Title    The potential development of cruise industry in Hong Kong

Name     Cheung Ka Yan

Student No  91204748

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FULL NAME  Cheung Ka Yan

STUDENT No  91204748

Supervisor:  Dr. Connie Mok

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Abstract

Cruising is the fastest growing category among the hospitality industry and became more popular than before. As compared with the global cruise industry, Asian cruise industry has experienced strong growth recently. Besides, Hong Kong has also been one of the most popular developing cruise destinations in Asia. However, only a few studies on the Hong Kong cruise industry have been conducted. The aims of this study were to analyze the motivations, travelling patterns, demographic characteristics of Hong Kong cruisers and the potential development of Hong Kong cruise industry. Online questionnaire was used to get better understandings to Hong Kong cruisers who aged 18 or above from 66 respondents. PEST analysis was conducted by using secondary data to analyze the potential development of Hong Kong cruise industry. The result indicated that Hong Kong had great potentials to develop its cruise industry and to be the leading regional cruise hub in Asia. Besides, young people and family groups with lower to middle level monthly income level (ie. below $19999) and with higher education level of middle school or above were growing new markets in Hong Kong. Respondents preferred taking short-haul cruises with their families and friends. Almost respondents preferred to purchase travel packages via travel agencies and would like to take cruise vacations again. The core motivation factors for Hong Kong cruisers were “Social gathering” and “Escape form normal life”.
Contents

Acknowledgements i
Abstract ii
Contents iii
List of Figures and Tables v

Chapter 1 INTRODUCTION
1.1 Background of cruise industry 1
1.2 Background of Cruise industry in Hong Kong 1
1.3 Rationale for choice of topic 3
1.4 Objectives of the study 3
1.5 The overall structure of the report 4

Chapter 2 LITERATURE REVIEW
2.1 Background of cruising 5
  2.1.1 Definition of cruise 5
  2.1.2 History of cruising 5
2.2 Motivation 6
  2.2.1 Push and Pull factors 6
  2.2.2 Psychological determinants 7
2.3 The cruise industry in North American 10
2.4 The cruise industry in Hong Kong 12
2.5 Demographic profile of North American cruisers 15
2.6 Demographic characteristics of Hong Kong cruisers 17
2.7 Other major trends of cruising industry 17
  2.7.1 Cruise rate became more common 17
  2.7.2 Booking patterns 18
2.8 Theory of PEST analysis 19

Chapter 3 RESEARCH METHODOLOGY
3.1 Research design 21
3.2 Secondary data 21
  3.2.1 Research instrument 21
  3.2.2 Data collection 22
3.3 Online questionnaire 22
  3.3.1 Research instrument 22
  3.3.2 Sampling plan and data collection 24
3.4 Data Analysis 25
3.5 Limitations 26

Chapter 4 FINDINGS AND ANALYSIS

4.1 Travel patterns 27
  4.1.1 Travel companions 27
  4.1.2 The length of cruising 27
  4.1.3 The frequency of taking cruise 28
  4.1.4 Booking patterns 29
  4.1.5 Repurchase intentions 29

4.2 Travel motivation factors 30

4.3 Demographic characteristics of Hong Kong cruisers 32

4.4 PEST analysis on Hong Kong cruise industry Potential development 35
  4.4.1 Political factors 35
    4.4.1.1 Role of Hong Kong Government 35
    4.4.1.2 Hardware development – Kai Tak cruise terminal 36
    4.4.1.3 Software development- Training, promotion, and cooperation with regions 37
    4.4.1.4 Less restriction of visa application between countries 40
    4.4.1.5 Good Investment environment 41
  4.4.2 Economic factors 42
    4.4.2.1 Renminbi revaluation 42
    4.4.2.2 Economic recovery 42
    4.4.2.3 Stable oil price 46
  4.4.3 Social factors 46
    4.4.3.1 Growing young people market 46
    4.4.3.2 Better lifestyle 47
    4.4.3.3 Prefer cruise tour more than land tour 47
  4.4.4 Technological factors 48
    4.4.4.1 High technology of cruise industry 48
    4.4.4.2 E-marketing for promotion 49

Chapter 5 CONCLUSIONS AND RECOMMENDATIONS

5.1 Conclusions 51
5.2 Recommendations 53

References 55

Appendices 62
  Appendix1 Asia's cruising map 62
  Appendix2 Samples of English and Chinese versions’ questionnaires 63
# List of Figures and Tables

## Figures
- Figure 1 Gross Domestic Product 44
- Figure 2 Total labor force and total employment 44
- Figure 3 Unemployment rate 45
- Figure 4 Private consumption expenditure 45

## Tables
- Table 1 Motivation factors for Hong Kong cruisers 8
- Table 2 Travel companions 27
- Table 3 The length of cruising 27
- Table 4 The frequency of taking cruise 28
- Table 5 Booking patterns 29
- Table 6 Repurchase intentions 29
- Table 7 Travel motivation factors 30
- Table 8 Demographic characteristics 32
Chapter 1 INTRODUCTION

1.1 Background of cruise industry

Cruise industry grows at the fastest pace among the tourism industry. According to Cruise Lines International Association, Inc. [CLIA] (2009), this lucrative industry has grown at 7.4% per annum since 1990. Decades ago, North America and Europe were the locomotives of the global cruise industry development, but many recent studies show that the rest of the world, such as South America, Africa and Southeast Asia, has been picking up at a decent pace (Singh, 2000; Cartwright & Baird, 1999; Douglas & Douglas, 2004; Marvin, 2006). The recent cruise industry development in Southeast Asia has been gaining attentions along with the rise of Asian economy. According to Singh’s study in 1998, the cruise industry in Southeast Asia has grown at an average annual rate of over 60% since 1994, which is eye-catching by all standards. Among all Southeast Asian countries, Hong Kong, China, Bali and Malaysia are most popular destinations (Singh, 2000). In order to benefit from the robust growth, cruise companies have designed lots of new itineraries within the region recently.

1.2 Background of cruise industry in Hong Kong

In the past, the selling points of Hong Kong tourism were “the Pearl of Orient”, “Shopping and Eating Paradise”, “MICE center”, etc. However, growing demands
from tourists around the globe results in more diverse selling points nowadays, and
cruise tourism is one of these new selling points. In fact, Star Cruises, a reputable
cruise operator, has chosen Hong Kong as its home port for many years, and Costa
Crociere, which is part of the Carnival Corporation, the world’s biggest cruise
company, has established its regional Asia headquarters in Hong Kong since 2006
(Hong Kong Tourism Board, 2009). Besides, several mega cruise ships including
Diamond Princess, Queen Victoria, Queen Mary 2 and Costa Classica, have also
visited Hong Kong in the past few years, proving Hong Kong’s popularity as a cruise
destination. However, the port facilities in Hong Kong do not catch up with the rapid
growth. In 2009, Sing Tao Daily criticized the inadequacy of cruise amenities in Hong
Kong in the view that Kwai Chung Container Terminal and Ocean Terminal are far
from enough to satisfy cruisers’ needs. For instance, some cruisers have to take an
uncomfortable ride on a feeder boat taking them to the cruise ship as many cruise
ships were too large to park at the port in Hong Kong. To provide better travel
experience to cruisers, Hong Kong Tourism Board decided to build new
infrastructures such as Kai Tak Terminal in order to compete with other Asian
countries to become a regional cruise hub of Asia (Hong Kong Tourism Commission,
2009).
1.3 Rationale for choice of topic

The researcher selected this topic because she did a project on Star Cruise when she was studying a higher diploma course and it aroused her interest to learn more about cruise industry. Therefore, she would like to take this opportunity to have better understandings of the cruise industry.

Besides, cruise industry in Hong Kong became a popular topic. Cruise industry became one of the fast growing sectors of the tourism industry and more and more cruisers joined the cruise vacations. So, she would like to concern about the potential development of cruise industry in Hong Kong.

On the other hand, Asia was an emerging destination and potential market of cruise industry. However, there are only a few studies on motivations, travel patterns and the profile of Hong Kong cruisers have been conducted.

Hence, a study of Hong Kong cruisers and external environment of Hong Kong cruise industry was carried out.

1.4 Objectives of the study

To determine the travelling patterns of Hong Kong cruisers

To study the motivation factors of Hong Kong cruisers

To find out the demographic characteristics of cruisers; and

To conduct the PEST analysis on the potential development of Hong Kong cruise
industry.

1.5 The overall structure of the report

In chapter one, the researcher introduced the background, the cruise industry in Hong Kong, reasons of choosing this topic, objectives of the study as well as the outline if the report.

Chapter two was the literature review on the history of cruise industry, reasons of cruise vacation, the growth of cruises destinations and market situations, global trends, and PEST analysis theory. The literature in this chapter leaded to the research areas.

Chapter three stated the research methodology, strengths and limitations of the research instrument, research process and method of data analysis.

Chapter four presented the results of findings which were related back to the literature mentioned and the previous research.

Chapter five was the session of conclusions and recommendations, which included consequences and suggestions from the research result.
Chapter 2  LITERATURE REVIEW

2.1 Background of cruising

2.1.1 Definition of cruise

In order to understand the cruise industry, it was important to know what was cruise. Dowling (2006, P. 3, cited in Collins English Dictionary) defines cruise as “to make a trip by sea in a liner for pleasure, usually calling at a number of ports.” Mancini (2004) defines cruise in a very similar manner and also emphasized on excludes only business purposes, primary transformational purposes and sail on one’s own pleasure craft.

2.1.2 History of cruising

Mancini (2004) believed that in ancient times, ships sailed mainly for practical reasons, such as exploration, commerce, migration and warfare. The concept “leisure sailing” has not been coined until 1800s, when merchant ships started taking wealthy passengers to faraway destinations for adventure. However, leisure sailing was still at an infant stage at that time, and steamships were mainly used to carry immigrants (Mancini, 2004).

Thanks to technology advance from 1920 and 1930, faster and larger steamships allowed ocean liners to provide passengers with more comfortable ship rides. Since then, there was a growing number of tourists select cruise ships as a vehicle of their
leisure trips. However, at the same time, cruise industry started facing keen competition from airlines, which were generally regarded as a more efficient way of traveling. (Mancini, 2004).

After decades of rapid development, modern cruising becomes well-developed. One of many sea changes is that ships nowadays are viewed as floating hotels instead of merely a mean of transportation. (Dowling, 2006). Ships nowadays are designed to provide passengers with enjoyable experience. To achieve this, almost travelling ships provide great dinning, excellent services and first-class facilities. (Mancini, 2004; Gibson, 2006; CLIA, 2008c). To competitive edge over land-cased hotels, the interior design of cruise ships has become more luxurious and grand. (Mancini, 2004; Gibson, 2006). On the back of this ongoing development, cruises nowadays become a popular option of having vacations.

Another marked change is that cruisers can now choose various itineraries, such as round-trip or one-way itinerary, besides only choosing destinations. Cruisers can also extend their cruise experience to pre- and post-cruise packages. Fly-cruise tour is also becoming more popular nowadays. (Mancini, 2004; Gibson, 2006).

2.2 Motivation

2.2.1 Push and Pull factors

Why people cruise? There were a number of reasons that motivate people to
cruise. Understanding customers’ motivations were very important for cruise line companies to set up effective marketing campaigns, to create more business and also to contribute to the cruise industry (Qu & Ping, 1999). According to K. Kim, Noh, & Jogaratnam (2006), tourism researchers actively introduced the travel motivations which were driven by push and pull forces because these forces influenced one’s decision making on traveling. According to Crompton (1979), push motivational force was defined as “the desire to travel” while pull motivational force was viewed as “the choice of destination”. The push motivational force is also regarded as socio-psychological motives (Crompton, 1979).

2.2.2 Psychological determinants


Cartwright & Baird (1999) conducted a research to understanding more about the cruisers and put the sample results of why people cruise into three main categories, such as “Relaxation”, “Safety” and “Social”. Relaxation and Social factors were fitted into the belief of Ryan (1991). However, Ryan (1991) did not did not explicitly
mention safety as one of the elements of psychological determinants. Other researchers stated that cruisers were motivated by the following factors, such as escape, relaxation, reunion with family and friends, social status, knowledge (Mancini, 2004; Qu & Ping, 1999; Moscardo, Morrison, Cai, Nadkarni, O’Leary, 1996; Ideal cruising, 2009; Gibson, 2006; K. Kim et al., 2006). Qu & Ping (1999) also conducted a research on the motivation factors behind Hong Kong cruisers’ decisions (Table 1).

Table 1  Motivation factors for Hong Kong cruisers

<table>
<thead>
<tr>
<th>Rank</th>
<th>Hong Kong cruisers’ motivation factors</th>
<th>Percentage (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Escape from normal life</td>
<td>36.4%</td>
</tr>
<tr>
<td>2</td>
<td>Social gathering</td>
<td>26.4%</td>
</tr>
<tr>
<td>3</td>
<td>Beautiful environment and scenery</td>
<td>12.1%</td>
</tr>
<tr>
<td>4</td>
<td>Cultural understanding</td>
<td>7.6%</td>
</tr>
<tr>
<td>5</td>
<td>Social status</td>
<td>6.9%</td>
</tr>
<tr>
<td>6</td>
<td>Business purpose</td>
<td>5.5%</td>
</tr>
<tr>
<td>7</td>
<td>Health and exercise</td>
<td>3.6%</td>
</tr>
<tr>
<td>8</td>
<td>Self- discovery</td>
<td>1.5%</td>
</tr>
</tbody>
</table>

Source: Qu & Ping (1999)

1. Escape

“Cruising can be seen as an escape attempt—a means of breaking out of the ruts
we are in and the routines that dominate our lives.” (Berger, 2004, P.74). During the cruise vacations, cruisers can escape from the reality or many things they hate, such as alarm clocks, ringing telephones, chattering fax machine (Berger, 2004; Mancini, 2004; Qu & Ping, 1999). Cruisers could go to their heaven, taste everything they like and store up fun and pleasant experience (Berger, 2004; Mancini, 2004). Qu & Ping (1999) found that “Escape from normal life” is the top motivation factor behind Hong Kong cruisers’ decision of taking cruise vacations (Table 1).

2. **Social gathering**

If cruisers travel with their families and friends, they can eat together, play together, and share incredible experiences together in order to strengthen the bonds between them within a short period of time (Crompton, 1979; Mancini, 2004; Qu & Ping, 1999; K. Kim et al., 2006). People who like to socialize can also meet new and old friends easily and share their interests and experience, too (Mancini, 2004). According to Qu & Ping (1999), “Social gathering” is the second reason that Hong Kong cruisers select to take cruise.

3. **Social status**

Social status meant prestige and could be called “Travel bragging” (Cha, McCleary & Uysal, 1995). Some researchers believed that the reason why people take cruise is they could brag about the vacations after they came back. (Crompton, 1979;
4. Knowledge

One of the travel motivations was knowledge. During the cruise vacations, cruisers can learn from various ways such as expert lectures (Cha et al., 1995; Mancini, 2004; Ideal cruising, 2009). During the vacation on the cruise ships, cruisers can take different courses such as golf and yoga courses. At ports, cruisers can learn about local history and local culture. As 71% of the surface of the plant was covered by water (Lutgens, 1992), cruise ships could easily access to the destinations around the world, especially the most popular cruise destinations, such as Caribbean, the Mediterranean, Alaska, islands of Southeast Asia, etc (Gibson, 2006). Cruisers can therefore reach most of the destinations by cruises and to enhance their knowledge.

As people have learnt more about the benefits of cruising, demands for cruise vacation packages have increased dramatically. Consequently, cruise companies have been increasing supply to boost their revenues.

2.3 The cruise industry in North American

North America was the world’s largest cruise market and one of the most popular cruise destinations in the world (Singh, 2000). The large cruise industry in North America was supported by cruisers from the United States and Canada (CLIA, 2009). The top five popular cruise destinations of North American cruisers were the
Statistics from CLIA (2008c) showed that passenger loads were grown from only less than 2 million in 1980 to 10.5 million in 2004. Thus, CLIA (2008a) stated that cruise vacations reached a level of popularity that very few observers could anticipate 30 years before. Despite the obstacles such as economic crisis, oil crisis and other uncertain situation (from 1980 to 2007), the number for cruisers has grown at an average annualized rate of 7.4% (CLIA, 2009). Based on CLIA (2008b), “77 percent of past cruise vacationers and 55 percent of vacationers expressed interest to take a cruise within the next three years.” The average length of cruises was from 6.7 days in 1981 increased to 7.2 days in 2009 (CLIA, 2009). Thus, the cruise market has a very ample room to grow. In 2008, the CLIA industry occupancy rate exceeded 100% to 104.2% (CLIA, 2009).

To satisfy the enormous demand from North American, the number as well as the size of the ships has increased steadily over time. CLIA (2009d) stated that 21 more new ships would be built during 2010-2012. And the average capacity rose at a rate of 7.46% from 1981 to 2008 based on CLIA (2008b). For example, the megaships, such as Queen Mary2 and Freedom of the Seas were built around 150,000 tons with capacities of over 3000 passengers (Dowling, 2006).

CLIA (2008a) found that the cruise industry in North America generated 357,710
jobs that paid a total of $16.2 billion in wages nationwide in 2008 and had a total economic contribution of $40.2 billion to the economy, representing a 6% increase over 2007.

2.4 The cruise industry in Hong Kong

“The cruise line industry in Southeast Asia is rapidly emerging as one of the fasters growing international cruise markets in the world. It is not only becoming a major cruise destination but also generating a new market of cruise vacationers.” (Singh, 2000, P.139) Singh (2000) highlighted that the dynamic growth in Southeast Asia could be explained by the attractiveness of cruise destinations in the region and social cultural factors of cruisers.

Actually, given several current competitive edges, Hong Kong has a lot of internal strengths to compete with other cruise destinations (Hong Kong Tourism Board, 2007b; Tourism Commission, 2008). For instance, Hong Kong is an international popular destination. According to Anon (2003), Hong Kong was the fourteenth within the Observer/ Guardian’s travel Awards lists tourists’ favorite overseas city. Hong Kong has been regarded as a melting pot of both eastern and western culture and this unique background arouse foreign cruisers’ interest to visit Hong Kong. Hong Kong has also been known as “Shopping and Eating Paradise” and “the Pearl of Orient”, providing cruisers opportunities to shop, to dine and sightseeing
during the pre-/ post- cruising tours and shore excursions itineraries (Hong Kong Tourism Board, 2007b; Tourism Commission, 2008).

Hong Kong has several in-born advantages. “Hong Kong’s climate is sub-tropical, tending towards temperate for nearly half the year.” (Hong Kong Observatory, 2003). Thus, Hong Kong was a year-round port of call and cruisers could visit Hong Kong anytime throughout the year. Geographically, Hong Kong perfectly located at the center of Southeast Asia and this is a perfect location for cruisers (refer to Appendix 1 Asia’s cruising map) (Hong Kong Tourism Board, 2007a; Tourism Commission, 2008). Moreover, Hong Kong is close to other South-Asian countries, such as China, Taiwan Thailand, Singapore, Malaysia, Vietnam, Indonesia, Philippines, Japan, Korea, etc (Qu & Ping, 1999). More importantly, Hong Kong was an aviation hub that travelers could visit Hong Kong by taking on more than 200 direct flights from all over the world (Hong Kong Tourism Board, 2007b). Fly-cruise packages are typically available to the overseas cruisers (Qu & Ping, 1999).

As Hong Kong has a number of strengths mentioned above, Hong Kong would be considered to be one of the top cruise destinations among cruisers (Qu & Ping, 1999; Hong Kong Tourism Board, 2007b; Tourism Commission, 2008). The number of Hong Kong cruisers was grown from 0.7 million in 2005 to over 1.8 million in 2009 and expected to increase to 2 million in 2020 (Hong Kong Tourism Board
PartnerNet, 2009). According to a study conducted by Cretron, Demicoo and Davies in 2006, Chinese would overtake Americans, Japanese, and Germans by 2010 to become the busiest travelers in the world. “If just 1 percent of them take a cruise each year, they will more than double the cruise market.” (Certron, et al., 2006, P.105). A survey conducted by the Hong Kong Tourism Board in 2004 indicated that more than 50% of Mainland cruisers expressed they were interested in joining a cruise vacation again. And, more than 80% of them would like to depart from Hong Kong (Hong Kong Tourism Board, 2004). This indicates that China has become a large potential cruise market to cruise line companies and travel agencies.

Additionally, Hong Kong people tend to seek for better lifestyle during affluent times (PATA, 1995; Qu & Ping, 1999) and cruise vacation became their most desirable type of travel as cruising presented a sense of luxury (Certron, et al., 2006).

Except Star group, the biggest international cruise line company, Carnival Corporation targeted Asian market, which includes Hong Kong people and Mainland China market based on the trends of cruise industry. Carnival Corporation has input investment, allocate resources, established Asia division and deployed its vessel, Allegra to expand and develop cruise industry business in Hong Kong since 2005 (Invest Hong Kong, 2009a). Many famous vessels, such as Diamond Princess, Queen Victoria, Queen Mary 2 visited Hong Kong and the international cruise ships even had
visited Hong Kong during 2007 and 2008 for more than 2000 times (Tourism Commission, 2008).

However, lack of port facilities was the key weakness for Hong Kong to develop cruise industry. Now, there is only an Ocean Terminal, which located in Tsim Sha Tsui, is the only terminal in Hong Kong offering two berths accommodating vessels of up to 50,000 tones. The annual occupation rate was raised from 71% in 2003 to 76% in 2007. During the peak seasons, some famous mega cruises had to use Kwai Chung Terminal or even berth mid-stream because Ocean Terminal could not meet the large demand. The idea of Kai Tak Terminal Project has been carries out to solve the problem of over-demand. (Tourism Commission, 2008; Legislative Council, 2008; Tourism Commission, 2009; Sing Tao Daily, 2009).

Cruise in or cruise out passengers spent HKD 46 million and HKD 56 million in 2007 and 2008 respectively. (Hong Kong Tourism Board PartnerNet, 2009). Therefore, cruise industry also facilitates the development of hospitality industry and other tourism related industries, and thus increases job opportunities in Hong Kong. Therefore, Hong Kong government and tourism related departments were working hard to develop Hong Kong cruise industry.

2.5 Demographic profile of North American cruisers

In the past, the target market of the cruise lines’ operators was the elderly.
Douglas & Douglas (2004, cited in CLIA study) stated that the average age of cruisers was 65 in the early 1970s. Older people form the wealthier segment of the cruising industry took the longest and most luxurious cruises (Centron et al., 2006). However, the average age of cruisers became younger and younger. “The median age of cruisers is now 46 years old, down from 49 in 2006.” and “The general profile of the 2008 cruise vacationer is upscale (with a median household income of $93,000), 69 percent have a college degree.” (CLIA, 2008b).

Family cruising growing steadily. 25% of cruisers also bring children (aged under 18) to cruise in 2008 while 13 percent in 2002. Baby boomers who aged 40s to 50s are family-oriented could also be fit into this segment. The reasons of increased family cruising were the value of cruise vacation was high (cruising was all-inclusive packages, buy the cruise packages in bulk usually gain special discount) as well as cruisers could gain unique experience during a short period (cruisers can do everything together and share with each other) (CLIA, 2005a). Besides, cruise ships offered family-friendly amenities and services, such as babysitters for the youngest travelers so that parents can do whatever they want (Dowling, 2006). Furthermore, two-earners households from America and Europe were busy for their work, thus a short length (such as three days, during weekends) cruise holiday, which offers them a chance to taste a sense of luxury and many of them can afford it (Cartwright & Baird,
1999). Disney Dream and Disney Fantasy under Disney Cruise Line would be launch in 2011 and 2012 to response the demand.

2.6 Demographic characteristics of Hong Kong cruisers

A research which aimed at understanding the profile of Hong Kong cruisers has been conducted by Qu & Ping (1999) showed that cruisers contained an almost equal number of males and females, who aged 18 to 44. Most of them were married and with children, majority of them with higher education level (middle school or above), were white-collar workers and with income $20000 or above.

2.7 Other major trends of cruising industry

2.7.1 Cruise rate became affordable

Researcher stated that the cruise rate became affordable in order to attract more customers (Leung, 2006; Cartwright & Baird, 1999). According to Chan (2010), as there were a number of cruise lines products, competition among the cruise line industry induced the cruise rate became cheaper. Competitive price could attract more people to join the cruise vacations. Unannounced discount ticket prices would be one of the strategies of cruise lines’ marketers (Vucetic, 2007; Frommer, 2006). Special discount for cruisers book in bulk was another marketing strategy, which offered by most travel agencies, depending on the number of cruisers in the groups (Cruise Critic, 2010). Usually, family cruising could gain the discount when they purchased up to 4
parties packages (Cruise Critic, 2010). It could save the cost for budget travel families and attract them to try to take cruise or repeat purchase. Researchers also believed that price reduction enable younger people and socioeconomic status group to access cruise vacations (Josiam et al., 2009, cited in Gorham & Rice, 2007; Vucetic, 2007).

2.7.2 Booking patterns

Cruise lines threat travel agencies are value partners. The relationships between cruise line companies and travel agencies are good and close. Travel agencies usually called travel counselors, which played important roles to assist cruise lines to sell the complicated and complex cruise products and match the consumers’ characteristics and styles in order to create repeat purchase and more commissions (Mancini, 2004). More importantly, some cruise lines do not let consumers book from them directly and direct them to purchase from travel agencies as they afraid it would harm the relationship between them(Mancini, 2004) and they thought that booking directly was a distracting thing (Centron et al., 2006; Mancini, 2004). In 2005, 95 % of cruisers booked their packages though travel agencies, only 5% of cruisers booked their cruise directly (Centron et al., 2006). However, today, 80 % of cruisers booked cruises via travel agencies and directly booked packages via cruise lines’ websites (Ward, 2007). It indicated that there were some changes on booking patterns. The usage of direct booking will become more popular and common, and therefore travel agents will
probably become less important in the future as people preferred online-shopping to face-to-face purchase (Centron et al., 2006). Moreover, cruise companies’ websites will provide richer information to consumers and online booking system will become necessity in their websites (Centron et al., 2006; Josiam et al., 2009).

2.8 Theory of PEST analysis

PEST analysis which suggested by Gibson (2006) was used for analyzing the potential development of destinations’ cruise industry.

PEST analysis, which was stood for Political, Economic, Social-cultural and Technological factors, could be used for cruise destinations to study the external macro environment (Gibson, 2006). The Chartered Institute of Personnel and Development (2008), gave more explanations on the above factors which presented as following. Political factors might include government role, change in government, international trade regulation, taxation policy, political stability, affection on infrastructure, education, etc. and they were usually combined with legal changes. Economic factors meant the economic situation, such as Gross Domestic Product (GDP), interest rate, exchange rate and inflation rate, wage rate, unemployment rate, price of raw materials from suppliers, etc. Social-cultural changes were change in lifestyle, attitude to work and leisure, education, and health. Technological factors tended to include the technology developments, research and development activities
and consumer buying technologies (such as impact of internet).

This analysis had four stages: under the headings of PEST, scanning to identify environmental changes, monitoring and recognizing the trends, forecasting the future changes and making amendment on the current situation and / or making new strategies (Aguilar, 1967; Gibson, 2006).

There were many benefits of using PEST analysis to assess the potential development of cruise industry in destinations. PEST analysis assisted to identify changes and impacts which might benefit or harm to destinations to develop cruise industry (Gibson, 2006). The destinations could response to the trends and protect them from changes which may be the threats (Gibson, 2006). Old strategies would be replaced by new strategies in the cruise destinations after the analyses and recommendations were suggested. So, it was an useful strategic tool and simple framework for conducting a market research, assessing the potential and direction for cruise destinations and tourism related parties could use this information for strategic decision-making (CIPD, 2008). As there were many environment changes from time to time, the government, tourism policy makers, and tourism departments should use the PEST analysis regularly (Gibson, 2006).
Chapter 3  RESEARCH METHODOLOGY

3.1 Research design

Both quantitative and qualitative researches were adopted in this study. Online questionnaire was used as an instrument to collect primary data and to get better understand of Hong Kong cruisers. The questionnaire was adopted from Qu & Ping (1999) was used to collect primary data for the study. It has three parts (samples of the questionnaire of Chinese and English versions were attached in Appendix 2). Besides, PEST analysis was conducted by using secondary data to determine the potential development of Hong Kong cruise industry. The secondary data were adopted from the academic books, journals, newspapers, reports from Hong Kong government departments, cruise association, and websites.

3.2 Secondary data

3.2.1 Research instrument

In order to understand how the external environment affect the cruise industry in Hong Kong, the researcher used secondary data as an instrument to contribute the PEST analysis for analyzing the potential development of Hong Kong cruise industry. The advantages of using secondary data are they can be collected easily, fast and less expense.
3.2.2 Data collection

Secondary data were collected through cruise academic books, journal of China Tourism Research, reports from Tourism Commission, Hong Kong Tourism Board, Hong Kong Tourism Board PartnerNet, press release form Commerce and Economic Development Bureau, Policy address 2009-2010, CLIA websites, and yahoo online news article, etc.

3.3 Online questionnaire

3.3.1 Research instrument

Primary data were collected through online questionnaire. Online questionnaire allows researchers to receive sheer volume of feedbacks from respondents within a short period of time. This instrument markedly reduces the time used for conducting face-to-face interviews and larger sample size also helps to reduce errors of studies. Thus, online questionnaire is an inexpensive tool to researchers nowadays. Moreover, questionnaire itself has been regarded as an effective tool for data collection. According to Moorman & Podsakoff (1992), the advantages of using questionnaires for data collection are easy to use, inexpensive, and they were the good method to measure unobservable construct. Tharenou & Donohue & Cooper (2007) also stated that the pre- set standardized questions could generate large amount of quantitative data to test the hypotheses. Therefore, online questionnaire was chosen as an
instrument to conduct the research. Questionnaires contained three parts:

**Questionnaire Part1 Travelling patterns**

Firstly, respondents were mainly asked about their travelling patterns including travel companions, frequency of cruising, length of route in the most recent trip, booking patterns, and repurchase intentions.

**Questionnaire Part2 Travel motivation factors**

Secondly, the respondents were asked to choose the main motivation factors when they decide to take a cruise from the eight motivation factors. Eight motivation factors, included “escape from normal life”, “social gathering”, “beautiful environment an scenery”, “cultural understanding”, “social status”, “business purpose”, “health and exercise”, and “self- discovery”, based on the research study by Qu & Ping (1999) and their study were based on the literature reviews of PATA (1993) survey of Hong Kong cruise travelers (Lee, 1993). One of the motivations, “business purpose” was identified clearly to be “incentive travel” as the definition of “cruising” stated by Mancini (2004) was “excludes only business purposes” which has been mentioned in the previous session.

**Questionnaire Part3 Demographic characteristics**

The last part of questionnaires aimed at identifying the demographic characteristics of local cruisers, including gender, age, marital status, educational
level, occupation, monthly household income, and number of household members. All these items were adopted from Qu & Ping (1999). All these items were adopted from Qu & Ping (1999) with several tweaks made by the researcher. Those changes included age, educational level and occupation. People aged under 18 were not be invited as the respondents as they are not targets of the study. The choices of educational level and occupation were tweaked with considerations of the most recent educational system and labor market.

3.3.2 Sampling plan and data collection

The target population of this study were cruisers who were Hong Kong residents aged 18 or above, as they are more likely to be targeted by cruise operators given their affordability. The respondents were clearly informed in the questionnaires with bold sentences to ensure they match the sampling criteria. The survey was conducted during February 2010 and March 2010. The total sample size was 66.

Online questionnaire is one of most convenient online research tools available. Once the online questionnaire is signed off by the researcher, the questionnaire is available to all parties. The online questionnaire could reach respondents via various ways. First, researcher sent out invitations to target parties. Second, the title as well as the snippet of the questionnaire was shown on the front page of the online questionnaire provider website. Third, researcher posted the invitation onto various
websites and traveler forums to broaden the respondent base.

The researcher created the questionnaire at http://www.my3q.com, a free and well-designed research tool provider. The results and the well-structured statistics of the survey reached the researcher once the survey was closely at the March-end 2010.

Given that all 13 questions of the survey were short, simple and comprehensive, this survey was not burdensome to almost respondents. Both Chinese and English versions’ questionnaires were provided to local Chinese and English speaking Hong Kong residents in order to reduce chances of miscommunication.

### 3.4 Data Analysis

The collected data were analyzed with the help of Statistical Package for the Social Sciences (SPSS) and PEST analysis. Firstly, the results of the questionnaires, such as travelling patterns, travel motivation factors and demographic characteristics of Hong Kong cruisers would be carried out by using SPSS. They were analyzed in descriptive statistics, including frequencies and presented in the form of table with percentage. Secondly, PEST analysis was conducted by using secondary data. The analysis was categorized under the sub-headings of 1) Political, 2) Economic, 3) Social- cultural and 4) Technological. It was suggested by Gibson (2006) that could be used as a matching tool for researcher to study the external macro environment in order to study the potential development of the Hong Kong cruise industry.
3.5 Limitations

There were several limitations of using secondary data. Firstly, the data may not be exactly related to the topic of project as cruise tourism is still an emerging industry in Hong Kong. Secondly, the data may be outdated as the cruise industry changed rapidly and all secondary data became outdated soon after the release. Therefore, the data from secondary research might not reflect the real situation.

Also, there were some disadvantages when using online questionnaire to collect information. Firstly, sampling size was quite small due to limited response time and human resources. Secondly, the questionnaires might not successfully reach senior citizens since they are not active Internet surfers. As a consequence, the results of online questionnaires may not truly reflect the reality. However, the findings were still useful and contributive to further researches on relevant topics.
Chapter 4 FINDINGS AND ANALYSIS

4.1 Travel patterns

4.1.1 Travel companions

Table 2 Travel companions

<table>
<thead>
<tr>
<th>Travel companions</th>
<th>Frequency (N=66)</th>
<th>Percent (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel with families and relatives</td>
<td>43</td>
<td>65.2%</td>
</tr>
<tr>
<td>Travel with friends</td>
<td>23</td>
<td>34.8%</td>
</tr>
<tr>
<td>Travel alone</td>
<td>0</td>
<td>0%</td>
</tr>
</tbody>
</table>

The respondents were asked about their travel companions in their most recent cruise vacation. Based on Table 2, a majority of respondents (65.2%) took cruise vacations with their families and relatives, 34.8% of the respondents took cruise vacations with their friends, and none of them travel alone. It reflected that cruisers preferred taking cruises with their families as cruise vacations could satisfy families’ needs. This conclusion concurred with the statement by Dowling (2006) that there were a number of on-board activities or shore excursion programs available that could satisfy all age groups and share unique time together. Family cruising has become a potential market for travel agencies and cruise line companies.

4.1.2 The length of cruising

Table 3 The length of cruising

<table>
<thead>
<tr>
<th>The length of cruising</th>
<th>Frequency (N=66)</th>
<th>Percent (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2-6 days</td>
<td>57</td>
<td>86.4%</td>
</tr>
<tr>
<td>7 days or above</td>
<td>9</td>
<td>13.6%</td>
</tr>
</tbody>
</table>
According to Table 3, 86.4% of respondents chose cruise packages of 2-6 days and only 13.6% chose packages of 7 days or above in their most recent trip. The summary reflected that Hong Kong cruisers preferred short-haul cruise vacation rather than long-haul because they didn’t have much time to take cruises and they were busy for their work (both workers and students). Hong Kong people were same as the Americans and Europeans that had busy life and preferred short length holiday. This conclusion concurred with the idea suggested by Cartwright & Baird (1999).

4.1.3 The frequency of taking cruise

Table 4 The frequency of taking cruise

<table>
<thead>
<tr>
<th>The frequency of taking cruise</th>
<th>Frequency (N=66)</th>
<th>Percent (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1time</td>
<td>40</td>
<td>60.6%</td>
</tr>
<tr>
<td>2-6times</td>
<td>26</td>
<td>39.4%</td>
</tr>
<tr>
<td>7times or above</td>
<td>0</td>
<td>0%</td>
</tr>
</tbody>
</table>

Respondents were asked how many time(s) that they have taken the cruise trip(s) thus far. As shown in Table 4, roughly three-fifth of respondents (60.6%) have taken cruise 1 time, 39.4% have taken cruise 2-6 times and none of them have taken 7 times or above. The summary reflected that Hong Kong people had little experience of taking cruise unlike the North Americans. To most of the Hong Kong people, cruise vacation remained something new and fresh.
4.1.4 Booking patterns

Table 5 Booking patterns

<table>
<thead>
<tr>
<th>Booking patterns</th>
<th>Frequency (N=66)</th>
<th>Percent (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Through travel agencies</td>
<td>44</td>
<td>66.7%</td>
</tr>
<tr>
<td>Through cruise lines directly (online or by phone)</td>
<td>5</td>
<td>7.6%</td>
</tr>
<tr>
<td>Through tour operators</td>
<td>7</td>
<td>10.6%</td>
</tr>
<tr>
<td>Through incentive companies</td>
<td>8</td>
<td>12.1%</td>
</tr>
<tr>
<td>Through international cruise associations (such as CLIA)</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>Others</td>
<td>2</td>
<td>3.0%</td>
</tr>
</tbody>
</table>

Referring to Table 5, two-thirds of respondents (66.7%) booked their most recent cruise vacations through travel agencies, and the rest booked through incentive companies (12.1%), tour operators (10.6%), cruise lines directly (7.6%), international cruise associations (3.0%), or others (3.0%) (e.g., the packages were given by friends) and none of them chose international cruise associations. It showed that Hong Kong cruisers preferred booking via travel agencies, because they did not recognize the complex cruise products and they needed the detail explanations by agents. Thus, the conclusion that direct booking will replace travel agencies in the future suggested by Centron et al. (2006) and Josiam et al. (2009) might not be suitable in Hong Kong.

4.1.5 Repurchase intentions

Table 6 Repurchase intentions

<table>
<thead>
<tr>
<th>Repurchase intentions</th>
<th>Frequency (N=66)</th>
<th>Percent (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>47</td>
<td>71.2%</td>
</tr>
<tr>
<td>Probably will</td>
<td>15</td>
<td>22.7%</td>
</tr>
<tr>
<td>No</td>
<td>4</td>
<td>6.1%</td>
</tr>
</tbody>
</table>
Respondents were asked whether they would like to take cruise vacation again. The result was listed in Table 6. Most of them answered they would (71.2%), while 22.7% said probably would and only 6.1% said they would not. The result illustrated that most of the Hong Kong cruisers satisfied the overall services, facilities, activities, programs provided by cruise lines and thus Hong Kong has potentials to develop its cruise industry.

4.2 Motivation factors

Table 7 Travel motivation factors

<table>
<thead>
<tr>
<th>Travel motivation factors</th>
<th>Frequency (N=66)</th>
<th>Percentage (%)</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social gathering</td>
<td>28</td>
<td>42.4%</td>
<td>1</td>
</tr>
<tr>
<td>Escape from normal life</td>
<td>19</td>
<td>28.8%</td>
<td>2</td>
</tr>
<tr>
<td>Beautiful environment and scenery</td>
<td>5</td>
<td>7.6%</td>
<td>3</td>
</tr>
<tr>
<td>Cultural understanding</td>
<td>5</td>
<td>7.6%</td>
<td>3</td>
</tr>
<tr>
<td>Business purpose (incentive travel)</td>
<td>4</td>
<td>6.1%</td>
<td>4</td>
</tr>
<tr>
<td>Social status</td>
<td>2</td>
<td>3.0%</td>
<td>5</td>
</tr>
<tr>
<td>Self- discovery</td>
<td>2</td>
<td>3.0%</td>
<td>5</td>
</tr>
<tr>
<td>Health and exercise</td>
<td>1</td>
<td>1.5%</td>
<td>6</td>
</tr>
</tbody>
</table>
The respondents were asked to choose only one of the motivation factors to be the most important push factors for taking cruise vacations. Table 7 showed that the main motivation factor was “Social gathering” (42.4%) and the second most popular motivation was “Escape form normal life” (28.8%). This result was slightly different from the conclusion drawn by conducted by Qu & Ping (1999), which stated that the most important motivation for taking cruise vacations was “Escape form normal life” and “Social gathering” was the second most important one. It indicated that nowadays Hong Kong cruisers preferred to take cruise vacations with family members, relatives and friends in order to share everything experienced on the trip with each other. This conclusion agreed with several researchers’ that cruise vacations provide good chances for them to foster their relationships in a short period of trip (Crompton, 1979; Mancini, 2004; Qu & Ping, 1999; K. Kim et al., 2006). Besides, “Escape from normal life” was still an important factor to motivate cruisers to take vacations. It showed that the statement of Qu & Ping (1999) was still applicable to the nowadays Hong Kong cruisers. They said that the Hong Kong cruisers lived under great pressure. Therefore, they would like to take cruise vacations for relaxation purpose. The least important motivation factors were “Beautiful environment and scenery” (7.6%), “Cultural understanding” (7.6%), “Business purpose (inventive travel)” (6.1%), “Social status” (3%), “Self- discovery” (3%), “Health and exercise” (1.5%).
### 4.3 Demographic characteristics

Table 8 Demographic characteristics

<table>
<thead>
<tr>
<th>Demographic characteristics</th>
<th>Frequency (N=66)</th>
<th>Percent (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Gender</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>30</td>
<td>45.5%</td>
</tr>
<tr>
<td>Female</td>
<td>36</td>
<td>54.5%</td>
</tr>
<tr>
<td><strong>Age</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18-24</td>
<td>32</td>
<td>48.5%</td>
</tr>
<tr>
<td>25-34</td>
<td>2</td>
<td>3.0%</td>
</tr>
<tr>
<td>35-44</td>
<td>10</td>
<td>15.2%</td>
</tr>
<tr>
<td>45-54</td>
<td>8</td>
<td>12.1%</td>
</tr>
<tr>
<td>55 or above</td>
<td>12</td>
<td>18.2%</td>
</tr>
<tr>
<td><strong>Marital status</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Single</td>
<td>34</td>
<td>51.5%</td>
</tr>
<tr>
<td>Married with children</td>
<td>28</td>
<td>42.4%</td>
</tr>
<tr>
<td>Married without children</td>
<td>4</td>
<td>6.1%</td>
</tr>
<tr>
<td><strong>Educational level</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Not educated</td>
<td>1</td>
<td>1.5%</td>
</tr>
<tr>
<td>Primary school</td>
<td>1</td>
<td>1.5%</td>
</tr>
<tr>
<td>Middle School</td>
<td>24</td>
<td>36.4%</td>
</tr>
<tr>
<td>Post secondary/ Diploma</td>
<td>14</td>
<td>21.2%</td>
</tr>
<tr>
<td>University or above</td>
<td>26</td>
<td>39.4%</td>
</tr>
<tr>
<td><strong>Occupation</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Self- employed</td>
<td>3</td>
<td>4.5%</td>
</tr>
<tr>
<td>Professional, Technical and related discipline</td>
<td>6</td>
<td>9.1%</td>
</tr>
<tr>
<td>Managerial/ Executive/ Administrative</td>
<td>13</td>
<td>19.7%</td>
</tr>
<tr>
<td>Government worker</td>
<td>2</td>
<td>3.0%</td>
</tr>
<tr>
<td>Customer service</td>
<td>3</td>
<td>4.5%</td>
</tr>
<tr>
<td>Student</td>
<td>19</td>
<td>28.8%</td>
</tr>
<tr>
<td>Retirement</td>
<td>10</td>
<td>15.2%</td>
</tr>
<tr>
<td>Others</td>
<td>10</td>
<td>15.2%</td>
</tr>
<tr>
<td><strong>Monthly household income (HK$)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Below $9999</td>
<td>32</td>
<td>48.5%</td>
</tr>
<tr>
<td>$10000- $19999</td>
<td>24</td>
<td>36.4%</td>
</tr>
<tr>
<td>$20000-$29999</td>
<td>6</td>
<td>9.1%</td>
</tr>
</tbody>
</table>
Seven variables, including gender, age, marital status, education levels, occupations, monthly household incomes, and household members were analyzed to understand the demographic characteristics of Hong Kong cruisers. According to the result which was listed in Table 8, there was almost equal number of male (45.5%) and female (54.5%). The majority of respondents were aged 18 to 24 (48.5%), while 45.5% of respondents were aged 35 or above and very few cruisers were age 25 to 34 (3.0%). Half of the cruisers were single (51.5%) and other half were married (48.5%). For those were married, 42.4% (out of 48.5%) of them had children and 6.1% without children. 60.6% of the cruisers had post secondary/ diploma/ university or above education, 36.4% had middle school education and only 3% had primary or below education. The occupations of most respondents were managerial/ executive/ administrative workers or professional, technical workers or government workers (31.8%), 28.8% of respondents were students and cruisers who responded others (15.2%) were clerks and housewives. 48.5% of the respondents had monthly household incomes of $9999 or below, 36.4% had $10000- $19999, 15.1% had
$20000- $49999. The majority of respondents had a household size of 3 to 4 (84.8%).

The result partly matched with the research which was conducted by Qu & Ping (1999). For the same part, respondents contained an almost equal number of males and females, majority of them with higher education level (middle school or above), and they were white-collar workers with middle size families. For the differences, respondents tended to be younger (18-24 VS. 18-44) than the result of Qu & Ping (1999), single slightly more than married and with lower monthly household income ($19999 or below VS. $20000 or above). Firstly, it showed that young people market is growing. People who age 18-24 might be students or workers, but they could join cruising. It might be because they joined with their family, the package rate became cheaper and they would like to try new things. On the other hand, the result reflected that cruise vacations were not only for upscale cruisers but also people who got middle or lower monthly income could afford cruise vacations and taste a sense of luxury. The result above matched with the statement of researchers that price reduction enabled younger people and groups with any socioeconomic status to access cruise vacations (Josiam, Huang, Spears, Kennon & Bahulkar, 2009, cited in Gorham & Rice, 2007; Vucetic, 2007). Therefore, people with different socioeconomic status, especially young people and family groups are the new potential cruiser markets.
4.4 PEST analysis on Hong Kong cruise industry Potential development

4.4.1 Political factors

4.4.1.1 Role of Hong Kong Government

Hong Kong Government has played the developer role of Hong Kong cruise industry. As the global cruise industry has grown rapidly, especially the huge demand in Asian counties, Hong Kong government would like to develop Hong Kong as a leading regional cruise hub (Hong Kong Tourism Board (HKTB), 2009a; Tourism Commission 2009). A number of policies, strategies were mainly implemented by Hong Kong Tourism Board and Tourism Council under the Hong Kong government and related departments inputted financial and human resources to enhance hardware and software facilities in Hong Kong for strengthening Hong Kong’s position. Hong Kong government also negotiated with the central government actively about the policies making mainlanders access to Hong Kong conveniently and create good relationships with cruise lines in order to attract them to deploy the cruise ships to Hong Kong and to be their homeport (The 2009-10 policy address). So, Hong Kong government played a very important role in the development process of cruise industry by giving fully internal and external supports.
4.4.1.2 Hardware development – Kai Tak cruise terminal

Kai Tak development plan was one of the ten major infrastructure projects which was announced in the 2007-08 policy address in 2007 by the chief executive of Hong Kong, Donald Tsang (The 2007-08 policy address). New cruise terminal project at Kai Tak was included in the Kai Tak development plan. Because of overuse of Ocean terminal and other container terminals, in order to satisfy the upcoming demand of cruise market and international cruise line companies, the first two berths, which will expedited for delivery, will be advanced from 2014-15 to within 2013 (Tourism Commission, 2009), will spend Hong Kong government $72 billion (Singtao, 2008). The further two berths and the tourism related facilities, such as hotels, shopping malls and conference facilities will be established in 2014-2015 (Tourism Commission, 2009). The purpose of separating two scenarios is to sustain its development as a regional cruise hub (Tourism Commission & Economic Development and Labor Bureau, 2004). Otherwise, Hong Kong will overtake by other competitors, such as Singapore, Malaysia and Thailand, Vietnam, etc. As many port expansion and investment projects have been undertaken by the above destinations (Singh, 2000). If the new cruise terminal is completed in Hong Kong, the port facilities can handle four cruise ships, including the new mega ships. More and more cruisers and cruise line companies will consider Hong Kong as one of their
destinations or one of the transit ports for shore excursion in their itineraries or even to be their homeport. More regional incomes and job opportunities can be generated, too.

4.4.1.3 Software development- Training, promotion, and cooperation with regions

Nowadays, the cruise industry has lack of specializes, such as professional agents, travel consultant, and middle management (Leung, 2006). It is difficult for agents with limited English language ability and limited knowledge to sell complex cruise products (Leung, 2006). As most of the promotion leaflets are in English version and most of the agents in Hong Kong only has secondary school education level without proper English training and formal cruise product selling training by the middle management (Leung, 2006). So, they can not explain the detail information to the customers properly. Customer dissatisfaction will be appeared and it might affect the whole cruise industry in Hong Kong. So, providing training courses to existing agents or people who would like to participant in cruise industry is needed to solve the problem. 32 cruise- related training courses, which are introduced and promoted by Advisory Committee on Cruise Industry (ACCI) in the website of Tourism Commission, offered to people who are interested in joining cruise industry in the future in different Universities and training institutes. Well- equipped agents with
cruise industry knowledge, English ability and customer service skills can match the needs and personalities of customers with the products in order to sell the suitable cruise products to them. Customer satisfaction, customer relationship and repurchase intention will be enhanced, too. The input of professional human resources will benefited the development of cruise industry in Hong Kong.

Hong Kong Tourism Board usually uses internet and international cruise trade shows to raise the recognition to cruise industry partners and promote Hong Kong as a regional cruise hub in Asia to the cruise line companies. For instance, the board introduces the multi-destination cruise itineraries along the South China coast within the website of Hong Kong tourism Board and official website of Cruise South China (refer to 4.4.4.2 for detail explanation). Also, the board arranged representatives to participate in 2008 China Cruise Industry Development Summit, the 1st Seatrade All Asia Cruise Convention, and Seatrade Cruise Shipping Miami in the recent years (Hong Kong Tourism Board, 2009a). The shows were powerful marketing campaigns that combined with exhibitions and conference programs. Booths and reception counters were set up during the show to introduce the profile of Hong Kong, such as existing and future cruise related facilities and strategic policies in Hong Kong to the potential cruise line buyers (different international cruise line companies operators). Outstanding conditions of Hong Kong could be shown as well as capture networking
and business opportunities to build good relationships with them. And valuable media coverage could be generated, too.

HKTB has collaborated with overseas tourism industry and cruise industry partners to introduce fly-cruise products to facilitate consumer demand, targeted Taiwan, Japan, India, Australia, the United States and the United Kingdom (Hong Kong Tourism Board, 2009a). According to the HKTB partner net research statistic (2010), these countries were the developing market to Hong Kong. The strategy could facilitate the outbound tourism of these countries and the number of fly-cruise passengers to Hong Kong. On the other hand, the board, which has built strategic partnerships with Mainland coastal provinces, included Fujian, Guangdong, Guangxi and Hainan in order to share port information, carry out the tourist attractions of provinces as well as promote multi-destination cruise itineraries in the official website (Hong Kong Tourism Board, 2009a; Hong Kong Tourism Board, 2009b). It can attract cruise line companies to consider develop new routes and potential cruisers to visit multi-destinations by referencing the information above. These strategies can establish consistent promotional strategies together, develop new markets together, create good relationships, generated coordination and cooperation between Hong Kong and overseas or between Hong Kong and neighbor costal regions. Win-win situations can be achieved, too.
4.4.1.4 Less restriction of visa application between countries

Foreigners come from 170 countries can visit Hong Kong without a visa/entry permit for a period ranging from 7 days to 180 days (Immigration department, 2010). So, the simple visa procedure can motivate foreign cruisers to visit Hong Kong.

Besides, there were some new measures which were announced by the Mainland government and Taiwan government to provide convenience to both Mainlanders and Taiwanese for traveling purpose since the political restriction has been loosened. Central government implemented the new measure within the Mainland and Hong Kong Closer Economic Partnership Arrangement (CEPA) to allow Mainland tour groups with “Taiwan Travel Permits for Mainland Residents” to travel to Taiwan via Hong Kong by taking cruise vessels homeporting (The Policy address 2009-10). On the other hand, Taiwanese hold a valid “Mainland Travel Permits for Taiwan Residents (MTP)” can enter Hong Kong and stay for up to seven days without entry-exit endorsement for the Mainland required (Immigration department, 2010).

The policies bring many positive factors to the development of Hong Kong cruise industry. Firstly, for the indirect benefit, the simple entry permits facilitate more and more Mainlanders and Taiwanese became willing to travel to the destinations, including Hong Kong as they can reach the places easily and travelers can visit different destinations in a short trip (mainland- Hong Kong- Taiwan).

Secondly, for the direct benefits, Mainland tour groups have to arrive to and depart
from Hong Kong. Regional incomes can be generated by pre- and post cruising tours
for mainland cruisers and business expenses, such as tariff, port charge of cruise lines
and expenditures by crews at Hong Kong. Thirdly, cruise operators launched relevant
tourism products after the new arrangement implemented (The Policy address
2009-10). The chief executive anticipated that there would be about 20 journeys from
Hong Kong to Taiwan, carry about 30 000 cruisers (The Policy address 2009-10).
Fourthly, except mainland and Taiwanese cruisers, Hong Kong and foreign cruisers
are attracted to join the multi-destination tours.

4.4.1.5 Good investment environment

Hong Kong, which is a cosmopolitan business, trade and financial hub, has many
outstanding conditions and policies that benefited cruise line companies who would
like to invest in Hong Kong. For example, Hong Kong has political stability, rule of
law and an independent legal system (one country, two system), 3rd low and simple
tax system in the world (only contains corporate tax and income tax), free market
principles (no barriers to trade, no restriction to investment, no foreign exchange
control), free movement of capital, talent, goods and information (Invest HK, 2009b).
Except the original excellent investment policies, a free trade agreement, CEPA,
grants easier access to Mainland China markets for Hong Kong-based service
companies (Invest HK, 2009b) was another attractive point for cruise line companies to invest in Hong Kong. As China is a big potential cruise market (Certron et al., 2006), cruise line companies are eager to expand their business to China and even Asia and allocate financial and human resources to Hong Kong. Star cruise group, Costa cruise line under Carnival Corporation are good examples. Furthermore, cruise centers established by travel agency, such as Hong Thai travel agency were set up for selling tickets and promotion purposes. So, good investment environment can attract more cruise line and travel agencies invest in Hong Kong and indicated that the development of cruise industry in Hong Kong are positive to them.

4.4.2 Economic factors

4.4.2.1 Renminbi revaluation

Renminbi revaluation can motivate mainlanders to travel in Hong Kong. It is because the exchange rate of Renminbi shift to Hong Kong dollars will be increased. The number of mainland tourists, even cruisers, consumption power of mainlanders will be increased, too. It will benefit the cruise industry, tourism industry, hospitality industry and retail industry directly.

4.4.2.2 Economic recovery

Potential customer may consider taking a cruise when they feel economically
secure (Centron et al., 2006). That meant if economy grow, cruise industry will grow, too. According to Financial Secretary’s Office (2009), Hong Kong Economy (2010) and the budget 2010-2011, Hong Kong economy is recovering from the economic crisis in 2009. A notable rebound is shown in Figure 1, Gross Domestic Product (GDP) was raised to 2.6% based on year-on-year growth rate. The total labor force and total employment were raised to 3.67% and 3.51% (Figure 2). The seasonally adjusted unemployment rate was decreased to 4.6% (Figure 3). And the private consumption expenditure was increased to 4.9% based on year-on-year growth rate (Figure 4). Besides, financial Secretary of Hong Kong, John C Tsang forecasted GDP growth of 4% in 2011 to 2014 (Hong Kong Economy, 2010a). These positive figures illustrated that the overall domestic sector is improved, labor market became stable, and consumer confidence is enhanced. The recovering economy can motivate more Hong Kong cruiser to take cruise vacations and benefits the development of cruise industry in Hong Kong.

On the other hand, even though the economic recovery pace of Mainland was faster than Hong Kong (The budget 2010-2011), it still came to good news that the big source of Hong Kong cruise market, who are mainlanders enable to afford the cruise related products and it would benefit Hong Kong cruise industry and economy.
Figure 1 Gross Domestic Product

Source: Hong Kong Economy (2010a)

Figure 2 Total labor force and total employment

Source: Hong Kong Economy (2010b)
Figure 3 Unemployment rate

Source: Hong Kong Economy (2009b)

Figure 4 Private consumption expenditure

Source: Hong Kong Economy (2009a)
4.4.2.3 Stable oil price

The effort has been paid by Organization of petroleum exporting counties (OPEC) and new oil supplies came from former Soviet Union, China, and other rest of the world has maintained the oil price between $25 to $28 per barrel (Centron et al., 2006). It save the oil expenditure of cruise line companies and keep the cruise packages with reasonable price. Over half of the respondents (53%) said “budget” was the major concern for joining cruise vacations and near two- third of cruisers (63%) also responded that “expensive ” was the main reason blocked them choosing cruise vacation (Leung, 2006). It indicated that the price of cruising product was very important to Hong Kong non- cruisers. In fact, current cruise package rate became cheaper than before because of the stable oil price (Centron et al., 2006) and competition among the cruise line industry (Chan, 2010). For example, a 5 days cruise vacation which across Hong Kong and Taiwan by taking Costa Classica with shore excursion activities provided by the tour guides, was just only cost about $3700 per adult cruiser. Reasonable price can attract more people with lower income level could able to afford it and joined the cruise vacations.

4.4.3 Social factors

4.4.3.1 Growing young people market

Based on the research conducted by Leung (2006), majority of respondents (91%)
who were Hong Kong residents aged 24-30 have thought to have cruise vacations.

Leung (2006) also found that cruise line companies started to target not only seniors
but also young people market, who age 30-40 could afford the cruise vacations in her
interview. The results indicated that young people market aged ranging from 24 to 40
is a potential new market for Hong Kong cruise industry.

4.4.3.2 Better lifestyle

Nowadays, Hong Kong people are seeking better lifestyle (PATA, 1995; Qu &
Ping, 1999). Since the economic condition has became better, Hong Kong people,
especially young people were willing to spend on high quality traveling products and
services (Leung, 2006). Thus, cruise vacation might be one of the luxury choices for
Hong Kong people.

4.4.3.3 Prefer cruise tour more than land tour

Hong Kong people have changed their travel mode as they have had much
experience on land tours (Leung, 2006). To them, land tours became less attractive
and other types of travel, such as cruise tour is a fresh travel mode. It is suitable for
young people who would like to try new things. Cruise vacation, which is different
from land tour package, is an all–inclusive package, providing 4-5 meals per day,
24-hour room services, berths and new on-board activities, exercise facilities, entertainment, attractive programs, and ship transportation without extra charges except shore excursion tours. Hong Kong people might think that cruise vacation is a sense of luxury, value for money and prefer cruise vacation more than land tour. Thus, Hong Kong people can contribute to Hong Kong cruise industry.

4.4.4 Technological factors

4.4.4.1 High technology of cruise industry

Cruise lines have applied the new technologies into their ships to encourage consumers to purchase the cruise products and increase their revenues as well as efficiency. For example, new transportation technology has used to build ships faster and sail faster (Centron et al., 2006) so that cruise line companies could ride on the rapidly growth of demand for cruise service. Besides, increasing size of cruise ships allowed ships to install various on-board innovative amenities, such as rock climbing on the deck, miniature golf course, extensible marinas, swimming pool with retractable glass roofs (on Queen Mary 2), video game consoles as well as Internet access 24/7 in every stateroom for e-mails checking (Dowling, 2006; Centron et al., 2006; Cartwright & Baird, 1999) in order to create new experience to younger and adventure cruisers. New itineraries and new destinations (such as Asia) will be added
so that the cruisers have more choices and the cruising area become larger (Cartwright & Baird, 1999; Josiam, Huang, Spears, Kennon & Bahulkar, 2009; Singh, 2000; Centron et al., 2006). Totally new experience, which is influenced by advanced and well-developed technology is created for first-time cruisers, repeat cruisers and especially the young cruisers who would like to try new things. So, high-technology is good for developing cruise industry in Hong Kong.

4.4.4.2 E-marketing for promotion

Nowadays, more and more people gain access to the internet and prefer searching information on the internet. Thus, a lot of cruise lines and cruise destinations used E-marketing method via cruise line companies’ official websites, cruise destinations’ official websites and social media, such as Twitter and facebook to attract more customers and business. HKTB established a cruise destination official website, named Cruise South China and co-operating with the four provinces (Fujian, Hainan, Guangdong and Guangxi). The board uploaded latest destination and travel information, tourists’ attractions port facilities and photos about Hong Kong and other regions, shared information within the platform via www.discoverhongkong.com/cruisesouthchina/. The new distribution method brings many advantages for developing Hong Kong cruise industry. Firstly, detail
information can be shown for cruise line companies to design new routes. Secondly, the website is linked to the website of HKTB and let more people to search related information (trip of multi- destinations) directly. Potential customers can get the latest notices and information anytime anywhere.
Chapter 5  CONCLUSIONS AND RECOMMENDATIONS

5.1 Conclusions

There is a great potential for developing cruise industry in Hong Kong and Hong Kong has potentials to be the leading regional cruise hub in Asia as Hong Kong has many positive factors on external environment based on the PEST analysis which suggested by Gibson (2006), used for analyzing the potential development of destinations’ cruise industry.

Meanwhile, this study provided essential and latest information on travel pattern, motivation factors, and demographic characteristics of Hong Kong cruisers as well as understood the potentials of cruise industry in Hong Kong. Hong Kong government, cruise line companies and travel agencies can use related information to implement the related strategies and gain competitiveness in the cruise market.

The PEST analysis showed that Hong Kong government paid much effort for enhancing hardware and software facilities to develop cruise industry. Convenient visa/permit system, good investment policies will attract cruise line companies to use Hong Kong as a base or homeport for targeting Hong Kong, China and even Asian market. Besides, cruise vacation is suitable for young people in Hong Kong who seek better lifestyle and preferred new travel concept and with increasing consumption powers after economic crisis. Cruise packages with reasonable price, e- marketing and
high-technological on-board facilities were the popular marketing strategies for targeting these market segments.

The study also found that the following travel patterns of Hong Kong cruisers. They preferred taking short-haul cruises with their family and friends. Booking via travel agencies for detail explanation was preferred as cruising was something new and complex to Hong Kong people. And most of the respondents would like to join cruise vacations again. So, local cruise market has great potentials to develop.

The core motivation factors for Hong Kong cruisers were “Social gathering” and “Escape from normal life”. With fast pace lifestyle and limited leisure time, Hong Kong people would like to capture the chance to gather with their families and friends and seek relaxation during cruise vacations.

After combining the result from the questionnaires and the information form the secondary data, the researcher identified the following facts. Firstly, Cruisers who aged ranging from 18 to 55 or above with lower to middle level monthly income level (below $19999) and with higher education level of middle school or above are growing new markets in Hong Kong. Young people and family are the groups included in the new markets while senior people market was no longer dominated the cruise market. The result matched with the statement by Josiam, et al. (2009), cited in Gorham & Rice, 2007 and Vucetic (2007) that price reduction enabled groups with
different socioeconomic status to access cruise vacations. On the other hand, mainlanders are the greatest potential market for Hong Kong cruise industry. Convenient enter- exit permit policies, Renminbi revaluation and faster economic recovery pace can motivate mainlanders to travel in Hong Kong. Extra marketing efforts should be targeted toward these new and potential markets.

5.2 Recommendations

Although there is a great potential to develop cruise industry in Hong Kong, recommendations and significant implications can be made from the result of the study. Firstly, public- private promotion should be developed. As Hong Kong people has less experience on cruise vacations than North America, partnership approach should be developed within the Hong Kong government, cruise line companies, and travel agencies for designing the promotional strategies together. For instance, as many people, especially young people prefer surfing on the internet, marketers can use free of charge promotional strategies, such as Twitter or facebook to upload photos, videos, online leaflet and discussion topics, interact with the potential markets, understand their interests, preferences, demographic characteristics, vacation attributes from the responds on the discussion board, highlight the advantages of cruising as well as attract more cruisers and potential cruisers to take cruise. Win- win
situation would be appeared among the cruise industry partners.

Secondly, further in-depth study with larger sampling size is recommended to be conducted for the cruise markets in Hong Kong in order to enhance the representativeness of the study. And the target respondents of the study may not only limit to local residents, but also mainlanders, the North Americans, Europeans and Australians, etc. These may be other potential cruise markets in Hong Kong and wait for other researchers to explore. Though the in-depth study, researchers can gain better understanding on travel pattern, motivation factors, demographic characteristics of cruisers and satisfaction levels with services provided by cruise companies. The research result will be useful for marketers of cruise line companies and cruise destinations to develop appropriate marketing campaigns and distribute suitable cruise products to each market segment.
Reference


Appendices

Appendix 1. Asia's cruising map

Source: Hong Kong Tourism Board (2009)
Cruise vacation questionnaire survey

I am a final year student of Sheffield Hallam University studying Tourism Management. For my dissertation, I aim to study the potential development of cruise industry in Hong Kong and try to understand more about the Hong Kong cruisers. If you are Hong Kong residents, aged 18 or above and have taken a cruise vacation before, I would like to invite you to spend a few minutes to complete this questionnaire. <All the collected data will be used for academic purpose only>

Thank you for your participation.

Part 1 General information related to cruise vacations (Please tick one only)

1. Are you traveling alone or with your companion in your most recent cruise vacation?
   □ Travel with families and relatives  □ Travel with friends  □ Travel alone

2. What is the length of your most recent cruise vacation?
   □ 2-6 days  □ 7 days or above

3. How many time(s) have you taken the cruise(s)?
   □ 1 time  □ 2-6 times  □ 7 times or above

4. How do you book your cruise vacation package in your most recent trip?
   □ Through travel agencies
   □ Through cruise lines directly (online or by phone)
   □ Through tour operators
   □ Through incentive companies
   □ Through international cruise associations (such as Cruise Lines International Association Inc., CLIA)
   □ Others (please state)_________

5. Would you consider another cruise vacation again?
   □ Yes  □ Probably will  □ No
Part 2 Reasons for taking cruise vacations (Please tick one only)

6. What is the main reason for taking a cruise vacation?
   □ Escape from normal life
   □ Social gathering
   □ Beautiful environment and scenery
   □ Cultural understanding
   □ Social status
   □ Business purpose (incentive travel)
   □ Health and exercise
   □ Self-discovery

Part 3 Demographic information (Please tick one only)

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<td>□ $40000- $49999</td>
<td>□ $50000 or above</td>
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<td>Number of household member</td>
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<td>□ 2 Persons</td>
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<td>□ 3-4 Persons</td>
<td>□ 5-6 Persons</td>
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<td></td>
<td>□ 7 Persons or above</td>
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The end. Thank you for your help.
你好！本人是 Sheffield Hallam University 修讀旅遊管理系三年級的學生，現正在進行一項關於香港郵輪旅客和香港郵輪業的潛力發展調查。如果閣下是十八歲或以上的香港居民及曾經乘搭郵輪旅遊，希望閣下能用兩分鐘填答以下問卷。所有資料只作學術用途，謝謝。（每題請選擇一個答案）

1. 在最近的一次郵輪假期，你跟誰人一起參加？
   □ 跟家人和親戚參加
   □ 跟朋友參加
   □ 獨自參加

2. 在最近的一次郵輪假期，你參加了多少天？
   □ 兩天至六天
   □ 七天或以上

3. 你曾經參加過多少次郵輪假期？
   □ 一次
   □ 兩次至六次
   □ 七次或以上

4. 在最近的一次郵輪假期，你如何訂購郵輪套票？
   □ 經旅行社
   □ 直接向郵輪公司訂購（包括經郵輪公司網上訂購或電話訂購）
   □ 經遊程承辦商
   □ 經獎勵旅遊公司
   □ 經國際郵輪協會（如 Cruise Lines International Association）
   □ 其他（請說明）_________________

5. 你會否考慮再次參加郵輪旅遊？
   □ 會
   □ 可能會
   □ 否
6. 甚麼是你參加郵輪假期的原因？
   □放輕鬆, 暫時忘卻現在的生活模式
   □聯誼 (包括跟家人, 親戚, 朋友)
   □欣賞美麗景色
   □認識到訪國家的文化
   □提高地位
   □獎勵旅遊
   □使用船上運動設施或參加有關課堂令身體健康
   □自我發現, 自我成長

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多謝你的幫忙！