

For Information

Legislative Council Panel on Economic Development Hong Kong Tourism Board Work Plan for 2015-16

Purpose

The paper at Annex sets out the Hong Kong Tourism Board (HKTB)'s work plan for 2015-16 for Members' information.

Background

2. The HKTB is a statutory body established in 2001 under the Hong Kong Tourism Board Ordinance (Cap. 302). Its core function is to promote Hong Kong globally as a leading international city in Asia and a world-class tourist destination.

3. The HKTB's activities are primarily funded by the Government. Each year, the HKTB maps out its work plan for the year ahead, taking into account the macro environment and the tourism policy of the Government. In drawing up the work plan, the HKTB conducted extensive consultation with various tourism stakeholders, including travel agents, airlines, hotels, retailers, restaurants, attractions, as well as the academia. The work plan at the Annex has incorporated their views. The paper also gives an overview of the tourism performance in 2014.

4. The work plan will be submitted to the Secretary for Commerce and Economic Development for approval under Section 17B of the Hong Kong Tourism Board Ordinance. The subvention for the HKTB will form part of the Appropriation Bill, the passage of which is subject to the Legislative Council's approval.

5. Members are invited to note the HKTB's Work Plan for 2015-16 at the Annex.

**Tourism Commission
Commerce and Economic Development Bureau
February 2015**

HONG KONG TOURISM BOARD WORK PLAN FOR 2015-16

PURPOSE

1. This paper presents the work plan of the Hong Kong Tourism Board (HKTB) for 2015-16. It also gives an overview of Hong Kong's tourism industry in 2014 and the outlook for 2015, which form the background for developing the objectives, strategic focuses and key initiatives of the HKTB for 2015-16.

BACKGROUND

2. The HKTB is a statutory body tasked with marketing and promoting Hong Kong as a preferred travel destination worldwide. Each year, the HKTB undertakes a structured planning process to map out its strategies and initiatives for the year ahead, taking into account various factors in the macro environment, such as global economic conditions and market trends, as well as relevant policy directions of the Government. In 2015-16, the HKTB will take active steps to increase visitor arrivals, by stepping up marketing efforts in source markets, organising mega events and promoting other tourism-related initiatives. The HKTB will also strive to maintain visitors' satisfaction and stimulate their spending to maximise the benefits brought by tourism to Hong Kong's economy and the community at large.

3. In devising the work plan for 2015-16, the HKTB has conducted a series of consultation with stakeholders of the local tourism industry, including travel agencies, airlines, hotel owners and management, retailers, food and beverage caterers, attraction operators, and academics.

OVERVIEW OF 2014 TOURISM PERFORMANCE

Total visitor arrivals

4. Visitor arrivals to Hong Kong reached 60.84 million in 2014, representing an increase of 12.0% over the previous year. Details are as follows:

	Visitor arrivals in 2014 (Vs. 2013)				
	Jan to Sept	Oct	Nov	Dec	Full-year
Mainland China ('000)	34,662 (+15.2%)	4,028 (+18.3%)	4,156 (+24.1%)	4,402 (+13.2%)	47,248 (+16.0%)
Short-haul markets[^] ('000)	6,223 (+3.0%)	666 (-5.1%)	678 (-10.6%)	840 (-6.8%)	8,407 (---)
Long-haul markets* ('000)	3,093 (+0.7%)	432 (-2.6%)	393 (-1.6%)	351 (-1.4%)	4,269 (---)
New markets** ('000)	681 (+4.7%)	88 (+8.4%)	72 (-0.7%)	74 (-1.8%)	915 (+4.0%)
Total ('000)	44,659 (+12.0%)	5,214 (+12.6%)	5,300 (+15.7%)	5,666 (+8.5%)	60,839 (+12.0%)

Remarks: Owing to rounding, the total may differ from the sum of the individual figures.

[^]Excluding Mainland China, Vietnam and India

*Excluding markets in the Gulf Co-operation Council (GCC), the Netherlands and Russia

**New markets include India, the GCC markets, the Netherlands, Russia and Vietnam.

---Figures less than 0.1%

5. In the first nine months of 2014, visitor arrivals across all market regions recorded growth. However, since the outbreak of the “Occupy Central” movement in late September last year, notwithstanding there was still growth in total arrivals, long-haul and short-haul arrivals declined for three consecutive months from October to December. Arrivals from the new markets also decreased in November and December.

6. To rebuild Hong Kong’s image as a world-class travel destination, the HKTb, with support from the local travel trade, launched a series of overseas promotions including organising travel missions in various short-haul markets, for example Southeast Asia, Japan, Korea and Taiwan in January and February of 2015.

7. Regarding the performance of individual market regions in 2014, fuelled by its steady economic development, arrivals from Mainland

China continued to record growth. In particular, arrivals from the non-Guangdong areas rose 14.8% year on year.

8. The performance of the short-haul region was similar to that in 2013. Though growth was recorded in South Korea, Singapore and Japan, the overall performance of the short-haul markets was offset by the diversion of visitor traffic to Japan owing to the sharp depreciation of the yen and its visa-free policies for visitors from various Southeast Asian countries. Long-haul arrivals also stayed at the 2013 level, whereas the satisfactory growth of Indian arrivals led to a 4.0% increase in new markets arrivals.

Overnight visitor arrivals

9. To attract high-yield visitors and increase the economic benefits brought by tourism, the HKTB has put much of its resources into drawing overnight visitors. In 2014, overnight visitor arrivals amounted to 27.77 million, 8.2% more than in 2013. Details are as follows:

	Overnight visitor arrivals		
	2014	2013	2014 Vs. 2013
Mainland China ('000)	19,080	17,090	+11.6%
Short-haul markets ^ ('000)	5,030	4,899	+2.6%
Long-haul markets * ('000)	3,050	3,058	-0.3%
New markets ** ('000)	620	614	+0.1%
Total ('000)	27,770	25,661	+8.2%

Remarks: Owing to rounding, the total may differ from the sum of the individual figures.

^Excluding Mainland China, Vietnam and India

*Excluding the GCC markets, the Netherlands and Russia

**New markets include India, the GCC markets, the Netherlands, Russia and Vietnam.

10. Performances of various market regions in respect of overnight arrivals are set out below:

(A) Mainland China: Overnight arrivals from Mainland China continued to grow (+11.6%). In particular, overnight non-Guangdong arrivals rose 14.7%, reflecting the effectiveness of the HKTB's strategy to tap into the non-Guangdong provinces.

(B) Short-haul markets: Robust economic growth, the appreciation of the Korean won, and expanded flight capacity offered by low-cost

carriers (LCCs) helped drive overnight arrivals from South Korea up 20.0%. Overnight arrivals from Singapore (+8.8%), Taiwan (+2.7%) and Japan (+4.7%) also increased year on year.

- (C) Long-haul markets: Benefitting from steady economic recovery and increased flight capacity, the US recorded a 1.9% increase in overnight arrivals. Europe, however, continued to be plagued by sluggish economic conditions and high unemployment rates, with overnight arrivals down 0.9% (excluding Russia and the Netherlands). Overall, the number of overnight arrivals from the market region was similar to that in 2013.
- (D) New markets: India was the best performer among the five new markets, with 13.2% growth in overnight arrivals. Russia (-10.0%) performed less well due to political instability and the depreciation of the rupee and economic sanctions. Vietnamese arrivals dropped by 30.5% owing to anti-Chinese sentiment and tightened visa requirements, etc.

Business and MICE visitors

11. Despite uncertainties in the global economy, overnight business arrivals to Hong Kong rose 7.4%. This could be attributed to the vigorous economic activities between the Mainland and Hong Kong, the steady recovery of the US economy, and stable development in various new economies. Increase in overnight MICE arrivals was even more significant, at 11.1%. The Mainland, Taiwan, the UK, India and various Southeast Asian markets were among the best performers.

Please refer to Attachment I for a detailed breakdown of visitor arrivals from individual markets in 2014.

Visitor spending and average length of stay

12. Visitor spending and average length of stay of overnight visitors in 2014 are shown in the table below:

	2014	2013	2014 Vs. 2013
Average length of stay of overnight visitors (nights)	3.3	3.4	-0.1
Per capita spending (PCS) by overnight visitors* (HK\$)	\$7,975	\$8,123	-1.8%
Total Expenditure Associated with Inbound Tourism (TEAIT) ^{1*} (HK\$ billion)	\$358.2	\$329.6	+8.7%
Visitor satisfaction* [^] (out of 10)	8.2	8.3	-0.1

*Projection made in January 2015

[^]Excluding same-day, in-town visitor arrivals

13. The average length of stay of overnight visitors was 3.3 nights, 0.1 night less than in 2013. The decrease was mainly due to the shorter stay of the Mainland visitors (from 3.4 nights in 2013 to 3.3 nights in 2014). Overnight long-haul visitors and short-haul visitors (excluding Mainland visitors) spent an average of 4.1 nights and 2.9 nights respectively, same as in 2013.

14. For tourists' spending in Hong Kong, the PCS of all overnight visitors is HK\$7,975, which has slightly dropped by 1.8% as compared with 2013. Nevertheless, since total visitor arrivals increased, TEAIT increased by 8.7% year on year to HK\$358.2 billion. Meanwhile, visitor satisfaction dropped 0.1 point to 8.2 points on a 10-point scale.

¹The tourism expenditure figures were calculated according to methodology recommended by the United Nations World Tourism Organization (UNWTO). The two components of TEAIT are: (1) Total Destination Consumption Expenditure – the sum of all payments made by visitors for goods and services consumed in Hong Kong, including accommodation, shopping, meals and entertainment. This information is collected from the HKTB's Departing Visitors Survey; (2) Passenger International Transportation Expenditure – receipts of Hong Kong-based carriers for cross-boundary transportation of non-resident passengers by air, sea or land. The data is provided by the Census and Statistics Department of the Hong Kong Special Administrative Region (SAR) Government.

TOURISM OUTLOOK FOR 2015

Continued uncertainties in the global economy

15. Recovery of the US economy is expected to speed up in 2015 and serves as a catalyst for global economic recovery. Both the International Monetary Fund (IMF)² and the Economist Intelligence Unit (EIU)³ projected that global GDP will grow 3.8% in 2015, versus 3.1% in 2014. Nevertheless, the European economy is expected to remain weak and high unemployment rates will prevail. For some European countries, economic sanctions on Russia may hurt their own economies.

16. Asia, especially Mainland China, has experienced sustained economic growth over the past few years. In 2015, however, growth of the Mainland economy may decelerate, as a result of the slowdown of export and real estate development, tightened control over the spending of state-owned enterprises, and the curbing of economic stimulus measures as a means to restrict excessive lending.

17. In the short-haul region, the Japanese economy is likely to remain sluggish, despite the fiscal stimulus measures implemented in 2014. The outlook for Southeast Asia is more optimistic in comparison. Driven by domestic demand, economic growth is expected for Indonesia, the Philippines and Singapore, though the Thai economy will be susceptible to the impact of political instability.

18. Among the new markets, India is expected to see the best economic growth in 2015, thanks to steady economic development in recent years which has given rise to an expanding middle-class, and the 2014 presidential election which led to various large-scale infrastructural projects. On the contrary, the Russian economy is expected to be restrained by the conflicts in Ukraine and the Crimean Peninsula and the economic sanctions by the West. The drop in international oil prices which affects its exports also poses certain challenges to the Russian economy.

19. The US dollar began to strengthen in 2014. The Hong Kong dollar, which is pegged to the US dollar, also strengthened against many global currencies, including the Japanese yen, the Australian dollar, the

² According to the *World Economic Outlook* published by the IMF in October 2014.

³ Forecast made by the EIU in December 2014.

Euro and the Russian rupee, thus reducing the spending power of travellers from these markets. The renminbi, the Singaporean dollar and the British pound also weakened during the year. In 2015, the US dollar is expected to remain strong.

20. According to a forecast by the UNWTO⁴, global tourism will grow mildly by 3% to 4% in 2015.

Ever-intensifying competition

21. As the importance of tourism increases, destinations from around the world are stepping up their marketing efforts. In particular, several Asian destinations, including Mainland China, South Korea and Malaysia, have invested substantially in developing tourism and launching large-scale marketing campaigns in recent years. This has led to intensifying competition in the region.

22. It is expected that the weak yen and the simplified tax-refund process in Japan will continue to draw more intra-regional tourism traffic to Japan in 2015, as a result of which Hong Kong will face even keener competition.

23. In addition, many countries and regions have relaxed visa requirements for inbound travellers, especially those from Mainland China. For example, the UK and France have simplified their visa application procedures for Mainland visitors; the US and the Mainland have agreed on a new, reciprocal visa policy under which the validity of tourist and business visas has been extended from one year to 10 years; Indonesia has been offering nationals of Mainland China, Australia, Japan, South Korea and Russia visa-free arrangement since the beginning of 2015; and Japan has extended the validity of multiply-entry visa for Mainland visitors from three to five years and removed the prefecture restriction on those travelling to Japan for the first time.

24. To tap the Mainland market, destinations are also refining their marketing strategies. For example, Australia and New Zealand have been heavily subsidising Mainland tourism marketing agencies and travel trade and they are launching large-scale marketing campaigns in the Mainland.

⁴ Forecast made by the UNWTO in January 2015.

Meanwhile, leveraging the popularity of Korean TV programmes among Mainland consumers, South Korea has appointed TV celebrities as tourism ambassadors.

25. Currently, the Mainland's Approved Destination Status policy covers 117 destinations. In addition, as at December 2014, visitors from 36 Mainland cities could visit Taiwan as free independent travellers (FITs) under the Free and Independent Traveller Programme implemented by the Taiwan tourism authority in 2011. Greater choices of travel destinations for Mainland visitors and further development of the Mainland economy mean greater competition for Mainland visitors, especially those from areas other than South China.

Opportunities arising from infrastructure development and tourism-related policies

26. Favourable cruise and visa policies: The Mainland's cruise policy, which allows Mainland tour groups to take cruises from Hong Kong to Taiwan, from where they can proceed to Japan or Korea on the same cruises before returning to Mainland China, facilitates the development of cruise products for attracting more Mainland visitors to take cruises from Hong Kong. In addition, various visa policies, including the "144-hour facilitation visa", and the "Beijing / Shanghai / Guangzhou / Chengdu / Chongqing / Shenyang / Dalian / Xi'an 72-hour Transit Visa-free"⁵ policy, facilitate the development of multi-destination itineraries featuring Hong Kong.

27. Enhanced transport network: The connectivity between Hong Kong and the Mainland will be further enhanced in the coming few years, with the anticipated completion of the Hong Kong-Zhuhai-Macao Bridge and the Hong Kong section of the Guangzhou-Shenzhen-Hong Kong Express Rail Link. These projects will not only provide Mainland visitors with greater convenience to travel to Hong Kong, but also facilitate travel by overseas visitors to the Mainland via Hong Kong, consolidating Hong Kong's position as the gateway to Mainland China. In addition, new service provided by the Mass Transit Railway, including the West Island line which began operation in December 2014, and the South Island line which is expected to be completed in 2016, enhances Hong Kong's intra-city

⁵ As at July 2014

transport network and offers visitors greater convenience.

28. Sustained development of tourism-related infrastructure and attractions: Hong Kong's two major theme parks are undergoing continuous expansion. Hong Kong Disneyland will have a new themed area "Iron Man Experience" featuring the popular Marvel character in late 2016, and a new hotel, Explorer's Lodge, in early 2017, while Ocean Park will open a "Koala Exhibit" in March 2015 and a new water park in the second half of 2017.

29. Increased hotel room supply: With the completion of new hotels, Hong Kong will have 2,400 more hotel rooms in 2015. By 2017, the total number of hotel rooms is expected to reach 82,100, 9,400 more than in 2014. This will help alleviate the pressure on hotel room supply in peak seasons.

PROJECTIONS FOR 2015

30. Having taken into account the above factors in the macro environment, including risks and opportunities, tourism-related policies, developments in visitor source markets, and the analyses and forecasts by international organisations, the HKTB has made the following projections for various key tourism performance indicators in 2015:

Key Tourism Performance Indicators	2015 Projections	Vs. 2014
Total visitor arrivals ('000)	64,715	+6.4%
Arrivals from Mainland China ('000)	51,028	+8.0%
Overnight arrivals	19,869	+4.2%
Same-day, in-town arrivals	31,159	+10.6%
Arrivals from short-haul markets ('000)	8,483	+0.9%
Arrivals from long-haul markets ('000)	4,243	-0.6%
Arrivals from new markets ('000)	960	+4.9%
Average length of stay of overnight visitors (nights)	3.3	Unchanged
Visitor satisfaction [^] (out of 10)	8.2	Unchanged
PCS by overnight visitors* (HK\$)	\$8,062	+1.1%
TEAIT* (HK\$ billion)	\$378.1	+5.5%

[^] Excluding same-day, in-town visitors

*Comparison based on preliminary figures made in January 2015

FOCUSES OF 2015-16 WORK PLAN

31. The HKTB Work Plan 2015-16 has five focuses:

- (A) Focus 1: Concentrate resources on driving overnight arrivals and developing markets with high growth potential.
- (B) Focus 2: Highlight unique Hong Kong experiences and uphold the city's image as a world-class travel destination.
- (C) Focus 3: Strengthen trade support and generate new business opportunities through partnership.

(D) Focus 4: Promote MICE and cruise tourism to draw high-yield visitors.

(E) Focus 5: Strengthen corporate governance.

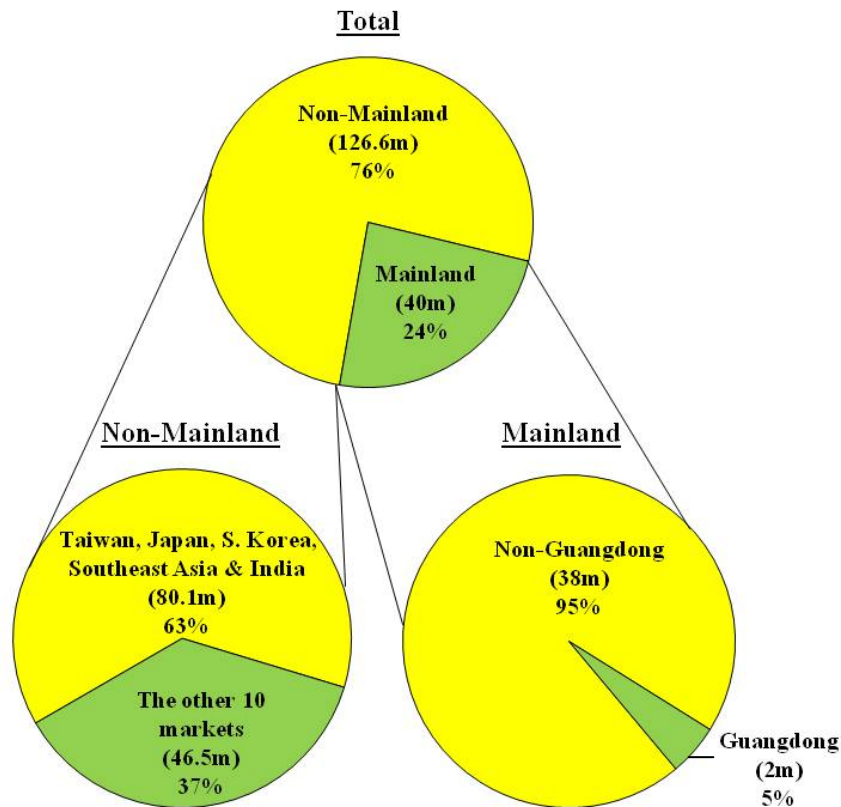
Focus 1: Concentrate resources on driving overnight arrivals and developing markets with high growth potential

Spend 100% of resources on drawing overnight visitors

32. In 2015-16, the HKTB will continue to focus its resources on 20 key markets, which together generate over 96% of all visitor arrivals to Hong Kong. To maintain a diverse market portfolio and uphold Hong Kong's image as Asia's world city, the HKTB will invest most of its marketing budget in the international markets. Meanwhile, it will continue to closely monitor the latest market developments and adjust its investments when necessary.

33. The HKTB's total marketing budget in 2015-16 is estimated to be HK\$352 million, of which HK\$167 million will be invested in visitor source markets to drive overnight arrivals. Of this, 76% will be allocated to the international markets, with increased investment in the short-haul markets compared to last year. The remaining 24% will be invested in the Mainland market, the majority of which will go into the non-Guangdong areas for drawing overnight visitors. The resources to be invested in Guangdong Province will make up 1% of the overall marketing budget for all markets, and it will be used mainly for promoting cruise tourism.

34. The HKTB will regularly review its market priority and investments in different markets and report its findings to the Board. It will also maintain flexibility in its resource allocation in order to minimise risks arising from unforeseeable changes in the macro environment. The diagram below shows the distribution of resources in different visitor source markets in 2015-16:



(A) Mainland China: tap further into the non-Guangdong areas

Relaxed travel policies for Mainland visitors and aggressive marketing by destinations from around the world mean not only more travel options for Mainland visitors but also increasingly fierce competition for Hong Kong in the Mainland market. To increase Hong Kong's tourism receipts from this market, the HKTb will further expand its reach in the non-Guangdong regions, with a view to raising the proportion of overnight visitors. It will also step up promotion of visitor offers provided by the local travel and related trade to stimulate visitor spending.

(B) Short-haul markets: focus resources on markets with high growth potential

To capitalise on the relatively stable economies in the region, the HKTb will increase its investment in the short-haul markets in 2015-16, focusing on summer (May to August) and winter (October to January) promotions. To maximise the effectiveness of its investment, it will adjust its resource deployment to different markets based on their latest economic and political developments.

- (i) Taiwan: While the number of business travellers from Taiwan has decreased in recent years due to increased direct cross-strait flights, more seats have been freed up as a result for vacation visitors. This, together with the free online visa registration offered by the Hong Kong SAR Government to Taiwan visitors, facilitates vacation travel to Hong Kong. Riding on these favourable factors, the HKTB will deploy more resources to Taiwan in 2015-16, mainly to attract vacation visitors from Taipei and second-tier cities linked with Hong Kong by direct flights, including Taichung, Kaohsiung and Tainan.
 - (ii) North Asia: The HKTB will increase investment in South Korea to sustain the market's strong growth momentum seen in recent years. On the other hand, it will invest cautiously in Japan, where travel propensity has been low due to an uncertain economic outlook and the sharp depreciation of the yen.
 - (iii) Southeast Asia: More resources will be focused on Indonesia, the Philippines and Singapore. The HKTB will launch consumer-oriented promotions with major Hong Kong attractions at large-scale travel shows, targeting the young and family segments. It will also step up promotion to the Muslim segment in the region.
- (C) Long-haul markets: maintain presence through public relations and digital marketing channels

Since travel sentiments in many long-haul markets are impaired by uncertain economic conditions, the HKTB will approach these markets with caution and focus on spring and autumn promotional windows.

- (i) The HKTB will maintain presence in the long-haul markets through increased use of digital and social media marketing and public relations initiatives.
- (ii) In view of the popularity of multi-destination travel among long-haul visitors, the HKTB will work closely with other

tourism authorities in the Pearl River Delta region to promote multi-destination products featuring Hong Kong.

(D) New markets: concentrate on attracting visitors from India

In recent years, the HKTB has actively opened up new visitor sources and invested in various new markets, including Russia, India, the GCC markets, Vietnam and the Netherlands. In view of their performances in 2014, which varied due to economic and other reasons that are likely to continue in 2015, the HKTB has planned to invest more resources reserved for the new markets in India, which performed relatively well in 2014. Strategies for the new markets are as follows:

- (i) India: Of the resources for India, 70% will be invested in Mumbai and New Delhi, and the rest in second-tier cities with direct flights to Hong Kong, including Bengaluru, Chennai, Kolkata and Hyderabad. The HKTB will step up promotion of cruise and MICE travel in the market, and will also promote multi-destination itineraries with Shenzhen and Macau.
- (ii) Russia: The HKTB will launch major promotions in winter, which is the peak outbound travel season in Russia. It will continue to raise destination awareness through public relations initiatives and digital marketing, and join hands with Mainland cities and Macau to promote multi-destination itineraries in the market.
- (iii) Vietnam, the GCC countries and the Netherlands: The main focus in these markets will be to increase awareness of the unique travel experiences offered by Hong Kong through digital marketing.

Attachment II shows the breakdown of the HKTB's investments by market.

Focus 2: Highlight unique Hong Kong experiences and uphold the city's image as a world-class travel destination

Promote Hong Kong experiences through the global “My Time for Hong Kong” campaign

35. In 2014-15, the HKTB launched the “My Time for Hong Kong” global branding campaign to strike an emotional connection with global consumers by promoting the diverse, unique experiences offered by Hong Kong through digital marketing, public relations initiatives and consumer shows. The HKTB’s strategy to anchor its promotions around experiences earned it numerous local and international marketing, digital marketing, and public relations awards in 2014.

Attachment III lists the marketing, digital marketing and public relations awards won by the HKTB in 2014.

36. The “My Time for Hong Kong” campaign was rolled out in seven markets in 2014, including Mainland China, Taiwan and markets in Southeast Asia. In 2015-16, the HKTB will extend the campaign to other markets, including Russia, Japan, India, South Korea, the UK and the US.

Enrich digital marketing contents and provide a platform for experience sharing

37. The ever-increasing popularity of digital media calls for enhanced use of digital tools, including the internet, mobile applications and social media, by the HKTB to promote Hong Kong. The HKTB will enrich the contents of its digital platforms so that users can learn about Hong Kong’s unique local culture and experiences more conveniently and in greater depth. Key initiatives include:

- (A) The HKTB will continue to produce short videos with the media and online celebrities and show them on its official website and other high-traffic digital platforms to showcase unique travel experiences offered by Hong Kong.
- (B) Nowadays, many visitors enjoy sharing their travel experiences on digital channels, which often include useful recommendations for other visitors. In view of this, the HKTB will create a new social

page on its official website for visitors and Hong Kong residents to upload images and videos of Hong Kong and share their experiences in the city.

- (C) A new initiative launched by the HKTB in 2014-15 was the “Insider’s Guide”. Available both on the HKTB website and as a mobile application, the guide showcases the unique characteristics, main attractions, histories, living culture, as well as dining and shopping hotspots in nine districts, including Eastern District, Kwun Tong, Wong Tai Sin, Sham Shui Po, Kowloon City, Sai Kung, Tsuen Wan, Yuen Long and the outlying islands, and features sharing by local residents living in there. Using experience as the hook, the guide encourages visitors to explore Hong Kong in depth. In 2015-16, the “Insider’s Guide” will introduce other districts to visitors.
- (D) Another initiative the HKTB launched in 2014 was the “My Hong Kong Guide”, a tool that allows users to make use of the internet, mobile devices and social media to plan and share their trip in Hong Kong. In 2015-16, the HKTB will enhance the content and functionality of the guide by including more information on attractions and shops and notifying visitors of special offers at shops near their current location with instant messaging to stimulate spending and enrich their travel experience.
- (E) Meanwhile, the HKTB will continue to promote Hong Kong and acquire more fans on major social media, including Facebook, Weibo, Twitter and Instagram, and encourage visitors to share their experiences on these platforms.
- (F) The HKTB plans to create a mobile version of its website in 2016 to facilitate browsing on tablet computers and smart phones.

Invite personalities from different markets to Hong Kong to generate international publicity

38. In 2014-15, the HKTB rolled out a year-round global public relations campaign, inviting personalities from different markets and sectors to get first-hand experience of Hong Kong. Their visits were reported extensively by the international media and on digital channels, helping to generate international publicity for Hong Kong. In 2015-16, the

HKTB will continue with the personality endorsement strategy in promoting Hong Kong experiences to consumers and the international media. Key initiatives are as follows:

- (A) South Korea: Invite high-rating reality shows to Hong Kong for filming, highlighting Hong Kong's dining, shopping, nightlife and arts and culture.
- (B) Southeast Asia: Co-operate with regional TV networks to produce programmes featuring the trendy experiences in Hong Kong by personalities from different sectors, such as fashion design, entertainment and the film industry.
- (C) Other markets: Leveraging on the interests of the target group in the source markets, invite personalities with different background to visit Hong Kong. For example, invite cultural workers from Taiwan and Michelin-starred chefs from Europe to showcase the arts and culture and dining scene of Hong Kong respectively.

39. In recent years, leveraging the high penetration of TV, the HKTB has actively collaborated with TV stations in different markets to promote Hong Kong. In the coming year, the HKTB will continue to invite global and regional TV channels and TV production houses to film their programmes in Hong Kong.

40. In addition, the HKTB plans to disseminate stories and photos capturing special moments and major events held in Hong Kong through newswires and a stock photo agency that has an extensive reach.

Promote unique Hong Kong experiences at consumer shows

41. In 2015-16, the HKTB will continue to participate in a number of important consumer shows in the Mainland and various short-haul markets, where it can directly promote Hong Kong's diverse offerings, including dining and cosmopolitan lifestyle, to consumers by showcasing videos and distributing collaterals.

Demonstrate Hong Kong's tourism strengths and uphold Hong Kong's image as the events capital of Asia

42. Each year, the HKTB stages a series of mega events to highlight Hong Kong's tourism strengths and promote the city's festive celebrations, international events, arts and cultural performances, and programmes organised by major attractions. These mega events not only enrich the visitor experience, but also shed the international spotlight on Hong Kong, as well as create business opportunities for merchants in different districts by diverting visitor traffic.

43. In 2015-16, the HKTB will continue to organise numerous mega events, including the first-ever Hong Kong Cyclothon, and the Hong Kong Wine & Dine Festival, which will be held at the New Central Harbourfront again. During the period when the major mega events take place, the HKTB will continue to stage the Hong Kong Pulse 3D Light Show on the façade of the Hong Kong Cultural Centre and the Clock Tower so as to enhance the festive ambience and showcase the night view of the Victoria Harbour.

44. Whenever resources allow, the HKTB will enhance existing events with new elements. For example, it will promote the special visitor offers by hotels, attractions and shops during its summer campaign, and explore the possibility to relocate the key installation of the Hong Kong WinterFest from the Statue Square to the New Central Harbourfront or other areas so as to create synergy between the winter promotion and other tourism facilities. It is also planning new programmes for the 2016 International Chinese New Year Night Parade.

45. At the same time, the HKTB will continue to promote events staged by other organisations, particularly sports, arts, cultural and design events, to cater for the interests of different markets and visitor segments

and consolidate Hong Kong's position as Asia's events capital. Key mega events to be organised are as follows:

Tourism strength(s) to be highlighted	Mega events (time)
Traditional festivals	<ul style="list-style-type: none"> • Chinese New Year Celebrations (January to February)[#] • Cultural Celebrations (May) • Dragon Boat Carnival (July) • Mid-Autumn Festival (September)
Western festivals	<ul style="list-style-type: none"> • Halloween Treats (October) • WinterFest and Countdown Celebrations (December)[#]
Shopping & entertainment	<ul style="list-style-type: none"> • Hong Kong International Film Festival (March to April) • Hong Kong Entertainment Expo (March to April) • Summer Fun (July to August)[#] • Hong Kong Brands and Products Expo (December to January)
Dining	<ul style="list-style-type: none"> • Wine & Dine Month (October to November)[#]
Sports and outdoors	<ul style="list-style-type: none"> • Hong Kong Marathon (January) • Hong Kong Masters (February) • Hong Kong Sevens (March) • Hong Kong Cyclothon (October/November) [new event] • Hong Kong Open (October) • Great Outdoors Hong Kong (November to March 2016) • Hong Kong International Races (horseracing) (December)
Arts & culture	<ul style="list-style-type: none"> • Hong Kong Arts Festival (February to March) • Art Basel Hong Kong (March) • Affordable Art Fair (May) • Business of Design Week (December)

[#]The HKTB plans to stage the Hong Kong Pulse 3D Light Show on the façade of the Hong Kong Cultural Centre and the Clock Tower during these promotions.

Expand visitor service coverage to maintain Hong Kong's edge

46. The HKTB will further expand the coverage of its visitor service in 2015-16 to enhance the visitor experience. Related initiatives are as follows:

(A) Visitor enquiry service

- (i) In late 2013, the HKTB set up a hotline dedicated to assisting the concierge of hotels and large shopping malls in Hong Kong in answering enquiries from visitors. By the end of 2014, 74 hotels and six shopping malls had subscribed to the hotline service. In 2015-16, the HKTB will invite more hotels and shopping malls to use the hotline to provide visitors with greater convenience and assistance.

(B) Quality Tourism Services Scheme

- (i) Since its inception in 1999, the Quality Tourism Services (QTS) Scheme has been encouraging merchants to raise their service standards. In December 2014, the Scheme had a total of 1,270 merchant members, covering 8,230 retail and dining outlets as well as visitor accommodation. In 2015-16, the HKTB will expand the scheme by acquiring new members, targeting especially shops in tourist districts and near newly established hotels.
- (ii) To raise visitors' awareness of the scheme, the HKTB will step up promotion through digital marketing, advertising and outdoor promotions in the Mainland, various Southeast Asian markets, Japan, South Korea and Taiwan.
- (iii) The HKTB will also help members of the scheme gain greater exposure by promoting their visitor offers through partnership with a popular online transaction platform in the Mainland and a dining website in Hong Kong. Visitors can also acquire information about these merchants in a more convenient way.

Focus 3: Strengthen trade support and generate new business opportunities through partnership

Foster closer collaboration to create business opportunities

47. To open up new opportunities for its trade partners, the HKTB will continue to collaborate with them on promotions in visitor source markets and provide them with customised support.

48. In 2015-16, the HKTB will take part in 17 consumer shows in the Mainland and various short-haul markets, as well as nine large-scale trade shows in the Mainland, Australia, the US, Germany and India. In addition, to facilitate business building between the local and overseas travel trade, the HKTB will organise eight travel missions and seven familiarisation tours.

Create a new promotional platform for the trade through a strategic partnership with Alipay

49. Online shopping is fast becoming a popular trend in the Mainland, and Alipay is currently the biggest online transaction platform in the market. In late 2014, the Alipay mobile application had over 200 million active users. Leveraging the extensive reach of the platform, the HKTB has entered into a strategic partnership with Alipay and extended its “Hong Kong Value Offer” application to the Alipay Service Counter. Through Alipay, the application, which consolidates offers from major dining, retail and other travel-related trade and allows users to download coupons on their phones for use in Hong Kong, can reach a huge number of visitors.

50. By promoting the “Hong Kong Value Offer” Alipay Service Counter to visitors and inviting more trade partners to provide their offers for the platform, the HKTB will not only enrich the visitor experience, but also drive visitor spending and open up business opportunities for its local trade partners.

Accelerate tour product development to enrich the visitor experience

51. In 2012-13, the HKTB launched the “New Tour Product Development Scheme”⁶, which aims at encouraging local travel agencies, tour operators and receiving agents to develop new themed tour products through subsidising part of the costs for marketing the tours. By late 2014, the scheme had subsidised 17 tour products.

52. The scheme will cover the following themes in 2015-16:

Themes for 2015-16	
• HKTB mega events	• Luxury
• Wine and dine	• Heritage
• Multi-destination	• Arts and culture
• Land excursions for cruise passengers	• Local living culture [new]
• Products customised for new markets	• Green tourism [new]

53. The HKTB will continue to promote the tour products developed under the scheme on its DiscoverHongKong.com website, PartnerNet website, trade co-op platforms, public relations initiatives and other suitable channels, both locally and in visitor source markets. It will also promote relevant tour products developed by the local travel trade through its “Explore Hong Kong Tours” platform to give visitors more choices.

Encourage the use of PartnerNet

54. In 2012, the HKTB re-launched its PartnerNet website, a business-to-business portal, to provide better support for its trade partners and facilitate business building. By December 2014, 14 market versions in eight languages have been launched.

55. The HKTB will step up promotion of PartnerNet in the coming year. In particular, it will encourage the travel trade to make use of the e-marketplace where they can set up and update their company profiles and identify industry partners for business collaboration. It will also highlight

⁶ Under the New Tour Product Development Scheme, successful applicants, selected by an evaluation panel, will receive dollar-for-dollar subsidies from the HKTB, amounting to no more than HK\$500,000, for one to three years for marketing the approved products.

the “Hong Kong Specialist” on the website, a training programme designed for members of the travel trade to deepen their understanding of Hong Kong’s history, culture, attractions, events and other tourism-related aspects so that they can enhance their service standard.

Strengthen partnership with destinations in the Pearl River Delta to promote multi-destination travel and consolidate Hong Kong’s hub position

56. In 2015-16, the HKTB will strengthen its partnership with destinations in the Pearl River Delta to promote multi-destination itineraries combining the diverse experiences offered by Hong Kong, Macau and cities in Guangdong Province, so as to consolidate Hong Kong’s position as the travel hub in the region. Related initiatives are as follows:

(A) Collaboration with Macau and Guangdong

- (i) Continue to work with Guangdong Province and the Macau Government Tourist Office (MGTO) to promote multi-destination itineraries featuring the three destinations at large-scale trade shows in selected long-haul markets, and highlight the destinations’ dining offers through media channels.
- (ii) Continue to roll out joint promotions in both long-haul and short-haul markets with the MGTO, and step up promotion of multi-destination itineraries in the new markets, especially Russia and India.

(B) Collaboration with Shenzhen

- (i) Conduct joint promotions with the Shenzhen Municipal Bureau of Culture, Sports and Tourism at overseas consumer shows and other platforms in selected short-haul and new markets, and work with the travel trade from Hong Kong and Shenzhen to roll out tactical packages featuring the two destinations.

- (ii) Organise familiarisation tours to Hong Kong and Shenzhen for the international media and travel trade to raise consumer awareness of the tourism offerings of the two destinations and encourage the travel trade to develop Hong Kong-Shenzhen itineraries.
- (C) Collaboration with Zhuhai
- (i) Since the Hong Kong-Zhuhai-Macao Bridge will be completed soon, the HKTB will establish a co-operation platform with the Zhuhai Municipal Bureau of Culture, Sports and Tourism to pave the way for promoting multi-destination travel to Hong Kong and Zhuhai.

Focus 4: Promote MICE and cruise tourism to draw high-yield visitors

Actively bring MICE events to Hong Kong

57. One of the HKTB's main work focuses is to promote MICE tourism. In 2015-16, the HKTB will continue to strive to uphold Hong Kong's image as the world's meeting place. To this end, it will attract international MICE events and high-spending visitors through tailored strategies for the various MICE segments and customised support and offers for MICE organisers and visitors. Its key strategies for the various MICE segments are as follows:

- (A) Meetings and incentive travel
- (i) Participate in international trade shows with local partners to strengthen ties with the meetings and incentives travel trade.
 - (ii) Strengthen connection with large-scale corporations; together with airlines and major venues in Hong Kong, provide both organisers and visitors from the meetings and incentives segment with special hospitality services and offers.
 - (iii) Through an award programme, motivate travel agents to promote Hong Kong as the ideal destination for meetings and incentive trips to their corporate clients.

- (iv) Shift the focus to private enterprises in the Mainland, where tightened control has been exerted on the spending of the government and state-owned enterprises.
- (v) Together with the local travel trade and major attractions, organise road shows in India to promote special products for meetings and incentives visitors.

(B) Conventions

- (i) Focus on the US and Europe, and reach out to six strategic sectors, namely science, medical science, engineering, social science, technology, and commerce.
- (ii) Form strategic partnerships with professional associations and professional conference organisers in Europe and the US and proactively reach out to and persuade their members to choose Hong Kong for their large-scale conferences and smaller-scale, recurrent business conferences.
- (iii) Leverage industry events such as IMEX as outreach platforms in Europe and the US to engage key associations and conference organisers.
- (iv) Strengthen the connection between associations in Mainland China and their corresponding local chapters in Hong Kong, and organise familiarisation trips for associations headquartered in key cities like Beijing and Shanghai to gain a better understanding of Hong Kong's MICE facilities and its competitive edge as a MICE destination.

(C) Exhibitions

- (i) Together with key partners from the local exhibition sector, showcase Hong Kong's edge at international industry events.
- (ii) Offer organisers marketing support and work with the travel trade to provide exhibition visitors with customised travel packages, special offers and hospitality support to retain recurrent events and attract new events.

Strengthen Hong Kong's image as Asia's cruise hub

58. One of the HKTB's key strategies for driving cruise tourism development is to promote Hong Kong's appeal as a cruise destination and raise the city's profile as Asia's cruise hub at large-scale international industry events, particularly Cruise Shipping Miami, the world's biggest cruise conference and exhibition, the 2015 edition of which will be held in March.

Foster regional co-operation

59. In April 2014, the HKTB and the Taiwan Tourism Bureau set up the Asia Cruise Fund, which aims at promoting co-operation among ports in the region and the development of Asian cruise tourism by pooling resources to subsidise cruise lines in developing and marketing cruise products featuring the member ports. In late 2014, Hainan and the Philippines joined the fund, further bolstering the strategic alliance.

60. In 2015-16, the HKTB will invite other ports in the region to join the Asia Cruise Fund to further promote regional cruise tourism and encourage cruise lines to include Hong Kong in their itineraries.

Raise consumer awareness of and demand for cruise travel

61. Riding on the emerging trend of cruise travel in Asia, the HKTB will step up consumer promotion and raise Hong Kong's profile as the preferred cruise destination in markets promising potential, including South China, Taiwan, India and Southeast Asia, through public relations initiatives, digital marketing and other channels. Together with the travel trade, it will also roll out tactical cruise packages featuring Hong Kong in various markets with the travel trade to attract cruise visitors.

Focus 5: Strengthen corporate governance

Setting objectives

62. While carrying out its work in visitor source markets, the HKTB strives to enhance its corporate governance continuously by regularly conducting audits and reviews of its financial policies and procedures to ascertain compliance and ensure stringent internal controls. It also identifies areas for improvement and enhances its accountability through consultation with academics and other stakeholders. To ensure the effective use of public resources, the HKTB has drawn up a set of objectives for measuring the effectiveness of its promotions based on the strategic focuses of 2015-16.

63. Given that the global economic and tourism environments are volatile, the HKTB will review the developments and its investments in individual source markets, and flexibly adjust its investments and strategies when required after consulting the Board.

Cost management

64. The HKTB's projected marketing budget for Mainland China, overseas markets and the Head Office in 2015-16 is HK\$352 million, of which about HK\$167 million (47%) will be allocated to promotions by its Worldwide Offices.

65. The remaining portion of the budget, which is around HK\$185 million, will be used mainly by the Head Office for global and regional promotions, and for implementing mega events and other initiatives, such as marketing of the QTS Scheme and providing visitor information and service in Hong Kong. Attachment IV sets out the detailed breakdown.

66. The HKTB will continue to exercise caution in investing its marketing resources and vigorously control costs. Currently, the HKTB has a worldwide network of 16 offices and representatives in six different markets. In 2015-16, the headcount of the HKTB in its Head Office and Worldwide Offices will be 377.

Finding new sources of income

67. In addition to enhancing its promotional activities through innovative and cost-effective methods, the HKTB will continue to solicit sponsorship for its mega events and other promotions, as well as increase the revenue from advertising on its websites and in its publications.

68. The HKTB has an established mechanism for seeking sponsorship for mega events. In addition, after staging each mega event, the HKTB immediately follows up with the sponsoring organisations and discusses further co-operation, with the objective of securing sponsorship agreements lasting more than one year. The HKTB has already started discussions with different organisations on sponsorship for the mega events in 2015-16. The HKTB aims to generate around HK\$55 million in cash sponsorship and other commercial sponsorship income in 2015-16. In the event that the HKTB is unable to identify suitable sponsors before a mega event is launched, it will kick-start the contingency mechanism in place and consult the Board and its Product and Event Committee regarding alternative strategies.

CONCLUSION

69. In conclusion, the HKTB will continue to invest prudently according to its market prioritisation model and flexibly deploy its resources. Its key focuses in 2015-16 will be to maintain a diverse visitor portfolio and maximise the effectiveness of its marketing effort. In particular, the HKTB will concentrate on developing markets with high growth potential and drawing overnight visitors to maximise the economic benefits brought by tourism. In addition, to attract high-yield visitors and open up new visitor sources, the HKTB will continue to grow its MICE and cruise businesses and tap the potential of new markets.

70. While attracting more visitors to Hong Kong, the HKTB believes it is important to ensure visitors enjoy their experience in the city. To this end, the HKTB will continue to organise mega events highlighting Hong Kong's tourism strengths with support from different sectors, and promote the unique experiences offered by different districts to visitors, encouraging them to explore Hong Kong in depth. The HKTB will also work closely with the travel and related trade to provide visitors with

quality tourism service so as to uphold Hong Kong's image as a world-class travel destination and maintain its competitive edge.

Hong Kong Tourism Board
February 2015

2014 Visitor Arrivals by Market

('000)	2014	2013	2014 Vs. 2013
The US	1,131	1,110	1.9%
Canada	354	354	0.1%
Central and South Americas	194	202	-3.8%
Europe	1,863	1,894	-1.6%
The UK	521	513	1.4%
The Netherlands	93	92	1.1%
Nordic Countries	118	127	-7.1%
Germany	219	221	-0.9%
France	217	228	-4.7%
Italy	112	113	-1.0%
Iberia	82	82	0.5%
Russia	202	224	-9.6%
Europe Others	299	294	1.8%
South Africa	71	68	3.9%
Africa Others	96	100	-4.7%
The Middle East	189	191	-1.4%
GCC Markets	49	51	-3.2%
Non-GCC Markets	139	140	-0.8%
Australia	604	610	-1.0%
New Zealand	101	98	3.2%
South Pacific Others	11	10	7.9%
Japan	1,079	1,057	2.1%
South Korea	1,251	1,084	15.5%
Southeast Asia	3,032	3,220	-5.8%
Indonesia	492	517	-4.9%
Malaysia	590	649	-9.1%
The Philippines	635	705	-10.0%
Singapore	738	700	5.4%
Thailand	485	535	-9.3%
Vietnam	55	79	-30.3%
SEA Others	37	35	8.3%
India	516	435	18.7%
Other Asian & Indian Sub.	67	63	5.5%
Taiwan	2,032	2,100	-3.2%
Macau SAR	1,002	958	4.5%
Mainland China	47,248	40,745	16.0%
Non-Guangdong	11,666	10,161	14.8%
Guangdong	35,581	30,584	16.3%
Total	60,839	54,299	12.0%

2015-16 Proposed Marketing Budget

	2015-16 Proposed Budget (HK\$M)	2014-15 Revised Estimates (HK\$M)
<i>Mainland China</i>	40.0	40.0
South China	6.8	6.8
Non-Guangdong	4.8	4.8
Guangdong	2.0	2.0
Central China	10.0	9.6
East China	11.2	11.6
North China	12.0	12.0
<i>Short-haul Markets</i>	66.5	56.7
Japan	13.5	13.2
Taiwan	12.6	11.7
South Korea	12.3	11.8
Singapore	5.5	4.3
The Philippines	7.1	3.4
Malaysia	3.9	3.9
Indonesia	7.7	4.6
Thailand	3.8	3.8
<i>Long-haul Markets</i>	40.5	42.5
The US	15.0	15.1
Australia	9.0	10.3
The UK	6.9	7.4
Canada	3.2	3.3
Germany	3.6	3.7
France	2.8	2.8
<i>New Markets</i>	19.6	19.6
India	13.6	10.5
Russia	3.5	4.8
The GCC Markets	2.0	3.3
Vietnam	0.3	0.7
The Netherlands	0.2	0.2
Total Marketing Budget for Source Markets	166.6	158.8
Total Marketing Budget for Head Office	185.4	206.8
Total Proposed Marketing Budget	352.0	365.6

Remarks: Owing to rounding, the total may differ from the sum of the individual figures.

Marketing, digital marketing and public relations awards won by the HKTB in 2014

Category	Initiative	Award
Marketing	“My Time for Hong Kong” New Brand Identity	<ul style="list-style-type: none"> Galaxy Awards 2014: Gold Award in the “Promotion – Brand Identity” category
	Hong Kong Chinese New Year 2014 Parade Floats	<ul style="list-style-type: none"> Astrid Awards: Bronze Award in the “Special Projects – Parade Floats” category
Digital Marketing	The HKTB’s website, DiscoverHongKong.com	<ul style="list-style-type: none"> TravelMole APAC Web Award 2014: The Best APAC Destination Website Web Accessibility Recognition Scheme 2013 organised by the Office of the Government Chief Information Officer: Silver Award
	“Discover Hong Kong” Facebook Fan Pages	<ul style="list-style-type: none"> Astrid Awards 2014: Gold Award in the “Self Promotion” category Galaxy Awards 2014: Bronze Award in the “Emerging Media – Travel/Tourism” category 2014 W³ Awards: Silver Award in the “Social Content – Social Presence” category
	“Be My Guest” Campaign	<ul style="list-style-type: none"> Internet Advertising Competition 2014: Best Travel Social Media Campaign WebAwards 2014: Social Network Standard of Excellence in the “Social Network” category iNova Awards 2014: Bronze Award in the “Brand Management” category
	“Hong Kong WinterFest” Campaign	<ul style="list-style-type: none"> Astrid Awards 2014: Bronze Award in the “Promotion – Viral Campaign” category
	“My Hong Kong Guide” Mobile Application	<ul style="list-style-type: none"> Galaxy Awards 2014: Grand Award in the “Apps” category and Gold Award in the “Emerging Media – Mobile App” category The Spark Awards for Media Excellence 2014: Best Engagement Strategy Marketing Excellence Awards 2014: Bronze Award in the “Excellence in Use of Apps” category
	“My Hong Kong Guide” Multi-level Platform	<ul style="list-style-type: none"> Galaxy Awards 2014: Silver Award in the “Emerging Media – Travel/Tourism” category
	“Discover Hong Kong · Travel Pack” Tablet Application	<ul style="list-style-type: none"> Astrid Awards 2014: Silver Award in the “Apps – Non-Profit Organization” category The Spark Awards for Media Excellence 2014: Best Media Campaign – Digital and Best Media Campaign – Mobile

PR	“Hold My Hand” Campaign	<ul style="list-style-type: none"> • PATA Gold Awards 2014: Gold Award in the “Marketing – Primary Government Destination” category • Astrid Awards 2014: Silver Award in the “Campaigns” category • Mercury Awards 2013/2014: Bronze Award in the “DVDs/Video – Travel/Tourism” category • PRWeek Awards Asia 2014: Certificate of Excellence in South Asia PR Campaign of the Year • 2014 Hong Kong Public Relations Awards: The Grand Award of Excellence, Gold Award in the “Integrated Marketing Communications” category, and the Most Creative Campaign Award
	“Visa go Hong Kong Super Shopper” Campaign	<ul style="list-style-type: none"> • PATA Gold Awards 2014: Gold Award in the “Marketing Media – Public Relations Campaign” category • Mercury Awards 2013/2014: Silver Award in the “Special Events” category • PRWeek Awards Asia 2014: Certificate of Excellence in Asia Pacific PR Campaign of the Year

2015-16 Proposed Marketing Budget
(By Strategic Focus)

Strategic Focus	Head Office (HK\$M)	Worldwide Offices (HK\$M)	Total (HK\$M)	2014-15 Revised Estimates (HK\$M)
1. Consolidate “Hong Kong · Asia’s world city” brand and step up public relations promotions	14.4	50.2	64.6	62.7
2. Intensify digital marketing	17.2	42.7	59.9	52.7
3. Strengthen the appeal of mega events	87.3	15.0	102.3	115.1
4. Promote Hong Kong as the hub for multi-destination travel in the region	1.2	1.6	2.8	2.8
5. Drive MICE business	14.5	17.5	32.0	34.6
6. Build cruise demand	12.0	1.2	13.2	17.8
7. Strengthen trade support and partnerships	9.5	30.8	40.3	43.4
8. Maintain quality service	11.6	-	11.6	10.0
9. Uphold corporate governance (Includes resource management, financial management, application of information technology, visitor surveys and strategic planning)	17.7	2.3	20.0	20.4
10. Others	-	5.2	5.2	6.1
Grand Total	185.4	166.6	352.0	365.6

Remarks: Owing to rounding, the total may differ from the sum of the individual figures.