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Ms Shirley Chan  
Clerk to Panel on Economic Development  
Legislative Council Complex  
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**Economic Benefits brought by the Cruise Industry  
2018 Mid Term Assessment**

Back in November 2008, the Tourism Commission (TC) informed Members of this Panel the estimated economic benefits brought by the cruise industry up till 2023 in the context of providing justifications to support the construction of the Kai Tak Cruise Terminal (KTCT). At that time, it was estimated that should KTCT be completed, the economic benefits brought by the cruise industry in Hong Kong by 2023 may range from \$1.5 billion to \$2.6 billion per annum depending on different growth scenarios. Details of such estimations are set out in **Annex**.

To better ascertain the progress made in realising such expected benefits by 2023, the Director of Audit, in his Report No 68 (Chapter 5) on the KTCT, recommended TC to conduct a mid-term assessment of the economic benefits brought by the cruise industry as a whole, as soon as the KTCT had gathered sufficient operational experience and to submit the results of such assessment to the Legislative Council when ready.

Commissioned in June 2013, the KTCT has been put into operation for over five years and has become a major infrastructure for development of cruise tourism in Hong Kong. Since then, Hong Kong's overall ship calls and passenger throughput have increased from 89 and 191,062 in 2013 to 210 and 875,212 in 2018. To follow up the recommendation of the Audit Report, TC, in consultation with the trade, has conducted the mid-term assessment of the

value added contributions brought by the cruise industry to the economy based on data of relevant key parameters such as the actual number of ship calls and passenger throughput in 2018 as well as passenger spending statistics collected through survey in 2018. The value added contributions brought by the cruise industry is estimated to be at \$1.736 billion, which is within the range of growth projected for 2023. Details of the assessment are listed below for members' information -

<b>Sector</b>	<b>Value Added Contribution in 2018 (in \$ billion)</b>
Retail and Dining	0.434
Travel Trade	0.908
Hotel	0.158
Others	0.236
<b>Total</b>	<b>1.736</b>

TC would continue to monitor the performance of the cruise industry through keeping track of the key parameters from time to time so as to ensure a balanced, healthy and sustainable growth of cruise tourism in Hong Kong,

Yours sincerely,



(Wendy CHUNG)  
*for Commissioner for Tourism*

**Estimated Economic Benefits brought by the Cruise Industry-  
Projection in 2008**

<b>Year</b> <sup>Note</sup>	<b>Estimated Value Added Contribution (in \$ billion)</b>					
	<b>2013</b>		<b>2016</b>		<b>2023</b>	
<b>Sector</b>	<b>Low growth scenario*</b>	<b>High growth scenario*</b>	<b>Low growth scenario</b>	<b>High growth scenario</b>	<b>Low growth scenario</b>	<b>High growth scenario</b>
Retail and Dining	0.298	0.413	0.521	0.945	0.538	0.961
Travel Trade	0.342	0.308	0.574	0.834	0.597	0.808
Hotel	0.121	0.220	0.215	0.453	0.224	0.477
Others	0.098	0.153	0.152	0.305	0.158	0.316
<b>Total</b>	<b>0.859</b>	<b>1.094</b>	<b>1.462</b>	<b>2.537</b>	<b>1.517</b>	<b>2.562</b>

\* The “low growth scenario” assumes growth brought by regional cruise operators developing cruise services with Hong Kong as homeport. The “high growth scenario” assumes growth brought by international cruise operators developing cruise services with Hong Kong as a homeport and port-of-call in addition to regional cruise operators.

Note: The years selected have taken into account the commencement of operation of the first berth and the second berth of KTCT in 2013 and 2014 respectively. By 2023, the first berth would have been in operation for 10 years.