

SOUTH KOREA

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HKTb TOURISM OVERVIEW 2025



MARKET PERFORMANCE SOUTH KOREA

Arrival to HK doubled YoY, supported by the gradual ramp-up of air capacity

Total Arrivals



855K

+109% vs 2023

Seat Capacity



70%

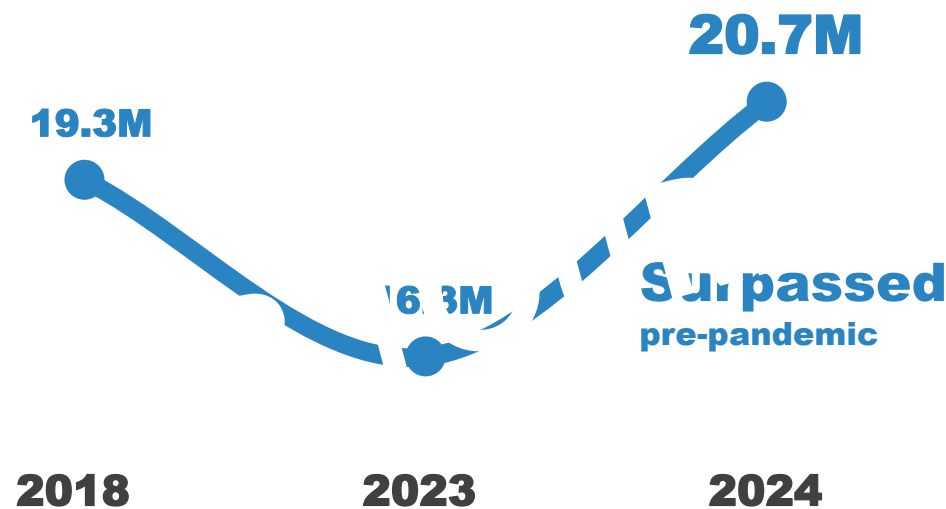
Q4'24 vs Q4'18



OUTBOUND MOMENTUM

KOREAN OUTBOUND


Outbound to Asia*



TOP ASIA DESTINATIONS

Ranked by
Korean's FY24
outbound

Destination

 **Sea's Gap**
Q1'24 vs Q1'18

#1	Japan	119%
#2	Vietnam	155%
#3	Thailand	92%
#4	Philippines	93%
#5	Taiwan	119%
#6	Hong Kong	78%
#7	Singapore	173%

*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

KEY PERFORMANCE INDICATORS

Share of Overnight Arrivals



84%

(+5% vs 2018)

LENGTH OF STAY



2.3 NIGHTS

(+0.1 vs 2018)

PER CAPITA OVERNIGHT SPENDING



\$4.6K

(+4% vs 2018)

ARRIVAL SEGMENTS

HK is becoming more appealing to Korean young and family travellers, and half of the Korean visitors are first-timers.

Young (Aged 0-35)



48%

+2%pt vs 2018

Family

With all
family
members



38%

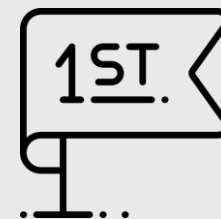
+8%pt vs 2018

With Kids
Aged 0-15

7%

~ vs 2018

First-timer



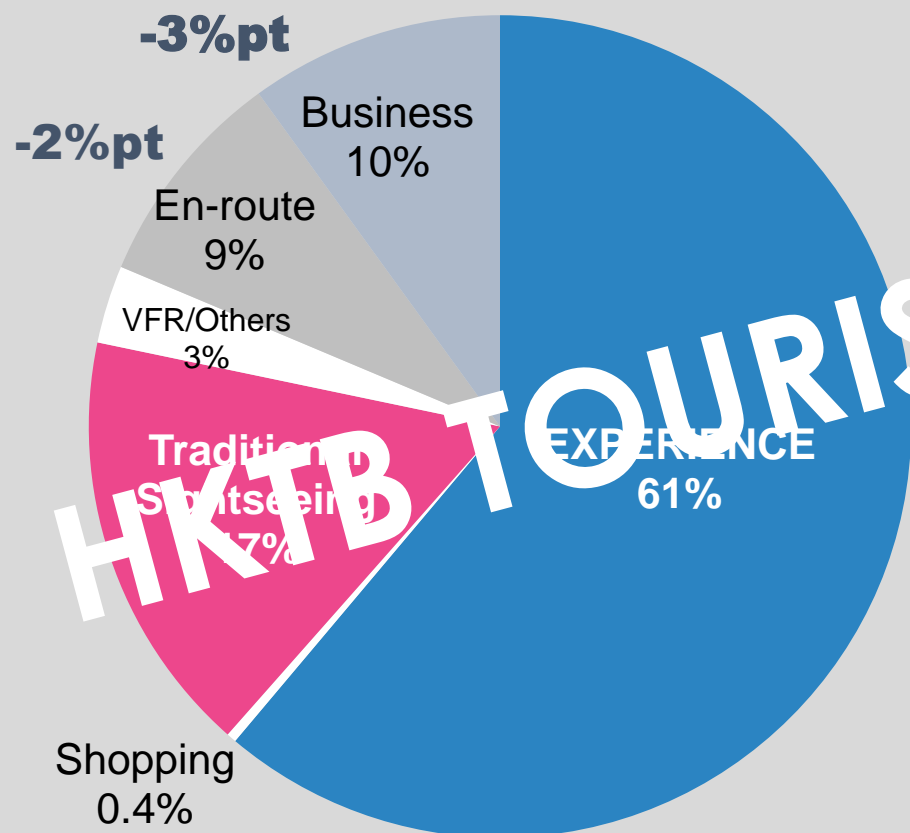
51%

+7%pt vs 2018

TRAVEL BEHAVIOUR – SOUTH KOREA

Korean visitors remain predominantly by experiential travellers and those who enjoy exploring the city.

VISIT HK FOR...



16% THEME PARKS

(+7%pt vs 2018)



45% CITY EXPLORATION



OPEN-AIR MARKETS



ARTS & CULTURE



DINING



GREEN

NEW

West Kowloon
Cultural District

NEW

Beaches

MARKET OUTLOOK



A Drop in
GDP Growth

2.2%

2.2%
(IMF)

1.9%

1.7%

(Bank of Korea)



Weakening Overseas
Travel Demand

Short-distance/
Cost-effective
Destinations
likely to be dominant
Due to air incident
& Socio-economic instability



Air Capacity
Recovery Challenge

Major Competing
Asian Destinations

FULL

Recovery or
Even Exceeding

Hong Kong

80%

Recovery
Compared to pre-pandemic



Increasing Trips
to China

Visa-free policy

Affordable cost

CONSUMER TREND

1

Favor FSC over LCC

Following the Jeju Air Incident



2

FIT Growth

Outpace Group Travel Growth



3

JP Visitor Numbers

Likely to Sustain



4

GenMZ to Pioneer

& Create Travel Trends



5

Influential Consumer Touch Points

Social Media &

TV in YouTube Short Form



6

Top Travel Desire Triggers
**Foods, Filming Locations
& Unique Experiences**



STRATEGIC FOCUSES

01

Gen MZ

Strengthen
Gen MZ Promotion



03

Value for Money

Showcase
Value-for-money
Experiences



05

Collaboration

Strengthen
Collaborations
With Local Travel
Trade



02

Family
Further Drive
Family Travel



04

New Segments

Expand
Visitor Segments

HKT
B
T
B



TOURISM

OVERVIEW 2025

01. Strengthen Gen MZ Promotion

Deliver Authentic Stories on HK's Uniqueness

- HK's Internationality
- Great Outdoors & Wellness
- Dining, Nightlife & Parties
- City Walks: Hidden Towns/Neighbourhoods
- Arts & Culture
- International Events & Festivals

Introduce Diverse Themes/Experiences



02. Further Drive Family Travel to Hong Kong

Hong Kong, Ideal Family Friendly Tourism Destination

Family Travel

Big source of overseas travel:
47% Market Share
(source: Korea National Statistics)

Family Segments

Consumer Survey By Travel Times

(Period: 17 May – 16 Jun 2024, Respondents: 3,229 ppl)

Travel companions (%)

	Total	Male	Female	Under 20s	30s-40s	50s+
Family	49.1	46	50.6	29	5	60
Friends/Partner	29.4	26.1	3	18.1	25	19.4
Alone	15.6	18.1	13	7.6	13.8	12.3
Social group/Club	2	15	1.1	1.5	2.1	5.2
(Coworkers) - Business	2.1	3.8	1.5	1.8	2.3	2.2
Peer	0.7	1.2	0.4	0.6	0.7	0.7
School group	0.6	0.9	0.4	0.5	0.6	0.4

Majority intend to make trip with **Family (49%)**

Trend Monitor Report on Priority Travel Companions

(June 2024, Sample: 798 ppl)

Family (56.3%) > Alone (16.1%) > Couple (14.5) > Friend (11.9%)



Married Couple



Family with Kids



3 Generation Family



Mom & Adult Daughter

2025



03. Showcase Value-for-Money Experiences

City Experiences + Strategic neighborhoods offering value-for-money experiences

Sai Kung/ D'Bay / Other Potential Areas

- ◆ **New Places** to showcase HK's other sides;
(Nature, Beaches, Activities, Relaxing, Seafoods, Local Snacks, Small Town, Resort-type and Exotic)
- ◆ **Good quality accommodations with relatively lower cost**
- ◆ Satisfying both **Family & Gen MZ**

Part of Summer Promotion (Jun - Sep)

- ✓ **KOL Co-op:** Contents highlighting local beauty and leisure activities
- ✓ **OTA Co-op:** Develop day tour for beaches and water activities
- ✓ **Airline Co-op:** Flight + Resort packages



04. Expand Visitor Segments with Growth Opportunity

Generate additional visitor arrivals to HK

Multi-destination/ Stop-over

- HK + Macau/Guangzhou/GBA
- Attract high resort traffic with Perfect Combination
>> City (HK) + Resort destinations (Bali & Bangkok, etc.)
- Incentivise CX's high traffic to long-haul destinations
>> Short-haul (HK) + Long-haul (Sydney & Europe, etc.)

Students

- Student Excursion Tour

Senior Citizens

- Easier access to China
- HK+China combo trip (golf, shopping, arts & culture, history)
- Alumni travel, common interest travel (e.g. hiking)



05. Strengthen Collaborations with Local Travel Trade

Trade Co-ops for Seasonal HK Themes

- ✓ Explore New Channels: Kakao makers & Shopping Live
- ✓ Products + Story-telling: "Reasons to visit HK for each season"



Jan - Feb

Great Outdoor

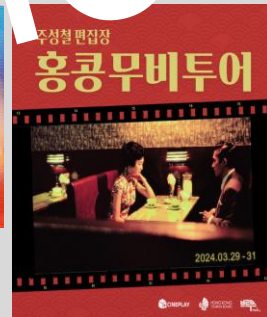
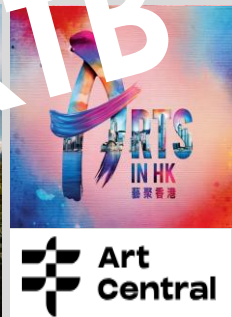
- HK Marathon
- HK Great Outdoors



Mar - May

Art & Culture

- Travel for Art Festival
- Hong Kong Movie Tour



Jun - Sep

Summer Beach

- Family Summer Fun
- Exciting Summer Vibes



Oct - Dec

Bar & Dining / Winter

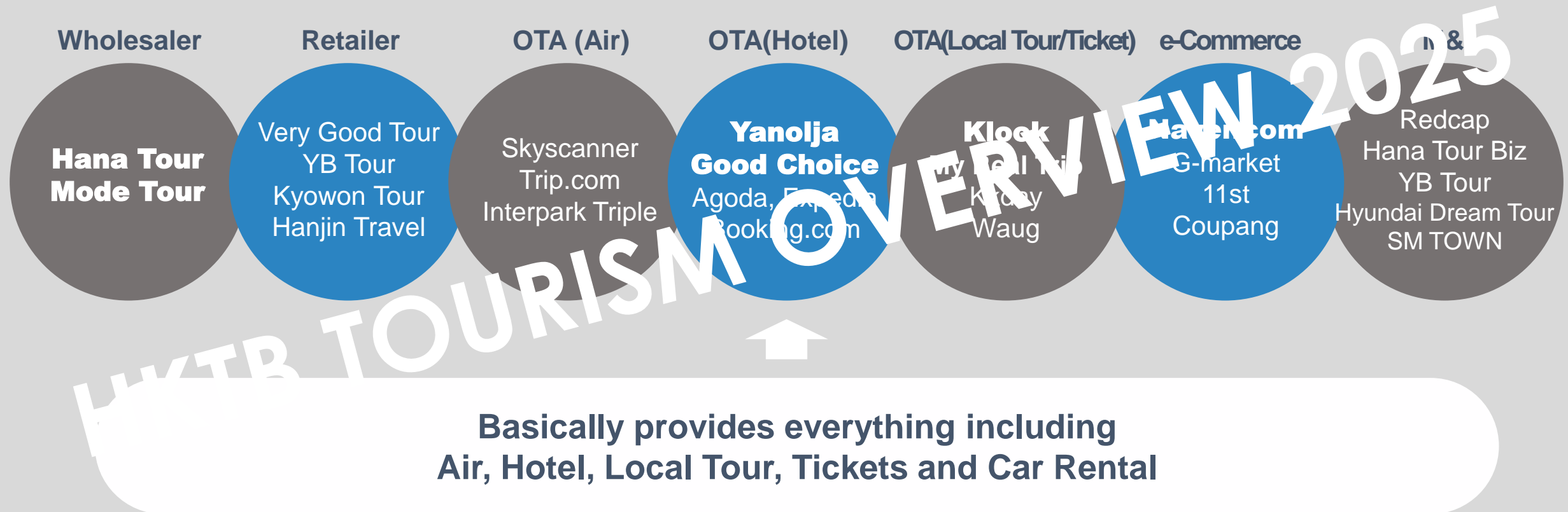
- Taste Around Town
- Romantic Winterfest



HK Travel Mission / Connect HK (June 2025)



UPDATE: Major Players Selling Hong Kong as a Destination



THANK YOU

YOON-HO KIM

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