

1. Introduction

1.1 The Coronavirus Disease ("COVID-19") outbreak has dampened visitor arrivals and spending in Hong Kong, hitting hard the tourism industry. In light of these challenges, the Government has rolled out three rounds of stimulus packages¹, providing **immediate financial relief** to suffering businesses and workers through measures such as cash subsidies and wage support. The Hong Kong Tourism Board has also announced the implementation of **longer-term recovery measures** to promote domestic tourism and subsequently inbound tourism from selected markets.

1.2 Likewise, some places, particularly those in Asia-Pacific, have put in place measures to support the restoration of tourism activities. At the request of Hon YIU Si-wing, the Research Office has completed a research task on measures to revive the tourism industry, focusing on relief and recovery measures in six places (i.e. Macao, New Zealand, Portugal, Shanghai, South Korea and Taiwan), where the epidemic situation is now relatively stable. Relevant documents are presented in an information pack folder with key findings outlined below.

2. Impact of COVID-19 on the tourism industry

2.1 With the closure of tourist attractions and global aviation at a near standstill due to travel restrictions, visitor arrivals in more than half of the selected places plunged over 90% year-on-year ("YoY") in March 2020 (**Figure 1**). Hotels in these places also saw low occupancy rates, with less than a third of their rooms being occupied in March. The outbreak of COVID-19 has not only curbed tourism spending but also local consumption, resulting in business closures, layoffs and/or unpaid leave for workers, mostly in sectors such as hospitality, retail and catering.

Figure 1 – Key indicators (data in March 2020)

	Hong Kong	Macao	New Zealand	Portugal ²	Shanghai	South Korea	Taiwan
Visitor arrivals, YoY	-98.6%	-93.7%	-54.0%	-62.3%	-92.0%	-94.6%	-92.8%
Hotel occupancy	32.0%	23.2%	14.9%	17.0%	8.6%	- ³	17.9%

¹ Relief measures in the 2020-2021 Budget and two rounds of Anti-epidemic Fund totaled HK\$287.5 billion, providing support to licensed guesthouses, travel agents, retailers and related industry practitioners.

² Portugal does not publish data on visitor arrivals. The figure refers to registered guests at tourist accommodation. Hotel occupancy data are in April and based on industry estimates.

³ Information not available.

3. Measures to revive the tourism industry in selected places

3.1 Like Hong Kong, all selected places have provided **immediate financial support** to tourism and/or related businesses. These measures typically range from **cash subsidies to loans and/or deferral of tax obligations** for travel agents, hotels, retailers, catering businesses, etc. **Wage subsidies** are also commonly used to relieve the financial burden of employers and preserve jobs. The monthly maximum subsidy received by employers ranges from NT\$20,000 (HK\$5,171) per employee in Taiwan to NZ\$2,343 (HK\$11,086) in New Zealand, compared with Hong Kong's HK\$9,000. To ensure the survival and prevent the loss of key tourist attractions due to the impact of COVID-19, New Zealand has additionally proposed setting up a **fund dedicated to the protection of tourist attractions and amenities** that are nationally and/or internationally recognized.⁴ It has also launched an **advisory programme** that helps tourism businesses transition towards domestic and Australian markets or considers other options.

3.2 Recovery measures have also been rolled out to boost **domestic tourism** and support the restoration of tourism activities. Macao, South Korea and Taiwan have issued **consumption vouchers** that can be used for dining, shopping and/or domestic travel. Apart from handing out shopping discounts and promoting local tours like Hong Kong does, Shanghai has experimented with **new tourism products**, such as night tours, virtual tourism⁵ and offering free museum admission to healthcare workers. Other places have also tapped into the healthcare market with tailor-made offerings. Portugal has collaborated with an online hotel platform, offering 30-day free accommodation to healthcare workers who cannot return home for fear of infecting their families. Taiwan offers a subsidy to hotels providing accommodation to healthcare workers, who receive a discount for their stay.

3.3 Some places have scaled up efforts to revive **inbound tourism** with new strategies and/or travel arrangements. For example, in Macao, apart from postponing the imposition of a new tourist tax, the government has taken a **stepped approach** similar to Hong Kong's. It has set to focus on domestic and/or selected markets (e.g. Greater Bay Area) first, before reaching out to international visitors. Taiwan has tentatively planned to reopen the door to international visitors beginning in October 2020. Meanwhile, New Zealand has attached importance to tourism recovery by setting up a cross-departmental ministers group tasked with overseeing the industry's recovery. The country also looks to **attract visitors from neighbouring places that share viable records in containing COVID-19**. To achieve this, New Zealand

⁴ Eligibility criteria and support options are in development and will be considered by the government in June 2020.

⁵ Also known as "cloud tourism", it enables sightseeing to take place at home through the use of technology such as virtual reality and live-streaming of exhibitions and tours.

has launched a winter ski campaign in Australia promoting regional travel. It has also announced plans to introduce a "COVID-safe travel zone" by easing travel restrictions on Australia, a move that resembles Hong Kong's plan to relax quarantine restrictions on travellers from neighbouring destinations such as Guangdong Province and Macao.

3.4 To restore traveller confidence, some places have taken further steps to improve **safety and health measures**. While Portugal has created a "clean and safe" **accreditation label** for recognizing tourism facilities that meet the government's hygiene and safety standards, some places have turned to **technology to assist health screening and/or crowd control**. For example, Taiwan has recently upgraded its traffic app to show visitors where to avoid crowds at tourist attractions during the recent Labour Day holiday. Macao and Shanghai have adopted the Mainland's health code system, which uses a colour-based QR code to indicate visitors' health status for entering tourist spots.⁶ Similar to Hong Kong, Macao and Shanghai have also issued **guidelines for resuming tourism activities**, requiring businesses to adopt measures such as limiting admissions, checking temperatures for visitors, increasing disinfection and/or providing only online channel for ticket sale.

⁶ A green code shows that one is healthy and free to travel. Yellow means that the holder should be in home isolation, while red indicates that one is a confirmed COVID-19 patient and should be in quarantine.

Measures to revive the tourism industry in selected places

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