

# Hong Kong Tourism Report Q4 2016

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## Abstracts

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BMI View: Hong Kong is home to a well-developed and mature tourism market. The country attracts high volumes of visitors from mainland China, and as a major regional travel hub also welcomes many visitors from throughout the Asia Pacific region and beyond. Tourism infrastructure is modern, including an extensive public transport network and one of the largest and busiest airports in the world. A spate negative media coverage in mainland China and recent political tensions led to an acute decline in mainland tourists in 2015 and early 2016; however, the government has stepped in to support the industry and the long-term outlook remains very positive.

### Key Updates And Forecasts

China remains the largest single source market for inbound arrivals to Hong Kong, expected to account for more than 75% of arrivals in 2016. We do note, however, that visitor numbers have been impacted by political disagreements, with the chief of Hong Kong's Professional Tourist Guides General Union, Yu Li-Hua, reporting that tour groups in January 2016 numbered 3,729 compared with 11,575 in January 2015. Visitors from China during the seven-day Lunar New Year period were down 12% y-o-y. However we expect flows between Hong Kong and the mainland to recover and resume growth over the remainder of 2016.

As well as opening a new concourse at Hong Kong International Airport (HKIA), the territory continues to expand the number of regional and global flight connections on offer. Hong Kong Airlines, which runs around 80% of its flights from the new concourse, was to add six new flights to Beijing and five new flights to Hanoi, and low-cost carrier HK Express has begun offering flights to

Japan in 2016 and is planning to offer flights to Myanmar and additional routes to Thailand beginning later in the year.

As a mature market, Hong Kong's inbound market is already huge (with more than 62mn arrivals projected for 2016), and overall we are forecasting a slow but steady increase in arrivals to Hong Kong between 2016 and 2020. This will have a positive impact on tourism-related expenditure, which is forecast to reach USD49.6bn in 2020.

## Contents

### BMI Industry View

Table: Key Forecasts (Hong Kong 2013-2020)

### SWOT

### Tourism

### Industry Forecast

Table: Inbound Tourism (Hong Kong 2013-2020)

Table: Tourism Receipts (Hong Kong 2013-2020)

Table: Hotel Accommodation (Hong Kong 2013-2020)

Table: Tourist Departures And Consumption (Hong Kong 2013-2020)

### Industry Risk/Reward Index

Table: Asia Tourism Risk/Reward Index

### Rewards

### Risks

### Market Overview

### Competitive Landscape

### Domestic Hotel Groups

Table: Domestic Hotels

### International Hotel Groups

Table: International Hotel Groups

### Methodology

### Industry Forecast Methodology

### Risk/Reward Index Methodology

Table: Weighting Of Indicators

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