

2024 INTERNATIONAL MARKET UPDATE HONG KONG

MARKET OVERVIEW

Results based on year ending June 2024

- Hong Kong (China Hong Kong SAR) is South Australia's ninth largest inbound market with visitation down by 23% compared to pre-Covid.
- Majority of consumers speak some English and are mature travellers.
- South Australia is positioned as an appealing holiday destination for independent travellers seeking Australia's best food and wine, nature and self-driving experiences. Seafood has very strong appeal.
- Hong Kong visitors have limited dispersal to regional South Australia, yet visitation through the Limestone Coast, Fleurieu Peninsula and Kangaroo Island indicates that this market enjoys self-drive journeys along some of the state's iconic touring routes.
- Key demand driving experiences include nature and wildlife, coastal and aquatic, food and wine.
- 33% of visits are for the purpose of Holiday, 65% for Visiting Friends & Relatives (VFR).

SNAPSHOT OF CURRENT STATISTICS

Results based on year ending June 2024

VISITORS



NIGHTS



EXPENDITURE



AVERAGE SPEND



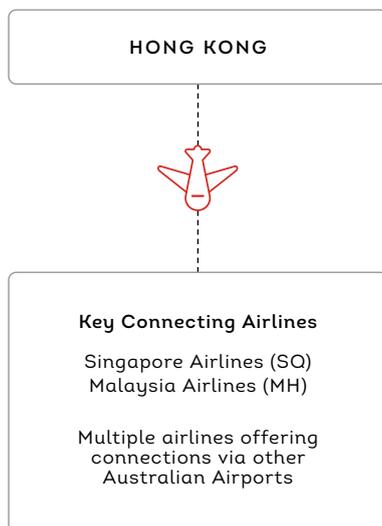
AVERAGE LENGTH OF STAY



INTERNATIONAL RANKING IN SOUTH AUSTRALIA

#9 FOR VISITORS
#13 FOR NIGHTS
#13 FOR EXPENDITURE

AIR ACCESS



FAST FACTS & FIGURES

Annual average of 2017-2019 figures - current year samples not yet sizeable enough

HONG KONG	HOLIDAY	VFR	BUSINESS	OTHER	TOTAL
Visits (SA)	7	5	2	2	15
Visits (AUS)	158	102	30	34	274
Nights (SA)	69	51	6	236	362
Nights (AUS)	2,189	1,471	249	2,757	6,666
ALOS - Nights (SA)	10	10	3	118	24
ALOS - Nights (AUS)	14	14	8	81	24

Expenditure **\$53M**

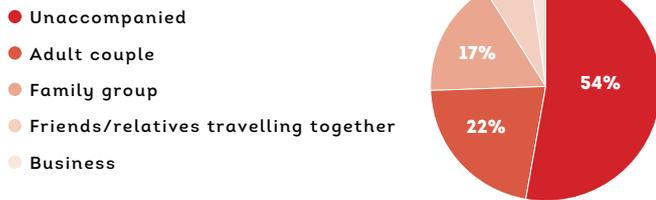
ALOS = Average Length Of Stay, VFR = Visiting Friends and Relatives.

VISITOR ACCOMMODATION TYPE & TRAVEL PARTY DESCRIPTIONS

Annual average of 2017-2019 figures - current year samples not yet sizeable enough



Travel party description (to SA)



IMPORTANCE FACTORS

Data from Consumer Demand Project (CDP) report - August 2023



53%

Safety and security
VS. 53% GLOBAL AGGREGATE



38%

World class beauty and nature
VS. 40% GLOBAL AGGREGATE



34%

Value for money
VS. 37% GLOBAL AGGREGATE



31%

Friendly citizens
VS. 31% GLOBAL AGGREGATE



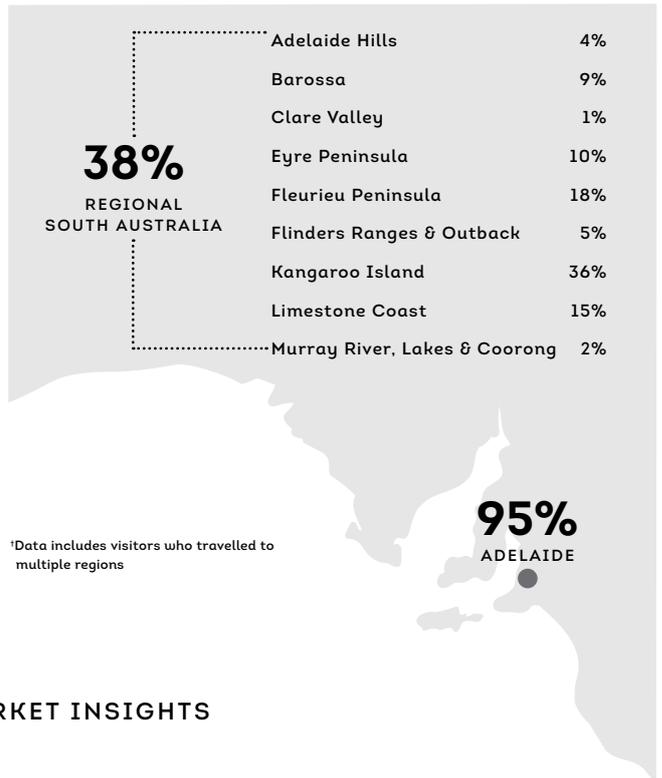
29%

Good food and wine
VS. 37% GLOBAL AGGREGATE

GLOBAL AGGREGATE: This is from the Consumer Demand Project research conducted quarterly by Tourism Australia in 12 key international markets for Australia. Global aggregate refers to the average across all these markets.

VISITOR DISPERSAL[†]

Annual average of 2017-2019 figures - current year samples not yet sizeable enough



MARKET INSIGHTS

- Generally speaking, people from Hong Kong enjoy travelling and travel is part of their lifestyle, indicating that they are experienced free and independent travellers (FIT).
- The SATC will continue to focus on attracting FIT through marketing and trade engagement.
- Travellers carefully consider what they spend and are looking for a variety of travel and interactive experiences. They are strong advocates as they enjoy sharing experiences with others, either through word of mouth or on digital platforms.
- The booking lead time for leisure is short except for Chinese New Year.
- Most arrangements for group tours are handled by the inbound tour operators based in Sydney, Melbourne or Adelaide who are critically important and need to be engaged.
- Specialised niche travel agents are growing in the market catering to a specific target segment promoting experiences such as golf, luxury, honeymoon, driving etc.
- Major travel agents are also developing new and themed itineraries such as photography, international marathons and cycling tours. Moreover, travel agents have increased their focus online in order to capture a larger market share of FIT travellers.
- Cruise packages are increasing in demand and are popular amongst families.

TARGET MARKET PROFILE



Educated professional, 28 - 50 years old in middle to high class groups. They enjoy travelling to experience food and wine, along with nature and wildlife.

BOOKING PREFERENCES

Data from Consumer Demand Project (CDP) report - March 2024



50%

Online Travel Agent
(e.g. Expedia)



44%

Direct with
Airline



32%

Retail Travel Agent/
Tour Operator



21%

Direct with
Accommodation



5%

Direct with
Experienced Provider



2%

Other

TOP 3 BARRIERS TO VISITING AUSTRALIA

Data from Consumer Demand Project (CDP) report - August 2023



High cost of travelling around



Expensive airfares



It is too far to travel

HONG KONG CHECKLIST

Consider the following points when targeting travellers from Hong Kong:

- ✓ **Travellers from Hong Kong generally speak Cantonese and read/write Traditional Chinese.** Many will also have good English skills but it's important not to assume that they do.
- ✓ **Get listed with the key Online Travel Agents** as many travellers from Hong Kong are quite comfortable to book aspects of their holiday on these platforms.
- ✓ Travellers from Hong Kong have a preference for **local immersive experiences that are short, sharp and interactive.**
- ✓ **Play to SA's strength.** Demonstrate immersive wildlife encounters and showcase our world-class produce, especially fresh seafood offerings if they are available in your business.

KEY TRADE PARTNERS

- Travel Circle International Limited
- Goldjoy Holidays
- EGL Tours
- Wing On Travel
- Morning Star Travel
- Miramar Travel
- Connexus Travel Limited
- Jebsen Travel/Jebsen Holidays
- China Travel Service (H.K.) Ltd
- Travel Expert (Asia) Enterprises Ltd
- Westminster
- Singapore Airlines Holiday
- Klook
- KKday

INBOUND REPRESENTATIVE COMPANY

- Australian Tours Management (ATM)
- Travel Around Australia
- Experience Tours Australia (ETA)
- Cheers Travel
- Fortune Dragon
- Four Z's
- MJ Tours
- Tranquil Travel

TOP TRAVEL WEBSITES



Booking.com



Trip.com



kkday



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Disclaimer: Source: International Visitor Survey Dec 2017, Dec 2018, Dec 2019, and June 2024 conducted by Tourism Research Australia, Consumer Demand Project (CDP) Aug 2023 and 2024. Totals may not add to 100% due to rounding. VFR = Visiting Friends and Relatives. ALOS = Average Length of Stay (Nights).

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