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Hong Kong's tourism industry

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Growth in Hong Kong's inbound tourism eased in 2014. The slowdown continued and was more pronounced in the first half of 2015 as a result of slower Mainland visitor arrivals during the period. Yet other popular tourist destinations such as Japan and Europe have seen increased inflow of Mainland visitors, possibly because of their relaxed visa requirement and/or local currency depreciation against the US dollar.

The recent setback in local inbound tourism reinforces the need for Hong Kong to diversify its tourism source markets and product offerings. There are suggestions that Hong Kong should develop more tourist attractions, introduce effective measures to attract more business visitors and enable further growth of the cruise tourism.

Hong Kong has seen very few well-received new tourist spots coming on stream after the opening of the Hong Kong Disneyland in 2005. On business travel, Hong Kong faces keen competition from other Asian cities which have implemented more proactive measures to develop themselves as a business travel destination.

As to cruise tourism, Singapore and Shanghai are, geographically speaking, the more preferred home ports for Southeast Asia and Northeast Asia itineraries respectively. For the development of port-of-call business, Hong Kong lacks new tourist attractions and its Kai Tak Cruise Terminal is lagging behind in passenger-friendly transport infrastructure.

The subject of tourism falls within the policy areas of the Panel on Economic Development.

1. Introduction

1.1 Tourism (including both inbound and outbound tourism) is one of the four pillar industries in Hong Kong, along with financial services, trading and logistics, as well as professional and producer services. According to the latest statistics from the Census and Statistics Department, tourism contributed 5.0% of GDP and provided 269 700 jobs or 7.2% of total employment in 2013. Inbound tourism accounted for the majority share of the GDP contribution and total employment of the tourism industry, with the respective shares at 84% and 88% in 2013.

1.2 Visitor arrivals to Hong Kong registered a notable growth of 12.0% to 60.8 million in 2014, but this represented a deceleration from the annual average growth of 16.4% during 2010-2013 (**Figure 1**). Visitor spending exhibited a similar moderating trend. In 2014, the per capita spending of same-day visitors increased by just 1.5%[1] to HK$2,414, much lower than the average annual growth of 7.2% during 2010-2013. The per capita spending of higher value-added overnight visitors even decreased by 2.0% to HK$7,960 in 2014, the first decline in 11 years.[2]

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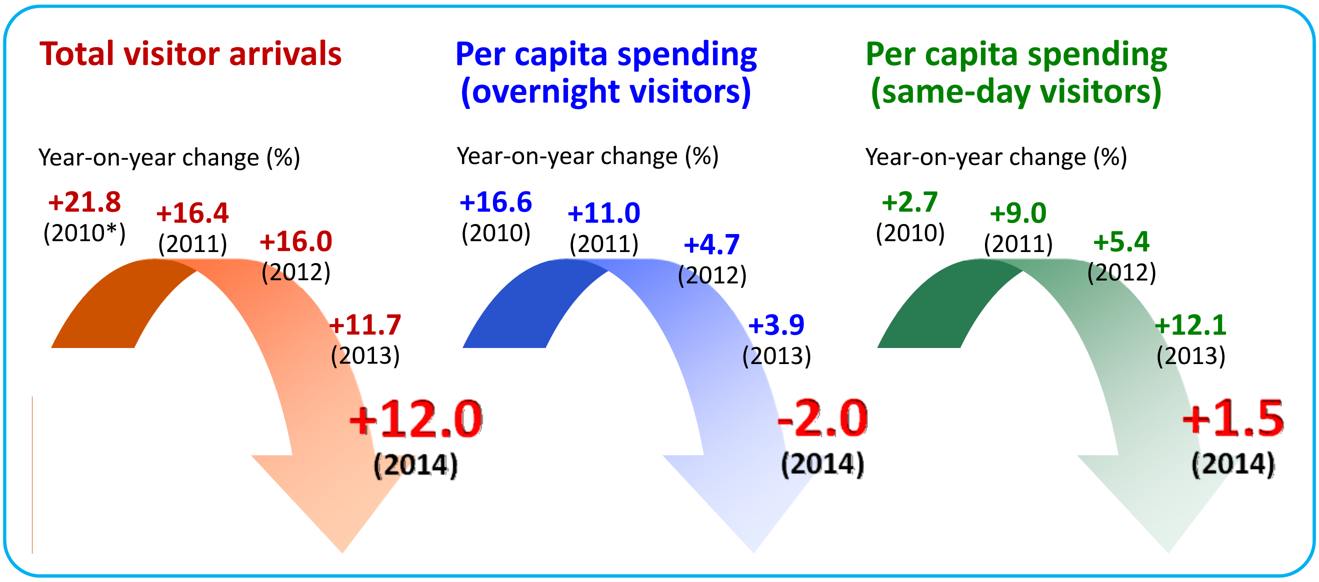
1 The percentage changes referred to in this Research Brief are year-on-year changes unless otherwise specified. Year-on-year change means the percentage changes over the same period of the preceding year.

2 The per capita spending of overnight visitors had been on the rise since 2004 and peaked at HK$8,123 in 2013.

Figure 1 – Total visitor arrivals and per capita visitor spending, 2010-2014

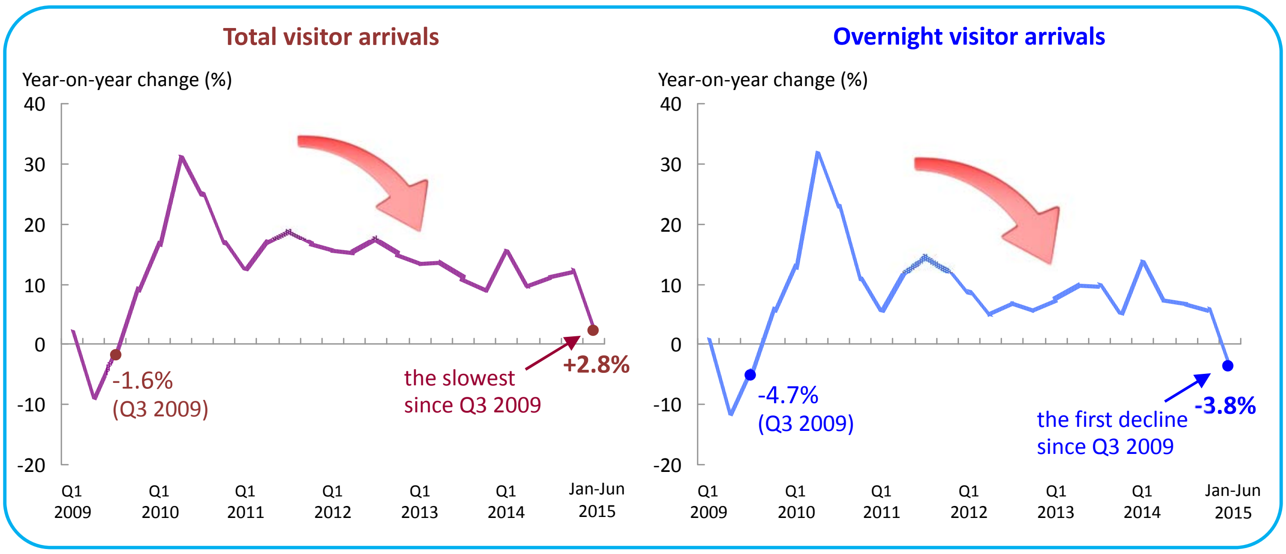


Note: (*) Total visitor arrivals surged in 2010, consequential to the Central Government's approval in 2009 for residents with eligible Shenzhen household registration to apply for the One-year Multiple-entry Individual Visit Scheme Endorsements to visit Hong Kong.

Data source: Hong Kong Tourism Board.

1.3 Inbound tourism exhibited a visible slowdown in 2015 as total visitor arrivals rose by a mere 2.8% in the first half of the year (**Figure 2**). The growth rate was the slowest since the third quarter of 2009 when inbound tourism was hit by the concerns over the spread of human swine flu. Overnight visitor arrivals slackened even more abruptly to decline by 3.8%, also the first setback since the third quarter of 2009.

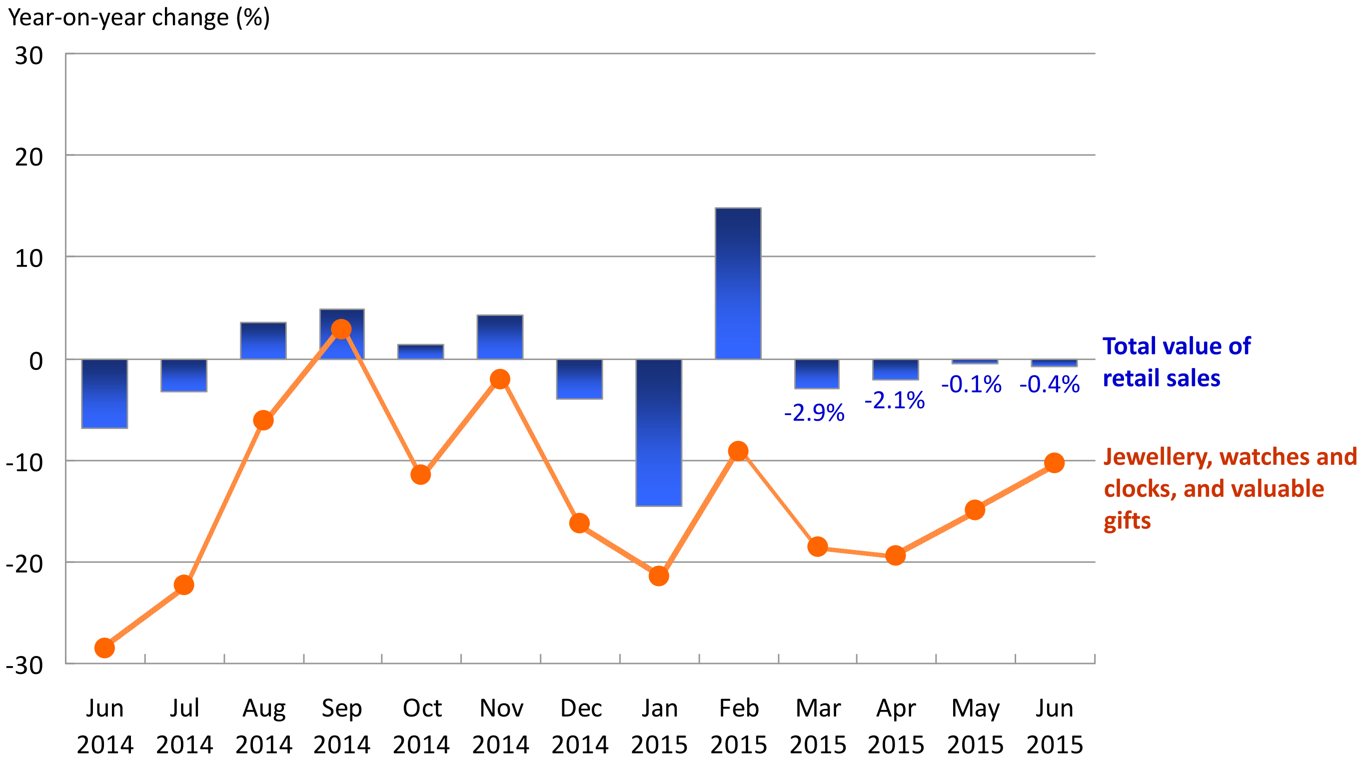
Figure 2 – Visitor arrivals to Hong Kong, 2009 to January-June 2015



Data source: Hong Kong Tourism Board.

1.4 Amid slower visitor arrivals, the average hotel room occupancy rate retreated from a high of 89% a year earlier to 85% in the first half of 2015. Likewise, the average achieved hotel room rate declined by 8.7% to HK$1,335. The total value of retail sales also fell by 1.6% in the first half of 2015, after having declined by four consecutive months since March 2015 (**Figure 3**). The declining trend was attributable largely to the double-digit decrease in the retail sales value of jewellery, watches and clocks, and valuable gifts, popular shopping items among visitors.

Figure 3 – Value of retail sales, June 2014 to June 2015



Data source: Census and Statistics Department.

2. Tourist diversion

2.1 The subdued performance of local inbound tourism indeed mirrored largely the slowdown in the growth of Mainland visitors, as the Mainland has become Hong Kong's largest visitor source market after the launch of the

Individual Visit Scheme ("IVS") in 2003[3]. Between 2009 and 2013, Mainland visitors registered an annual average growth of 19.3%. However, in 2014, the growth in Mainland visitors eased to 16.0%, the slowest since 2009 when the Central Government allowed residents with eligible Shenzhen household registration to apply for One-year Multiple-entry IVS Endorsements to visit Hong Kong. The Mainland market remained weak in 2015 with the growth of Mainland visitors decelerating to 4.7% in the first half of the year. Among them, the number of higher value-added overnight Mainland visitors even declined by 3.8%.

2.2 While Hong Kong has seen reduced inflow of overnight Mainland visitors, the number of visits they made to other popular overseas destinations has accelerated in recent months (**Figure 4**). Relaxed visa requirements (**Figure 5**) and favourable exchange rates[4] (**Figure 6**) in Japan, Europe and other destinations might have resulted in tourist diversion from Hong Kong.

Figure 4 – Number of Mainland visitors to selected popular overseas tourist destinations

Destination	Year-on-year growth*
Japan	+116.3% (Jan-Jun 2015)
Thailand	+97.5% (Jan-May 2015)
South Korea	+12.4% (Jan-Jun 2015)
Europe	+26.9% (Jan-Mar 2015)
Australia	+20.8% (Jan-May 2015)
Hong Kong (overnight visitors)	-3.8% (Jan-Jun 2015)

Note: (*) Based on the latest figures available.

Data sources: Hong Kong Tourism Board, China National Tourism Administration, Japan National Tourism Organization, Korea Tourism Organization, Ministry of Tourism and Sports of Thailand, and Tourism Australia.

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[3] In 2002, before the launch of IVS, Hong Kong received 16.6 million visitors and 41.2% of them came from the Mainland. The corresponding figures surged to 60.8 million and 77.7% in 2014.

[4] The US dollar has strengthened since mid-2014. The Hong Kong dollar, which is linked to the US dollar, has also strengthened against many major currencies.

Figure 5 – Relaxed visa requirements for Mainland visitors in selected tourist destinations since 2014

The United Kingdom, France, Germany and Italy

- Visa application procedures simplified during 2014-2015.

The United States

- Validity of visas extended from one year to 10 years in November 2014.

Indonesia

- Visa-free status granted with effect from June 2015.

Japan

- Announced in January 2015 to:
  - (a) extend the validity of multiple-entry visa from three to five years for high-income visitors; and
  - (b) exempt high-income visitors from the requirement to stay at Iwate, Miyagi, Fukushima or Okinawa one night for their first-time travel to Japan*.

Note: (*) The requirement is to promote reconstruction of these four prefectures after the earthquake and tsunami that hit Japan in 2011.

Sources: Government of the United Kingdom, Consulate General of France, German Federal Foreign Office, Italy Visa Application Centre in China, United States Department of State, Embassy of the Republic of Indonesia and Ministry of Foreign Affairs of Japan.

Figure 6 – Depreciations of selected currencies against the US dollar, June 2014 to June 2015

₩ Korean won ↓8%

¥ Japanese yen ↓18%

$ Australian dollar ↓18%

€ Euro ↓18%

Data source: Census and Statistics Department.

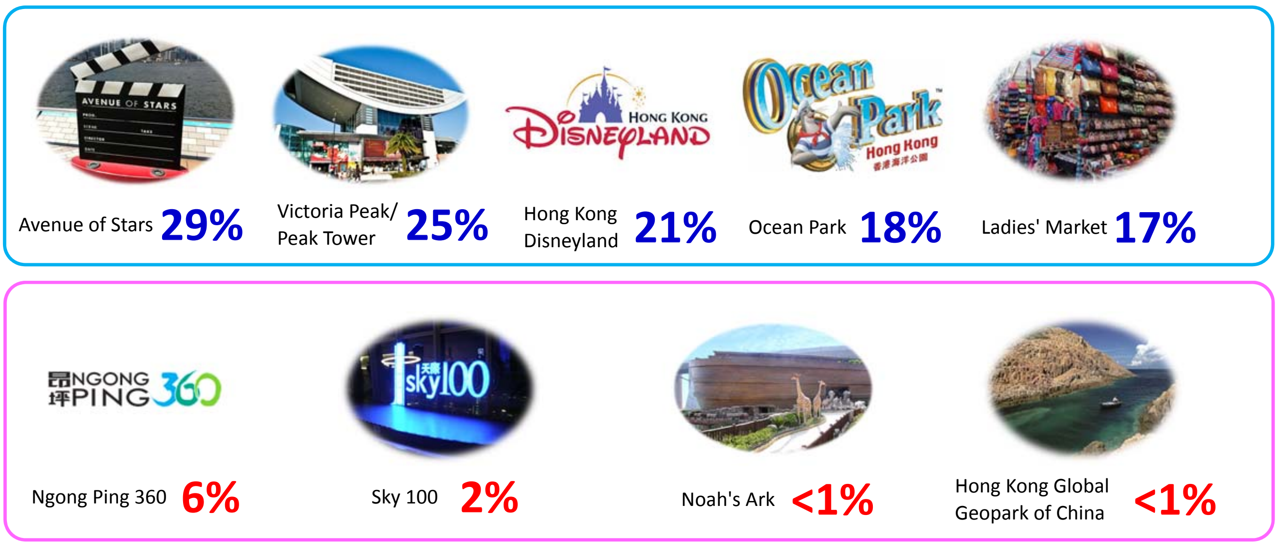
3. Diversification of Hong Kong's tourism industry

3.1 The recent setback in inbound tourism reflects the over-reliance on Mainland visitors and underscores the need for Hong Kong to diversify its source of tourism and what it offers to visitors. To attract new visitors, encourage repeated visits of returning visitors, and lengthen their stays, there is a view that Hong Kong should develop more tourist attractions in order to enrich visitors' experiences. To attract higher value-added visitors and open up new visitor sources, there are suggestions that Hong Kong should attract more inbound business travellers coming for meetings, conventions, exhibitions and other commercial events, and take effective measures to enable the further growth of the cruise tourism.

Tourist attractions

3.2 Hong Kong has seen very few well-received tourist spots coming on stream since the opening of the Hong Kong Disneyland in 2005. The subsequent opening of new tourism spots, such as Ngong Ping 360, Noah's Ark at Ma Wan, Hong Kong Global Geopark of China and Sky 100, are not particularly attractive to visitors (**Figure 7**). Indicative of the above trend, eight of Hong Kong's top 10 places most visited by tourists remained the same during 2006-2014, according to the annual surveys conducted by the Hong Kong Tourism Board (**Figure 8**).

Figure 7 – Proportion of surveyed visitors having visited selected tourist spots in 2014*



Note: (*) Based on the survey conducted by the Hong Kong Tourism Board.
Data source: Hong Kong Tourism Board.

Figure 8 – Hong Kong's top 10 tourist spots, 2006-2014

Spots		2006	2007	2008	2009	2010	2011	2012	2013	2014
	Avenue of Stars	●	●	●	●	●	●	●	●	●
	Victoria Peak/Peak Tower	●	●	●	●	●	●	●	●	●
	Hong Kong Disneyland	●	●	●	●	●	●	●	●	●
	Ocean Park	●	●	●	●	●	●	●	●	●
	Ladies' Market	●	●	●	●	●	●	●	●	●
	Temple Street	●	●	●	●	●	●	●	●	●
	Hong Kong Convention and Exhibition Centre	●	●	●	●	●	●	●	●	●
	Clock Tower, Tsim Sha Tsui	●	●	●	●	●	●	●	●	●
	Waterfront Promenade, Tsim Sha Tsui	-	●	●	●	●	●	●	●	●
	Lan Kwai Fong/Soho IN since 2013	-	-	-	-	-	-	-	●	●
	Repulse Bay OUT after 2011	●	●	●	●	-	●	-	-	-
	Wong Tai Sin Temple OUT after 2012	●	-	-	-	-	-	●	-	-
	Po Lin Monastery/ Giant Buddha OUT after 2010	-	-	-	-	●	-	-	-	-

Data source: Hong Kong Tourism Board.

3.3 Unlike Hong Kong, Singapore has new tourist spots opening up one after another almost every year since 2008, including Singapore Flyer (2008), rejuvenated Orchard Road (2009), Integrated Resorts at Marina Bay and Sentosa (2010), Gardens by the Bay (2012), River Safari (2013), and National Gallery Singapore (tentatively November 2015). Among them, rejuvenated Orchard Road was the most visited free-access spot in 2013, whereas Singapore Flyer, Integrated Resorts at Marina Bay and Sentosa, and Gardens by the Bay were among the top five most visited paid-access spots during the year[5]. The popularity of new tourist spots has contributed to the increase in the number of visitor arrivals to Singapore from 10.1 million in 2008 to 15.1 million in 2014, an increase of 49.2%.

3.4 In contrast, South Korea has not launched any large-scale new tourism infrastructure projects in recent years. Indeed, the top 10 most popular tourist spots in South Korea remained the same during 2011-2015[6]. Nevertheless, South Korea has managed to develop existing scenic locations into a number of new tourist attractions by leveraging on the popularity of Hallyu[7] (Korean Wave or 韓流). Hallyu tourism features attracting tourists coming to visit the locations used in their favourite Hallyu dramas and movies[8]. For this type of tourism, South Korea does not need to invest in developing large-scale new tourism infrastructure, but just creating new tourist attractions based around well-known drama/movie locations. Amid the development of Hallyu tourism, the number of visitors travelling to South Korea more than doubled from 6.9 million in 2008 to 14.2 million in 2014.

Business travel

3.5 Business travel is an important segment of the tourism industry for the benefits it brings to the host city. These include the commercial activities generated by the organization of exhibitions and conventions, as well as the spending of participants on transportation, accommodation and shopping during

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5 Based on the latest statistics from the Singapore Tourism Board.

6 They are Myeong-dong, Dongdaemun Market, Palaces, Namdaemun Market, Namsan Park/N Seoul Tower, Insa-dong, Lotte World, Museums (Memorial Halls), Sinchon/Hongik University and Itaewon. See InvestKorea (2014) and Ministry of Culture, Sports and Tourism (2015).

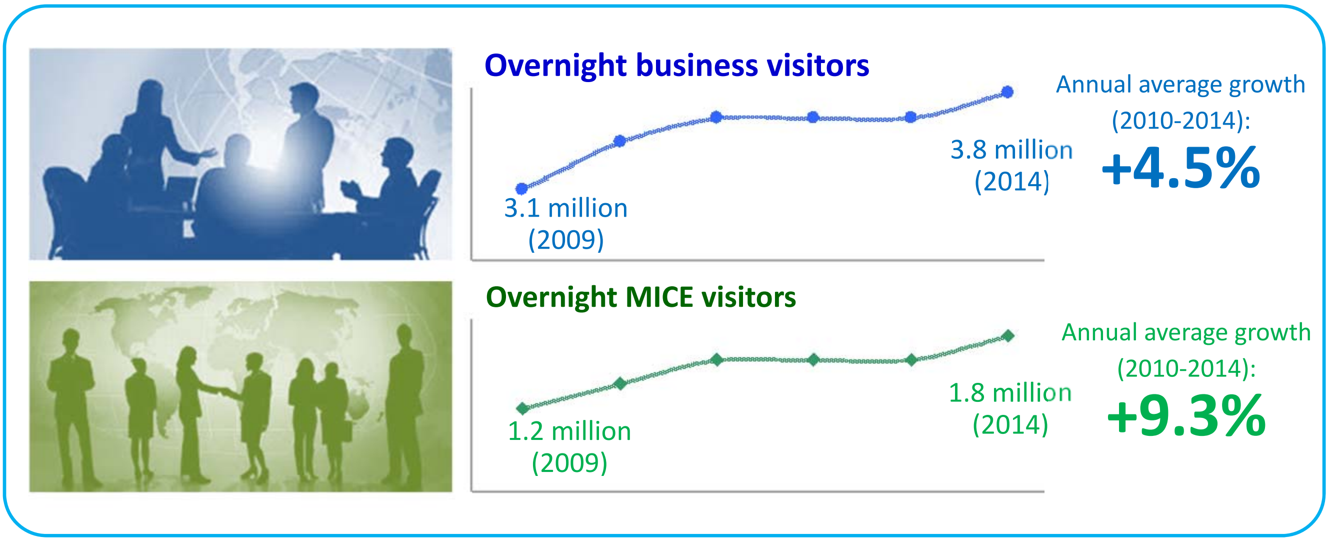
7 Hallyu began with the spread of the South Korean television dramas throughout East and Southeast Asia in the late 1990s. Other genres of pop culture including Korean pop ("K-pop") music and movies were immediately included in Hallyu. Within a few years, Hallyu has expanded to Central Asia, the Middle East and Eastern Europe, and the Korea Tourism Organization has capitalized on its popularity to promote local tourism industry.

8 Hallyu tourism also involves attracting tourists coming to South Korea to catch a performance involving their favourite K-pop stars, participate in fan meetings with Hallyu celebrities, and shop for items associated with Hallyu. See Organisation for Economic Co-operation and Development (2014).

their stay in the host city[9]. In addition, business travel is not as sensitive as leisure tourism to seasonality factors since meetings, conventions and exhibitions can take place all year round. The business travellers can help the host city by taking up some of the empty rooms available during off-peak seasons. Other intangible benefits brought by business travel include promoting the international image of the host city and network building of local businesses.

3.6 Hong Kong has attracted increased number of overnight business visitors in recent years, particularly those travelling for meetings, incentive travels, conventions and exhibitions ("MICE") events (**Figure 9**). The per capita spending of overnight business visitors has all along been higher than that of overnight non-business visitors (**Figure 10**). In addition, overnight business visitors also tend to spend more on services with higher local value-added content, such as hotel accommodation and meals at restaurants.

Figure 9 – Number of overnight business visitors and MICE visitors, 2010-2014



Data source: Hong Kong Tourism Board.

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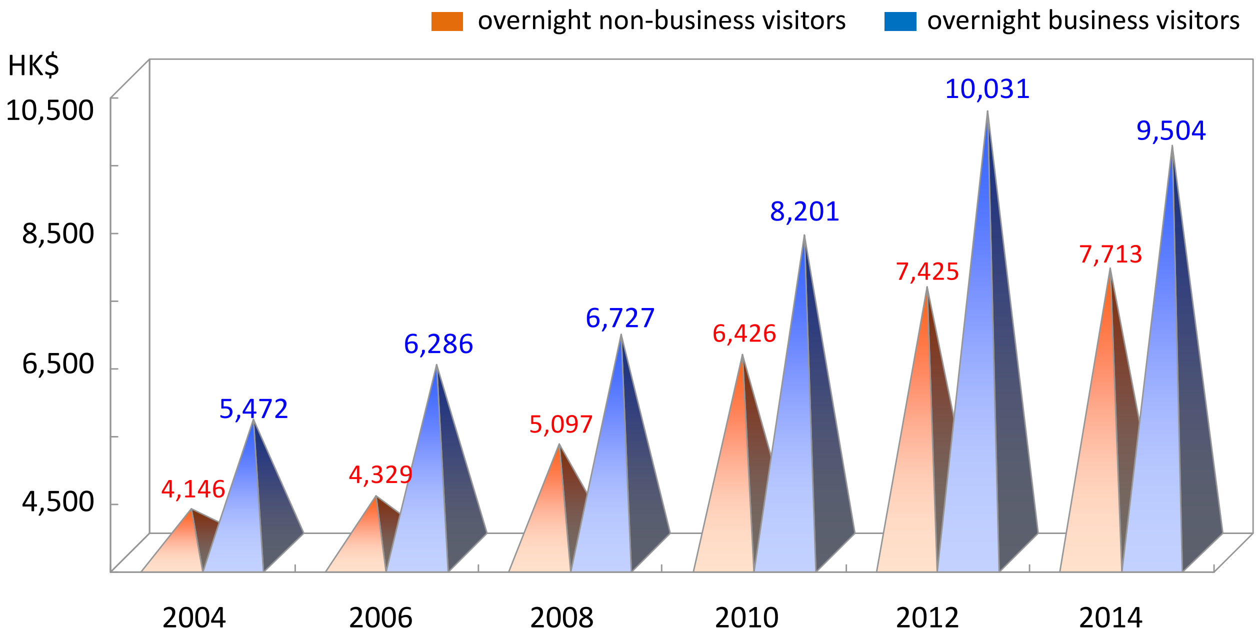
[9] In Hong Kong, the exhibition industry contributed 2% of GDP and generated 69 600 full-time jobs in 2012. See Hong Kong Exhibition & Convention Industry Association (2013).

Figure 10 – Per capita spending of overnight business and non-business visitors, 2004-2014



Data source: Hong Kong Tourism Board.

3.7 Asia is a fast-growing business travel market amid its growing importance in the global economy. According to the forecast by the World Tourism Organization, business visitor arrivals to the Asia-Pacific region will increase by an annual average of 5.1% in 2010-2020 and 3.7% in 2020-2030. The figures are higher than the corresponding growth rates of 3.5% and 2.7% for the global average.

3.8 Amid the above positive outlook for the Asia-Pacific business travel market, the Government commissioned a study in 2014 to assess the long-term demand for convention and exhibition facilities. It also considers constructing a new convention centre above the Exhibition Station of the Sha Tin to Central Link around 2020. Apart from Hong Kong, other Asian cities are also eyeing on the lucrative business travel market. This will inevitably subject Hong Kong to intense competition from Singapore, Beijing and Seoul, whose global rankings in terms of the number of international meetings hosted are higher than that of Hong Kong.[10]

[10] According to the survey conducted by the International Congress and Convention Association ("ICCA") on the number of international meetings hosted by various global cities, Hong Kong ranked 16th and trailed behind Singapore (7th), Beijing (14th) and Seoul (15th) in 2014. To be considered as an international meeting in the ICCA survey, the meeting must fulfil a set of criteria such that it must rotate on a regular basis and attract a minimum of 50 delegates.

3.9 In recent years, Singapore, Beijing and Seoul have rolled out more proactive measures than Hong Kong to promote themselves as the premier MICE destination in Asia Pacific (**Figure 11**). In particular, they differ from Hong Kong with the introduction of specific incentive schemes to promote the growth of the business events. In Singapore, qualifying business event organizers receive funding support of up to 70% of qualifying costs[11], while Beijing and Seoul subsidize business event organizers/businesses for the cost of hosting international meetings and events. In addition, they have developed medium- to long-term plans to chart the growth of the MICE industry. In contrast, the Hong Kong Tourism Board only publishes annual work plan setting out key activities for the year ahead.

Figure 11 – Promotion of MICE tourism in selected Asian cities

	Singapore	Beijing	Seoul	Hong Kong
Responsible bureau/office	Singapore Exhibition & Convention Bureau under the Singapore Tourism Board	Beijing Convention and Visitors Bureau under the Beijing Municipal Commission of Tourism Development	Seoul Convention Bureau under the Seoul Tourism Organization	Meetings and Exhibitions Hong Kong Office under the Hong Kong Tourism Board
Support services to organizers in bidding for international business events	✓	✓	✓	✓
Incentives to organizers/ hosting units	✓	✓	✓	✗
Partnership with overseas global cities to promote MICE	Formed the BestCities Global Alliance with 11 other global cities	✗	Founded the Future Convention Cities Initiative with six other global cities	✗
Medium- to long-term plan	Roadmap up to 2020 containing initiatives to: (a) develop Singapore into a smart MICE city; (b) enhance MICE visitors' experiences in Singapore; and (c) attract MICE talents.	Five-year growth plan (2011-2015) with performance targets on areas, such as: (a) expanding exhibition facilities to 0.6 million - 0.7 million sq m; and (b) hosting 30 to 40 large-scale exhibition events by 2015.	Master plan up to 2028 featuring: (a) the first stage to expand Seoul's current meeting capacity; and (b) the second stage to develop a MICE complex in Southeast of Seoul.	✗

Sources: Hong Kong Tourism Board, Singapore Tourism Board, Seoul Tourism Organization and 北京市旅遊發展委員會.

[11] These include costs related to marketing and bidding activities.

Cruise tourism

3.10 The cruise industry is a global industry with cruise itineraries destined for cities/countries and ports around the globe. Cruise ports can be functionally divided into home ports and ports-of-call. A home port is where a cruise begins and/or terminates, whereas a port-of-call is one of the several intermediate ports visited on a cruise itinerary and passengers usually have a whole day or few hours to experience the port[12]. Passenger ports aim to be selected as home ports for the benefits of a constant flow of visitors, stable revenue for cruise terminals, and higher per capita passenger spending[13].

3.11 A well-developed cruise home port should be equipped with dedicated infrastructures and facilities and easily accessible to an international airport[14]. The recently constructed HK$8.2 billion Kai Tak Cruise Terminal is a world-class infrastructure with the capacity to berth the world's largest cruise vessels.[15] Hong Kong also has the advantage of extensive air connections with other cities. Nevertheless, other neighbouring ports such as Singapore and Shanghai are also aggressive on capitalizing on the market potential of the fast-growing cruise industry in Asia.

3.12 Singapore has invested S$500 million (HK$3.17 billion) in the construction of a new cruise terminal, the Marina Bay Cruise Centre, which was opened in October 2012[16]. Extensive renovations have also been made to the other international cruise terminal, the Singapore Cruise Centre at HarbourFront. Singapore's well-connected Changi Airport also adds to its competitiveness as a passenger port. For Shanghai, it has three large international cruise terminals and serves as an important passenger port on all Asia-Pacific cruises. Geographically speaking, Singapore and Shanghai also seem to be the more preferred home port for Southeast Asia and Northeast Asia itineraries respectively (**Figure 12**).

3.13 Probably reflecting the geographical limitation, Hong Kong appears to be more popular as a home port for a round-trip itinerary to Taiwan, and as a home port for a cruise trip departing from Hong Kong to Vietnam, Thailand and Singapore[17]. For longer itineraries with more visit points from Southeast Asia to Northeast Asia (or vice versa), Hong Kong is more likely a port-of-call visited by cruise passengers.

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12 See Lekakou, Pallis & Vaggelas (2009), and Hsu (2015).

13 In Hong Kong, the average per capita spending of home port passengers (HK$4,700) is higher than that of port-of-call passengers (HK$1,500). See GovHK (2015).

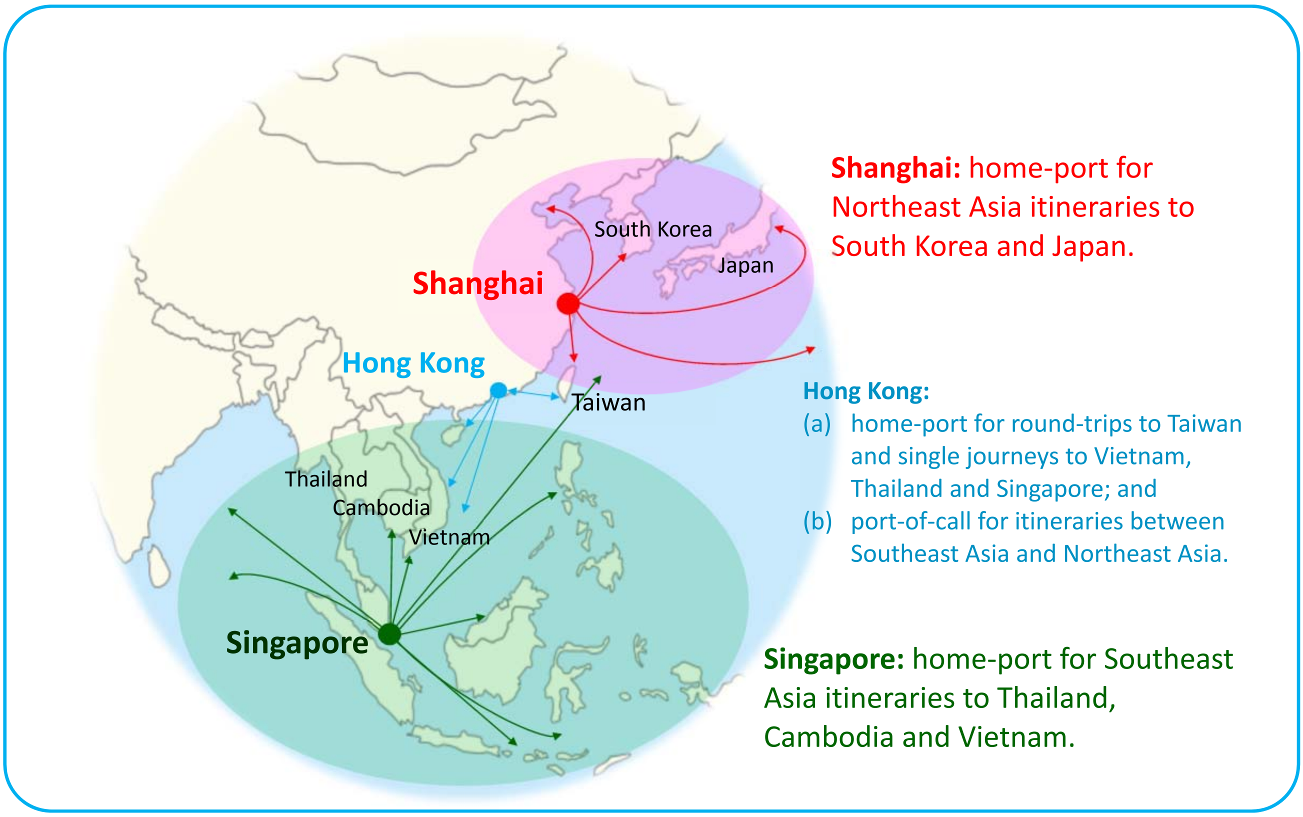
14 See Association of Southeast Asia Nations (2002).

15 The Kai Tak Cruise Terminal consists of two berths. The first one was commissioned in 2013 and the second in 2014.

16 The number of ship calls at Singapore's Marina Bay Cruise Centre was about 80 in FY2012-2013 and 110 in FY2013-2014. In comparison, 28 cruises docked at the Hong Kong's Kai Tak Cruise Terminal in 2014 and the number is forecast to increase to 58 in 2015 and over 100 in 2016.

17 Based on the cruise itineraries published by the Hong Kong Tourism Board for the period from mid-2015 to end-2016.

Figure 12 – Selected passenger ports in Asia



3.14 It is crucial for a port-of-call to be equipped with adequate tourist attractions and land transport nearby. Hong Kong has seen very few well-received tourist spots coming on stream in recent years, and the Kai Tak Cruise Terminal is lagging behind in passenger-friendly land transport. At present, the accessibility to the city centre from the terminal relies heavily on taxis and operator-arranged shuttle buses.[18] This constraint is unlikely to improve in the short term as the proposed Environmentally Friendly Linkage System[19] that includes the design of green public transport modes[20] to connect the Kai Tak Cruise Terminal with nearby MTR stations is still in the planning and assessment stage. In contrast, Singapore has well-connected network of public transport and limousine services to complement its Mass Rapid Transit ("MRT")[21] for transporting passengers to and from its two cruise terminals.

18 The public may travel to the Kai Tak Cruise Terminal by green minibus. Special public buses are only available on weekends and public holidays. As indicated by the Government, the cruise operator is planning to arrange special ferry service on ship call days or event days to increase the connectivity of the Terminal.

19 A two-stage public consultation on the System was completed in February 2014. The Government has recently sought the funding approval from the Legislative Council for carrying out the detailed feasibility study, which is expected to complete in 2017.

20 Green public transport modes include monorail, modern tramway, automatic people mover, bus rapid transit, urban light transit, trolley bus, electric or hybrid bus, cable car, travellator, or a combination of the above modes.

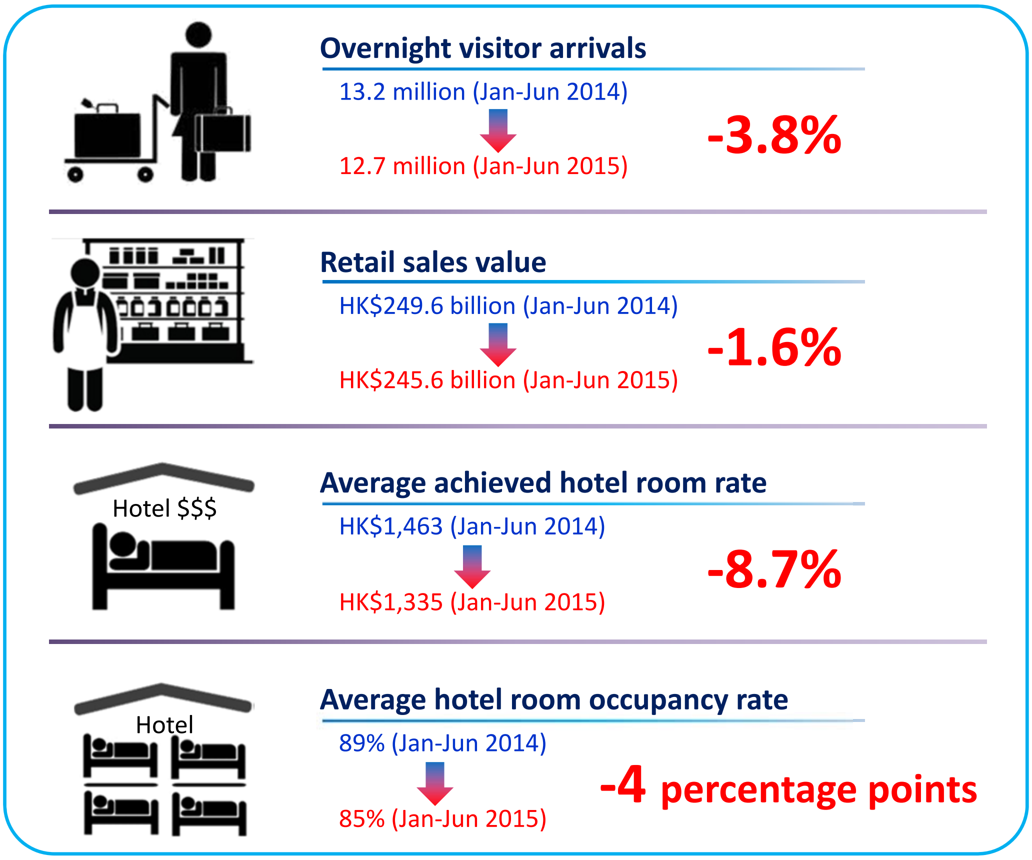
21 The Singapore Cruise Centre at HarbourFront is directly connected to HarbourFront MRT station, whereas the Marina Bay Cruise Centre is accessible from Marina South Bay Pier MRT station which was opened in November 2014.

4. Observations

4.1 The following observations are made based on the findings above:

(a) Hong Kong's inbound tourism underwent a distinct slowdown in the first half of 2015, with visitor arrivals recording the slowest growth since the third quarter of 2009. Other indicators fared worse and declined during the period (**Figure 13**);

Figure 13 – Weak performance of Hong Kong's tourism industry



Data sources: Hong Kong Tourism Board and Census and Statistics Department.

(b) the subdued performance of inbound tourism reflected largely the moderated growth in the number of Mainland visitors, which decelerated to 4.7% in the first half of 2015 from the surge in recent years. Relaxation of visa policies and favourable exchange rates of other popular tourist destinations might have affected the desire of Mainland visitors travelling to Hong Kong;

(c) the recent setback in local inbound tourism reinforces the need for Hong Kong to diversify its tourism source markets and product offerings. Suggestions coping with the setback include developing more tourist attractions, attracting more business visitors, and growing the cruise tourism;

(d) Hong Kong lacks new well-received tourist attractions, particularly after the opening of the Hong Kong Disneyland in 2005. Yet Singapore has opened new tourist spots one after another almost every year since 2008. Meanwhile, South Korea has not invested in developing new large-scale tourism infrastructure, but it has created new tourist attractions through attracting tourists coming to visit the locations used in their favourite Hallyu dramas and movies. As a result of the above development, both Singapore and South Korea recorded notable growth in their inbound tourism between 2008 and 2014;

(e) compared with Hong Kong, Singapore, Beijing and Seoul have rolled out more proactive measures to promote themselves as the premier MICE destination in Asia Pacific. In particular, they have put in place specific incentive schemes to support business event organizers/businesses and medium- to long-term plans to chart the MICE industry growth. In contrast, Hong Kong has not introduced any specific incentive schemes for the MICE industry. It relies on the annual work plans submitted by the Hong Kong Tourism Board for the way ahead; and

(f) on cruise tourism, Hong Kong faces intense competition from Singapore and Shanghai which are, geographically speaking, the more preferred home ports for Southeast Asia and Northeast Asia itineraries respectively. As to the development of port-of-call business, Hong Kong does not have enough new tourist attractions and the Kai Tak Cruise Terminal is lagging behind in passenger-friendly land transport. At present, the proposed Environmentally Friendly Linkage System that includes the design of green public transport modes to connect the Kai Tak Cruise Terminal with nearby MTR stations is still in the planning and assessment stage. In comparison, Singapore's cruise terminals have well-connected public transport network (including MRT) to transport the cruise passengers.

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