding Mainland.  
Source: various NTOs, OAG/IATA

# AIR CAPACITY

Seat Capacity Recovery vs 2018





# KEY PERFORMANCE INDICATORS

## Share of Arrivals



Overnights

**63%**

80% vs 2018

Same day

**37%**

117% vs 2018

## Length of Stay



Total:

**4.1 nights**

+0.2 vs 2018

## Per-Capita Overnight Spending



**\$8.5K**

2018 PCS: \$6.0K

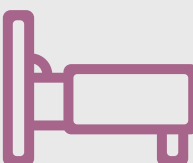
*#3 Highest among source market*



**\$3.3K**

**+146%**

vs 2018



**\$2.6K**

**+6%**

vs 2018



**\$1.4K**

**+45%**

vs 2018

# ARRIVAL BY SEGMENTS



## MULTI-DESTINATION

77%

HK+  
Mainland  
36%

HK+  
Macao  
~30%

HK+  
Others  
~20%



## FIRST-TIMER

48%

Overnight visitors



## FAMILY

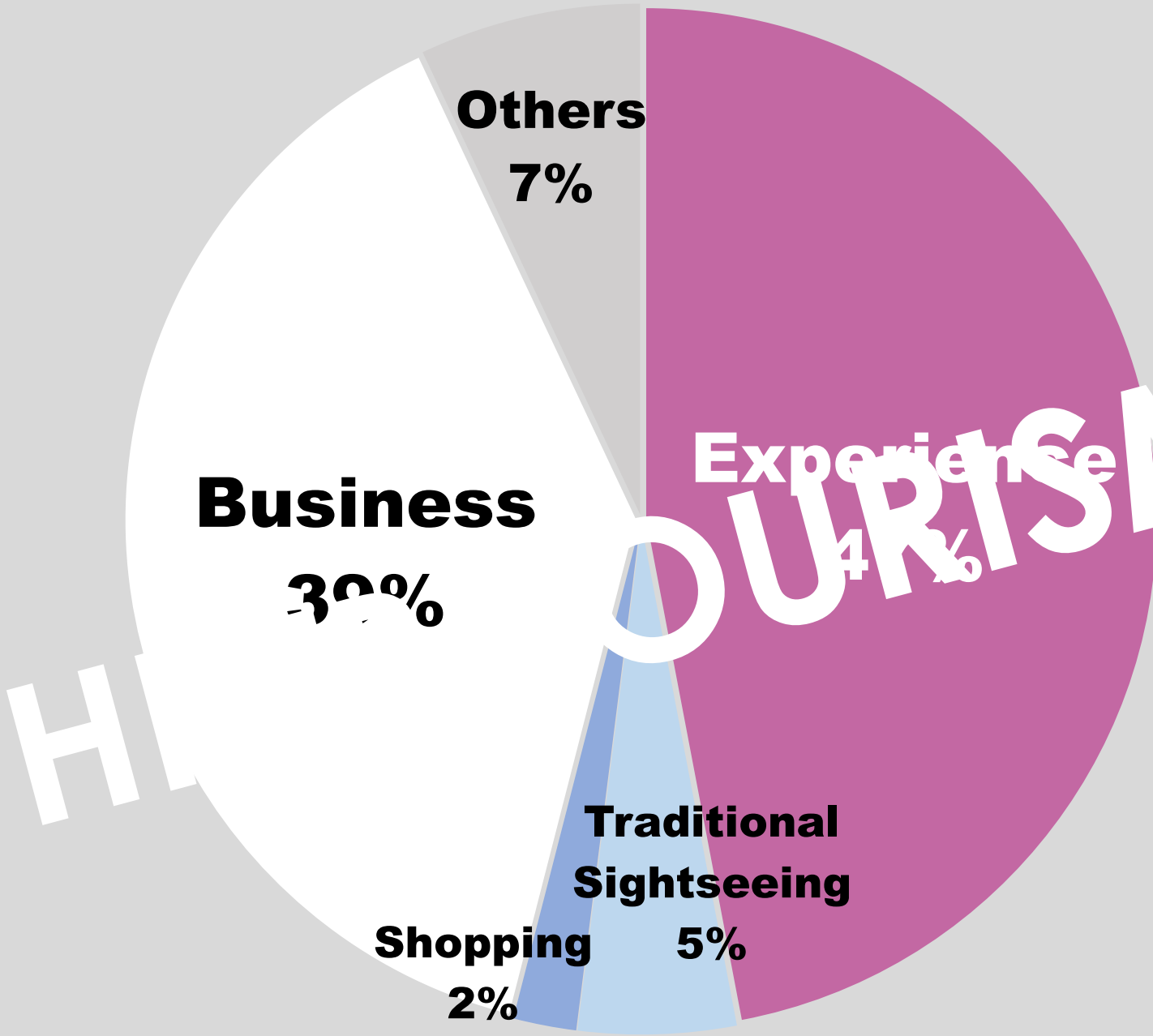
10%

*~3/4 of Family is First-Timer*



# TRAVEL BEHAVIOUR

## VISIT HK FOR... (Excl. En-route)



**25% *THEME PARKS***

↑4%pt (vs. 2023 H2)



**22% *CITY EXPLORATION***



OPEN-AIR  
MARKETS



ARTS &  
CULTURE



GREEN

# MARKET OUTLOOK

India is in a very good position with strong ally in US, Russia, and now better alignment with China

NEW 2025

## GROWING ECONOMY

↑ 3rd largest economy by 2025 overtaking Japan

## GROWING AFFLUENCE

↑ 1.6M new HNIs in next 5 years  
100M affluent Indians by 2027

## GROWING POPULATION

↑ Gen Z = Spend Z  
1/3rd of Population

## GROWING OUTBOUND

↑ 30M Outbound Trips  
\$18.81B Travel Spends

TOURISM



# MARKET TRENDS

## Decoding Indian Outbound Travellers

Family & Couple Travel  
over Solo Trips



Holiday Coupons As Wedding  
Shagun (Red Packet)

Rise in Experience-Based  
& Event-Based Travel



The Urge to "Stay in the Loop"  
+ FOMO

Emergence of New Luxury  
Traveler



\$200B Luxury  
Market by 2030

HKTBT  
TOURISM OVERVIEW 2025



# MARKET TRENDS

Travel for Indians is beyond bucket list & hotspots

Everything traveller wants both

*Vacationing + Travelling*

HKTb TOURISM

CELEBRATION  
VACATIONERS



BLEISURE



SET-JETTING



GOSSIPING



BOUGIE  
FOODIES



ADRENALINE  
ADVENTURES



ART-VENTURES



DETOUR DESTINATION

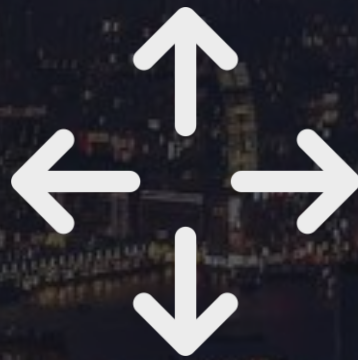


# STRATEGIC FOCUS



## Harnessing Quality Tourism Potential

1. Events & Festivals
2. Superlative Luxury Experiences
3. Culinary, Culture, City Vibes



## Expanding Key Growth Segments

1. Gen Z
2. Family
3. MICE Group Travel



## Driving High-Value Travel

1. HNI's
2. Affluent Mass
3. Global Indian Diaspora

**HKTb TOURISM OVERVIEW 2025**





# ASSESSING QUALITY TOURISM POTENTIAL

## OVERVIEW 2025





# MARKETING PROGRAMMES

HK Always On, Always Yours!!



COCONUT POLY

Condé Nast  
**Traveler**

**VOGUE**

**TRAVEL+  
LEISURE**

**MEGA EVENTS**

**Raise Destn' Appeal**

**Fresh & Exciting**

**Diverse & Unique**



# MARKETING PROGRAMMES

## Date Night in Hong Kong



BAR  
TAKEOVERS



FOOD  
FESTIVALS



RESTAURANT  
POP-UPS



CULINARY  
TOURS

HKTB  
FOOD & BEVERAGE



ST REGIS

The Oberoi Group

TAJ

CULINARY &  
NIGHTLIFE

Fine Dining

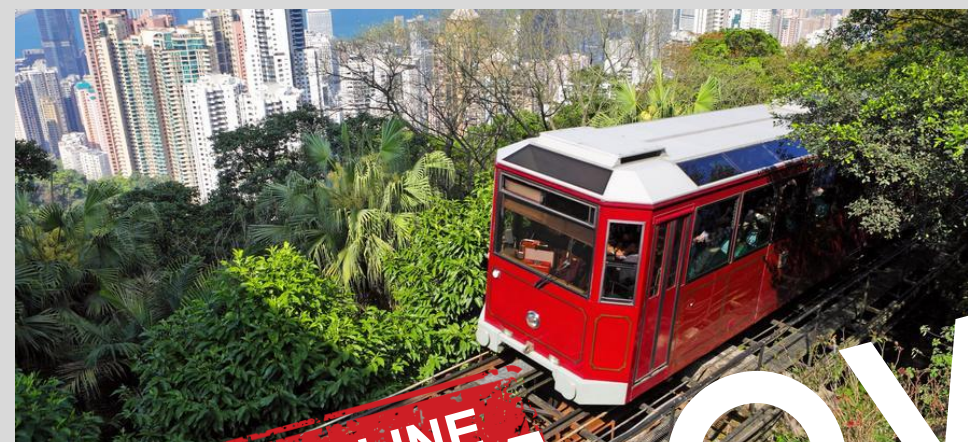
Local Cuisine

After-dark vibes



# MARKETING PROGRAMMES

Outdoor Adventures Meet Urban Living



GREEN  
TOURISM

ADRENALINE  
JUNKIE

ACTIVE  
ADVENTURES

HKT  
TOURISM



CITY VIBES

Stunning  
Outdoors

World-class  
Adventures

Urban  
Comforts





# ENTER TOURISM OVERVIEW 2025

## EXPANDING KEY GROWTH SEGMENTS

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# MARKETING PROGRAMMES

HK- The Moments You Take Home with You



OVERVIEW 2025

FUN-FILLED ADVENTURES

ROMANTIC ESCAPES

ACROSS GENERATIONS

FAMILIES

Holiday Season

Long Weekends

Celebrations



# MARKETING PROGRAMMES

## Hong Kong Vibe Check



HKTB  
TAP INTO  
COMMUNITY

TOURISM

OVERVIEW

FOMO

2025

SOCIAL

gobble

DIGITAL  
AMPLIFICATION

GEN Z

Raw

Authentic

Soul Searching

YOLO





# PRIVATE TOURISM OVERVIEW 2025

## PRIVATE HIGH-VALUE TRAVEL

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# MARKETING PROGRAMMES

**LUXE***bration* Hong Kong-Style



MILESTONE  
CELEBRATION  
HKT  
B

COLLABS WITH  
EVENT  
PLANNERS

TRENDSETTING

**CELEBRATIONS**

**For the Global Indian**

**Jet-Set-Envy**

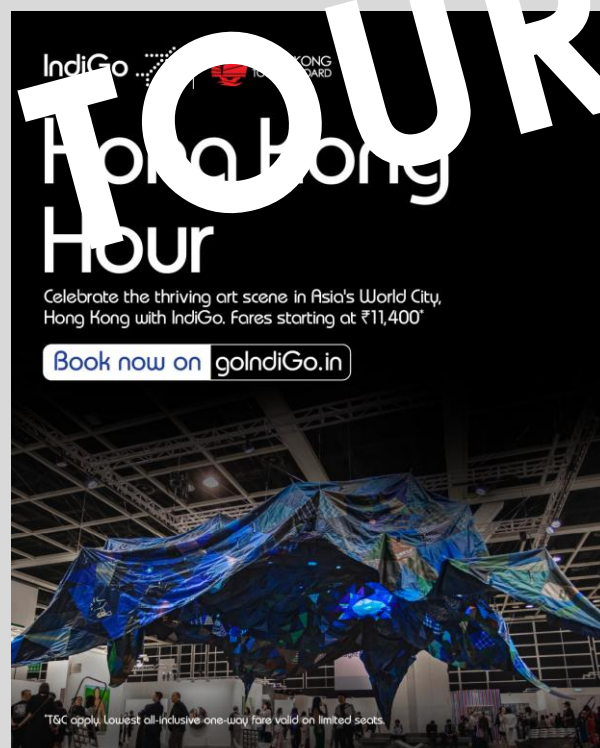
**Aspirational Luxe**



# Hong Kong



# Weekender 2025



Origin

INDIA

Destination

HONG KONG

Fly Non-Stop  
DAILY

DAILY FLIGHTS

5 Ports = 52 Weekly Flights

MEGA EVENTS +

52 Weekends = 52 Events

HK BUCKET LIST

Thrilling Experiences & Stunning  
Cityscapes

FLIGHT + FARE

Book Lowest Fares

#AirIndia #CathayPacific #IndiGo #DiscoverHongKong #HongKong #StopoverinHK



# HKTb TOURISM OVERVIEW 2025



# MARKET PERFORMANCE

## MIDDLE EAST

Middle East has a 27% YoY growth in arrival in 2024. GCC achieved 16K visitors, which is a 69% YoY growth.

Total Arrivals 

67K

(+27% vs 2023)

Seat Capacity 

60%

Q4'24 vs Q4'18

vs 2023

Key source  
markets

GCC

+69%

Saudi Arabia  
United Arab Emirates  
Kuwait

16K

Non-GCC

+17%

Türkiye, Israel,  
Egypt, Jordan

50K



# AIR CAPACITY

Seat Capacity Recovery Q1 2025 vs Q1 2018

**Air Capacity**

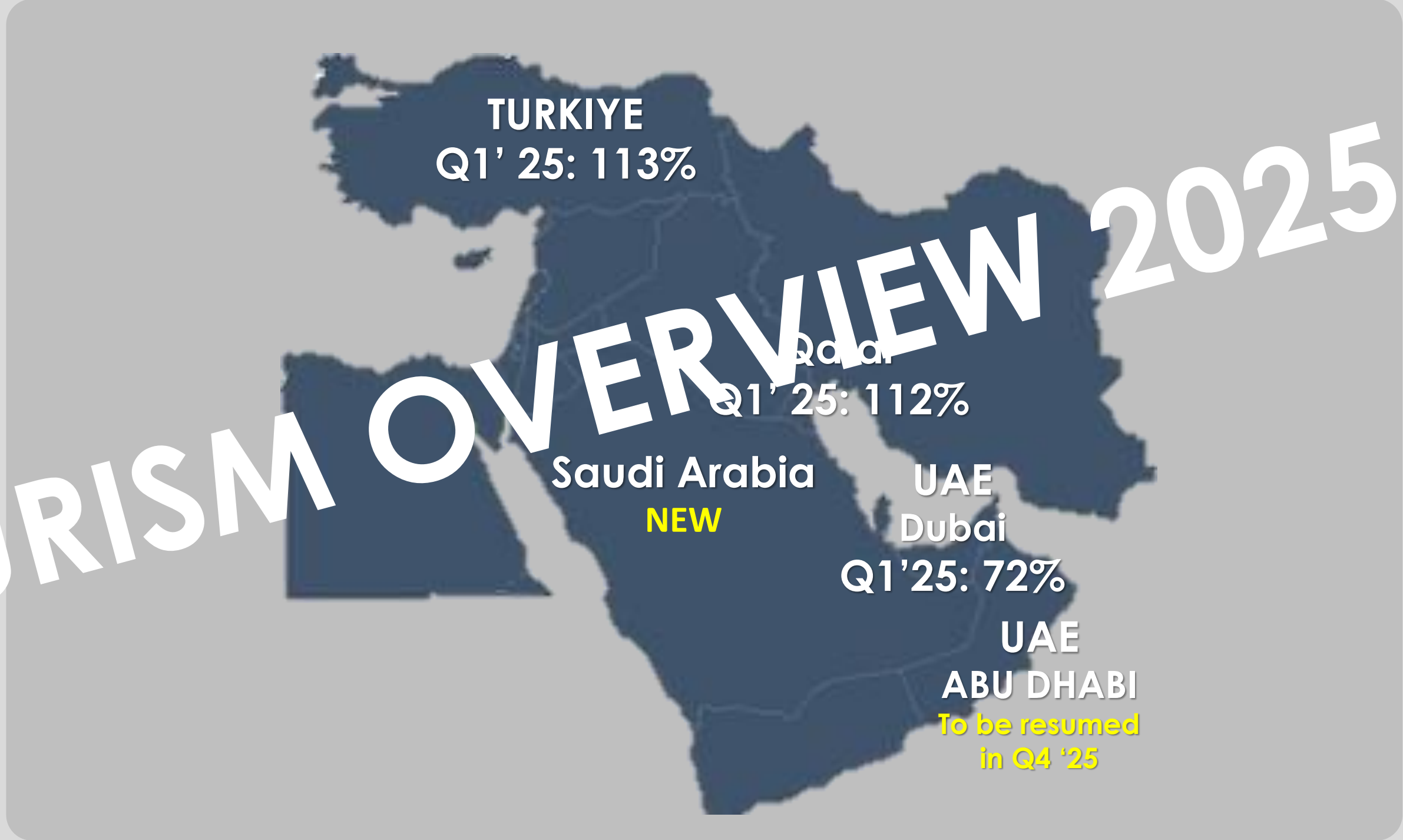
**65%**

**recovered vs 2018**



**GCC 71%**

**NON GCC 41%**



EGYPT / BAHRAIN <> HK TO BE RESUMED  
ISRAEL <> HK HAS BEEN SUSPENDED

# KEY PERFORMANCE INDICATORS

## Share of Overnight Arrivals



**73%**

+6%pt vs 2018

## Length of Stay



**4.4 nights**

+0.7 night vs 2018

## Per-Capita Overnight Spending



**\$10.2K**

2018 PCS: \$8.7K

*#1 Highest among source markets*

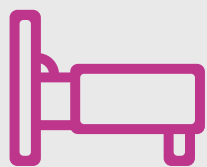
+18% vs 2018



**\$3.9K**

+62%

vs 2018



**\$3.4K**

*on par*

vs 2018



**\$1.6K**

+14%

vs 2018



# ARRIVAL BY SEGMENTS



## MULTI-DESTINATION

70%

HK+  
Mainland

HK+  
Macao

HK+  
Others

31%

13%

36%



## FIRST-TIMER

46%

#2 highest  
among all markets



## SOLO

61%

+14%pt vs 2018



## FAMILY

With family members

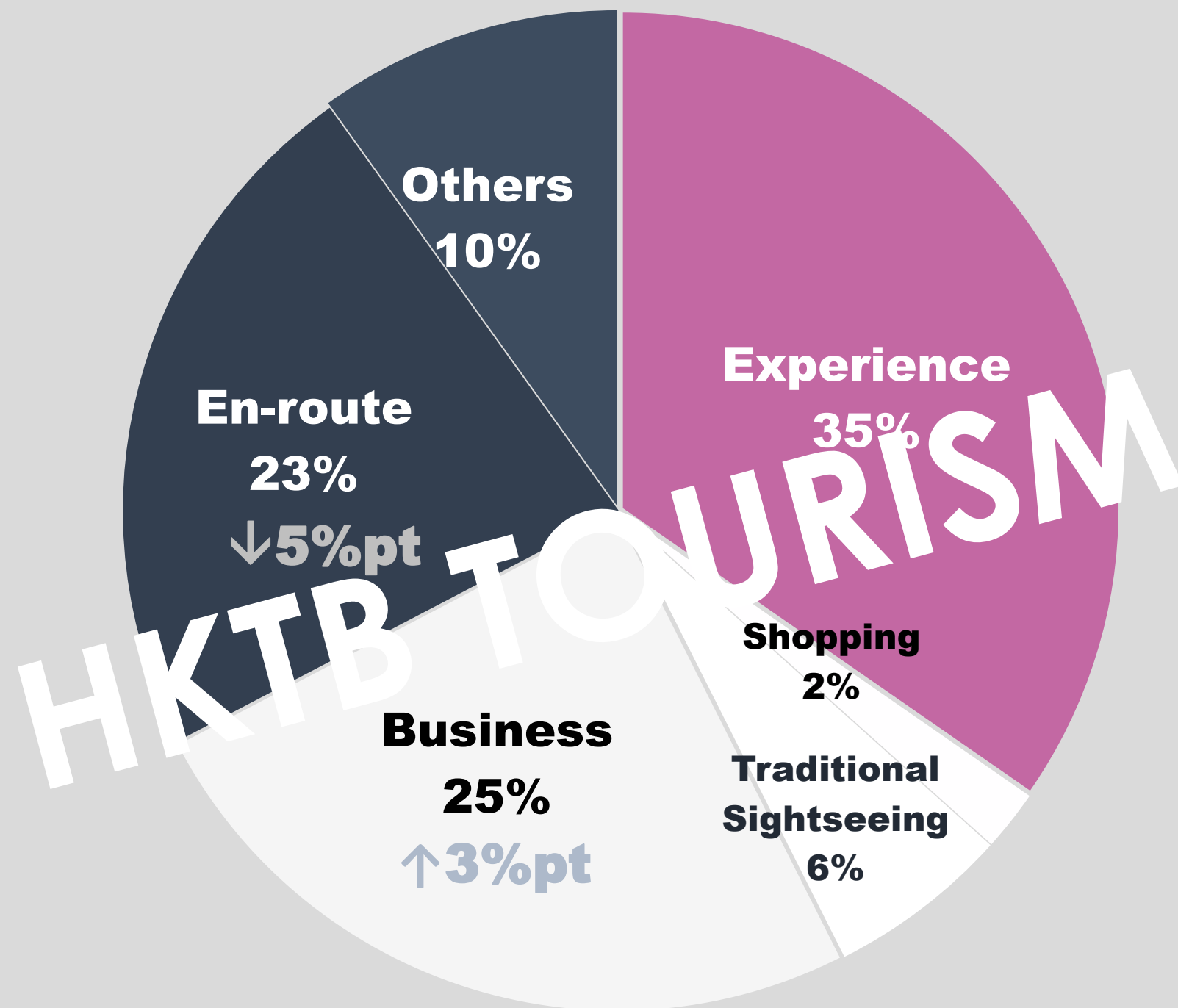
25%

7% travelling  
with kids 0-15

# TRAVEL BEHAVIOUR

*Total Leisure: 42%*

**VISIT HK FOR...**



**24% CITY EXPLORATION**



OPEN-AIR  
MARKETS



ARTS &  
CULTURE



GREEN  
TREASURES

**11% THEME PARKS**





# MARKET OUTLOOK

## TRAVEL IS A MUST



## ECONOMIC

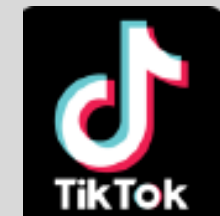


Combined GDP for  
GCC >1.8trillion

- ▶ Jobless rate 0.1% -  
>5%

## MEDIA

EVERYTHING links to  
SOCIAL MEDIA  
95% Penetration



- ▶ 58.5M internet users
- ▶ 50.9M active social media users

HKT  
70%  
TOURISM

# CONSUMER TREND

## Family segment projected for high growth

Family segment is expected to make up 44.5% share of travellers in the GCC



## Leisure travel dominates due to desire for new experiences

Off the beaten tourist routes, unique places with unspoiled natural beauty and local authenticity

## Social media-driven travels

Travellers are influenced by user-generated content and influencers who showcase unique destinations





# STRATEGIC FOCUS

01

## Destination Brand Building

Increase consideration of Hong Kong as a destination through storytelling and targeted marketing efforts



03

## Industry Outreach

Trade partnership, engagements, training & joint promotions



02

## Destination Experience Building

Create memorable experiences through high-quality offerings

HKTB TOURISM OVERVIEW 2025

# GCC Market activities

## Destination Brand Building (Trade)

- OTA, airlines & key travel agencies cooperation
- Participation in key Leisure & luxury travel events



## Destination Brand Building (Consumer)

- Influence Marketing
- Seasonal Campaigns



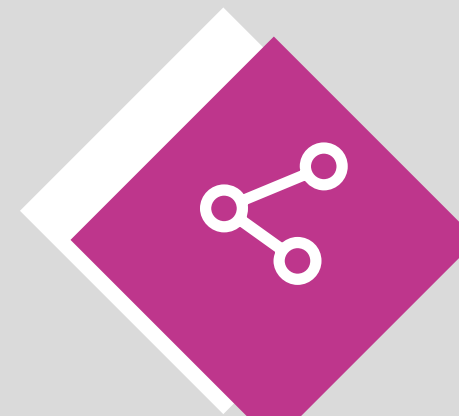
## Destination Experience Building

- Tailor Experience: Work with brand owners & experience creators to develop a pipeline of value-driving activities
- Strengthen industry capabilities—Partner key players to develop new experiences & standards



## Industry Outreach

- Trade engagements, outreach, training & FAMs
- Annual Roadshows in key target cities





# Destination Brand Building through Strategic Trade Partnerships

## Primary Markets

Saudi Arabia

UAE

Target cities: Dubai, Abu Dhabi, Riyadh, Jeddah

Saudi Arabia & UAE

**AmmanSafer**

Saudi Arabia & Qatar

**musafir.com**

## Secondary Markets

Qatar

Kuwait

Target cities: Doha, Kuwait City

UAE

**dnata**

الإتقاد  
**ETIHAD**  
AIRWAYS

All GCC

**Flyin** com

 **cleartrip**

**wego** 

# Destination Brand Building through Trade Engagements & Training

## Trade shows & exhibitions

Hong Kong pavilion at Arabian Travel Mart; MALT, KBLT, Saudi Travel Mart, to increase destination brand and foster relations



## Trade networking & training

Training and networking sessions in key source cities – Dubai, Abu Dhabi, Riyadh, Jeddah



## Sales Missions to key cities

Sales missions to key source cities – Dubai, Abu Dhabi, Riyadh, Jeddah, Doha

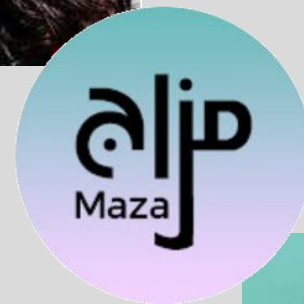




# Destination Brand Building through Media Partnerships



Beki Ksouri  
Total following: 5m+



Caroline Marlin  
Total following: 3m+



Mazaj Travels to Hong Kong  
6-episode travelogue



Discover Hong Kong: Travel in Luxe



## Mazaj Travels - Teaser Video

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A blurred image of two people walking on a grassy field with mountains in the background. The image is overlaid with the text 'HKTb TOURISM OVERVIEW 2025' in a large, white, sans-serif font, angled diagonally across the center. The background shows a green field in the foreground, a body of water in the middle ground, and blue mountains under a cloudy sky in the background. The overall image has a motion blur effect, suggesting movement.



**THANK YOU**

**PUNEET KUMAR**

**DIRECTOR, SOUTH ASIA & MIDDLE EAST**

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