

**For Discussion on
10 September 2015**

LanDAC ESD SC Paper No. 06/2015

**Lantau Development Advisory Committee
Economic and Social Development Subcommittee**

Proposed Recreation and Tourism Development Strategy for Lantau

PURPOSE

1. This paper sets out the proposed Recreation and Tourism Development Strategy for Lantau for discussion of the Economic and Social Development Subcommittee.

BACKGROUND

2. At the joint meeting of the Planning and Conservation Subcommittee and this Subcommittee held on 29 May 2015, the Consultant presented the study approach of the “Recreation and Tourism Development Strategy for Lantau” and the initial analysis of the recreation and tourism market situation (LanDAC ESD SC Paper No. 05/2015). The Consultant has now further submitted the draft recreation and tourism development strategy for consideration.

GENERAL SITUATION AND TREND OF RECREATION AND TOURISM DEVELOPMENT

3. Based on past statistics and information regarding the local and international tourism market, the Consultant has summarised the following phenomena:

Tourist Growth Trend

(1) According to the World Tourism Organization (UNWTO)’s forecast in 2011¹, Asia-Pacific Region will be the main source of visitor growth.

¹ UNWTO forecast in 2011: the arrivals in Asia and the Pacific are expected to increase from 204 million in 2010, 355 million in 2020 and 535 million in 2030.

Modes of Tourism

- (2) The major tourism resources of global tourism industry² are: culture, wellness, culinary, ecology/sustainable, sports, adventure travel etc. (**Annex 1**). In the Asia-Pacific Region, particularly the Mainland and India, tourism trends are more focused on diversified, experiential cultural products, recreational and outdoor activities³.

Visitors to Hong Kong

- (3) According to the statistics of Hong Kong Tourism Board (HKTb), the visitors' growth from mature markets (e.g. Europe, USA, Canada, Australia, New Zealand, Japan, Taiwan etc.) has levelled off, while a successive growth was observed from the emerging market (e.g. South Korea, Malaysia, India, etc.). Furthermore, more than 70% of visitors are from the Mainland China (**Annex 2**).
- (4) The statistics of HKTb (**Annex 3**) also indicate that, compared with the long haul visitors, short haul visitors are mostly comprised of young female visitors and focus on weekend getaway with escapist behaviour. On the other hand, long haul visitors mostly stay in Hong Kong as a base or gateway for longer trips.
- (5) Currently, most of the visitors to Hong Kong stay in the urban areas and mainly go for shopping. However, there are also a few tourists from Europe/America and North Asia keen on hiking and activities related to culture and heritage. Furthermore, there is a declining trend for short haul and repeat visitors to visit themed attractions. This may imply that visitors' interest towards themed attractions would decrease with the increasing number of visits. It may also imply that due to the time constraints and unfamiliarity

² Source: Global Wellness Tourism Economy, SRI International 2013

³ Source: Hurun Luxury Consumer Survey 2013, McKinsey and Tripadvisor Trends 2014

with the environment, visitors tended to choose clustering nodes in downtown with easy accessibility.

4. Regarding recreation, statistical data from the Leisure and Cultural Services Department shows that there is a significant increase in demand for facilities of outdoor and water activities by Hong Kong residents.

5. The Consultants have conducted case studies for popular recreation and tourism destinations in Southeast Asia, such as Jeju of Korea, Okinawa of Japan, Nantou of Taiwan (Sun Moon Lake), Singapore, Pearl River Delta Region, and renowned resorts in Southeast Asia countries. Based on the information in the case studies and the analysis on the main trend on recreation and tourism development (**Annex 4**), six themes for recreation and tourism development were formulated:

- **Adventure:** Outdoor/Extreme Sports (connect with Nature), e.g. Hiking and BMX Bike;
- **Excitement:** Theme Parks/Escapist Activity, e.g. War Game and Bubble Soccer;
- **Splurge + Indulge:** Shopping and Dining;
- **Relaxation + Wellness:** Beach, Spa and Retreats;
- **Culture + Heritage:** Architecture, Social Culture and History, e.g. Museum and Cultural Heritage; and
- **Ecology:** Education/Experience/Farm Stay etc.

RECREATION AND TOURISM DEVELOPMENT STRATEGY

6. There are a number of existing tourism infrastructure on Lantau Island, including Hong Kong Disneyland, Tian Tan Buddha, Ngong Ping 360, Wisdom Path, etc. Lantau Island also possesses rich natural resources, particularly the country parks covering vast area, places with special scientific interest, nature conservation area, coastal conservation area and places with significant ecological importance and value. In addition, Lantau has a history of development back to pre-Stone Age. Lantau had been an important base for salt production and fishery in the Pearl River region since the Eastern Jin and Song Dynasty. Many of the existing Religion and Declared Monuments, historic buildings, salt pan etc., can be categorised into six clustering areas with diversified characters, including the Tai O traditional fishing village, Ngong Ping/Luk Wu/Keung Shan religious community, Pui O/Cheung Sha/Tong Fuk beachside settlement, Mui Wo historical rural township, Discovery Bay low density and car-free

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community and Tai Ho Valley natural ecological stream etc. All these illustrate the uniqueness and diversities of Lantau Island.

7. Following the forthcoming completion of the major transport infrastructures including the Hong Kong-Zhuhai-Macao Bridge (HZMB), Tuen Mun-Chek Lap Kok Link and the Third Runway System of the Hong Kong International Airport (HKIA) together with the HKIA's North Commercial District (NCD) development, the topside commercial development at Hong Kong Boundary Crossing Facilities (HKBCF) of HZMB and Tung Chung New Town Extension, it is expected that more visitors from PRD region and the world will be attracted to Hong Kong.

Vision, Mission and Guiding Principles

8. We suggest that the vision for the recreation and tourism development in Lantau be **“To Shape Lantau as a Kaleidoscopic Recreation and Tourism Destination”**.

9. Pursuant to the aforementioned vision, the mission shall comprise:

- (1) achieving sustainable tourism development taking account of its natural resources and assets, social acceptability and economic benefits;
- (2) building a tourism branding for Lantau and making Lantau a recreation and tourist hub;
- (3) creating attractions that bring unique feeling and contrasting experience to visitors;
- (4) driving repeated visitation and increasing visitors per capita expenditure;
- (5) extending visitors' length of stay; and
- (6) offering diversified and charming attractions.

10. To conserve Lantau's green resources with balance against development, the Consultants suggest the following guiding principles as the guidelines for future development:

- (1) promote smart, green and resilient recreation and tourism development;
- (2) balance conservation needs and respect natural resources;
- (3) create a constellation of diverse attractions by adding new elements and enhancing existing offerings;
- (4) integrate and cluster new and existing recreation facilities and tourist attractions to achieve synergy effect;

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- (5) offer opportunities for more people to enjoy the country parks and other natural tourism resources;
- (6) capitalise local history and cultural heritage and develop them as unique tourism experience while appreciating the needs of local community;
- (7) Create critical mass and broaden the market appeal; and
- (8) Improve accessibility and strengthen the linkages between tourist destinations.

Initial Concept

11. This Study suggests developing new recreational facilities and tourism attractions at suitable locations and enhancing linkage between various attractions and facilities with a view to enhancing Hong Kong's overall competitiveness in tourism while meeting the local demands for recreation activities and facilities.

12. Given the majority of land on Lantau Island is covered by country parks and the principles of sustainable development, it is suggested that resources should be focused on future development of recreation and tourist facilities in clusters forming nodes with designated theme and each node should display different themes. The Consultants suggest the introduction of diversified themes so as to develop Lantau as a destination for recreation and tourism and would thus leverage Lantau's appeal to different tourists with a view to extending visitors' length of stay. The planning framework of the initial development concept (**Annex 5**) comprises six themes and eleven major Recreation and Tourism Nodes. Furthermore, the Study suggests developing those areas at remote location (e.g. Fan Lau, Shui Hau, Yi O) as places of interest that offer uniqueness and exploration value for niche market.

13. The following are the preliminary proposals of Recreation and Tourism Nodes, places of interest and their corresponding themes and possible development options:

“Excitement” Theme:

- **Sunny Bay Node:** Located at North-East Lantau and being adjacent to Hong Kong Disneyland Resort, Sunny Bay is currently linked to Tung Chung and Hong Kong Disneyland through railway and is the gateway to Lantau Island. With the proposed reclamation at Sunny Bay, there is a potential for further developing recreation and tourism facilities in the area. The possible offerings include role-playing and

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occupational education park, indoor adventure park for youth (e.g. indoor surfing/wave pool, 4D theatre, iFly indoor skydiving etc.), thematic leisure and entertainment area and marina etc.

- **Mui Wo Node:** Mui Wo is mainly a rural township. Silvermine Beach and Silvermine Beach Resorts together offer facilities for water sports and coastal recreation facilities. Besides, Silvermine Cave and Waterfall is a popular venue for hiking and picnicking with newly planted cherry trees in the area. The visitors can enjoy the view of the adjacent agricultural land and the distant view of Silvermine Beach from the plateau. It is suggested that this node should be developed into a place which offers diversified outdoor activities, such as outdoor adventure park (e.g. zipline, hillside slides, paintball/war game), aqua park (e.g. Wibit, flyboarding), mountain bike, etc. Regarding culture and historic aspects, it is proposed to set up a Lantau History Museum at Mui Wo based on the significant historical value of the place. Besides, local music festivals could also be organized so as to foster the development of modern culture. With respect to recreation and services, activities such as Silvermine Blossom Festival/Wedding Tourism and the provision of visitor centre are suggested so as to enhance visitation. Together with the preliminary concept of “East Lantau Metropolis”, Mui Wo could be developed as a gateway to Lantau Island in the long term.

“Splurge + Indulge” Theme:

- **Aerotropolis Node:** It is the starting point of Ngong Ping cable car and has Citygate Outlet, HKIA and AsiaWorld-Expo. With the planned HZMB, NCD of HKIA and Topside Development on the HKBCF island, it is suggested that this node should be developed as a venue for shopping and dining, marina, international ice rink, hotels, etc.

“Ecology” Theme:

- **Siu Ho Wan Node:** Currently is a rural area with abandoned agricultural land. The existing Olympic Trail has significant ecological value of woodland. Moreover, Tai Ho Stream is the habitat of various species of freshwater and brackish fish, such as the rare Horseshoe crab, Ayu etc. There are also mangrove and seaweed bed (including *Halophila beccarii*) growing at the estuary. As the landing point of the southern section of the Tuen Mun-Chek Lap Kok Link connecting the HKBCF island of HZMB and the northern coast of Lantau will be at Siu Ho Wan area and it is also planned to add a new railway station at Siu Ho Wan to support the proposed

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developments at Siu Ho Wan reclamation and on the topside of the railway depot, the accessibility of Siu Ho Wan would be enhanced by that time. Therefore, the Study considers possible to introduce eco-tourism to the designated area and set up a creative eco-tourism hotspot at Siu Ho Wan such as the provision of an iconic botanic garden, eco-tour centre and eco retreat corresponding to wetland context at Tai Ho Stream.

- **Sunset Peak Node:** The Sunset Peak is a renowned attraction for enjoying the view of sunrise/sunset and for stargazing, while it is also a popular attraction along the Lantau Trail. In order to attract more visitors to the Sunset Peak to enjoy the scenic view, in addition to the existing trails, the Study suggests enhancing the accessibility to the area and the provision of viewing deck at Sunset Peak. Furthermore, the provision of stargazing facilities and campsite could be explored.
- **Yi O:** Agricultural land has been abandoned after the old Yi O Village moved out. Revitalization of the abandoned land has commenced in recent years and related agricultural activities can also be observed in the area. The Consultants suggest the provision of farm stay, such as harvest walk and farm-to-table eatery that should promote citizens' experience to agricultural lifestyle.

“Culture + Heritage” Theme:

- **Tung Chung Valley Node:** Existing offerings include rural villages with cultural assets, several hiking trails linking to Lantau Peak and Sunset Peak such as Tung O Ancient Trail, Tung Chung Fort, Tung Chung Battery and Tung Chung River etc. The Consultants suggest the provision of tourism attractions such as River Cum Biodiversity Park, eco-tour centre, Tung Chung historic walking district etc.
- **Tai O Node:** Tai O is renowned as the Venice of the East. Existing iconic offerings include the historical water village and stilt houses, fishing trail, wetland and mangrove, abandoned salt pan etc. The Consultants suggest services such as active contemplative practice, (e.g. Wushu Retreat, Tai Chi Centre), culinary heritage centre, experiential village life attraction as well as outdoor activities (e.g. open air repertory theatre for enjoying sunrise/sunset view). In addition, we are now exploring the opportunity for cable car extension from Ngong Ping to Tai O. This proposed extension, if materialized, could offer tourists with extra travel options.

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- **Zen Node:** This node covers Ngong Ping, Luk Wu, Keung Shan, etc areas and already has Ngong Ping 360, Monasteries, Tian Tan Buddha and Ngong Ping Piazza etc. Ngong Ping, Luk Wu, Keung Shan, Tei Tong Tsai and Ling Wui Shan (Infinity Pool) together are called the “Five Buddha Monasteries”. The area around Luk Wu and Keung Shan is one of the earliest Buddhism development in Hong Kong and many temples, monasteries, nunneries and religious communities are clustered there. This makes the area a significant node for religious purpose. Although Luk Wu, Keung Shan and Ng Yuen have a relatively few visitations, it is still a great destination for weekend getaway to a number of Hong Kong citizens. The Consultants suggest maintaining the status quo with the provision of limited religious activities such as Temple tour, Zen class, Zen meditation and retreat.
- **Fan Lau:** Existing offerings include cultural heritage such as Fan Lau Fort, Fan Lau Stone Circle and etc. It is suggested that facilities for outdoor activities such as exploration campsite/outward bound and hiking trail should be provided.

“Adventure” Theme:

- **Pui O, Chi Ma Wan Node:** This area currently has a rural setting with facilities for water sports and holiday accommodations available at sheltered beach. This node has rich ecological resources with a diversified ecology such as wetlands, mangroves, mudflats, beaches, streams, etc. There are a number of abandoned farmlands at the shores of Pui O River, which are now wetlands providing habitats to various organisms (e.g. dragonfly, buffalo). To tie in with this theme, the Consultants suggest the provision of water sports (e.g. windsurfing, canoeing and kayaking), paragliding, extreme sports (e.g. rock climbing, Skate Park), aqua park (e.g. Wibit), cattle conservation area and campsite in the area.
- **Shui Hau:** There is a natural coast that extends along from Pui O to this area. Mangrove at Shui Hau Bay with significant conservation value is the habitat of various species and also the natural incubator of the rare Horseshoe crab. Existing facilities and activities include hiking trails and campsites, clam digging, kitesurfing and stargazing sites. It is suggested that facilities for paragliding and exploration campsites should be provided, and biking and hiking trail network should be extended etc.

“Relaxation + Wellness” Theme:

- **Cheung Sha Node:** Existing offerings include long beaches, mountain bike trails and campsites. The Consultants suggest the development of spa and resorts, water sports centre (e.g. sailing, windsurfing), local music festival, campsites, wedding centre, cycle track and etc.
- **Soko Islands Node:** It is an ex-Vietnam Refugee camp and a place of geological interest, with tranquil setting and marine park. Taking advantage of natural terrain of the islands, the Consultants propose to develop spa and resorts and facilities for extreme sports (e.g. rock climbing).

14. To enhance the accessibility of visitors between nodes and to promote “experiencing the journey itself is tourism”, the Consultants propose experiential transport connections between nodes and places of Interest so that visitors could enjoy the scenic beauty of Lantau from different angles which echo the diversity of recreation and tourism. Proposed connectors include water-based connections (e.g. water taxi), above-ground modes (e.g. cable car, funicular railway) and land-based links (cycle tracks, round-the-island sightseeing shuttle, etc.).

15. On the other hand, with the prerequisite of enhancing conservation, it is suggested that the attractiveness of country parks for green tourism, recreation and educational purposes should be increased through measures such as improving and augmenting country trails, park facilities, signage, etc, to enhance the educational values of country parks on Lantau. Tree walks could be established within country parks in order to increase the public’s knowledge about the native tree species of Lantau.

16. The aforementioned proposals are initial concept of the Consultants, the feasibility of which are still subject to technical studies and financial viability assessment.

Next Stage of Work

17. For the recreation and tourism development proposals, the Consultants will screen out effective ones for short, medium and long term implementation. Some proposals will also be selected for conducting preliminary feasibility assessment (including financial viability) and broad technical assessment including traffic, environment and infrastructure aspects and effective measures will also be formulated to mitigate any

adverse impact that may be brought about.

18. The Development Bureau and the Consultants will consult and brief the LanDAC and its relevant Subcommittees on further study findings at suitable time.

ADVICE SOUGHT

19. Subcommittee Members are invited to note the content of this paper and give views.

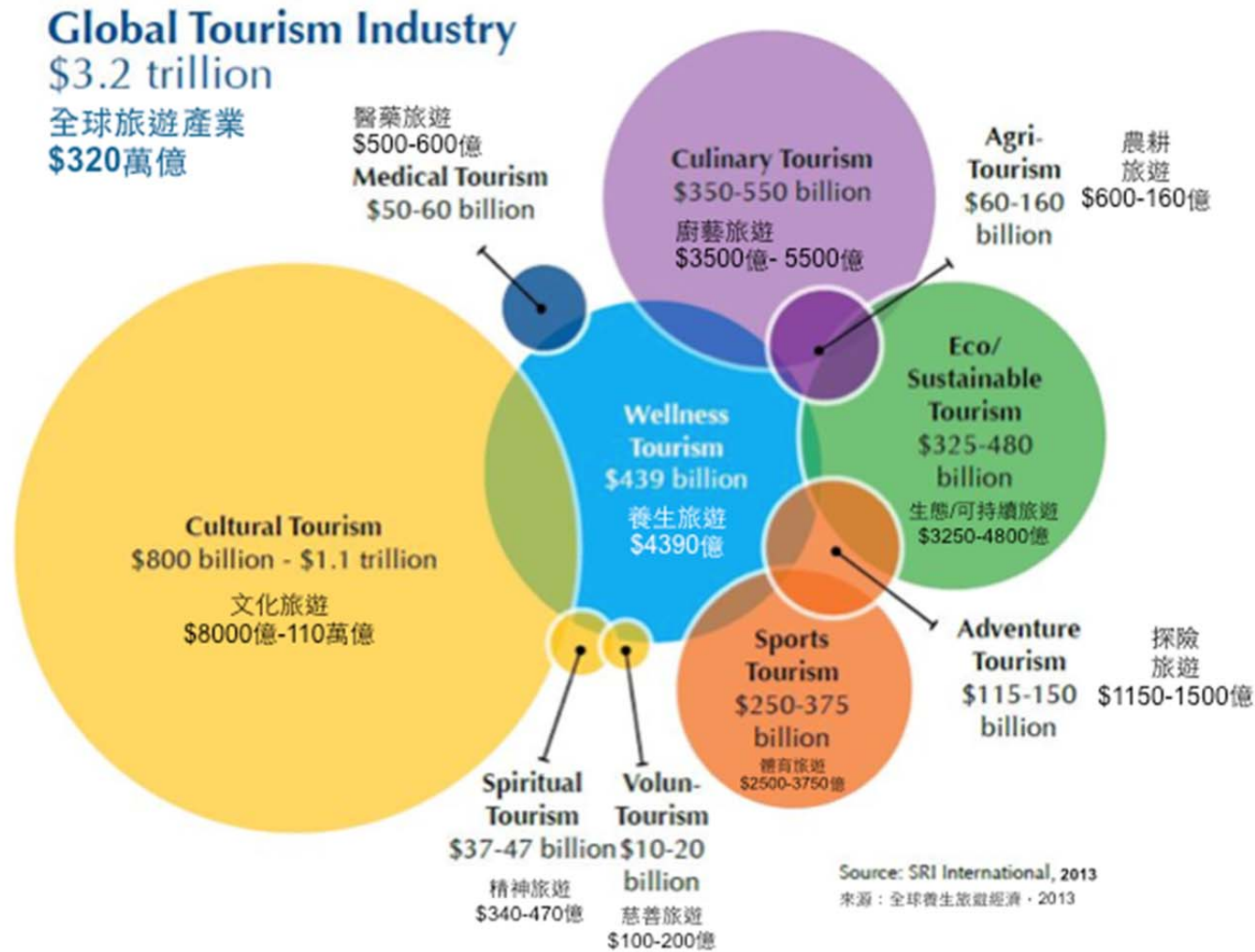
ANNEX

Annex 1: Global Tourism Industry Economic Analysis
Annex 2: Visitors Profile Origin Analysis
Annex 3: Visitors Profile Characteristics Analysis
Annex 4: Regional Benchmarking
Annex 5: Planning Framework

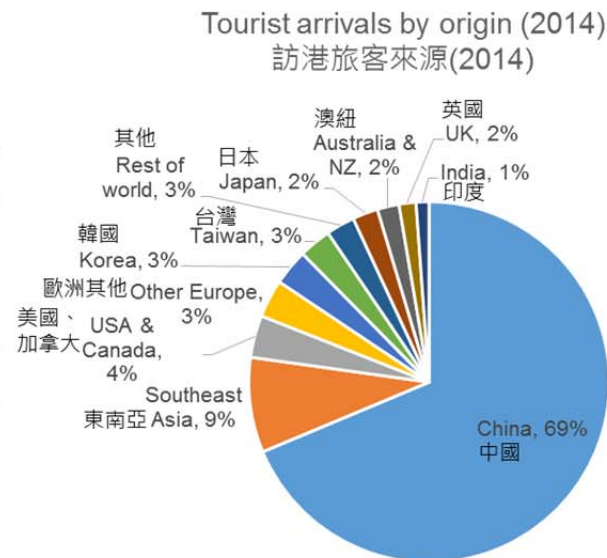
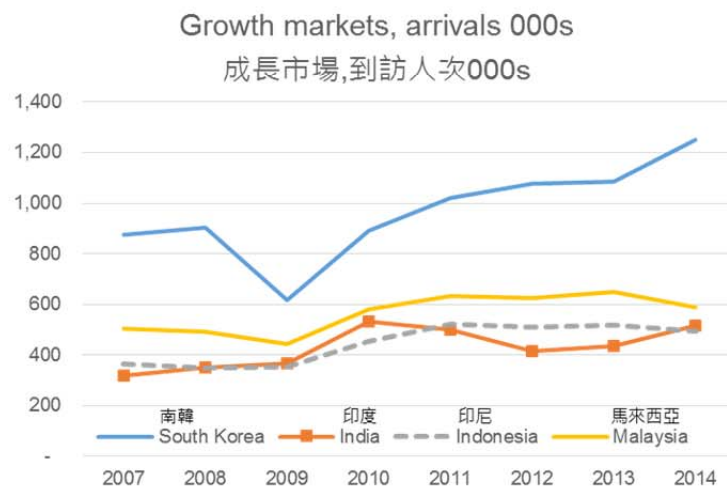
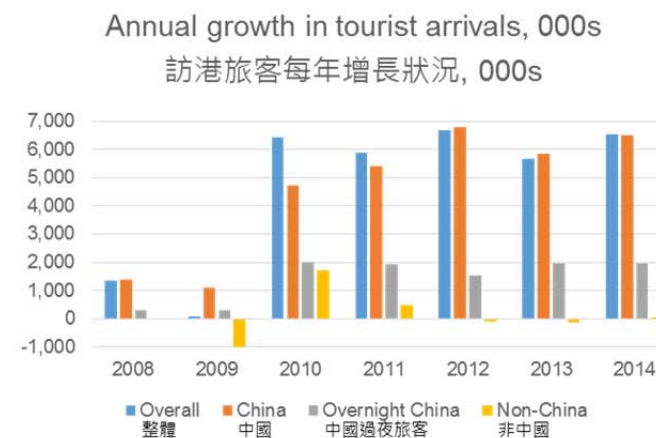
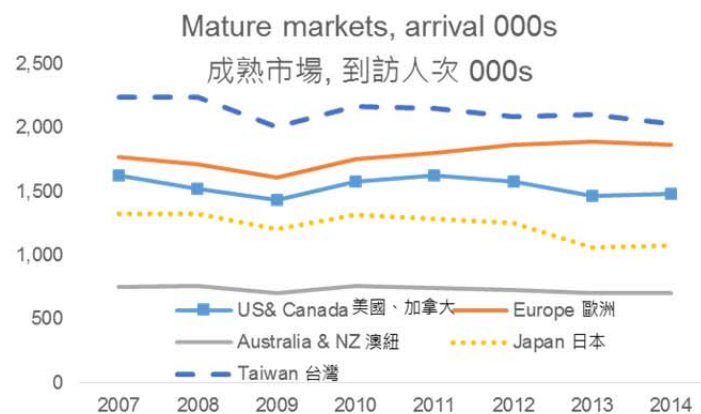
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Annex 1: Global Tourism Industry Economic Analysis



Annex 2: Visitors Profile Origin Analysis



Source: HKTB Visitor Profile (2007-2014)
來源: 香港旅遊發展局, 訪港旅客分析報告(2007-2014)

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Annex 3: Visitors Profile Characteristics Analysis

市場來源 Market	年齡中位數 Median age	女性旅客 百分比 % Female	只到訪香港的 百分比 % HK as only destination	平均停留時間 (夜) Mean Length of Stay (nights)	第一次到訪百 分比 % First time visitors
台灣Taiwan	35.8	61	69	2.3	30
中國China	36.1	62	72	2.3	34
日本Japan	41.2	52	50	2.3	43
南韓S. Korea	36.9	64	29	1.9	67
印尼Indonesia	38.6	58	26	2.9	34
馬來西亞Malaysia	37.9	57	41	2.9	35
菲律賓Philippines	37.2	62	54	2.8	32
新加坡Singapore	40.2	58	47	3.0	19
泰國Thailand	36.9	64	49	2.5	29
印度India	38.1	41	15	3.4	69
美國America	43.2	49	5	3.4	53
歐洲Europe	39.9	43	11	3.4	60
澳洲/新西蘭 Australia / NZ	45.0	52	11	3.8	43

來源: 香港旅遊發展局, 訪港旅客分析報告(2014)

Source: HKTb Visitor Profile (2014)

Annex 4: Regional Benchmarking

區域標杆分析 REGIONAL BENCHMARKING

	探險 Adventure	刺激 Excitement	奢華與享受 Splurge+ Indulge	放鬆與養生 Relax+ Wellness	文化與歷史 Culture+ Heritage	生態 Eco
南韓,濟州島 Jeju, S. KOREA	✓	✓		✓	✓	✓
日本,沖繩 Okinawa, JAPAN	✓			✓	✓	✓
台灣,南投 (日月潭) Nantou (Sun Moon Lake), TAIWAN	✓	✓			✓	✓
澳門 Macau	✓	✓	✓		✓	
中國,大鵬&大梅沙 Dapeng & Dameisha, CHINA	✓		✓		✓	✓
中國,珠海橫琴 Hengqin, ZH, CHINA		✓		✓		✓
中國,海南 Hainan, CHINA			✓	✓		✓
越南,芽莊 Nha Trang, VIETNAM	✓	✓		✓	✓	✓
泰國,普吉島 Phuket, THAILAND	✓		✓	✓		✓
菲律賓,宿霧 Cebu, THE PHILIPPINES	✓					✓
馬來西亞,檳城 Penang, MALAYSIA		✓		✓	✓	✓
馬來西亞,怡保 Ipoh, MALAYSIA			✓	✓	✓	✓
新加坡 SINGAPORE	✓	✓	✓	✓	✓	
印尼,民丹島 Bintan, INDONESIA	✓			✓		✓
印尼,峇里島 Bali, INDONESIA	✓		✓	✓	✓	✓

區域標杆分析- 珠三角地區 REGIONAL BENCHMARKING – PRD region

	探險 Adventure	刺激 Excitement	奢華與享受 Splurge+ Indulge	放鬆與養生 Relax+ Wellness	文化與歷史 Culture+ Heritage	生態 Eco
深圳 Shenzhen	✓	✓	✓	✓		✓
東莞 Dongguan			✓		✓	
惠州 Huizhou	✓					✓
廣州 Guangzhou		✓	✓		✓	✓
清遠 Qingyuan	✓			✓	✓	✓
肇慶 Zhaoqing				✓	✓	
佛山 Foshan		✓	✓		✓	
中山 Zhongshan			✓	✓		✓
江門 Jiangmen				✓		✓
珠海 Zhuhai		✓	✓	✓	✓	✓
澳門 Macau	✓	✓	✓		✓	

Annex 5: Planning Framework

