

Hong Kong's First Five-Year Plan & the 2026 Policy Address

A special briefing for hotel owners: what was announced, what it means for the hotel and tourism trade, and where the Federation's recommendations have been adopted.

English 中文版

FROM THE FEDERATION

On 16 September 2026 the Government published Hong Kong's first-ever **Five-Year Plan for Economic and Social Development (2026–2030)** and released the **Chief Executive's 2026 Policy Address** on the same day. The Plan explicitly positions tourism value-added growth and the development of a “multi-destination” core zone as national-strategic priorities. This edition summarises the trade-relevant announcements, sets out which of the Federation's submissions have been taken forward, and highlights the student-accommodation measures linked to our “Study in Hong Kong” (做大「留學香港」) study.

01 • WHAT WAS ANNOUNCED

The Plan, the Policy Address, and how they fit together

01

First Five-Year Plan (2026–2030)

Eight parts covering the Four Centres, talent hub, Northern Metropolis, GBA integration, livelihoods and governance — with **105 indicators** (22 headline indicators, 83 work indicators).

02

2026 Policy Address

Released the same day around “five major development opportunities” and “25 key livelihood initiatives”, implementing the Plan's strategic directions through annual work plans.

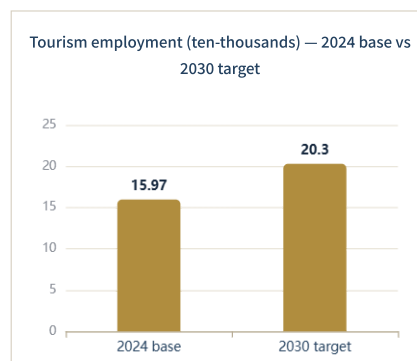
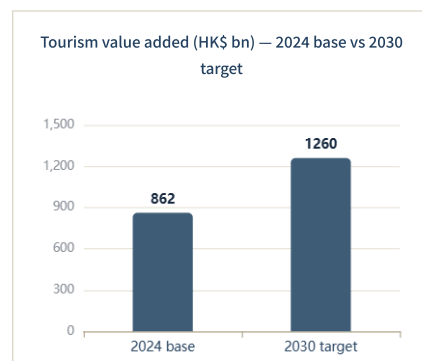
03

Delivery mechanism

The Plan sets out a “five-year plan as master, annual Policy Address for implementation, Budget for resources, annual duty report” cycle — giving the trade a predictable annual engagement channel.

02 • THE NUMBERS THAT MATTER

Tourism targets move from volume to value



+~46%

Tourism value added growth by 2030 (HK\$86.2bn → HK\$126bn)

40%

Non-mainland share of overnight visitors targeted by 2030

49.9m

2025 arrivals (+12% YoY); HK\$238.1bn spending expected in 2026 (+~10%)

240

Air destinations by 2030, from ~220 today

Sources: Five-Year Plan headline indicators & Box 24; 2026 Policy Address paras 70, 349.

What it means for hotels, tourism and hospitality

MEGA EVENTS ENGINE Asia’ s Events Capital Kai Tak Sports Park to reach 60% non-local artists in performances by 2030 (170+ events, 2.6m spectators to date; Asia’ s No.1 venue revenue in 2025). Victoria Park Centre Court to be explored as an all-weather multi-purpose venue. Four Asian and international sports federations have already established a presence in Hong Kong. HKTb will run the year in three themed seasons and flagship event funding will be regularised.	GATEWAY & YIELD “One trip, multi-stop” core zone Hong Kong is designated the demonstration core area for multi-destination itineraries — the southern gateway for overseas visitors entering the Mainland (over 20% of overseas visitors already extend their trips). HKTb will package multi-destination products with airlines, targeting higher-spend, longer-stay, overnight visitors.
AVIATION & MICE Capacity and events infrastructure 61m passengers in 2025 (+15%); 220→240 destinations over five years; T2 Concourse due before end-2027. HKCEC expansion via Wan Chai North redevelopment; HK\$100m fund to attract international flagship exhibitions — the first (November) centred on super yachts and premium lifestyle.	HIGH-VALUE ASSETS Yacht economy Aberdeen marina composite project to tender in H1 2027; SKYTOPIA yacht bay under Airport City; GBA cross-boundary navigation (nine cities) from May 2026 with the first northbound voyage in June; southbound MOU with Guangdong to follow. Aligns with the Federation’ s high-end asset-platform positioning.
NEW DEMAND SEGMENTS Muslim-friendly & niche travel Hong Kong ranked 2nd among non-OIC Muslim-friendly destinations (Global Muslim Travel Index); the halal certification funding scheme for restaurants is extended to end-2027 — supporting infrastructure for a high-growth source segment.	LICENSING & OPERATIONS Home-stay facilitation On outlying islands, HAD will waive deed-of-mutual-covenant use restrictions when processing guesthouse licence applications for buildings of three storeys or less — easing a long-standing barrier to small accommodation supply.
CONNECTIVITY Clearance experience Huanggang Port redeveloped with co-location and “collaborative inspection and joint clearance” (Q4 2026); contactless on-board clearance (AUTOS) at HZMB from December 2026; longer cross-boundary clearance hours sought; “Northbound/Southbound Travel” vehicle arrangements expanded.	COSTS & GREEN Energy and sustainability Commercial building electricity use to fall 30–40% by 2050 vs 2015 (half by 2035), with electricity-price stability an explicit goal and zero-carbon fuel share rising to 60–70% by 2035 — hotels as large energy users should plan retrofit and green-finance strategies now.

Federation recommendations taken forward

The tables below set out the Federation’ s submissions (August 2026) that have been taken forward in the documents published on 16 September 2026, alongside the corresponding measures announced.

A • Five-Year Plan submission — recommendations taken forward in the Plan

FHKHO recommendation	Outcome in published documents	Status
Raise labour participation (target ~58%) and review “welfare cliff” effects	Plan Ch.23 commits to lifting labour supply and orderly, dynamically adjusted supplementary labour; PA adds the “30,000 Youth Positions and Internship Programme” to raise participation.	Adopted
Expand aviation network and multimodal connectivity	Plan: 220→240 destinations over 5 years, 10+ new aviation partners annually (≥40% Belt & Road); PA: T2 Concourse, 94 new routes in 2026.	Adopted
MICE & mega-event economy with event pipeline and joint-hosting models	Plan: “Asia’ s Events Capital” , MICE reinforcement; PA: HKCEC expansion, HK\$100m exhibitions fund, regularised flagship-event funding, three themed seasons.	Adopted

FHKHO recommendation	Outcome in published documents	Status
High-end service standards, accreditation and a hospitality talent scheme	Plan and PA advance the specialised tourist-guide licensing programme (geopark, then heritage/culture) and elevate hospitality service standards.	Adopted
“One trip, multi-stop” core demonstration zone with cross-boundary facilitation	Plan designates Hong Kong as the multi-destination core demonstration area; PA promotes multi-destination itineraries with airlines and extends clearance facilitation (Huanggang co-location, AUTOS).	Adopted
Wellness, healthcare, TCM and sports tourism framework	Sports industry targets, “sports + mega events” , TCM inheritance and eco-tourism measures are taken forward in the Plan and Policy Address.	Adopted
Yacht economy as a high-end asset platform	PA: Aberdeen marina tender (H1 2027), SKYTOPIA yacht bay, GBA navigation and southbound MOU; the first flagship international exhibition (November) is super-yacht and premium-lifestyle led.	Adopted
Streamline hotel licensing and make planning flexible	PA: outlying-islands home-stay facilitation (deed restriction exemption for ≤3-storey buildings) eases licensing and planning constraints for small accommodation supply.	Adopted
AI and technology adoption for hotels (funding, tax incentives)	PA: AI-personalised travel recommendations on Discover Hong Kong (end-2026) and AI city-management systems support digital adoption across the tourism trade.	Adopted
Green transformation support for hotels	Plan: commercial-building electricity reduction targets and electricity-price stability support hotels’ green transition planning.	Adopted
National-level coordination and institutional safeguards	Plan establishes the five-year-plan implementation mechanism; PA sets up GBA rules-alignment task forces.	Adopted

B · 2026 Policy Address submission — recommendations taken forward in the Policy Address

FHKHO recommendation	Outcome in the 2026 Policy Address	Status
“Tourism+” strategy and high-value overnight visitors	“+ Tourism” joint initiatives, three themed seasons, ticket-stub economy to extend stays, and a 40% non-mainland overnight target in the Plan.	Adopted
MICE and mega-event platform	HKCEC expansion, HK\$100m international exhibition fund, KTSP “sports + mega events” , Victoria Park venue exploration.	Adopted
Human resources: participation, family support, labour supply	“30,000 Youth Positions and Internship Programme” , fertility measures and a tiered labour-import review strengthen the hospitality workforce.	Adopted
Service standards and hospitality talent development	Specialised tourist-guide licensing expanded to heritage/culture deep tours, elevating professional standards across the trade.	Adopted
Aviation, venue transport, cruise infrastructure	Aviation expansion and venue upgrades confirmed; MICE and connectivity infrastructure developed under the Plan.	Adopted
GBA “one trip, multi-stop”	Multi-destination itinerary promotion with airlines; mainland immigration facilitation pursued.	Adopted
Wellness, TCM and sports tourism	TCM inheritance and innovation, sports development and “ecological conservation + green tourism” advanced.	Adopted
Cross-boundary facilitation and integrated services	AUTOS contactless clearance (Dec 2026), Huanggang co-location (Q4 2026), expanded vehicle arrangements.	Adopted
Licensing, planning and tax review (incl. Hotel Accommodation Tax)	Outlying-islands home-stay facilitation adopted, easing licensing and planning constraints for accommodation supply.	Adopted
Green transformation incentives	Building energy-efficiency targets and electricity-price stability support hotels’ green investment planning.	Adopted
Yacht economy	Aberdeen marina, SKYTOPIA, GBA navigation, yacht-master training.	Adopted
Institutional coordination and phased implementation	Plan’ s five-year implementation mechanism provides the annual engagement cycle requested.	Adopted

C · “Study in Hong Kong” — student-accommodation recommendations taken forward

FHKHO recommendation (做大「留學香港」)	Outcome in the Plan / Policy Address	Status
Whole-building, professionally managed (hotel-model) student accommodation as the priority market direction	Hostels in the City (城中學舍) progressing with 41 applications (~10,800 beds); first dedicated student-hostel land sale this financial year; Youth Hostel Scheme expanded to hotels and guesthouses (+3,000 places, 2022–27) — the hotel-model conversion pathway is supported.	Adopted
Clear conversion path for hotels, serviced apartments and commercial buildings	Hostels in the City covers commercial-building conversion and is being extended to new-build student hostels; hotels are eligible participants in the expanded Youth Hostel Scheme.	Adopted
Standards / certification framework (24-hr management, e-access, visitor control, CCTV, digital maintenance, complaints)	PA supports the <i>Code of Practice for the Operation of Student Hostel Facilities</i> (《學生住宿設施營運實務守則》) covering accommodation facilities, hygiene, safety and warden arrangements — the standards direction is adopted.	Adopted
Plan student housing in parallel with Northern Metropolis university towns	Three university towns (San Tin, Hung Shui Kiu, Ta Kwu Ling) covering over 1,000 ha, each integrating living-community areas; student-hostel land sales under way.	Adopted
Scale up the “Study in Hong Kong” brand	Plan: non-local students to grow from 78,800 (2024/25) to 100,000 by 2029/30 with “Study in Hong Kong” as an explicit brand strategy; the “non-local graduate stay/return employment” arrangement is extended to GBA campus graduates on a two-year pilot basis.	Adopted

Assessment prepared by the Federation secretariat on 16 September 2026, based on documents published on that date.

05 · KEY DATES

The 2026–2030 horizon at a glance

Q4 2026	Huanggang Port redevelopment opens Co-location with “collaborative inspection and joint clearance” ; AUTOS contactless clearance at HZMB from December; HKTBAI recommendations on Discover Hong Kong (year-end).
Nov 2026	First flagship international exhibition Super-yacht and premium-lifestyle showcase, supported by the HK\$100m exhibitions fund.
2026/27 FY	First student-hostel land sale Market bidding for new student hostels; LKF streetscape beautification Phase 1 from October 2026.
2027	Infrastructure and standards milestones Aberdeen yacht composite tender (H1); specialised guide licensing extended to heritage tours (end-2027); WestK Performing Arts Centre opens; T2 Concourse commissioned; halal certification scheme until end-2027; tourism value added +~20% vs 2024.
2028	MICE capacity and digital identity AsiaWorld-Expo Phase 2 completed (end-2028); full corporate digital-identity coverage.
2030	Plan targets land Tourism value added HK\$126bn; 40% non-mainland overnight visitors; 240 air destinations; 60% non-local artists at Kai Tak; Hung Shui Kiu Station opens; 5,000 high-speed chargers targeted within five years.

06 · LOOKING AHEAD

Working with the Government through the annual cycle

FEDERATION POSITION

The Plan’s “five-year plan as master, annual Policy Address for implementation” mechanism gives hotel owners a structured annual channel to work with the Government. The Federation is fully supportive of the Plan and the Policy Address, and looks forward to continuing our partnership with the Government as the tourism economy grows from strength to strength.

聯 會 的 話

2026年9月16日，政府公布香港首份《香港特別行政區經濟和社會發展第一個五年規劃（2026—2030年）》，並同日發布《行政長官2026年施政報告》。規劃把旅遊業增加價值的增長及「一程多站」核心示範區建設列為重點方向。本特刊為會員整理與酒店、旅遊業相關的公布內容，說明本會各項建議獲採納的情況，並重點介紹本會「做大『留學香港』」研究相關的學生住宿措施。

0 1 · 公 布 內 容

五年規劃、施政報告與落實機制

01 首個五年規劃（2026—2030） 八篇內容涵蓋四大中心、人才高地、北部都會區、大灣區建設、民生福祉及治理，共訂立105項指標（22項主要指標、83項工作指標）。	02 2026年施政報告 同日發布，以「五大發展機遇」及「25項重點民生舉措」為框架，透過年度工作計劃落實規劃戰略方向。	03 落實機制 規劃確立「五年規劃統領、年度施政落實、財政預算支持、年度述職匯報」的執行循環，為業界提供可預期的年度對接渠道。
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0 2 · 關 鍵 數 字

旅遊業由「量」轉向「質」的目標

上文圖表顯示：旅遊業增加值由2024年的862億元增至2030年的1,260億元（累計增長約40–50%）；旅遊業就業人數由159,700人增至約203,000人。主要指標如下：

約+46% 2030年旅遊業增加值增長（862億 → 1,260億元）	40% 2030年過夜旅客中非內地旅客比例目標	4,990萬 2025年訪港旅客（按年+12%）；今年入境旅遊總消費料達2,381億元（+約一成）	240 2030年全球航點目標（現約220個）
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資料來源：《五年規劃》主要指標及專欄24；《施政報告》第70、349段。

0 3 · 行 業 重 點

對酒店、旅遊及款待業的意義

盛事引擎 「亞洲盛事之都」 啟德體育園目標至2030年六成表演由非本地藝人領銜（迄今已辦170多場盛事、吸引逾260萬人次；2025年主場館票房收入亞洲第一）。維園中央網球場擬改建全天候多用途場館。旅發局將分三個主題季節推廣，大型旗艦盛事的額外撥款將常規化。	門戶與收益 「一程多站」核心示範區 香港定位為多站式行程的核心示範區，作為海外旅客進入內地的南部門戶（今年上半年已有逾兩成海外旅客經港續遊內地）。旅發局將聯同航空公司推廣「一程多站」產品，重點吸引高消費、留宿、過夜旅客。
航空與會展 運力與盛事基建 2025年客運量6,100萬人次（+15%）；五年內航點由220增至240個；T2客運廊於2027年底前啟用。灣仔北重建擴建會展設施；撥款1億元吸引國際旗艦展覽，首個（11月）以超級遊艇及高端生活品味為主題。	高端資產 遊艇經濟 香港仔遊艇綜合發展項目料於2027年上半年招標；「機場城市」SKYTOPIA遊艇灣；2026年5月起港澳遊艇可於大灣區九市航行，6月完成首航「港艇北上」，即將與粵方簽署「粵艇南下」諒解備忘錄。與本會高端資產平台定位一致。
新增客源 穆斯林友善及特色旅遊 香港連續兩年排名上升，位列非伊斯蘭合作組織目的地第二位（全球穆斯林旅遊指數）；餐廳清真認證資助計劃延長至2027年底，為高增長客源市場提供配套。	發牌與營運 離島民宿便利化 民政事務總署處理離島三層或以下樓宇的賓館牌照申請時，將不再考慮大廈公契的使用限制，掃除小型住宿供應的長期障礙。

互聯互通 通關體驗 重建後的皇崗口岸實施「一地兩檢」及「 合作查驗、一次放行 」（2026年第四季）；港澳大橋香港口岸12月起試行「智通行」車上無感通關；爭取延長陸路口岸服務時間；擴展「港車北上／粵車南下」。	成本與綠色 能源與可持續發展 商用建築用電量目標較2015年 減少30–40% （2035年前完成一半），並明確穩定電價，零碳能源比例2035年升至60–70%——酒店作為用電大戶，應及早規劃節能改造及綠色融資。
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04 · 本會建議獲採納

聯會建議獲採納的情況

下表列出本會建議書（2026年8月提交）中獲2026年9月16日公布文件採納的措施及對應公布內容。

A · 五年規劃建議書 — 建議獲規劃採納

聯會建議	公布文件中的成果	狀態
提升勞動參與率（目標約58%）及檢視「福利懸崖」	規劃第23章提出增加勞動力供應、有序動態調整輸入勞工；施政報告推出三萬青年就業及實習計劃，提升勞動參與。	已採納
擴展航空網絡及多式聯運	規劃：五年內航點220→240個，每年拓展10個以上航空夥伴（一帶一路國家佔不少於四成）；施政報告：T2客運廊、2026年開辦94條新航線。	已採納
會展及盛事經濟、活動蓄水池與「一會兩地」	規劃：建設「亞洲盛事之都」、強化會展；施政報告：擴建會展中心、1億元國際展覽基金、旗艦盛事撥款常規化、三個主題季節。	已採納
高端服務標準、專業認證及款待人才培訓計劃	規劃及施政報告推進「專項專牌」導遊發牌（地質公園，再擴至歷史文化深度遊），並提升旅遊業整體服務標準。	已採納
「一程多站」核心示範區及跨境便利	規劃將香港定位為「一程多站」核心示範區；施政報告聯同航空公司推廣多站式行程，並擴展通關便利（皇崗一地兩檢、智通行）。	已採納
養生、醫療、中醫藥及體育旅遊框架	規劃及施政報告出台體育產業目標、「體育+盛事」、中醫藥傳承創新及綠色生態旅遊措施。	已採納
遊艇經濟作為高端資產平台	施政報告：香港仔遊艇項目2027年上半年招標、SKYTOPIA遊艇灣、大灣區航行及「粵艇南下」備忘錄；首個旗艦國際展覽（11月）以超級遊艇及高端生活為主題。	已採納
簡化酒店發牌、規劃更具彈性	施政報告：離島三層或以下樓宇賓館發牌免卻公契限制，簡化小型住宿供應的發牌及規劃限制。	已採納
酒店應用人工智能及科技（資助、稅務優惠）	施政報告：旅發局年底推出AI個人化旅遊推薦、城市管理引入AI，支援旅遊業界數碼轉型。	已採納
酒店綠色轉型支援	規劃：商用建築節電目標及穩定電價，支持酒店綠色轉型規劃。	已採納
國家層面統籌及制度保障	規劃建立五年規劃落實機制；施政報告設立大灣區規則銜接工作組。	已採納

B · 2026施政報告建議書 — 建議獲施政報告採納

聯會建議	2026施政報告成果	狀態
「旅遊+」策略及高增值過夜旅客	「+旅遊」聯合行動、三個主題季節、門票尾根經濟延長留宿；規劃訂立2030年非內地過夜旅客比例40%目標。	已採納
會展及盛事平台	擴建會展中心、1億元國際展覽基金、啟德「體育+盛事」、維園場館改建探討。	已採納
人力資源：參與率、家庭支援、勞動力供應	三萬青年就業及實習計劃、生育措施及分層有序的輸入勞工審視，壯大款待業勞動力。	已採納
服務標準及款待人才發展	「專項專牌」擴至歷史文化深度遊，全面提升旅遊業專業水平。	已採納
航空、場館交通、郵輪基建	航空擴展及場館升級確認；規劃下同步發展會展及連通基建。	已採納
大灣區「一程多站」	聯同航空公司推廣多站式行程；持續爭取外國旅客入境內地便利措施。	已採納
養生、中醫藥及體育旅遊	中醫藥傳承創新、體育發展及「生態保育+綠色旅遊」推進。	已採納

聯會建議	2026施政報告成果	狀態
跨境便利及綜合服務	「智通行」無感通關（2026年12月）、皇崗「一地兩檢」（第四季）、擴展車輛往來安排。	已採納
發牌、規劃及稅務檢討（包括酒店房租稅）	離島民宿便利化採納，簡化住宿供應的發牌及規劃限制。	已採納
綠色轉型激勵	建築節能目標及穩定電價，支持酒店綠色投資規劃。	已採納
遊艇經濟	香港仔遊艇項目、SKYTOPIA、大灣區航行、遊艇船長培訓。	已採納
制度統籌及分階段落實	規劃的五年落實機制提供所要求的年度對接循環。	已採納

C · 「做大『留學香港』」 — 學生住宿建議獲採納

聯會建議（做大「留學香港」）	規劃／施政報告成果	狀態
以「整幢、專業管理（酒店模式）」學生住宿為優先市場方向	「城中學舍」接獲41宗申請（約10,800個宿位）；本財政年度首幅學生宿舍地皮推出市場競投；青年旅舍計劃擴至酒店及賓館（2022–27年新增約3,000個名額）——酒店模式改裝路徑獲支持。	已採納
為酒店、服務式住宅及商業樓宇提供清晰改裝路徑	「城中學舍」涵蓋商業樓宇改裝並擴展至新建學生宿舍；酒店可參與擴大的青年旅舍計劃。	已採納
標準／認證框架（24小時管理、電子出入、訪客管理、閉路電視、數碼維修、投訴機制）	施政報告支持制定《學生住宿設施營運實務守則》，涵蓋住宿設施、衛生、安全及舍監安排——標準化方向獲採納。	已採納
北部都會區大學城同步規劃學生住宿	三個大學城（新田、洪水橋、打鼓嶺）佔地逾1,000公頃，各設宜居生活社區；學生宿舍地皮持續推出。	已採納
做大「留學香港」品牌	規劃：非本地學生由78,800人（2024/25）增至2029/30年100,000人，並明確打造「留學香港」品牌；「非本地畢業生留港／回港就業安排」亦試行涵蓋大灣區校園畢業生（為期兩年）。	已採納

本評估由聯會秘書處於2026年9月16日按當日公布文件整理。

05 · 關鍵日期

2026–2030年路線圖

2026年第四季	皇崗口岸重建啟用 「一地兩檢」及「合作查驗、一次放行」；12月港珠澳大橋試行「智通行」；旅發局年底推出AI個人化旅遊推薦。
2026年11月	首個國際旗艦展覽 以超級遊艇及高端生活品味為主題，獲1億元國際展覽基金支持。
2026/27年度	首幅學生宿舍地皮出售 市場競投興建學生宿舍；蘭桂坊街道美化第一期10月起陸續完成。
2027年	基建與標準里程碑 香港仔遊艇綜合項目上半年招標；「專項專牌」年底前擴至歷史文化深度遊；西九演藝中心啟用；T2客運廊啟用；清真認證資助至2027年底；旅遊業增加值累計增長約20%（對比2024年）。
2028年	會展容量及數碼身份 亞博館二期2028年底完成；數碼企業身份全面覆蓋。
2030年	規劃目標全面落地 旅遊業增加值1,260億元；非內地過夜旅客佔40%；全球航點240個；啟德六成非本地藝人表演；洪水橋站啟用；五年內高速充電樁增至5,000支。

06 · 展望

透過年度機制與政府攜手合作

聯會立場 規劃確立的「五年規劃統領、年度施政落實」機制，為酒店業主提供與政府合作的結構化年度渠道。聯會全力支持《五年規劃》及《施政報告》，期待在旅遊經濟持續增長之際，與政府繼續緊密攜手、共同發展。
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