

Hong Kong and Macau Market Research Report

April 2025

About The Research

- Based on 10 trade partner interviews and our industry observations, the number of travel agencies in Macau offering European products has dropped by ~60% since the pandemic.
- **As a result, a large proportion of Macau travelers now end up joining group tours organized by Hong Kong-based travel agencies.** Some of these tours are pieced together through Macau agencies and then merged into Hong Kong groups, while others are directly purchased from Hong Kong-based agencies with physical storefronts in Macau.
- Therefore, in this study, you will find that **the Hong Kong and Macau markets are often analyzed collectively**, due to their overlap and similarities, only with exceptions where differences exist.

A G E N D A

- 1. Hong Kong & Macau Market Overview**
2. Traveler Characteristics & Behavior Evolution
3. Spain-Related Product & Perception
4. Promotion Challenges & Support Needed
5. Methodology & Research Disclaimer

AGENDA

1. Hong Kong & Macau Market Overview

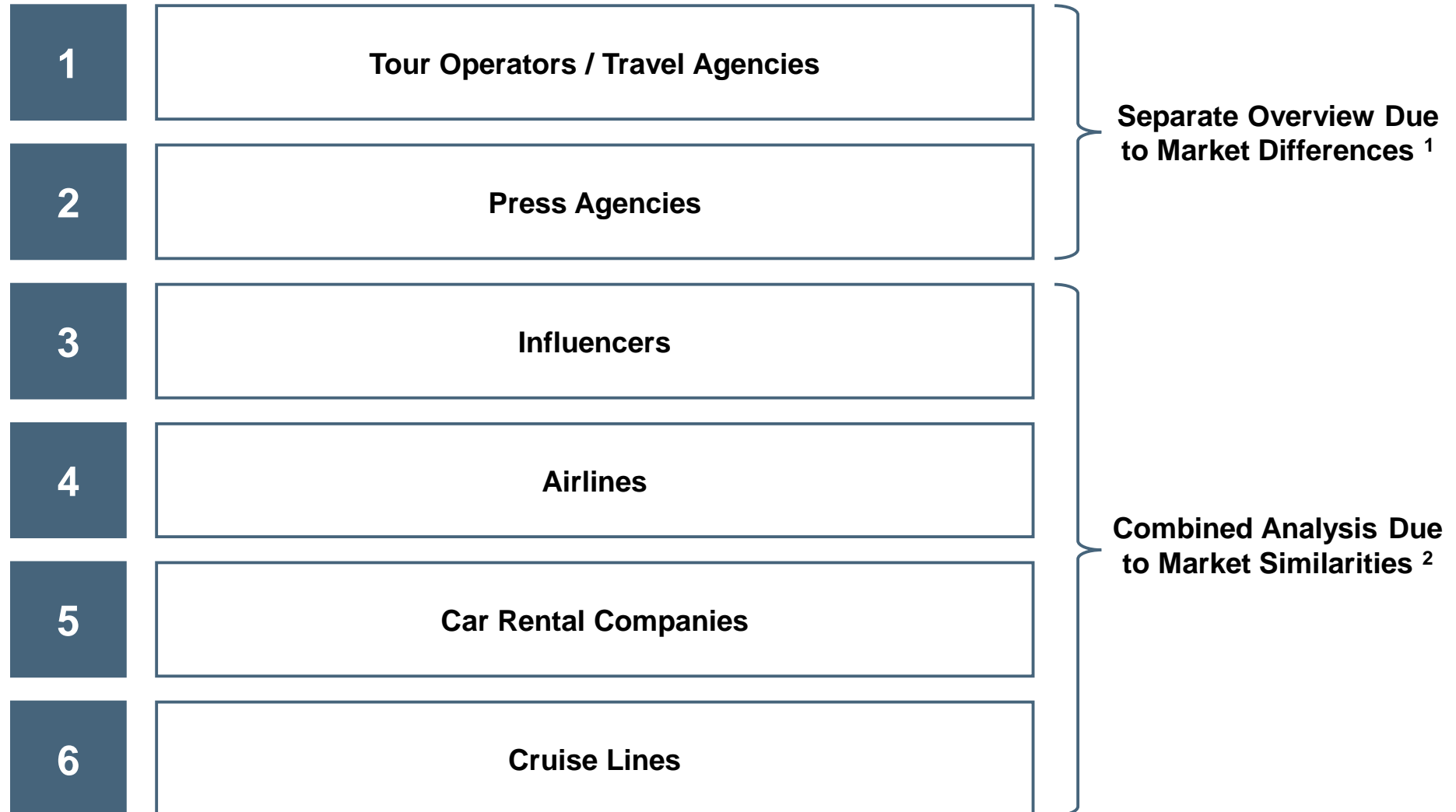
1.1 Tourism Stakeholder Overview

1.2 Local Authority Overview & Potential Cooperation

1.3 Tourism-related Economic Statistics

1.4 Air Connectivity Overview

This section outlines the key stakeholders in the Hong Kong and Macau markets, covering six key aspects



1. Though analyzed separately, some Hong Kong-based travel agencies and press agencies also influence the Macau market.

2. The Macau market is primarily covered by Hong Kong-based influencers and airlines, and it shares the same suppliers for car rentals and cruises with Hong Kong.

We list the leading travel agencies offering Spain-related products in the Hong Kong market post-pandemic (1/2)

1. TRAVEL AGENCIES

#	Travel Agency Name ¹	Logo	Establishment Year	Key Market	Position in Europe Business ³
1	Wing On Travel		1964	Hong Kong	Top-tier
2	Travel Circle International		1965	Hong Kong	Top-tier
3	Premium Holidays		2012	Hong Kong	Top-tier
4	Jetour Holiday		1983	Hong Kong	Top-tier
5	EGL Tours		1986	Hong Kong & Macau ²	Top-tier
6	Charming Holidays		1987	Hong Kong	Top-tier
7	Goldjoy Holidays		1989	Hong Kong	Top-tier
8	Miramar Travel		2004	Hong Kong & Macau ²	Top-tier









1. In the B2B interview, we couldn't obtain accurate market share rankings but categorized agencies as top-tier and secondary-tier. Therefore, the list is in no particular order.

2. These three Hong Kong agencies also operate in Macau and hold a notable market presence there.

3. Top-tier and secondary-tier classifications are solely based on B2B interviews, as no public ranking data is available.

We list the leading travel agencies offering Spain-related products in the Hong Kong market post-pandemic (1/2)








1. TRAVEL AGENCIES

#	Travel Agency ¹	Brief Profile	Contact Information
1	 永安旅遊 WING ON TRAVEL	<ul style="list-style-type: none"> The company offers FIT, group tours, and flight & cruise bookings to over 400 destinations in more than 50 countries, with a user-friendly official APP. Its annual tourist volume exceeds one million. 	hotline@wingontravel.com (+852) 2928 8882
2	 TCI 勝景遊	<ul style="list-style-type: none"> The company offers premium outbound travel, individual travel products, ticketing, and cruises, covering long-haul destinations (America, Europe, Africa, Australia/New Zealand) and short-haul destinations (Japan, Korea, Southeast Asia, India, China). 	mgt@tcitravel.com (+852) 2956 6888
3	 PREMIUM HOLIDAYS 尊賞假期	<ul style="list-style-type: none"> The company offers high-quality group tours, cruise holidays, business travel, and independent tours, covering various destinations and providing personalized experiences for high-end needs. 	general@premiumholidays.com (+852) 2115 9828
4	 Jetour 捷旅	<ul style="list-style-type: none"> The company offers services including corporate meetings, incentive travel, overseas business conferences, exhibition management, and luxury tailor-made group tours. 	info@jetour.com.hk (+852) 3180 9988
5	 Egl tours 東瀛遊	<ul style="list-style-type: none"> The company operates in Hong Kong and Macau, offering FIT packages, group tours, and cruises across Japan, Southeast Asia, Australia, Europe, Egypt, South Africa, and China. 	ct.tour@egltours.com
6	 翠明假期 CHARMING HOLIDAYS	<ul style="list-style-type: none"> A wholly-owned subsidiary of Ming Pao Holdings Ltd., the company operates across North America with branches in major US and Canadian cities, offering diverse tours to Europe, South America, Australia, and Africa, supported by major airlines. 	charming@charming.mingpao.com (+852) 2542 0220
7	 Goldjoy Holidays 金怡假期	<ul style="list-style-type: none"> The company offers group tours, FIT packages, MICE services, and tailor-made packages, and is recognized as a leader in long-haul and alternative destinations like Egypt, Africa, the Middle East, and South America. 	goldjoy@goldjoy.com (+852) 2804 1188
8	 Miramar Travel 美麗華旅遊	<ul style="list-style-type: none"> The company operates in Hong Kong and Macau and was awarded “Capital Best Travel Agency” for 11 years (2009-2019). It offers over 400 itineraries across 50 countries, including Europe, Japan, China, Southeast Asia, and South America. 	travel@miramartravel.hk

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We list the leading travel agencies offering Spain-related products in the Hong Kong market post-pandemic (2/2)

1. TRAVEL AGENCIES







#	Travel Agency Name ¹	Logo	Establishment Year	Key Market	Position in Europe Business ²
9	Morning Star Travel		1972	Hong Kong	Top-tier
10	Sunflower Travel Service		1974	Hong Kong	Secondary-tier
11	China International Travel Service (Hong Kong)		1981	Hong Kong	Secondary-tier
12	China Travel Service (Hong Kong)		1985	Hong Kong	Secondary-tier
13	Big Line Holiday		2003	Hong Kong & Macau ²	Secondary-tier
14	GEG Travel Limited		2007	Hong Kong	Secondary-tier
15	Pro Tours Limited		2023	Hong Kong	Secondary-tier

1. In the B2B interview, we couldn't obtain accurate market share rankings but categorized agencies as top-tier and secondary-tier in the local market position, specifically for European businesses. Therefore, the list is in no particular order.

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1. TRAVEL AGENCIES

#	Travel Agency ¹	Brief Profile	Contact Information
9	 星晨旅遊 MorningStar	<ul style="list-style-type: none"> The company specializes in group tours, customized itineraries for individuals and companies, study tours, and culinary journeys, providing enriching travel experiences across Europe, Central Asia, Africa, Southeast Asia, and China. 	cs@morningstartravel.com.hk
10	 Sunflower 新華旅遊	<ul style="list-style-type: none"> The company offers group tours, study tours, and conference/wedding tours, covering long-haul destinations (America, Europe, Australia/New Zealand) and short-haul destinations (Greater Bay, Southeast Asia). 	enquiry@hksunflower.com (+852) 2722 2870
11	 CITS 中国国旅	<ul style="list-style-type: none"> The Hong Kong subsidiary of the Chinese state-owned China International Travel Service Head Office, it offers global travel packages along with local tours, car rentals, and hotel bookings. 	(+852) 2853 3835
12	 香港中国旅行社 CTS CHINA TRAVEL SERVICE (HONG KONG)	<ul style="list-style-type: none"> The company, Hong Kong's first Chinese-owned travel agency, specializes in inbound and outbound tours, business travel, exhibitions, tailored tours, travel document applications, and ticketing services. 	office@ctshk.com (+852) 2853 3888
13	 大航線	<ul style="list-style-type: none"> The company operates in Hong Kong and Macau, offering FIT packages, group tours, cruises, and flight bookings, specializing in short and long itineraries to China, Japan, Southeast Asia, and Europe. 	commercial@bigline.hk
14	 GEG TRAVEL 至活旅遊 玩得更加歐洲	<ul style="list-style-type: none"> GEG Travel Limited, a leading agency founded in 1988 and a subsidiary of GEG Europe Limited, offers comprehensive European land travel services and operates globally with nearly 300 staff across Europe, China, Hong Kong, and Canada. 	hk@gegeu.com (+852) 3106 3838
15	 PRO TOURS 優越旅遊	<ul style="list-style-type: none"> The company offers a wide range of international travel routes, including destinations in Asia, Europe, the Americas, Oceania, Africa, and the Antarctic. 	info@protours.com.hk (+852) 2309 5666

1. In the B2B interview, we couldn't obtain accurate market share rankings but categorized agencies as top-tier and secondary-tier in the local market position, specifically for European businesses. Therefore, the list is in no particular order.

We list the leading travel agencies offering Spain-related products in the Macau market post-pandemic

1. TRAVEL AGENCIES







#	Travel Agency Name ¹	Logo	Establishment Year	Key Market	Position in Europe Business ²
1	China Travel Service (Macau)		1961	Macau	Secondary-tier
2	New Sintra Tours		1986	Macau	Secondary-tier
3	Multinational Tourism Group Company		1990	Macau	Secondary-tier
4	China International Travel Service (Macau)		1995	Macau	Secondary-tier
5	Energy Travel Agency		2005	Macau	Secondary-tier
6	Macau MTP Travel Agency		2013	Macau	Secondary-tier

1. In the B2B interview, we couldn't obtain accurate market share rankings but categorized agencies as top-tier and secondary-tier in the local market position, specifically for European businesses. Therefore, the list is in no particular order.

2. Top-tier and secondary-tier classifications are solely based on B2B interviews, as no public ranking data is available.

We list the leading travel agencies offering Spain-related products in the Macau market post-pandemic

1. TRAVEL AGENCIES

#	Travel Agency ¹	Brief Profile	Contact Information
1	 澳門中國旅行社股份有限公司 CHINA TRAVEL SERVICE (MACAO) LTD.	<ul style="list-style-type: none"> Founded in 1961, it was initially a branch of China Travel Service (Hong Kong), and is now a subsidiary of the Nanguang Group, Macau's only central enterprise, offering services in hotel management, transportation, catering, and document services. 	cts@cts.com.mo (+853) 2870 0888
2	 SINTRA TOURS NEW SINTRA TOURS, LTD. 新新麗華旅行社有限公司	<ul style="list-style-type: none"> The company offers group tours, ticket booking, and local dining experiences, with itineraries covering Europe, North America, Southeast Asia, East Asia, and Australia. 	(+853) 2871 5432
3	 ASF 澳大利亞證券交易所上市公司 萬國旅遊集團 Multinational Travel Group	<ul style="list-style-type: none"> As an IATA member and the first Macau travel agency to obtain ISO9001:2000 certification, it has organized over six million trips and offers group tours, ticketing, hotel bookings, car rentals, and custom itineraries globally and locally. 	myt701912@qq.com (+853) 2833 6263
4	 CITS 中国国旅	<ul style="list-style-type: none"> The Macau subsidiary of China International Travel Service Head Office, it offers global travel packages, local tours, local car rentals, and hotel bookings. 	(+853) 6886 9768
5	 牙力旅行社 JATY TRAVEL AGENCY LIMITED 牙力旅行社	<ul style="list-style-type: none"> A professional travel services provider in Macau, offering ferry tickets, chartered vehicles, group tours, ticket booking, local dining, and coach services. 	jaty119@qq.com (+853) 2875 0303
6	 MTP 澳門葡京旅行社 MACAU MTP TRAVEL AGENCY LIMITED	<ul style="list-style-type: none"> The company, with a branch in Zhuhai since 2014, operates in both Macau and Mainland China, offering group tours, MICE services, and Macau car rentals and ticketing. 	macau_mtp@hotmail.com (+853) 2883 5427

1. In the B2B interview, we couldn't obtain accurate market share rankings but categorized agencies as top-tier and secondary-tier in the local market position, specifically for European businesses. Therefore, the list is in no particular order.

We list the influential tourism-related press agencies in the Hong Kong market (1/2)

2. PRESS AGENCIES

#	Media Name ¹	Type	Category	Market Position
1	U Travel	Online	Travel	Tier One
2	Yahoo Hong Kong	Online	Online Portal	Tier One
3	HK Economic Times	Traditional/Online	Mainstream Media	Tier One
4	Sing Tao Daily	Traditional/Online	Mainstream Media	Tier One
5	Wen Wei Po	Traditional/Online	Mainstream Media	Tier One
6	am730	Traditional/Online	Mainstream Media	Tier One
7	Ming Pao Weekly	Traditional/Online	Lifestyle	Tier One

1. Generally, media influence in China is not ranked specifically but categorized into first-tier and second-tier. Therefore, the list is in no particular order.

We list the influential tourism-related press agencies in the Hong Kong market (1/2)

2. PRESS AGENCIES

#	Media Name ¹	Brief Profile	Contact Information
1	U Travel	<ul style="list-style-type: none">A website that offers travel information, guides, discounts, videos, and community engagement for travelers.	info@ulifestyle.com.hk
2	Yahoo Hong Kong	<ul style="list-style-type: none">An online portal offering a diverse selection of news and content, including news, finance, sports, entertainment, etc.	https://yahooblog.yadvertising.com.hk/en/
3	HK Economic Times	<ul style="list-style-type: none">A Hong Kong media group offering newspapers, magazines, digital platforms, real-time stock trading information, software, and talent matching services. Its flagship, Hong Kong Economic Times and hket.com, provides financial, real estate, and economic data analysis.	mktg1@hket.com
4	Sing Tao Daily	<ul style="list-style-type: none">One of Hong Kong's oldest and most influential Chinese-language newspapers, known for its comprehensive and timely news coverage across a wide range of topics, including current affairs, finance, entertainment, and sports.	info@singtao.com info@stheadline.com
5	Wen Wei Po	<ul style="list-style-type: none">Hong Kong Wen Wei Po, founded on September 9, 1948, originally a historic newspaper in Shanghai, is now part of the Ta Kung Wen Wei Media Group in Hong Kong and serves as an official newspaper of the Central People's Government Liaison Office in Hong Kong.	editor@wenweipo.com (+755) 2542 1005
6	am730	<ul style="list-style-type: none">am730, Hong Kong's third major free newspaper, targets young people and the white-collar class with a daily print run of about 260,000 copies, offering news, finance, and lifestyle content in a light, visually appealing design.	marketing@am730.com.hk (+852) 3408 3880
7	Ming Pao Weekly	<ul style="list-style-type: none">A renowned Hong Kong leisure weekly focusing on celebrities and fashion, offering engaging content on lifestyle, arts, and society.	business@omghk.com (+852) 3605 3778

1. Generally, media influence in China is not ranked specifically but categorized into first-tier and second-tier. Therefore, the list is in no particular order.

We list the influential tourism-related press agencies in the Hong Kong market (2/2)

2. PRESS AGENCIES

#	Media Name ¹	Type	Category	Market Position
8	CAPITAL	Traditional/Online	Economic & Finance	Tier One
9	JET	Traditional	Lifestyle	Tier Two
10	JETSETTER HK	Traditional/Online	Lifestyle	Tier Two
11	TTG	Traditional/Online	Travel B2B	Tier Two
12	LifeStyle Journal	Traditional/Online	Lifestyle	Tier Two

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We list the influential tourism-related press agencies in the Hong Kong market (2/2)

2. PRESS AGENCIES

#	Media Name ¹	Brief Profile	Contact Information
8	CAPITAL	<ul style="list-style-type: none">The flagship publication of South China Media, South China Business, is the most influential monthly business magazine in Greater China, featuring success stories of listed companies, financial analysis, property investment, and market news.	capital-sales@capital-hk.com (+852) 2963 0837
9	JET	<ul style="list-style-type: none">A high - taste modern lifestyle and culture monthly magazine that provides readers with modern urban leisure life information. It offers updates on fashion, travel, sports, and more.	jet_ad@fromthecabin.com (+852) 3844 6915
10	JETSETTER HK	<ul style="list-style-type: none">A multi-medium luxury travel lifestyle platform that includes a quarterly print magazine, a comprehensive website, and an informative bi-weekly newsletter.	info@artemiscomms.com (+852) 2964 9997
11	TTG	<ul style="list-style-type: none">A leading travel trade media in greater China, covering market trends, industry developments, and offers valuable insights for tourism professionals in the region.	traveltradesales@ttgasia.com
12	LifeStyle Journal	<ul style="list-style-type: none">A Hong Kong - based fashion and culture magazine covering diverse topics like fashion, art, culture, gourmet food, and travel.	digital-sales@hkej.com sales@hkej.com

1. Generally, media influence in China is not ranked specifically but categorized into first-tier and second-tier. Therefore, the list is in no particular order.

We list the influential tourism-related press agencies in the Macau market

2. PRESS AGENCIES

#	Media Name ¹	Type	Category	Market Position
1	Macau Lifestyle	Online	Travel	Tier One
2	The Trip Addict	Online	Travel	Tier Two
3	SODA Magazine	Online	Travel	Tier Two

1. Generally, media influence in China is not ranked specifically but categorized into first-tier and second-tier. Therefore, the list is in no particular order.

We list the influential tourism-related press agencies in the Macau market





2. PRESS AGENCIES

#	Media Name ¹	Brief Profile	Contact Information
1	Macau Lifestyle	<ul style="list-style-type: none">A digital media platform offering unique and engaging content on events, dining, culture, travel, style, city guides, and people profiles, strategically targeting both tourists and local communities to highlight the best of what Macau has to offer.	https://sodamagazine.co.uk/contact
2	The Trip Addict	<ul style="list-style-type: none">A travel media platform offering diverse content like travel guides, cultural insights, and adventure stories to inspire and inform travelers.	salielei@thetripaddict.com (+853) 2892 2589 / (+853) 6637 7881
3	SODA Magazine	<ul style="list-style-type: none">Macau's first free monthly lifestyle magazine, covering local entertainment, consumer trends, culture, fashion, food, and community hotspots.	https://macaulifestyle.com/contact-us/

1. Generally, media influence in China is not ranked specifically but categorized into first-tier and second-tier. Therefore, the list is in no particular order.

The following are influencers generated significant impact in Hong Kong and Macau with Spain-related content in recent years (1/2)

3. INFLUENCERS

ID	Key Platform	Follower Base	Spain-related Content	Content Impressions	Contact Information
 @eatgoodwesteatbadwest	Instagram Facebook	> 100k	<ul style="list-style-type: none">Food in Madrid and Barcelona in May 2024 – Jun 2024	> 100k	eatgoodwesteatbadwest@gmail.com
 @indulgenteats	Instagram	> 368k	<ul style="list-style-type: none">Food in Costa del Sol in Jun 2024	> 23k	No public contact info; contactable only via in-platform messages
 @goldfishbrain	YouTube Facebook Instagram	> 1,260k	<ul style="list-style-type: none">Food in Madrid, interaction with locals, Madrid one-day itinerary in Dec 2023 – Jan 2024	> 1,710k	nerdyboy@nerdyboy.com.tw
 @Snowblue 雪蓝	YouTube Instagram	> 47k	<ul style="list-style-type: none">Food, hotels, famous attractions in Madrid, Barcelona, Toledo and Segovia in Sep 2023 – Feb 2024	> 272k	No public contact info; contactable only via in-platform messages





The following are influencers generated significant impact in Hong Kong and Macau with Spain-related content in recent years (2/2)

3. INFLUENCERS

ID	Key Platform	Follower Base	Spain-related Content	Content Impressions	Contact Information
 @JoeyfulJoey	YouTube	> 139k	<ul style="list-style-type: none">Culture, cuisine experience and interaction with locals in Jul 2023	> 46.5k	joeyful.joey.co@gmail.com
 @audrey_life	YouTube	> 14k	<ul style="list-style-type: none">Food in Barcelona in May 2023	> 15k	No public contact info; contactable only via in-platform messages
 @Dishtravel	YouTube Facebook Instagram	> 24k	<ul style="list-style-type: none">Food in Spain, day trip in Bubi3n, Capileira, and Granada in Jun 2021 – Sep 2022	> 7.5k	i@dishim.com
 @JoanneCheuk	Facebook Instagram	> 4k	<ul style="list-style-type: none">Food, arts and traditional architectures in Madrid in Jan 2023 – April 2025	> 2.2k	info@joannecheuk.com
 @ Chanchanchannel	Facebook	>3.4k	<ul style="list-style-type: none">Spanish food in Sep 2024	>1k	cccwww@gmail.com

We identify carriers for GBA-Spain routes as key stakeholders, as many travelers also fly from Shenzhen








4. AIRLINES

Airline Stakeholders	2024 Annual Seat Numbers	Weekly Flights in 2024 ¹	
 CATHAY PACIFIC 國泰航空公司	Hong Kong-Madrid	46.622	 <ul style="list-style-type: none">• 3 flights/week, in Jan–Oct• 4 flights/week, in Nov–Dec Hong Kong Direct Flights
	Hong Kong-Barcelona	15.960	
 深圳航空 Shenzhen Airlines	Shenzhen-Barcelona	45.114	 <ul style="list-style-type: none">• 2 flights/week, in Jan• 3 flights/week, in Feb–Dec Shenzhen Direct Flights
	Shenzhen-Madrid	3.450	

1. Refers to the scheduled weekly frequency published by airlines in 2024.
Source: OAG Aviation Database

We also list airlines offering major one-stop flights connecting Spain with the Hong Kong and Macau markets

4. AIRLINES

Carrier ¹	Departure ²	Stopover ³	Arrival ³
 Lufthansa	Hong Kong	Frankfurt	Madrid, Barcelona, Valencia, Malaga, Palma, Bilbao
 Royal Dutch Airlines	Hong Kong	Amsterdam	Madrid, Barcelona, Valencia, Malaga, Palma, Bilbao
 SWISS	Hong Kong	Zurich	Madrid, Barcelona, Valencia, Malaga, Palma, Bilbao
 AIRFRANCE	Hong Kong	Paris	Madrid, Barcelona, Valencia, Malaga, Bilbao
 TURKISH AIRLINES	Hong Kong	Istanbul	Madrid, Barcelona, Valencia, Malaga, Bilbao
 QATAR الخطوط الجوية القطرية	Hong Kong	Doha	Madrid, Barcelona, Malaga
 Emirates	Hong Kong	Dubai	Madrid, Barcelona

1. We can only access airline-scheduled flights for April-June 2025, not 2024.

2. Based on interviews and product audits, Macau travelers depart via Hong Kong.

3. We only list the major stopovers and routes to Spain for Hong Kong and Macau travelers in April-June 2025, as there are too many routes to include them all.









Consumers in Hong Kong and Macau purchase car rental services through online travel platforms, primarily from European suppliers

5. CAR RENTAL COMPANIES









#	Key Car Rental Platforms ¹
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1	
2	
3	
4	

#	Key Car Rental Suppliers ¹
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1	
2	
3	
4	
5	
6	
7	
8	

#	Key Car Rental Suppliers ¹
---	---------------------------------------

9	
10	
11	
12	
13	
14	
15	
16	

1. The numbering does not reflect market performance.

Based on our interviews and research, consumers frequently compare information and prices across platforms and suppliers, making public market influence rankings difficult to obtain.

Hong Kong and Macau travelers mainly consume European cruise products from the following cruise lines

6. CRUISE LINES ¹



1. In no particular order.

A G E N D A

1. Hong Kong & Macau Market Overview

1.1 Tourism Stakeholder Overview

1.2 Local Authority Overview & Potential Cooperation

1.3 Tourism-related Economic Statistics

1.4 Air Connectivity Overview

The tourism boards of the two markets are introduced below, with cooperation opportunities for TURESPAÑA in cultural events



Background & Nature



- | | |
|--|---|
| <ul style="list-style-type: none"> Established as Hong Kong Tourist Association in 1957, restructured in April 2001. Publicly funded by the Hong Kong government, headquartered in World Trade Centre, Causeway Bay. | <ul style="list-style-type: none"> Publicly funded by the Macau SAR government. Located at Alameda Edifício “Hot Line”, 18º andar, Macau. |
|--|---|

Key Goals



- | | |
|---|---|
| <ul style="list-style-type: none"> Solidify Hong Kong's status as a world-class tourist destination. Drive social and economic development through tourism. | <ul style="list-style-type: none"> Position and develop Macau as a World Centre of Tourism and Leisure. Implement, analyze and assist in formulating the tourism policies of the Macau SAR. |
|---|---|

Core Functions

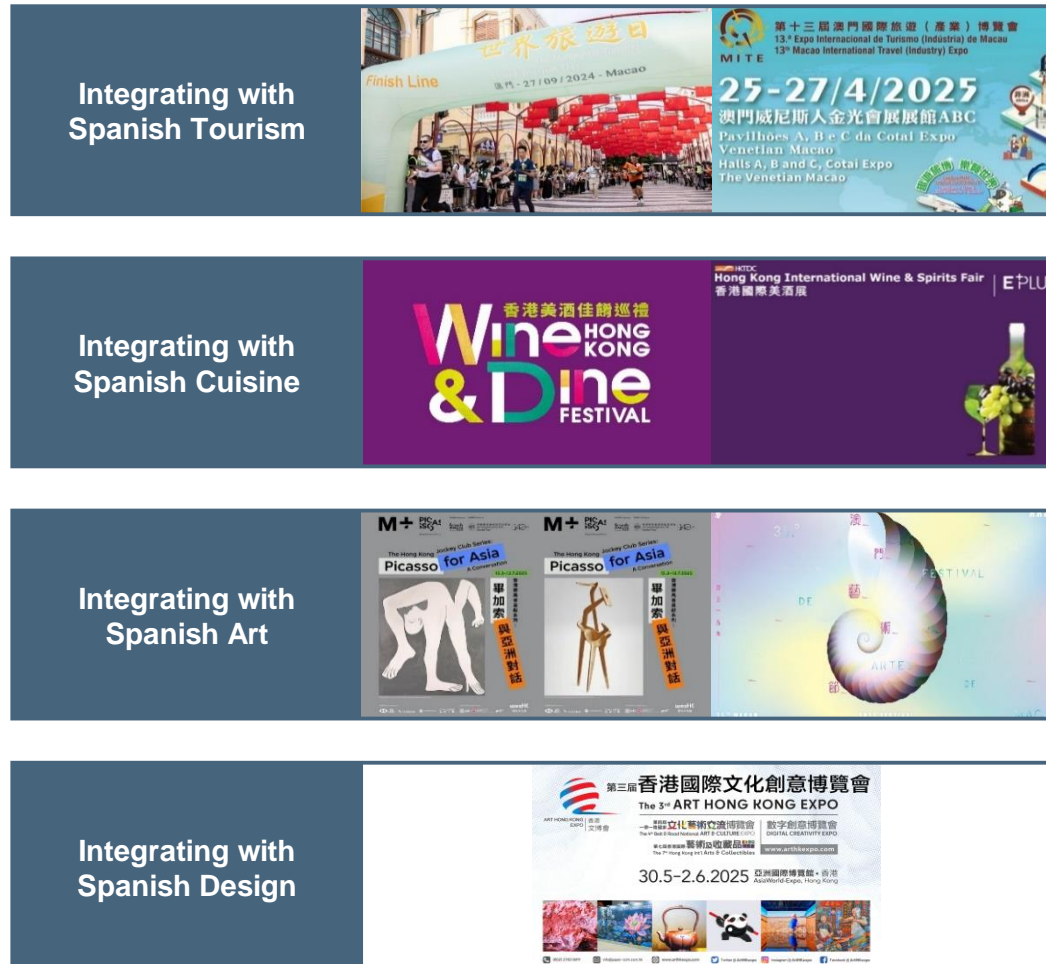


- | | |
|--|---|
| <ul style="list-style-type: none"> Event Promotion & Destination Enrichment: Year-round events, independent or with sponsors, to promote Hong Kong. Global Promotion & Brand Building: 15 global offices, 6 market reps to attract international visitors. Visitor Experience Enhancement: Service ratings, merchant certifications, traveler surveys. Partners & Industry Support: Local tourism database, market insights, promotional resources for industry practitioners. | <ul style="list-style-type: none"> Event Promotion & Destination Enrichment: A variety of tourism projects and mega events to foster and improve the tourism in Macau. Global Marketing: Launch and manage marketing campaigns targeting international and regional markets to highlight Macau's attractions. Policy & Regulation: Formulate and implement tourism policies and regulations. Industry Supervision & Crisis Management: Manage tourism-related crises to protect the well-being of tourists. |
|--|---|

Cooperation Opportunities

We suggest that TURESPAÑA cooperate with local tourism boards by participating in cultural events

Cultural Events for Potential Cooperation ¹



Cooperation Strategy Highlights

We recommend that **TURESPAÑA leverage existing annual cultural events** in the Hong Kong and Macau markets to showcase Spain's offerings and boost visibility.

- **Higher Cost-effectiveness:** Compared to organizing standalone events, tapping into established local events is more budget-friendly. Multiple Spanish brands have already participated in such events in the past, suggesting available resources to build upon.
- **Stronger Partnership Potential:** If TURESPAÑA contributes to enhancing the appeal of these local events, it could also foster greater willingness for collaboration from local tourism authorities in Hong Kong and Macau.

1. Some posters are examples from 2024, while the events are held annually.

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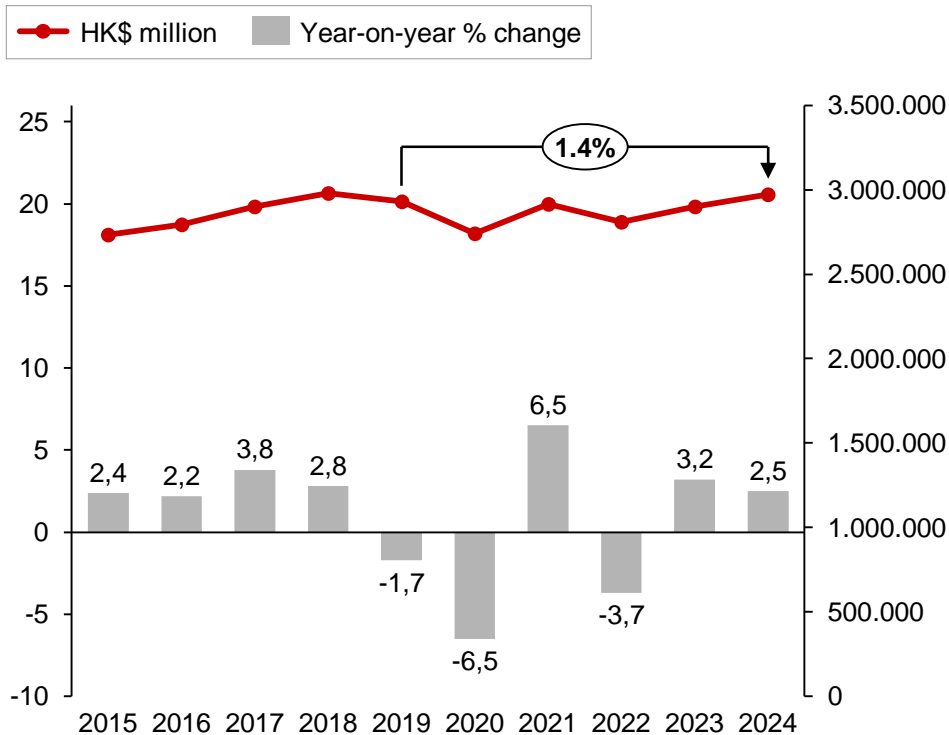
1.4 Air Connectivity Overview

Viewed through the lens of GDP, Hong Kong's economic growth has noticeably slowed, which echoes the takeaways from our interviews

HONG KONG

GDP and Annual Growth Rate

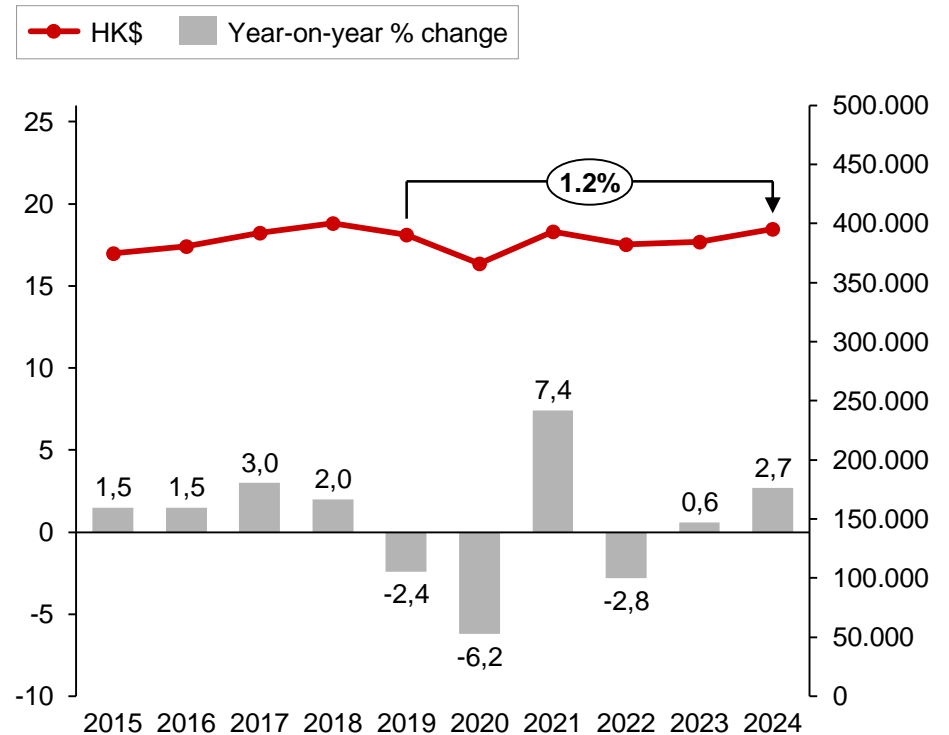
GDP in chained (2022) dollars



Measured by GDP in chained (2022) dollars, Hong Kong's economy grew steadily before 2019 but fluctuated afterward, with just a 1.4% increase in 2024 compared to 2019.

GDP per Capita and Growth Rate

Per capita GDP in chained (2022) dollars



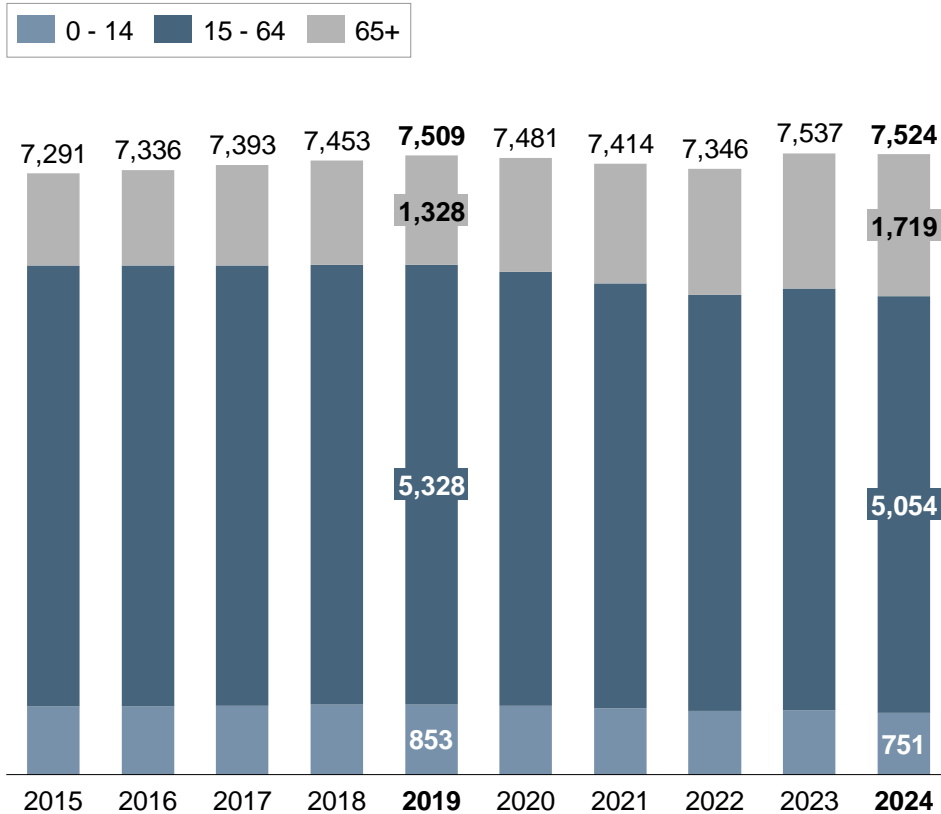
A similar trend is seen in per capita GDP in chained 2022 dollars — economic growth has stagnated since 2019 and 2024 levels remain below those of 2018.

The following charts illustrate Hong Kong's population structure and average salary levels

HONG KONG

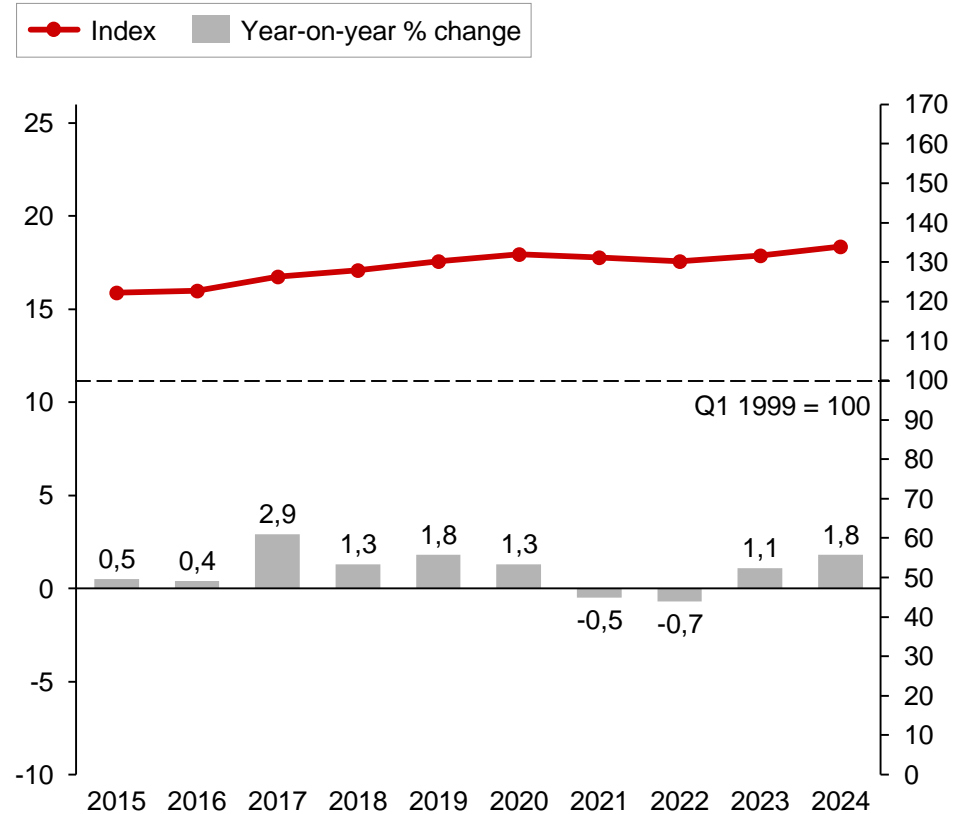
Population and Population Structure

Mid-year population by age-group (in thousand)



Average Income Index

Real Indices of Payroll per Person Engaged ¹ (Q1 1999 = 100)



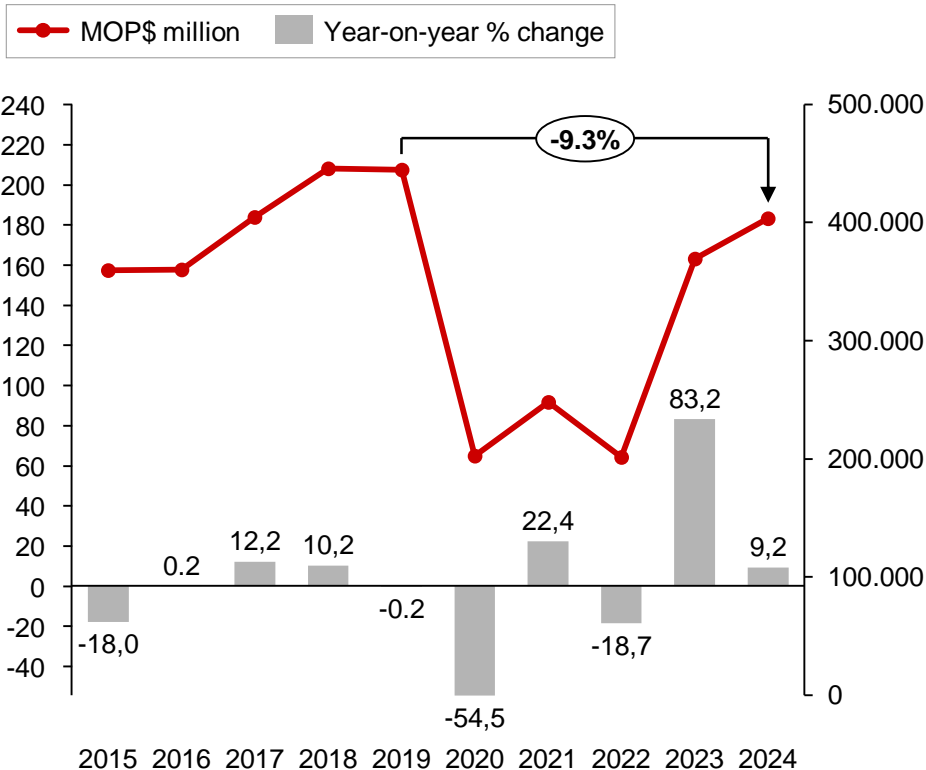
1. The indices listed in this table all refer to Q1 of each year.
Source: The Census and Statistics Department of Hong Kong

Macau's economy has declined significantly due to the pandemic, with GDP levels of 2024 still below the 2019 levels

MACAU

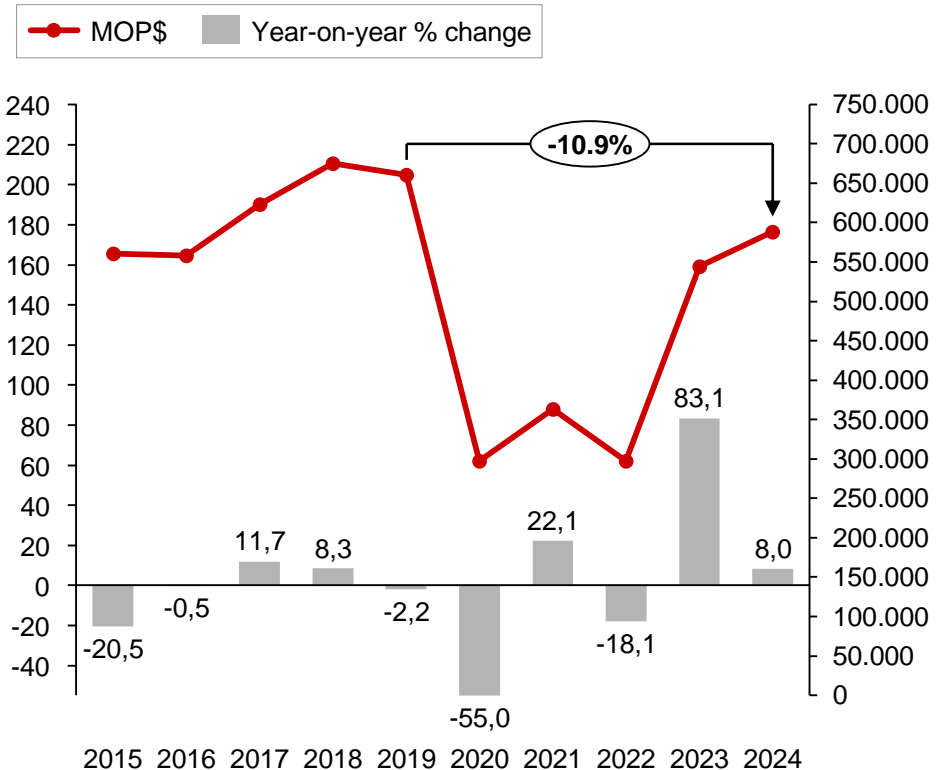
GDP and Annual Growth Rate

GDP at current prices



GDP per Capita and Growth Rate

Per capita GDP at current prices

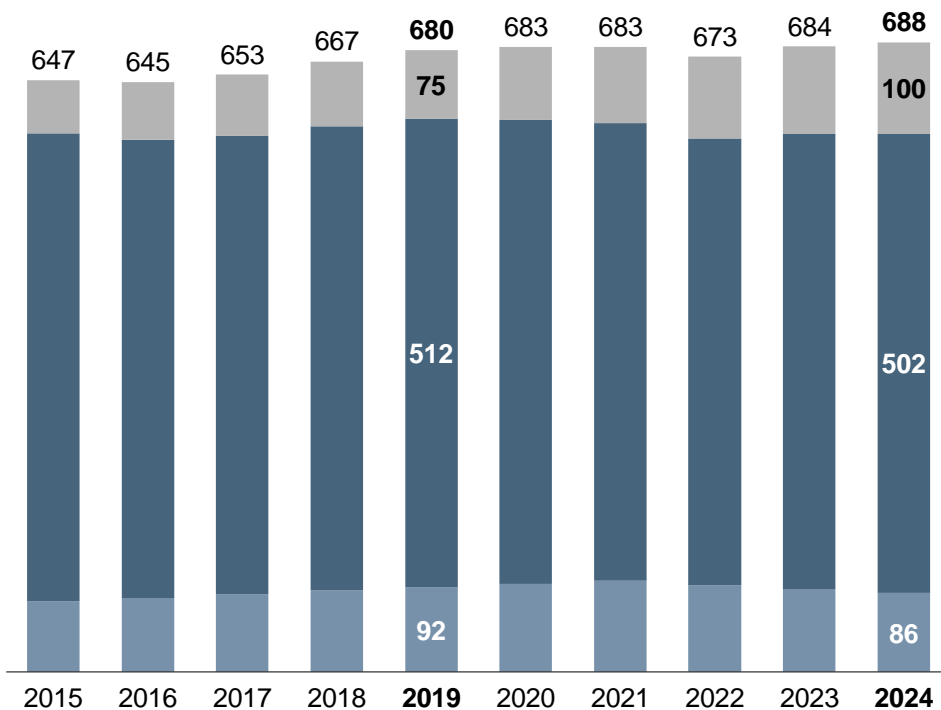


Macau's population is much smaller than Hong Kong's, and its per capita gross income has yet to recover from the pandemic

MACAU

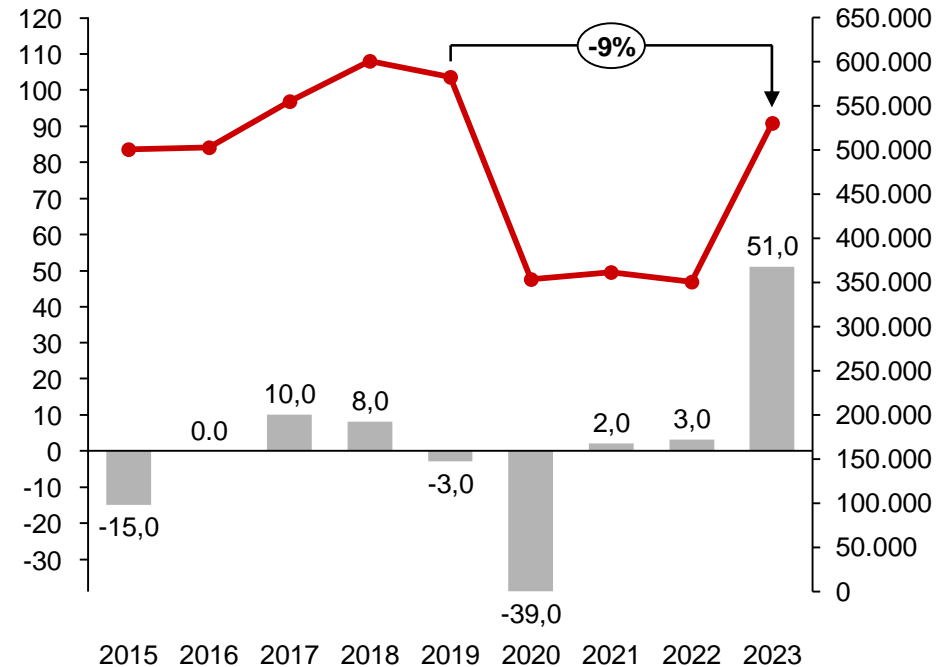
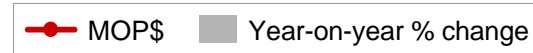
Population and Population Structure

End-year population by age-group (in thousand)



Average Income

Per capita gross national income at current prices ¹



Due to the pandemic, per capita income dropped significantly, especially between 2020 and 2022, reaching only 60% of pre-pandemic levels. While recovery started in 2023, it still hasn't reached 2019 levels, standing at 91%.

1. The latest data on the official website is updated to 2023.
Source: Statistics and Census Service of Macau SAR

A G E N D A

1. Hong Kong & Macau Market Overview




1.1 Tourism Stakeholder Overview

1.2 Local Authority Overview & Potential Cooperation

1.3 Tourism-related Economic Statistics

1.4 Air Connectivity Overview

We list all direct flights connecting Spain with the Hong Kong and Macau markets in 2024

		Carrier	Flight Number	Route	2024 Frequency ¹	2024 Capacity ²
From Hong Kong	 CATHAY PACIFIC 國泰航空公司		CX315	Hong Kong – Madrid	164	46,622
			CX321	Hong Kong – Barcelona	57	15,960
From Shenzhen	 深圳航空 Shenzhen Airlines		ZH9065	Shenzhen – Barcelona	100	30,900
			ZH865	Shenzhen – Barcelona	46	14,214
	 海南航空 HAINAN AIRLINES		HU749	Shenzhen – Madrid	12	3,450

1. 2024 Frequency: Number of annual flights by the flight number on the route.

2. 2024 Capacity: Number of annual seats by the flight number on the route.

Source: OAG Aviation Database

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1. Hong Kong & Macau Market Overview
- 2. Traveler Characteristics & Behavior Evolution**
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5. Methodology & Research Disclaimer

About the Section

- This section analyzes the **unique characteristics of travelers** in the Hong Kong and Macau markets, covering aspects such as free independent vs. group inclusive travel market share, traveler profiles and companions, information sources, booking platforms, traveler interests, and trip budgets. These characteristics have notably evolved in the post-pandemic era, and we will examine **how consumer behavior has shifted** across each of these dimensions.
- Based on discussions with 10 travel trade experts from Hong Kong and Macau, **travelers from both markets exhibit largely similar behaviors**. As noted earlier, the two markets are closely intertwined, with Macau consumers frequently purchasing travel products through Hong Kong-based agencies.
- Therefore, the analysis in this section addresses the two markets collectively.

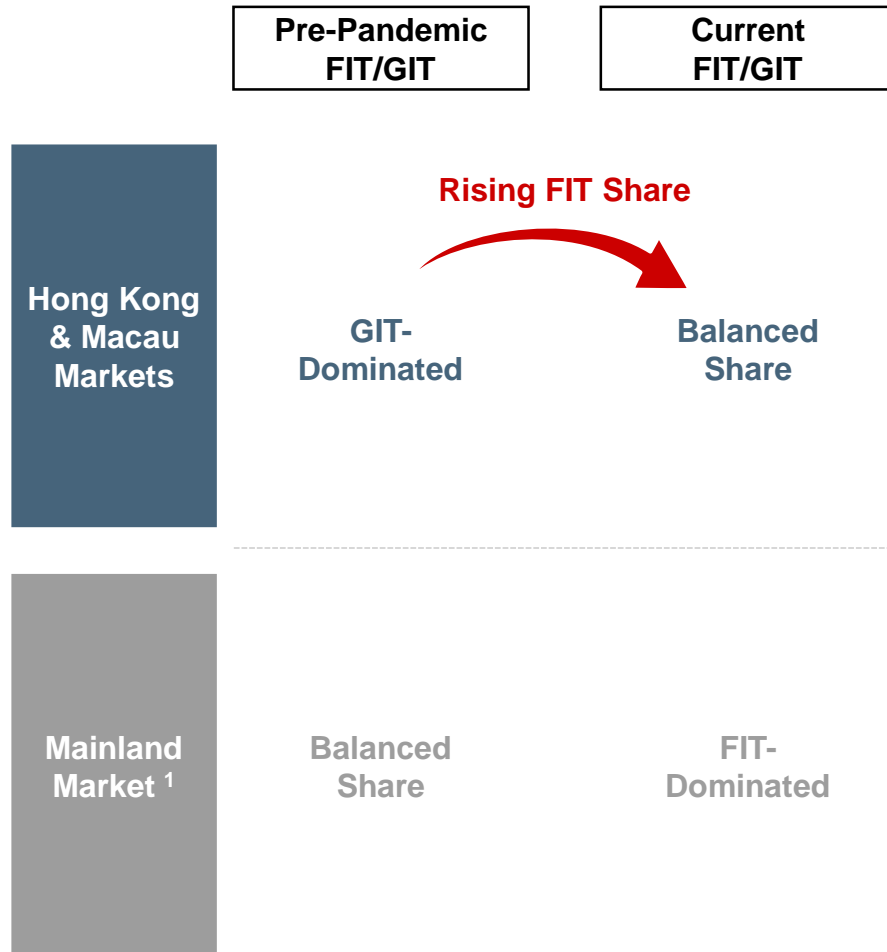
This section analyzes the unique characteristics and post-pandemic evolution of travelers in the region, based on trade partner interviews

1	Free Independent Travel / Group Travel Share
2	Traveler Profiles & Companions
3	Information Sources
4	Booking Platforms
5	Traveler Interests
6	Trip Budgets

Trade interviews highlight the unique balance of FIT and GIT in Hong Kong and Macau, with a post-pandemic shift toward FIT

1. FIT/GIT SHARE

Hong Kong & Macau show a balanced FIT / GIT split, unlike the FIT-dominated Mainland market



Hong Kong & Macau's post-pandemic shift toward FIT travel can be attributed to three reasons

Key Drivers of the Evolution toward FIT

- **Higher Consumer Maturity:** Not only have information sources and booking channels become more diversified post-pandemic, but consumers' travel experience in Europe has also increased after previous trips. This higher level of maturity has led to a stronger demand for FIT travel.
- **More Limited Budgets:** Post-pandemic, both Hong Kong and Macau have faced challenging economic environments, resulting in more constrained travel budgets. FIT is preferred in this context due to its greater budget flexibility — unlike GIT, it doesn't require a large deposit, offers more flexible cancellation policies, and allows travelers to save money by adjusting accommodation standards.
- **Declining Appeal of GIT Products:** GIT products in the Hong Kong and Macau markets are perceived as having seen little innovation over the past 10–20 years, leading to a gradual decline in their attractiveness to consumers.

FIT Demand



GIT Supply





1. Based on data shared by TURESPAÑA via email on 4 April 2024.

Free independent and group travelers in the Hong Kong and Macau markets exhibit distinct profiles

2. TRAVELER PROFILES & COMPANIONS

FIT Traveler Profiles & Companions



FREE INDEPENDENT TRAVELERS



Aged 30 – 50

Travel with
Partner or Friends

Outbound Frequency
~3 short-haul trips per year
~1 long-haul trip every 2 years

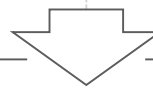
GIT Traveler Profiles & Companions

GROUP-INCLUSIVE TRAVELERS



Aged 50 – 70

Travel with
Multi-Generational Family with Kids

Outbound Frequency
~4 short-haul trips per year
~1 long-haul trip per year
Repeat visitors to Europe



Post-pandemic changes are mainly seen in the decline of younger travelers aged 20–30, driven by limited budgets and time off amid a weaker economic environment.

Post-pandemic, FIT travelers use more diverse sources, while GIT travelers still rely on travel agencies—but in more proactive ways

3. INFORMATION SOURCES

Free Independent Travelers

Current Information Sources ¹

Social Media



Online Travel Agencies



Flight Deal Websites



Tourism Board Websites

Travel Agency Websites & Physical Stores

Hong Kong International Travel Expo

Post-Pandemic Evolution

Online Reliance

The importance of online channels has surged, while offline and traditional media have significantly declined.

- Online sources like RedNote, TikTok, Trip.com, and YouTube have become significantly more influential in Hong Kong and Macau post-pandemic.
- Meanwhile, agency storefronts are closing, with no plans to reopen, and traditional media (TV, newspapers, magazines) have sharply declined, with agencies pulling out of these channels.

De-centralization

The rise of self-media has disrupted the centralized information flow once dominated by travel agencies.

- During the pandemic, consumers grew accustomed to influencer content, and even tour guides launched their self-media accounts.
- As a result, travel agencies have lost their previous information monopoly, with FIT travelers turning directly to online sources and creators.

Group-Inclusive Travelers

Travel Agency:

- **Online:** Websites, WhatsApp, Hotline, Ads
- **Offline:** Physical Stores, Talk Seminars, Brochures

Social Media



Active Search

Travelers shifted from relying on travel agency recommendations to actively searching for information online (via agency websites or social media) with itinerary preferences before approaching agencies.

Online Growth

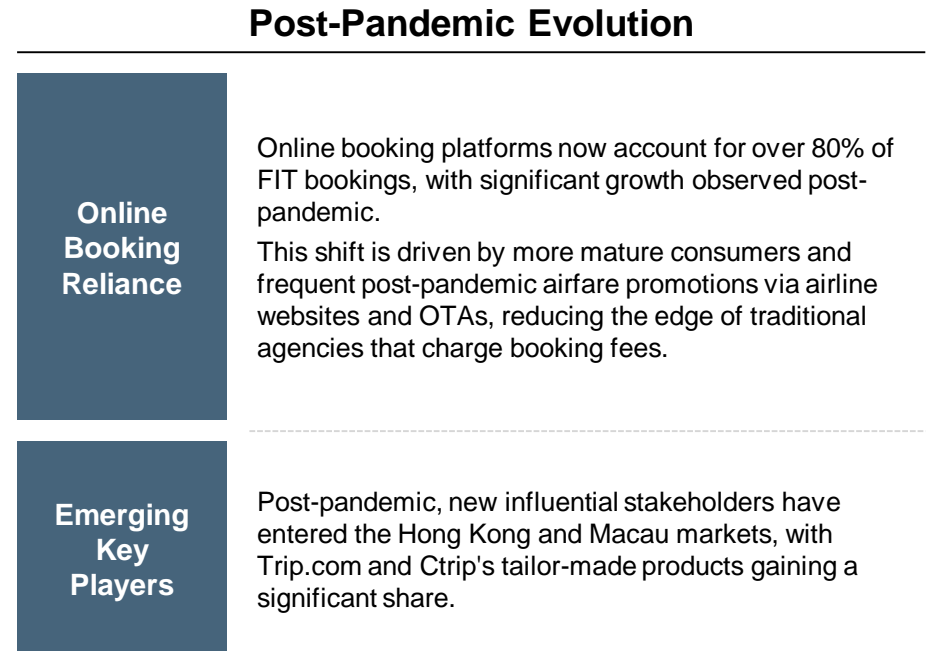
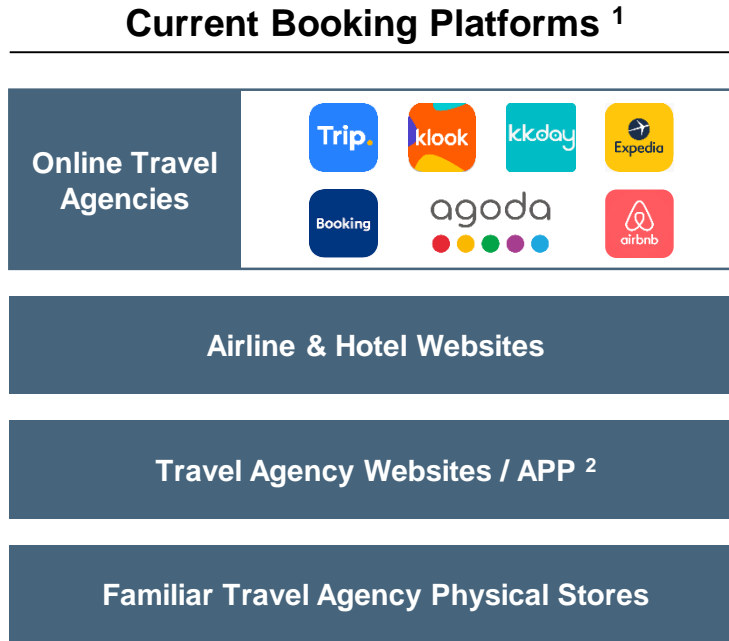
The influence of offline stores has declined as consumers now first refer to websites, WhatsApp, or hotlines for information before making decisions.

1. For both FIT and GIT, the information sources are ranked in descending order of influence from top to bottom.

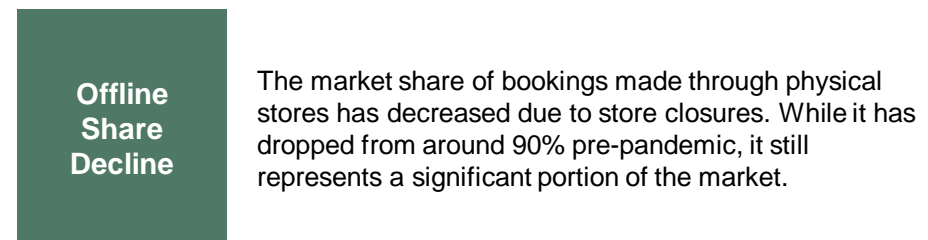
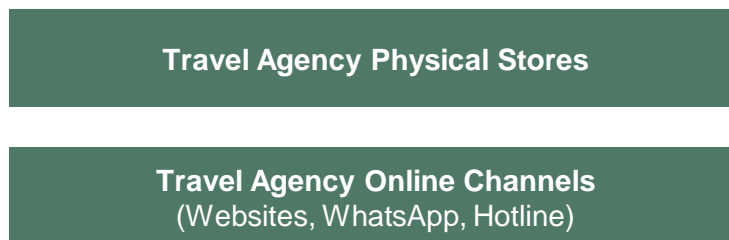
FIT has shown a shift towards multiple online booking platforms, while GIT bookings are primarily made through travel agencies

4. BOOKING PLATFORMS

Free Independent Travelers



Group-Inclusive Travelers



1. For both FIT and GIT, the booking platforms are ranked in descending order of influence from top to bottom.

2. The commonly used APP is Wing On Travel's APP.

Post-pandemic, local travelers seek higher quality, unique experiences, deeper immersion, and greater safety

5. TRAVELER INTERESTS

Higher Expectations for Quality & Value



*“Post-pandemic, with rising travel costs to Europe and a slow local economic recovery, customers **seek the best possible trip quality within a limited budget**—simultaneously demanding high-end quality across food, accommodation, transport, and shopping.”*

Mr. Chan from Big Line Holiday

Demand for Unique & Non-standardized Experiences



*“Before COVID, clients mainly cared whether the itinerary matched the price—for example, a 40,000 RMB trip should feel luxurious. Now, they still expect that, but also want unique, non-standardized experiences—**like niche Michelin dining or castle stays—to feel it’s worth the cost.**”*

Ms. Yiu from Kuoni Tumlare

Preference for Culturally Immersive Travel



*“Travelers are placing greater importance on in-depth cultural experiences. While they’ve always appreciated Spanish culture and architecture, more now **prefer immersive museum visits to truly understand the local heritage**, rather than just viewing buildings from the outside.”*

Mr. Yueng from Pro Tours Limited

Increased Focus on Personal Safety



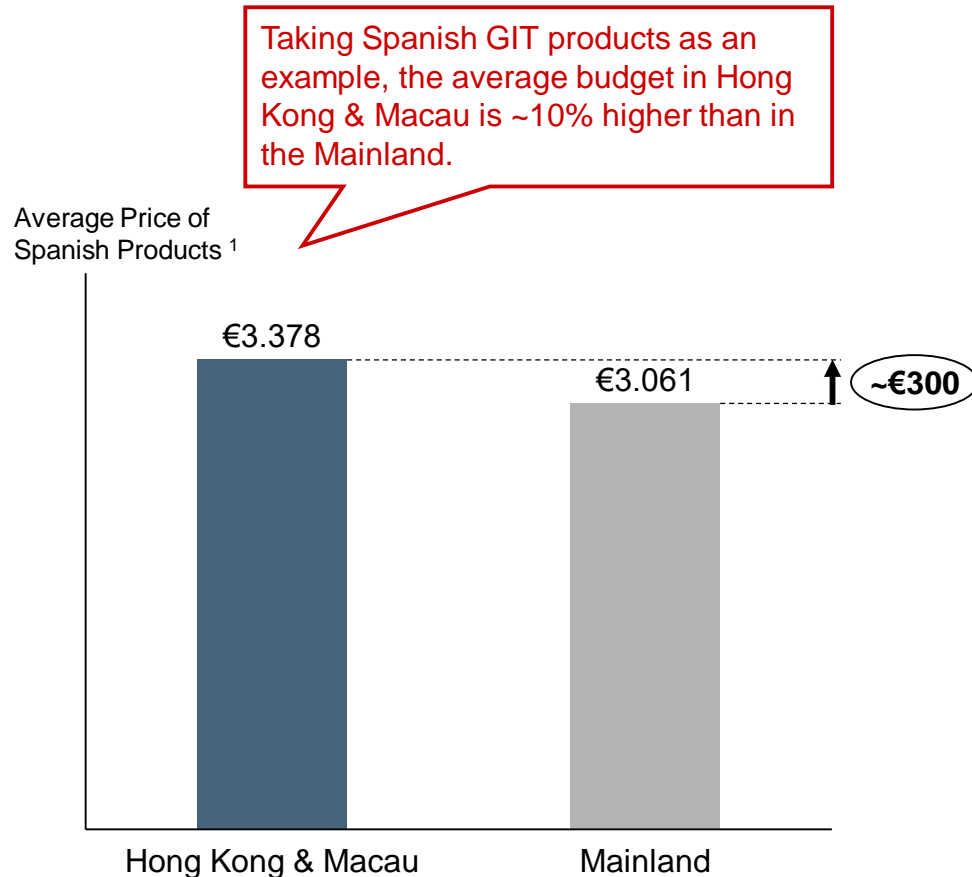
*“Travelers, especially older ones, **are more concerned about travel safety after the pandemic**. Even if they’ve been to Europe before, they tend to choose group tours post-pandemic for added peace of mind.”*

Mr. Cen from Energy Travel Agency

Consumers in Hong Kong and Macau have a higher trip budget than the mainland, which has further increased by 30% post-pandemic

6. TRIP BUDGETS

Compared to Mainland China, consumers in Hong Kong & Macau have a higher trip budget



The trip budget in the Hong Kong & Macau markets has increased by 30% post-pandemic

- According to interviewees, European GIT products in the Hong Kong and Macau markets **have generally increased by 30%**.
- They believe that **GIT prices reflect the overall market budget change**, as despite the different budget structures, the overall budget level for FIT and GIT is consistent.

“Overall, the trip prices to Europe have **increased by about 30% post-pandemic**. As a result, local tourists are now more cautious and may reduce the frequency of their trips to Europe, possibly visiting only once every year or a few years.”

Mr. Cen from Energy Travel Agency

“**Land costs in Europe have risen by about 30%**, including for coaches, hotels, city taxes, and bus permits. Post-pandemic, GIT tourists are more price-sensitive and expect unique experiences that justify the cost, which wasn't as emphasized before.”

Mr. Lui from EGL

1. For the average price of Spanish GIT products in the Hong Kong and Macau markets, we analyzed 36 products from key players. Please refer to product details in Section 3. For the average price of Spanish GIT products in the Mainland China market, we refer to the average price of the Top 20 products on Ctrip, Fliggy, Tongcheng, and Tuniu (data collected in April 2024). We used the exchange rate on April 11: 1 EUR = 8.13 RMB; 1 EUR = 8.74 HKD.

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AGENDA

3. Spain-Related Product & Perception

3.1 Spain vs. Europe – Group Tour Market Share

3.2 Popular Group-Inclusive Tour Product Audit

3.3 Cruise Ship Product Audit

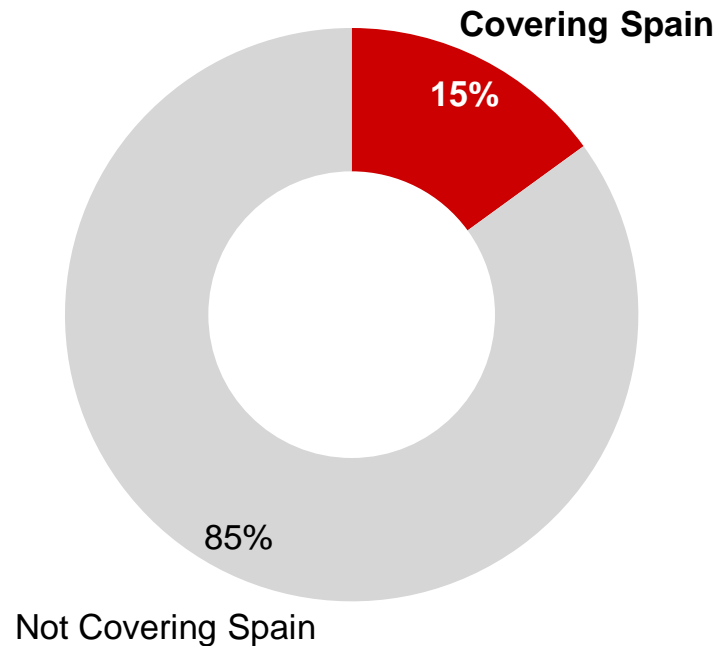
3.4 Destination Perception of Spain

We collected 80 European GIT products from local travel agencies to analyze Spain's market share, with the following disclaimer

Methodology Limitation	The findings are based solely on desk research, without B2B interviews. As a result, we were only able to access European products that are publicly available on official websites.
Audit Period	Travel agency products are subject to change over time; this audit reflects the offerings available during the study period from May 5th to May 9th.
Package Type	Only full-package group tours are included in the analysis, covering flights, accommodations, and attractions. Optional itinerary items are not included.
Selection Criteria	Our selection criteria involved searching for "European GIT" on the official websites of travel agencies and collecting a total of 80 top popular European products based on the default recommended ranking on those websites.
Product Coverage	Only products from agencies with a dedicated 'European Products' category were reviewed. Those dividing Europe into multiple regions without unified classification and consistent comparability (e.g., Bigline Holiday, Premium Holidays, Goldjoy Holiday, EGL) were excluded.
Research Independence	Due to different keyword criteria, this section is independent from the next. The next section focuses on products filtered by the keyword "Spain GIT," which may not be among the top 80 most popular European products on travel agencies' websites, and thus are not necessarily covered in this section.

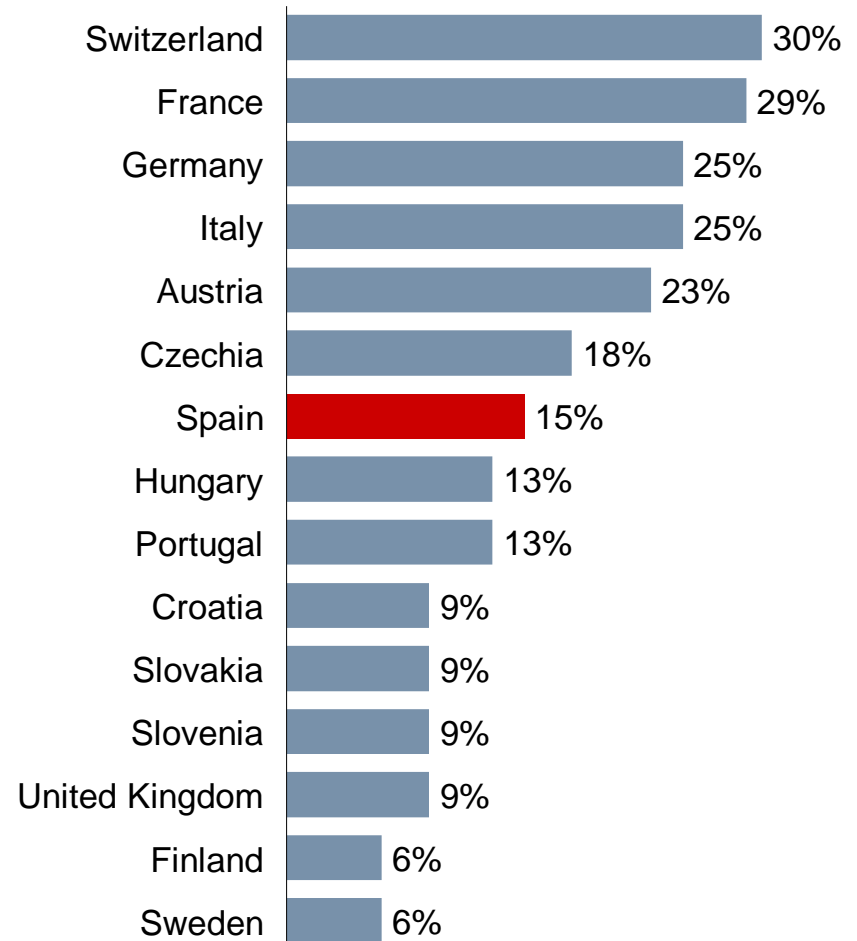
Spain is covered by 15% of the studied European products, competing with Switzerland, France, Italy, Germany, Austria, Czechia

Spain-related Product Market Share in Europe



Among the 80 popular group-inclusive tour products reviewed, 15% feature Spain.

Coverage by Country in European Products ¹



1. Market Share per Country = (Number of Products Covering the Country / 80) × 100%. Please note that **each product may cover more than one country**. Countries with the same market share are listed alphabetically. For instance, Germany and Italy both have a 25% market share — meaning each is covered by 20 of the 80 products.

Back-Up: Coverage statistics of 80 leading Hong Kong and Macau group-inclusive European products by country (1/2)

TOP 15 DESTINATIONS

European Destination	Number of Products Covering the Country	Market Share per Country ¹
Switzerland	24	30%
France	23	29%
Germany	20	25%
Italy	20	25%
Austria	18	23%
Czech	14	18%
Spain	12	15%
Hungary	10	13%
Portugal	10	13%
Croatia	7	9%
Slovakia	7	9%
Slovenia	7	9%
United Kingdom	7	9%
Finland	5	6%
Sweden	5	6%

1. Market Share per Country = (Number of Products Covering the Country / 80) × 100%. Please note that **each product may cover more than one country**.

Back-Up: Coverage statistics of 80 leading Hong Kong and Macau group-inclusive European products by country (2/2)

OTHER DESTINATIONS

European Destination	Number of Products Covering the Country	Market Share per Country ¹
Denmark	4	5%
Netherlands	4	5%
Norway	4	5%
Belgium	3	4%
Estonia	3	4%
Vatican	3	4%
Bosnia and Herzegovina	2	3%
Greece	2	3%
Latvia	2	3%
Liechtenstein	2	3%
Lithuania	2	3%
Montenegro	2	3%
Serbia	2	3%
Andorra	1	1%
Luxembourg	1	1%
Malta	1	1%
Monaco	1	1%

1. Market Share per Country = (Number of Products Covering the Country / 80) × 100%. Please note that **each product may cover more than one country**.

AGENDA

3. Spain-Related Product & Perception

3.1 Spain vs. Europe – Group Tour Market Share

3.2 Popular Group-Inclusive Tour Product Audit

3.3 Cruise Ship Product Audit

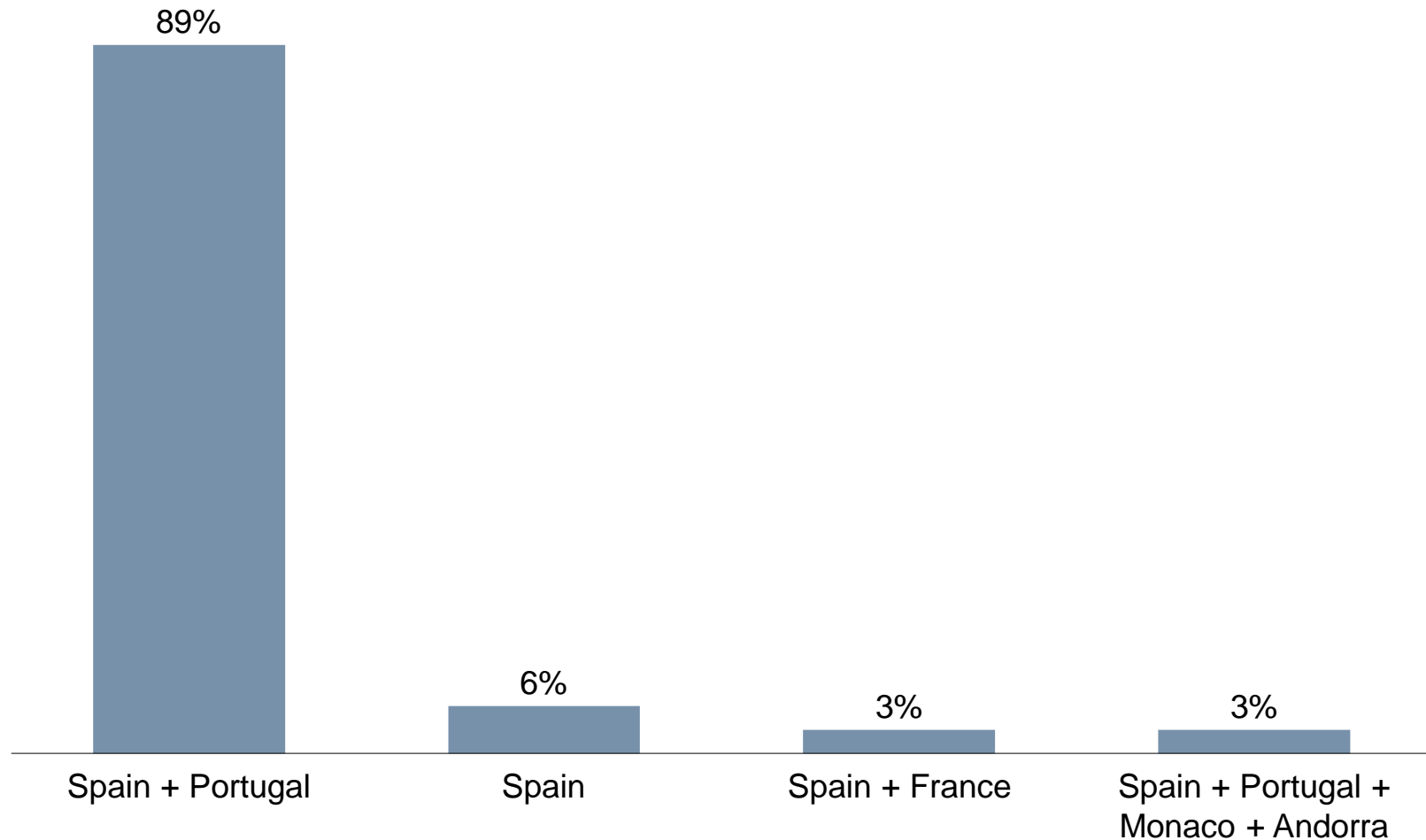
3.4 Destination Perception of Spain

We present findings for the product audit of 36 popular Spain-related GIT itineraries sold in the region, with the following disclaimers

Audit Period	Travel agency products may evolve over time; our audit reflects the state of offerings during the study period from March 25 to April 9.
Product Coverage	The 36 itineraries are not evenly distributed across key travel agency stakeholders, as some agencies offer customized or non-public products.
Departure Origin	The analysis includes only itineraries departing from Hong Kong and Macau, and excludes those departing from Mainland cities (e.g., Shenzhen and Guangzhou).
Package Type	Only full-package tours are included in the analysis, covering flights, accommodations, and sightseeing (note: some sightseeing may only include exterior viewing and not entrance fees). Optional itinerary items are not included.
Pricing Basis	The listed product price refers to the lowest available price at the time of research (including promotional offers), based on one adult and inclusive of taxes, insurance, stamp duties, and other surcharges.
Country Dispute	Gibraltar is not counted in the “countries visited” tally due to ongoing sovereignty disputes.

Among the 36 popular Spain-related itineraries in the Hong Kong and Macau markets, about 89% visit both Spain and Portugal

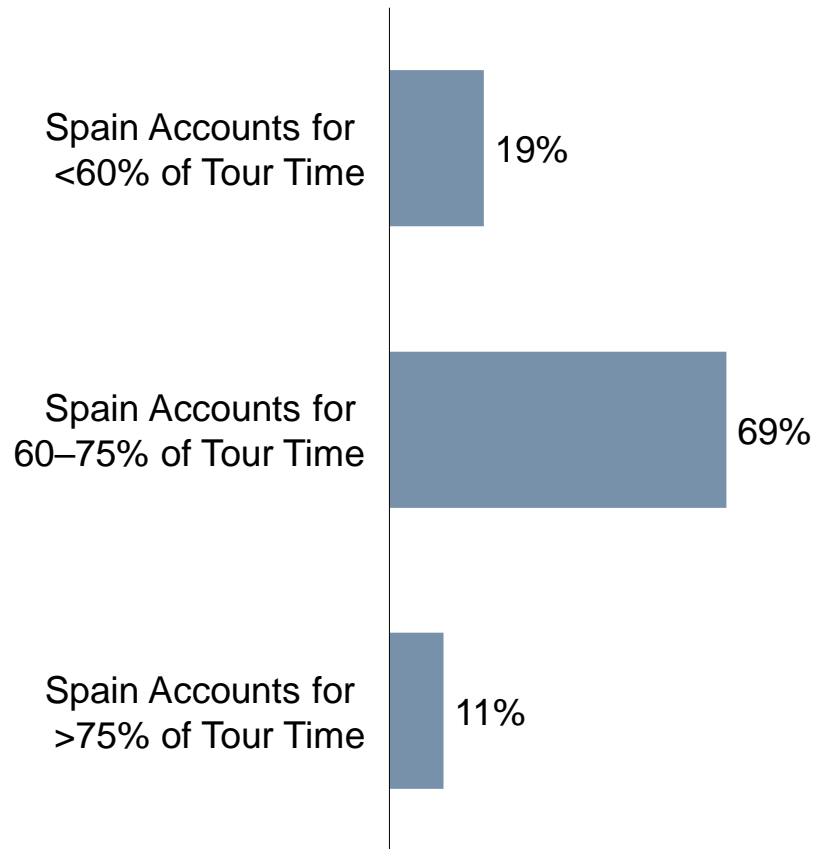
THE COUNTRIES VISITED



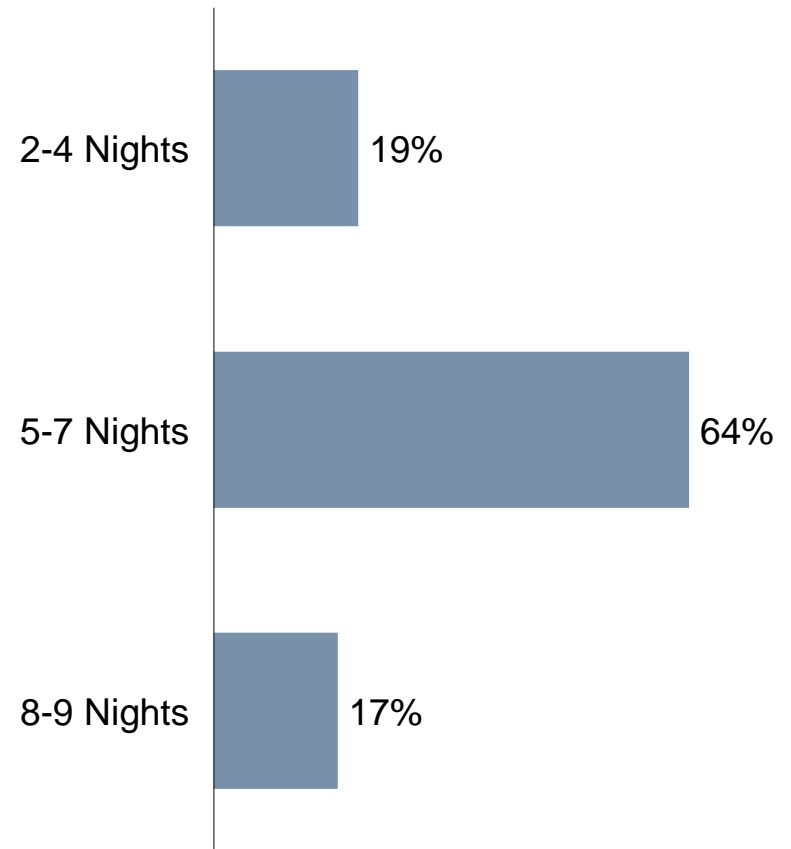
On average, the popular itineraries spend 6 nights in Spain, with Spanish overnights accounting for 67% of the entire European tour

OVERNIGHTS IN SPAIN

Spanish Overnight Share in European Tours ¹



Overnights in Spain ²



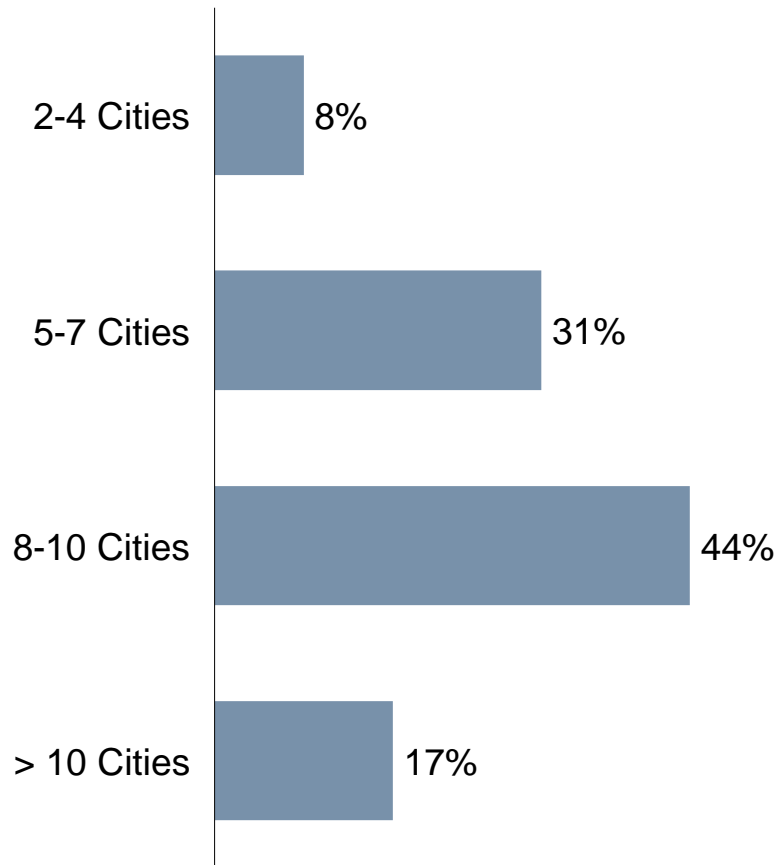
1. Spanish Overnight Share within the European Tour = Spain Overnight / Entire European Tour Overnight * 100%

2. Overnights in Spain excludes time spent in other countries. All durations are estimated based on itinerary analysis, excluding flight time and reviewing the daily schedules in detail.

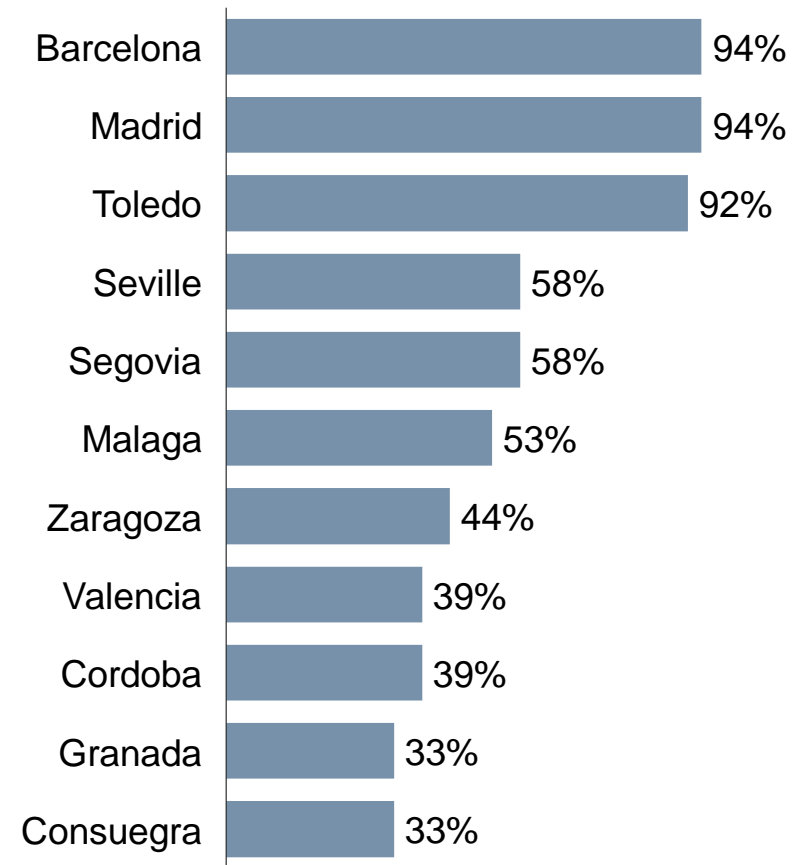
Itineraries typically cover 8 to 10 Spanish cities, with Barcelona, Madrid, and Toledo being the most frequently visited

NUMBER OF CITIES VISITED ¹

Number of Cities Visited



Top 10 Most Visited Cities ²

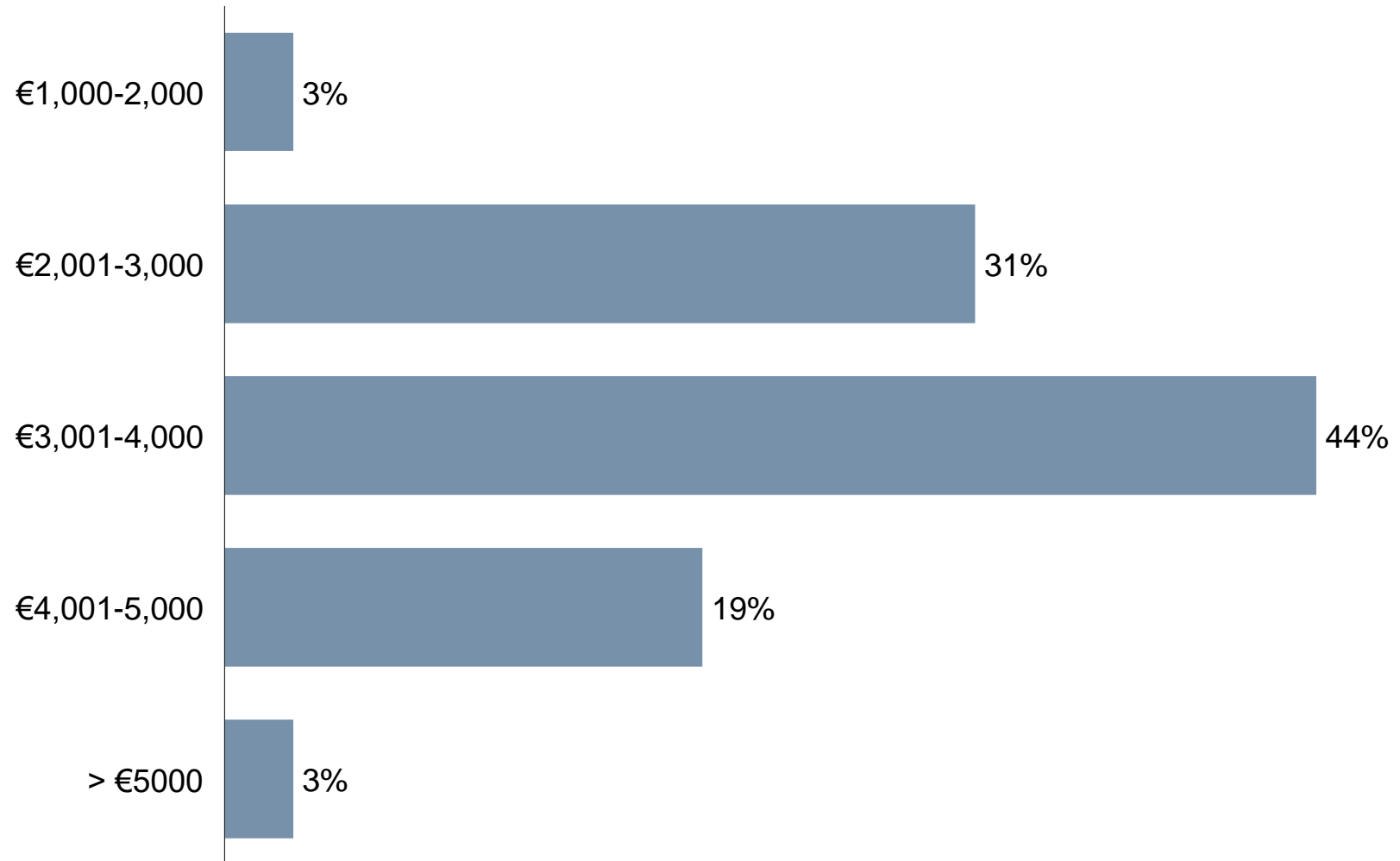


1. Excluding optional cities or those visited at extra cost.

2. Since Granada and Consuegra appeared with equal frequency across the 36 popular itineraries, we included a total of 11 most-visited cities.

The average price of the popular Spain-related itineraries in the Hong Kong and Macau markets is €3,378

PACKAGE PRICE ¹



1. According to the State Administration of Foreign Exchange, the currency exchange rate is: 1 EUR = 8.74 HKD on April 11th, 2025.

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3. Spain-Related Product & Perception

3.1 Spain vs. Europe – Group Tour Market Share

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3.3 Cruise Ship Product Audit

3.4 Destination Perception of Spain

We present our findings from the product audit of 14 leading cruise products related to Spain, with the following disclaimers

Methodology Limitation	The findings came from desk research only, without B2B interviews, so only questions about stopover Spanish cities and duration are addressable, while internal operation questions—such as whether travel agencies or cruise companies organize stopover tours—are beyond the scope.
Audit Period	Travel agency products are subject to change over time; this audit reflects the offerings available during the study period from May 5th to May 8th.
Product Type	This section focuses only on all-inclusive group tour products involving cruise itineraries, which include air tickets, accommodation, attractions, and cruises. Pure cruise ticket products, sold by travel agencies as general sales agencies (GSAs), are excluded.
Product Coverage	Only cruise tour products publicly available on official websites were reviewed. During the study period, such offerings were found only on the sites of Jetour, Wing On Travel, and Miramar Travel. This section includes all their qualifying products: 4 from Jetour, 5 from Wing On Travel, and 5 from Miramar Travel.
Stopover Only	This section audited only the Spanish cities visited as cruise stopovers and the duration of each stop. Land-based itineraries and cities prior to embarkation or after disembarkation are all not included.

Below are the Spanish cities visited by the 14 cruise tour products, with an average of 2 Spanish stopovers per itinerary

SPANISH STOPOVER CITIES¹

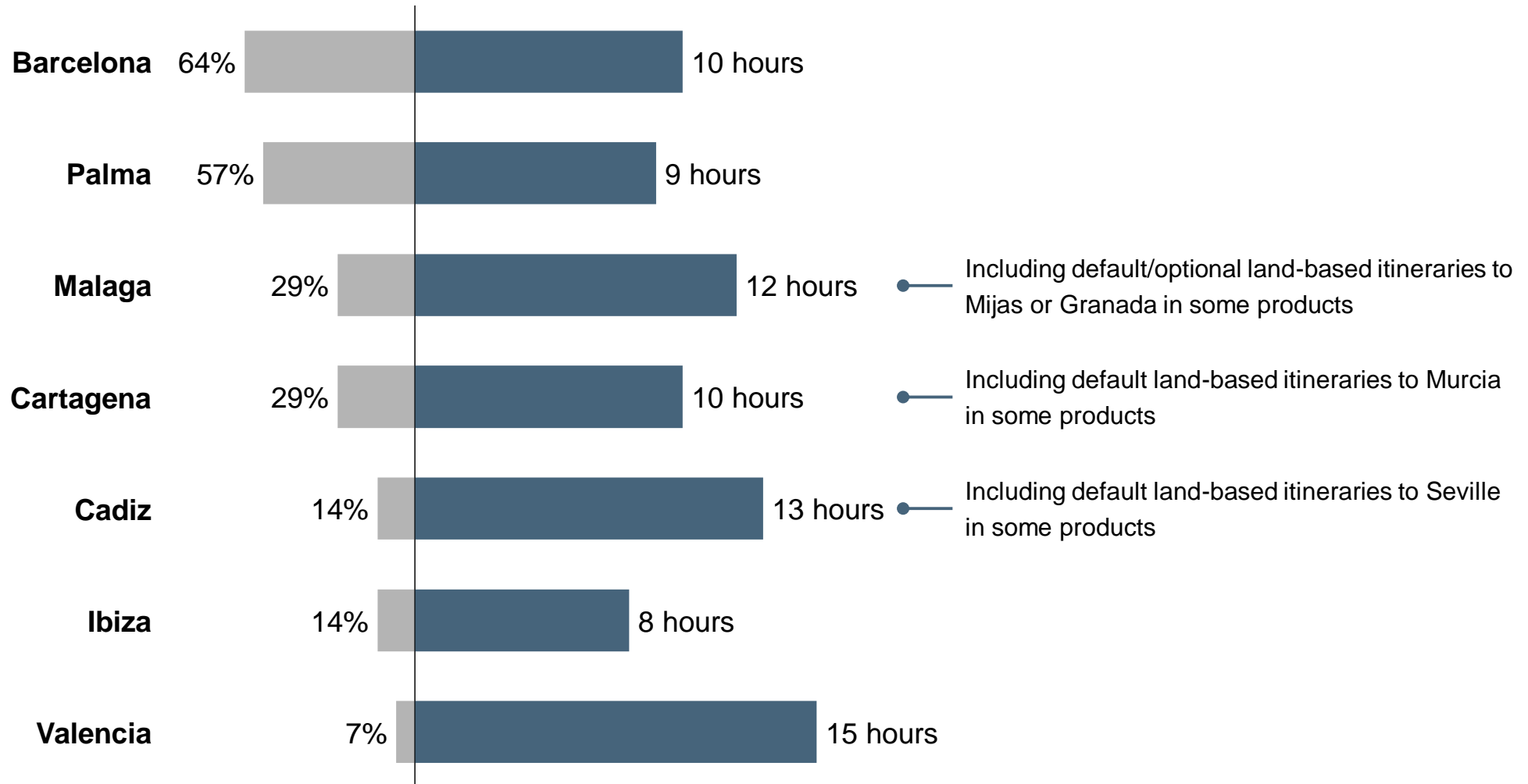


1. Malaga & Cartagena and Cadiz & Ibiza have the same coverage frequency, and the rankings between them are in no particular order.
Share of the Stopover = Number of Products Covering the City / 14 * 100%

The number of hours spent at each Spanish stopover is summarized below

HOURS SPENT AT SPANISH STOPOVERS ¹

■ Share of Spanish Stopover Cities ■ Average Hours Spent at Each Stopover City



1. We calculated stopover hours based on the time difference between the cruise's arrival and departure at each stopover.

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3.4 Destination Perception of Spain

Spain's brand association in Hong Kong and Macau is reflected in the word cloud, aligned with local travelers' purposes

BRAND ASSOCIATION & TRAVEL PURPOSES

Spain's Brand Association Word Cloud ¹



We adopted an indirect research approach to explore Spain's perception in the Hong Kong and Macau markets, drawing on trade partner insights into key consumer travel motivations and must-have experiences in the itineraries.

1. Word size in the cloud corresponds to the frequency of mentions across the interviews.

Travelers' Travel Purposes to Spain

Cultural exploration and food discovery are the main travel purposes for Hong Kong and Macau travelers to Spain, aligning with their perception of the destination.

“ **Most travelers visit Spain for its cultural experiences.** They're drawn to history — shown by rising interest in museum visits — as well as art that transcends language through visual impact. Football is another growing pull, with more visitors eager to tour stadiums or watch live matches. Overall, cultural expectations are becoming **more diverse and immersive.** ”

Mr. Yueng from Pro Tours Limited

“ **Food has always been a key travel purpose** for local travelers, who often explore global cuisines and bring those experiences back home. Compared with other European countries, **Spain better fulfills this desire.** ”

Mr. Cen from Energy Travel Agency

Consumers perceive Spain as a high-end European destination, yet more budget-friendly than other European countries

PRICE PERCEPTION

As a European destination, Spain is viewed as high-end, with a higher budget and time commitment

*“The silver-haired generation might visit Europe once a year, while young people travel to Asia 3-4 times annually **but need to save for two years for a European trip**. On average, a family trip to Europe (Nordic countries and Switzerland are even higher) costs at least 100,000 RMB (1,200 euros). Given the current economic situation, consumers are becoming more cautious with spending.”*

Ms. Yiu from Kuoni Tumlare

*“Post-pandemic, the economic recovery has been slower than expected, leading consumers to be more cautious about costs. **Many now reduce trips to long-haul destinations like Europe**, potentially traveling once every year or a few years. It's not just about spending power — with a 16-hour flight to Spain and 2-3 days for a round flight, long vacations aren't common in the local culture, and the **economic situation has made this even more pronounced**.”*

Mr. Yueng from Pro Tours Limited

Spain is seen as more budget-friendly, balancing experiences & cost-effectiveness

*“**Spain is generally more affordable than other European countries**, while still offering a well-rounded experience that balances dining, accommodation, transportation, and shopping — all without compromising on quality.”*

Mr. Chan from Big Line Holiday

*“From a value-for-money perspective, **Spain is now one of our company's top three most popular destinations**, alongside Switzerland and Italy. Spain stands out by offering a rich experience at a more accessible price point, making it especially attractive to cost-conscious travelers.”*

Ms. Yiu from Kuoni Tumlare

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The main challenges for local travel agencies in promoting Spain are limited consumer awareness and travel trade resources

CHALLENGES & OBSTACLES

Limited local consumer awareness makes it challenging to promote outbound travel to Spain

“Consumers perceive Spain as lacking destination awareness and persuasiveness, possibly due to insufficient consumer-facing promotions. Additionally, the increasing competition from other destinations, especially the mainland, has diverted many potential customers.”

Ms. Leng from Multinational Tourism Group

“Local consumers are highly trend-driven, so a promotional topic is crucial for Spain, but the market lacks such awareness-driving moments.”

Ms. Law from Corporate Travel Management

Travel agencies' lack of access to Spain-related travel trade resources hinders product innovation

“A lack of local resource knowledge has resulted in stagnant products for over a decade, which has led to diminishing appeal among consumers. We need updated information on new attractions, optional day tours, and authorized DMC contacts to design new products.”

Mr. Yueng from Pro Tours

“One of the obstacles in our work is the lack of available materials on Spain, such as images, text, and videos to share with consumers.”

Mr. Wong from Top Holidays - P&E International

Accordingly, travel agencies recommend that TURESPAÑA enhance consumer-facing awareness boosting investment in both markets

SUPPORTS NEEDED

Collaborating with airlines on promotional campaigns or events related to route addition

*“Partnering with airlines on consumer-facing promotional campaigns, **especially for flight discounts**, as consumers in our market are very sensitive to ticket deals. It's a direct way to boost consumer interest.”*

Mr. Cen from Energy Travel Agency

*“**If a flight route is resumed or launched**, hosting a celebration event with the airline involving consumers is a great approach.”*

Ms. Law from Corporate Travel Management

Promoting with appealing themes, such as niche regions, football, and shopping

*“Promoting under the theme of **Niche Regions**, like highlighting lesser-known areas rather than always focusing on the southern region. Instead, promote the **western and northern regions** to attract consumers with something new.”*

Ms. Chu from Miramar Travel

*“Promoting themes like **Football and Shopping** in B2C campaigns, as these are areas especially favored by local consumers and are advantages Spain can leverage.”*

Mr. Wu from Gray Line Tours

Meanwhile, travel agencies need support in resource sharing & training, DMC contact database, and product innovation boosting

SUPPORTS NEEDED



Resource Sharing & Training

- Travel agencies need **updated destination resource sharing through online seminars, training, or workshops**, especially new offerings and niche regions like the western and northern areas.
- *Suggestion from*
 - Mr. Chan – Big Line Holiday
 - Mr. Lui – EGL Tours
 - Mr. Yueng – Pro Tours
 - Ms. Yiu – Kuoni Tumlare
 - Ms. Law – Corporate Travel Management



DMC Contact Database

- Travel agencies need **a certified DMC contact database** from TURESPAÑA, where they can directly reach out to DMC resources that have been **officially recognized** for service quality.
- *Suggestion from*
 - Mr. Wu – Gray Line Tours
 - Mr. Chan – Big Line Holiday
 - Ms. Law – Corporate Travel Management



Product Innovation Boosting

- Agencies also **seek ways to boost new product creation**, such as **roadshows** with supplier negotiations, **sales incentives** for new products, or **FAM trips** for firsthand experience and inspiration.
- *Suggestion from*
 - Ms. Leng – Multinational Tourism Group
 - Ms. Law – Corporate Travel Management
 - Mr. Chan – Big Line Holiday
 - Mr. Yueng – Pro Tours

A G E N D A

1. Hong Kong & Macau Market Overview
2. Traveler Characteristics & Behavior Evolution
3. Spain-Related Product & Perception
4. Promotion Challenges & Support Needed
- 5. Methodology & Research Disclaimer**

This research interviewed the following 10 travel agency representatives from Hong Kong or Macau

#	Type	Interviewee	Company Name
1	Hong Kong Leisure	Mr. Chan	Big Line Holiday Ltd.
2	Hong Kong Leisure	Mr. Yueng	Pro Tours Ltd.
3	Hong Kong Leisure	Mr. Lui	EGL Tours
4	Hong Kong Leisure	Ms. Chu	Miramar Travel Ltd.
5	Hong Kong Leisure	Ms. Yiu	Kuoni Tumlare
6	Hong Kong MICE	Ms. Law	Corporate Travel Management
7	Macau Leisure	Ms. Leng	Multinational Tourism Group Co., Ltd.
8	Macau Leisure	Mr. Cen	Energy Travel Agency Ltd.
9	Macau Leisure	Mr. Wu	Gray Line Tours
10	Macau MICE	Mr. Wong	Top Holidays - P & E International Travel

We outline the following methodology disclaimers for this study

Research Lens

Our interviewees were all travel agents focused primarily on GIT (group tours), so their insights on FIT (individual travelers) may be less accurate. Many questions were explored indirectly from a trade partner's perspective (as aligned in our contract) rather than directly from a consumer's viewpoint.

Interviewee Profile

As both Hong Kong and Macau agencies have scaled back their European business post-pandemic, some interviewees were from companies with extensive past experience in Europe but are no longer active in this segment.

Europe-Spain Applicability

According to our interviews, the characteristics and behavioral shifts of travelers going to Europe broadly apply to those going to Spain as well, so we did not analyze Spain-specific patterns separately in this aspect.