



HKTb TOURISM OVERVIEW 2025

SOUTHEAST ASIA

C J Liew
Regional Director



2024 OVERVIEW 2025

HKTb TOURISM

SEA MARKET OUTLOOK

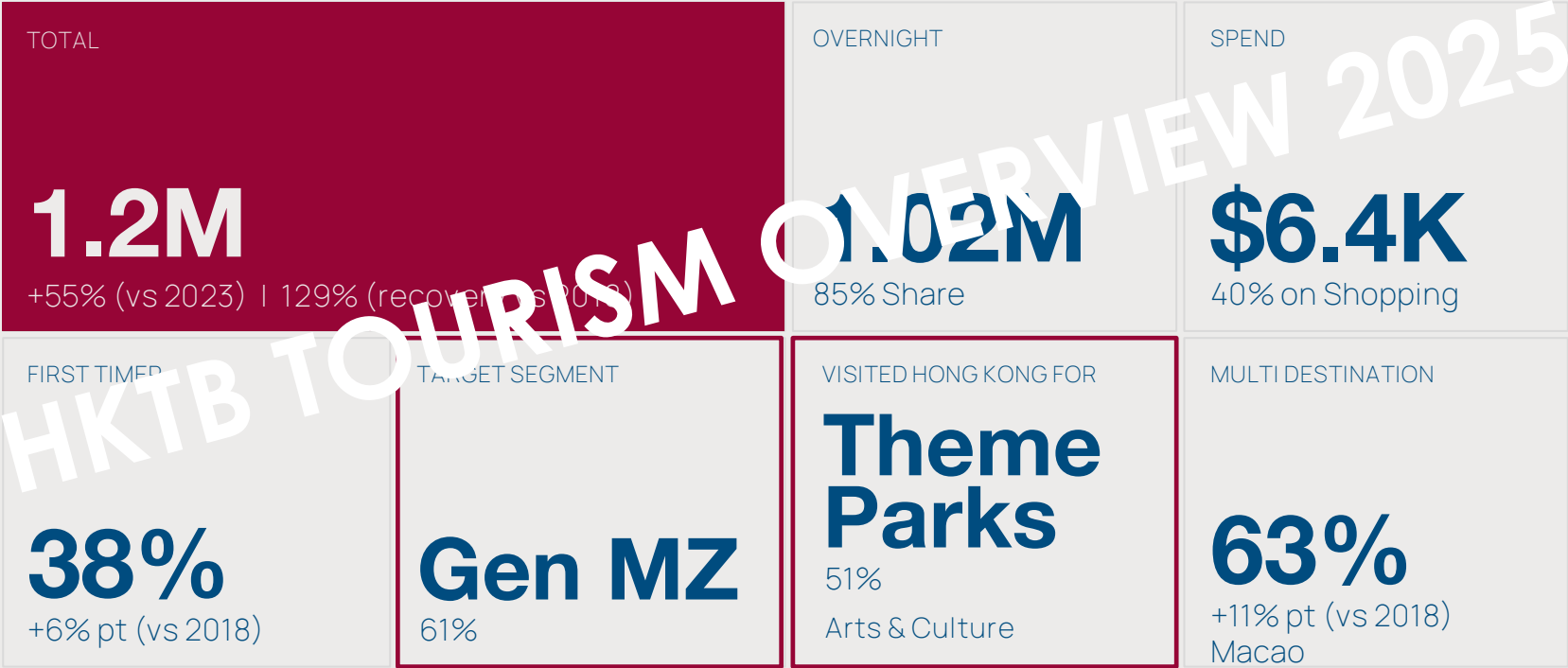
<div>TOTAL</div> <div>3M</div> <div>+41% (vs 2023) 97% (recovery vs 2018)</div>	<div>OVERNIGHT</div> <div>2.5M</div> <div>+8% Share</div>	<div>ALOS</div> <div>3.1-3.8</div> <div>No significant change</div>	<div>SPEND</div> <div>7.0K</div> <div>About 1K more than pre pandemic</div>
<div>TARGET SEGMENT</div> <div>Below 35yrs old</div> <div>47%</div>	<div>VISITED HONG KONG FOR</div> <div>Theme Parks</div> <div>Open Air Markets</div> <div>Arts & Culture</div> <div>Dining</div> <div>Temple</div> <div>Greenery</div>		

SEA MARKET OUTLOOK

Markets	Economy	Political	Travel	Flight Capacity	Overall Recovery
Philippines	Robust Growth	Stable	✓✓✓	96%	129%
Thailand	Slow Growth	Political turmoil (End 2024)	✓	95%	212%
Singapore	Sustained Growth	Stable	✓✓	77%	42%
Malaysia	Sustained Growth	Stable	✓✓	73%	91%
Indonesia	Sustained Growth	Stable	✓✓✓	76%	-
Vietnam	Robust Growth	Stable	✓✓	100%	177%

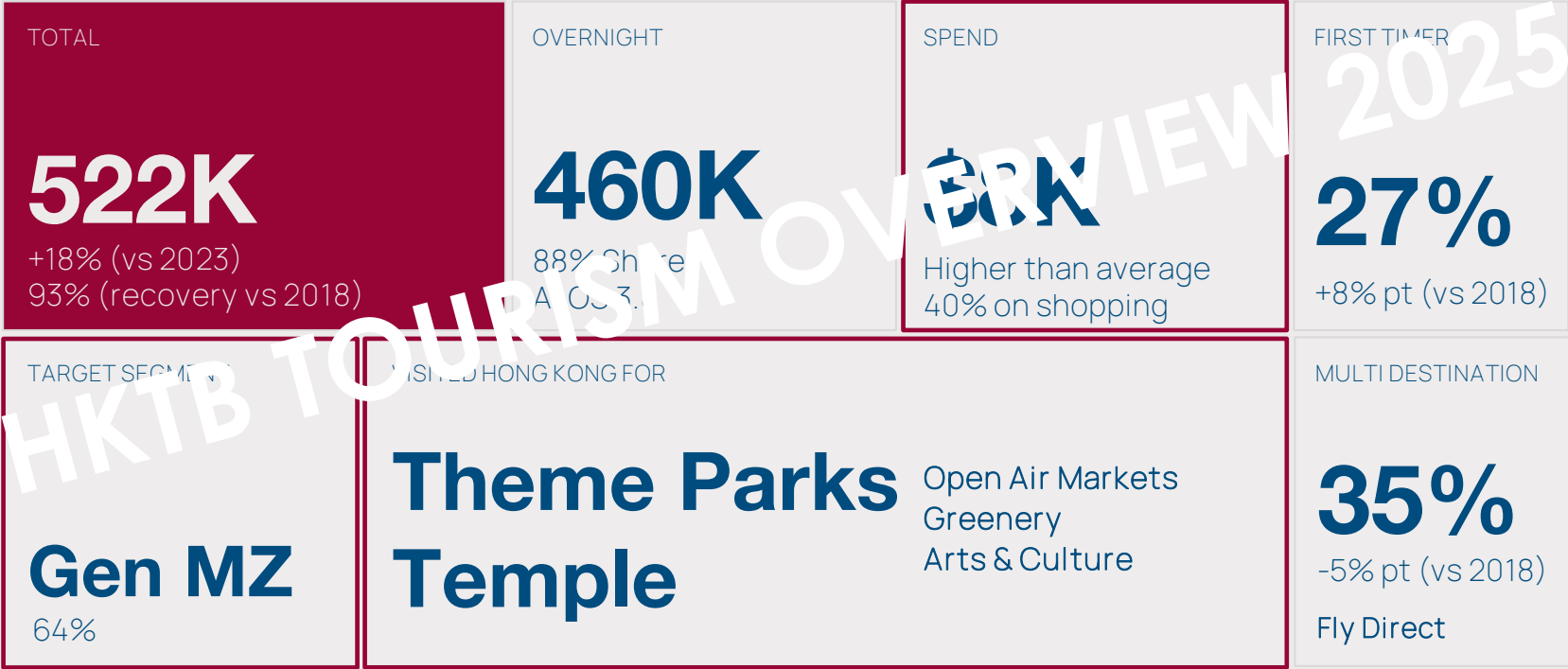
MARKET PERFORMANCE

Philippines Arrivals



MARKET PERFORMANCE

Thailand Arrivals



MARKET PERFORMANCE

Singapore Arrivals

TOTAL

466K

+33% (vs 2023)
87% (recovery vs 2018)

OVERNIGHT

379K

81% Share

SPEND

\$2.7K

Higher than average
Equal spend - accommodation and shopping

FIRST TIMER

11%

+2% pt (vs 2018)

TARGET SEGMENT

**Multi-
Generation**

Even distribution
across age groups

VISITED HONG KONG FOR

Business

20%

Dining
Arts & Culture

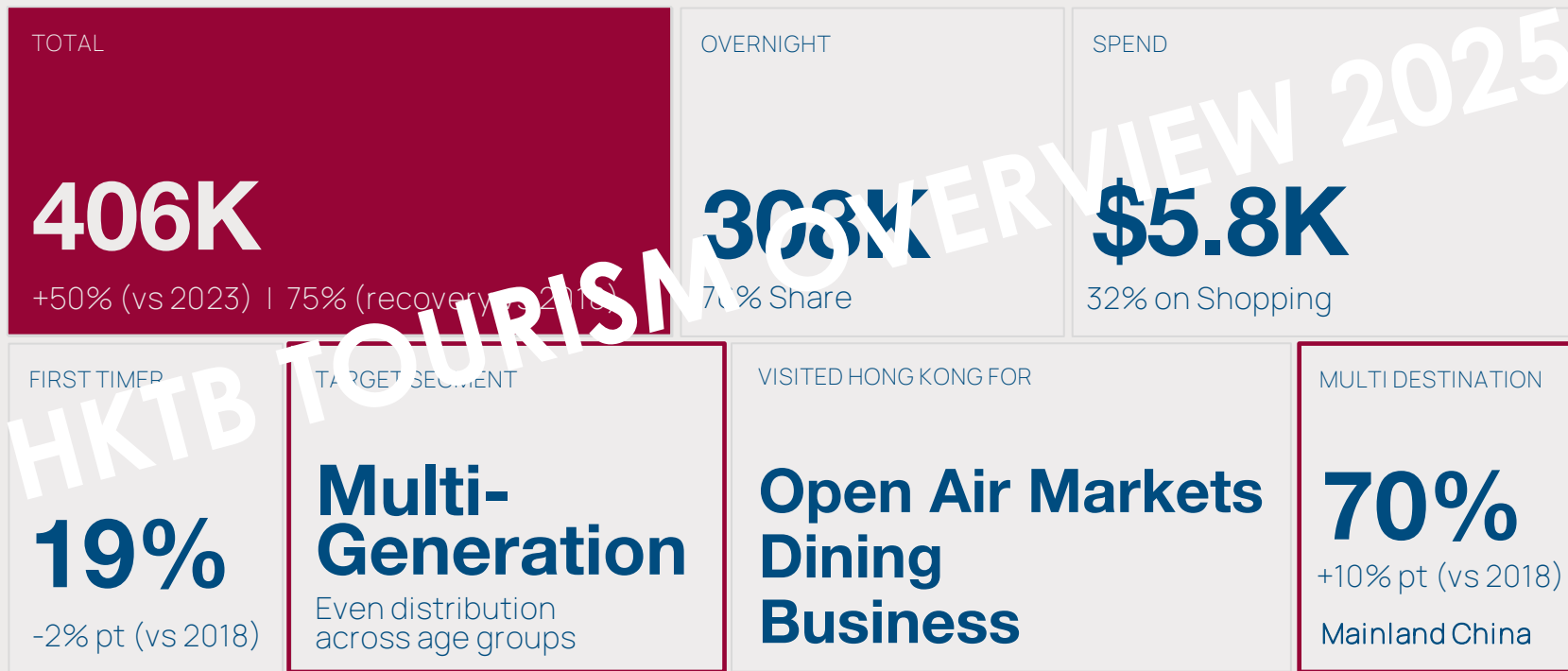
MULTI DESTINATION

57%

+5% pt (vs 2018)
Mainland China

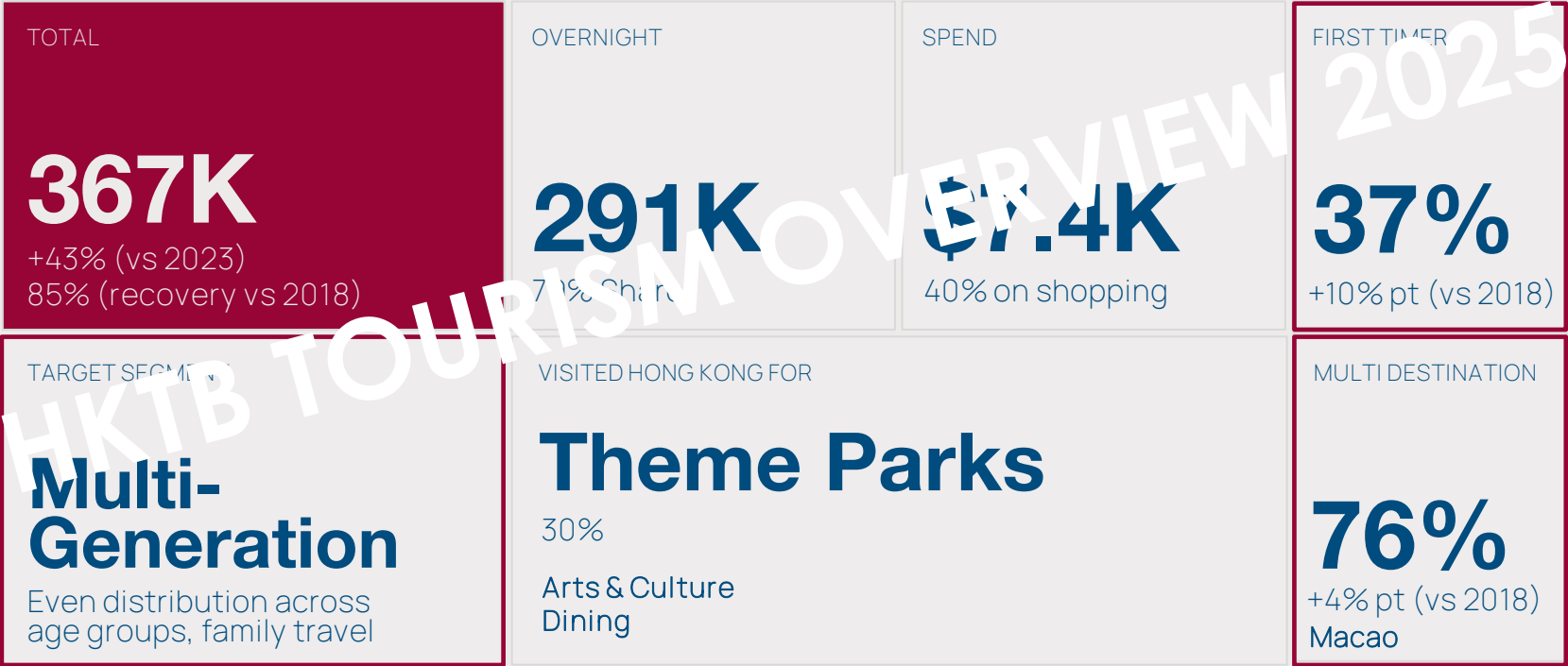
MARKET PERFORMANCE

Malaysia Arrivals



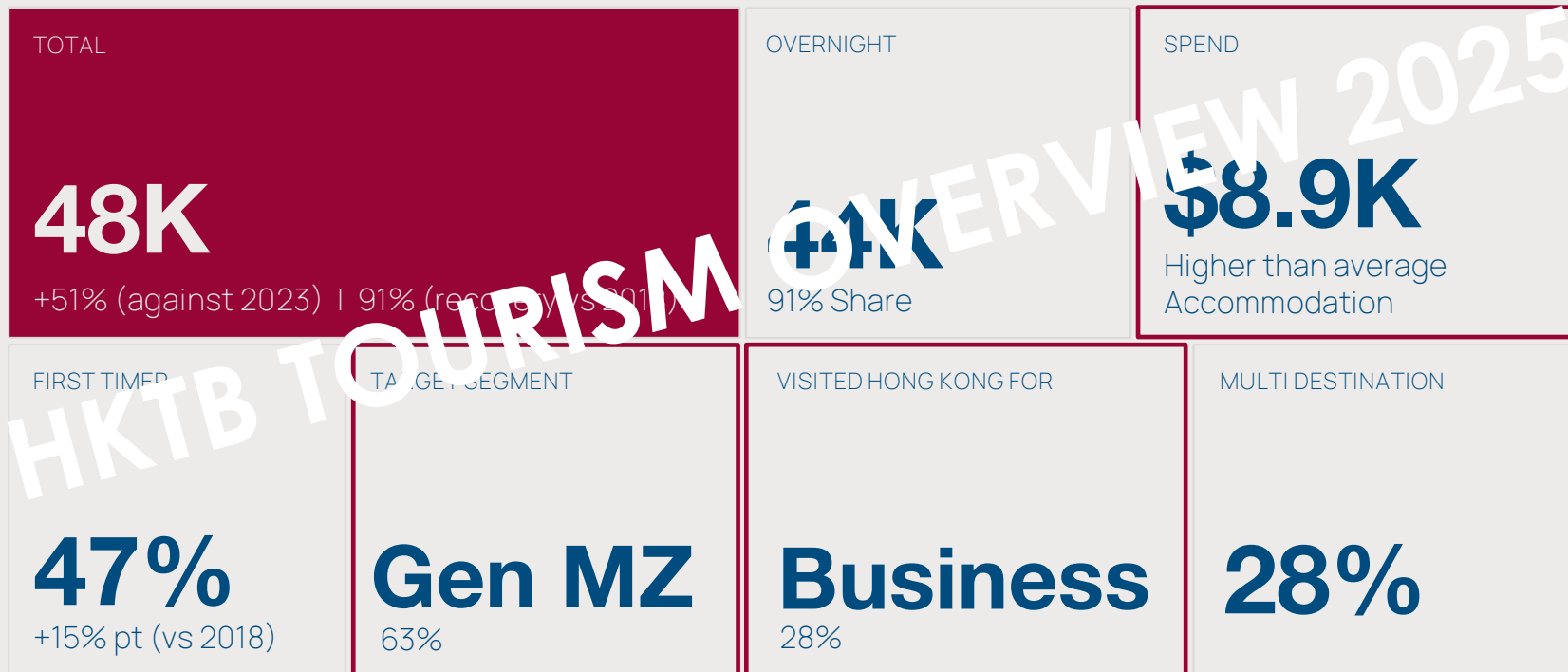
MARKET PERFORMANCE

Indonesia Arrivals



MARKET PERFORMANCE

Vietnam Arrivals



SEA Market Outlook

SUMMARY

Political

Stable except Thailand

Spend

Higher than global average

Interests

Theme parks,
Open Air Markets, Dining

Arts & Culture,
Greenery

Economy

Positive growth in SEA
Less optimistic for Thailand

Targets

Gen MZ, Multi-Generation

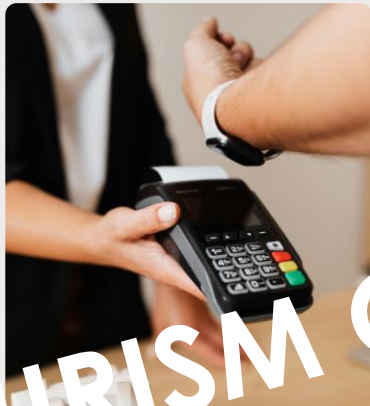
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TRENDS



ONLINE

- Evolving media consumption
- Shopper-tainment
- Widespread adoption for AI



PAYMENT

- Contactless, Online
- Mobile wallets
- Buy Now Pay Later



LIFESTYLE

- Flourishing Asian food and bar scene
- Travel for music, entertainment and culinary experiences



TRAVEL

- Wellness, Healing, Fitness
- Slow and Immersive
- Multi-Generation
- Multi-Destination

PEAK TRAVEL PERIOD

(Colored bars represent peak periods)



Target both Peak...



OVERVIEW 2025

Multi-Generation
Family Travel

...and Non-Peak Travel Periods

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Millennials

Gen Z

Interest Groups Travel



A nighttime photograph of a city skyline across a body of water, with numerous fireworks exploding in the dark sky. The city lights and various billboards (including Panasonic, Sun Life, and TCL) are visible. A large, white, stylized text overlay is centered on the image.

MOVING INTO 2025 OVERVIEW 2025

HKTb TOURISM

MARKET PRIORITISATION

ROBUST GROWTH

Philippines

Sustain
monetary m

HIGH POTENTIAL

Indonesia
Thailand

Penetrate market
including secondary cities

MATURE

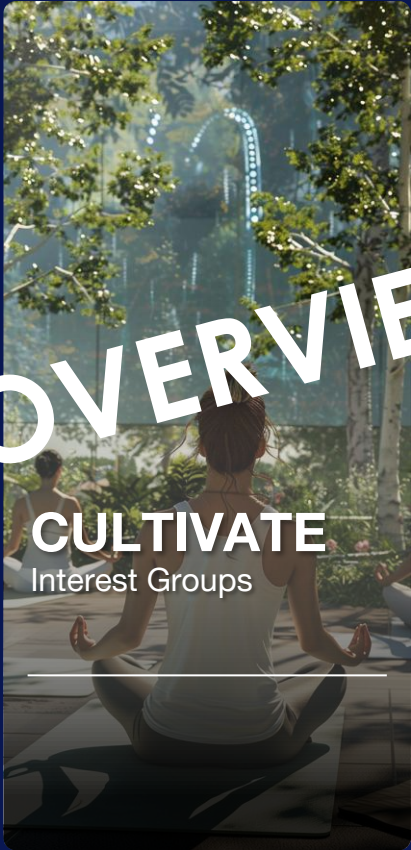
Singapore
Malaysia

Innovate and
differentiate

EMERGING

Vietnam

Build
awareness



TOURISM OVERVIEW 2025



TOURISM OVERVIEW 2025

MUSLIM TRAVEL SEGMENT

Ramp up awareness of Hong Kong's
ancient establishments

Leverage partners with established
Muslim centric databases

TOURISM OVERVIEW 2025



Muslim Travel Segment

ALWAYS ON INITIATIVES



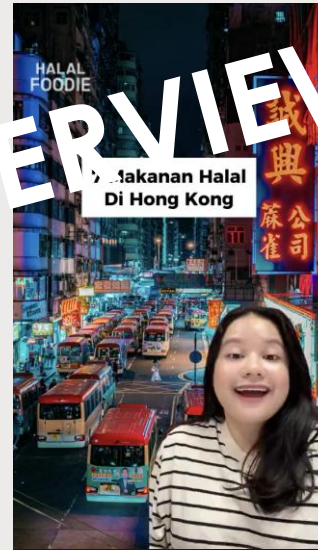
Media and Trade Fairs



In-Market Events



TV Production



Media and Trade Co-op





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Muslim Travel Segment

NEW INITIATIVES

Jelajah
HONG KONG



**Creative partnership
with lifestyle brands**



**Engage Muslim community through
in-market events and KOL led tours
with agents**



malaysia
airlines



CATHAY PACIFIC

Garuda Indonesia

**Muslim-centric campaigns
with Airlines**

SPIRITUAL TOURISM

Differentiate Hong Kong's Mutelu
journey from other destinations

Claim top Mutelu destination

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Spiritual Tourism

ALWAYS ON INITIATIVES



Media Fams



In-Market Events



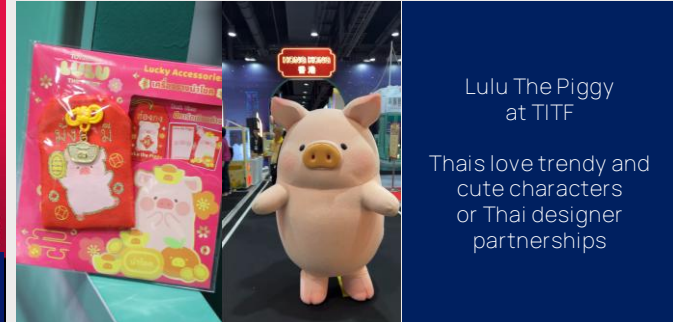
Media and Trade Co-op



Mobile Fortune Wallpaper



Temple Guidebook with Thai artist



Lulu The Piggy at TITF
Thais love trendy and cute characters or Thai designer partnerships

Spiritual Tourism

NEW INITIATIVES



Continue to modernize Mutelu in HK with trendy partnerships such as Lifestyle / Toys partnership



Profile HK temples through cinematic partnerships (Drama / Movie)



UGC Marketing (Testimonials) through agents' co-op

**RAMP UP
VIETNAM
HKTB**

Level up awareness
of tourism offerings

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Ramp Up Vietnam

ALWAYS ON INITIATIVES



Media and Trade Fams

vietjetAir.com

Vietnam Airlines

Airline Co-ops



TV Production Co-ops



Agents Co-ops

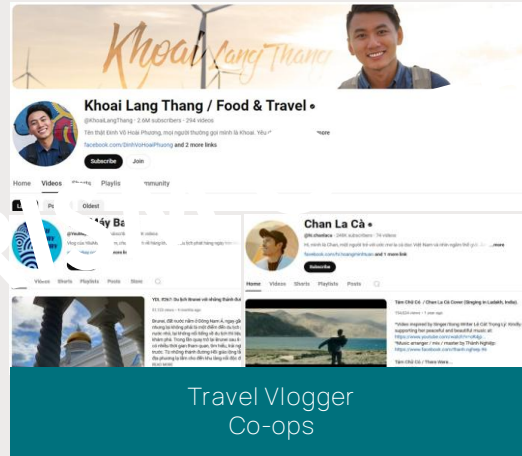
Ramp Up Vietnam

NEW INITIATIVES

Vietnamese actress
5M followers on social media.



Leverage star power
to build affinity



Travel Vlogger
Co-ops



Luxury Fashion
Media Co-ops

ELEVATE & DOCUMENT Initiatives

Muslim Travel Segment,
Spiritual Tourism,
Ramp up Vietnam

EXPAND Potential Growth Segments

Gen MZ &
Multi-Generation
Travellers

CULTIVATE Interest Groups

BEYOND Incentives

TOURISM OVERVIEW 2025

GROWTH SEGMENTS

THE NEXT POTENTIAL

GEN MZ

- 75% of ASEAN population by 2030
- Next big consumer force
- Tech savvy and setting pace for pop culture & trends
- Travelling is a lifestyle choice





GEN MZ

WHO

- High positive SOV on social media
- Constantly in search of trends
- Seek authentic and creative content
- Drawn to cinema to portray a destination

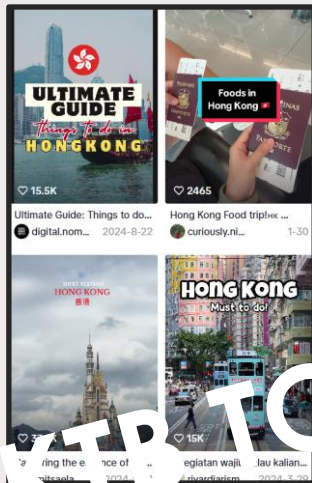
WHEN

- Long weekends
- Non-school holidays
- Off peak season

HOW

Authentic showcase of trendy tourism offerings in Hong Kong

GEN MZ



SOCIAL TRAILBLAZING

Social trends are the way to inspire my next travel plan



VINTAGE VOYAGING

Where adventures meet the charms of Hong Kong's yesteryear



THE PATH LESS-TRAVELLED

An invitation to venture beyond and experience the thrill of discovery



GASTRO GLOBETROTTING

Every bite and sip tells a story of Hong Kong's culture & passion

GROWTH SEGMENTS

THE NEXT POTENTIAL



MULTI-GENERATION

- Post-pandemic trend
- More than 20% increase
- Seek variety to cater to age range

MULTI-GEN TRAVEL

WHO

- Millennials lead the planning, influenced by Gen AZ
- Accessibility and ease are key considerations – Baby Boomers
- 1 – 2 annual trips with wide variety of offerings

WHEN

- School Holidays
- Peak Travel Period

HOW

- Showcase variety and diverse offerings in Hong Kong
- Fuss free packages





MULTI-GEN TRAVEL

MAXIMIZE VISIBILITY THROUGH MEDIA

- Variety of Hong Kong offers
- Practical tips for travelling with seniors and children
- Presented through
 - Content creation and amplification through influencers
 - Family-friendly media fams
 - Variety / Travel shows media coop

TRADE INITIATIVES

- Co-develop family-friendly itineraries and experiences
- Highlight occasions to celebrate family milestones
- Family and Group travel discounts/promos

ELEVATE & DOCUMENT Success Initiatives

Muslim Travel Segment,
Spiritual Tourism,
Ramp up Vietnam

SELECTED GROWTH Segments

Gen M, Z &
Multi-Generation
Travellers

CULTIVATE Interest Groups

Wellness, Culinary
and Multi-Destination

BEYOND Incentives



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WELLNESS TOURISM OVERVIEW 2025

HKTB & TOURISM

Travel Season:

Winter – Spring (Nov – May)

Create awareness on
wellness, nature, sports themed experiences

WELLNESS TOURISM

Media



KOL & MEDIA RELATIONS

- KOL-led fitness retreats
- GO & Wellness Sensory Media Fam

Consumer



BRAND COLLABORATIONS

- Leverage in-market fitness groups
- Awareness and Attendance building for mega events



CULINARY TOURISM HKTb TOURISM OVERVIEW 2025

Travel Season.

All year round. Food is everyone's love language

Uphold Hong Kong as
the trending culinary destination all year round.
From hyperlocal to Michelin Fine Dining.

CULINARY TOURISM

Media



MEDIA SHOWCASE

- TV Programs
- Foodie KOL Co-op

Consumer



MEGA EVENTS

- Hong Kong Wine and Dine Festival media fam
- In-market event showcase
- Media and KOL Co-op

Trade



CELEBRITY CHEF-LED FOOD TOUR

- Trade Co-op to drive conversion
- Curated itinerary for different themes & markets



MULTI- DESTINATION

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MULTI-DESTINATION

STOPOVER PROMOTION



Cityair Pacific

- Stop over before/after long haul or North Asia destinations
- Price promo to swing consumers to Hong Kong



Singapore Airlines

- Fly beyond Singapore to Hong Kong
- Indonesia and Malaysia



Travel Agents and OTAs

Position Hong Kong as hub to Greater Bay Area

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ELEVATE & DOCUMENT Selected Initiatives

Muslim Travel Segment,
Spiritual Tourism,
Ramp up Vietnam

ENGAGE Selected Growth Segments

Gen M, Z &
Multi-Generation
Travellers

CULTIVATE Interest Group

Wellness, Culinary
and Multi-Destination

BEYOND Incentives

Hong Kong
The World's
Meeting Place

Beyond Incentives

ALWAYS ON INITIATIVES

SEA M&I Arrivals

234K

Hong Kong Rewards!

> 500 groups of 25,000 pax



Beyond Incentives

ALWAYS ON INITIATIVES



MICE Fams



Trade Associations



IT&CM Asia



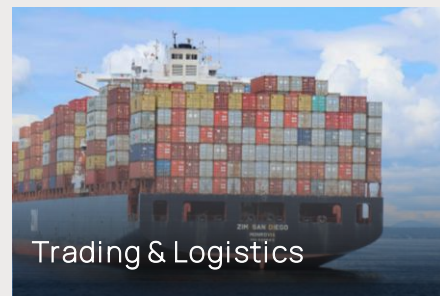
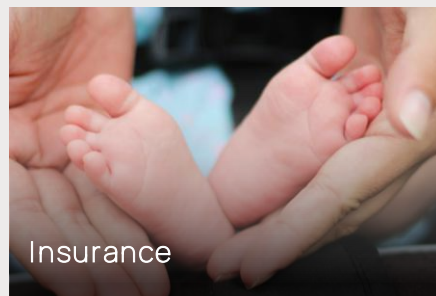
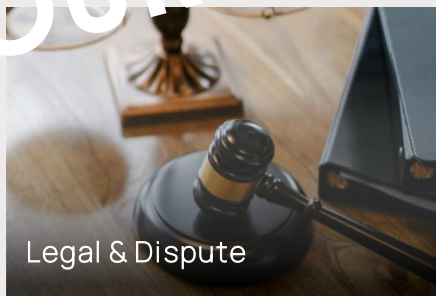
Corporates & Agents Engagements

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Beyond Incentives

MICE 8 KEY FOCUS SECTOR

Leverage Right-to-Win sectors to establish MICE hub status





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HKTb TOURISM OVERVIEW 2025



THANK YOU.

HKTb TOURISM OVERVIEW 2025



HONG KONG
TOURISM BOARD