



香港旅遊業議會  
TRAVEL INDUSTRY COUNCIL  
OF HONG KONG  
Incorporated with limited liability

IMPORTANT

**DIRECTIVE**

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**Code of Business Practice on Study Tours (revised edition)**  
**Resolution No. 161**  
**(Directive category: Outbound → Package Tour)**

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In order to enhance protection for tour participants of study tours, the Board decided at its meeting held on 8 May 2007 to issue the revised edition of the Code of Business Practice on Study Tours (see the enclosure).

This Directive supersedes Directive No. 147 and applies to study tours which are registered with the TIC on or after 1 June 2007.

BY ORDER OF THE BOARD OF DIRECTORS  
TRAVEL INDUSTRY COUNCIL OF HONG KONG

Joseph Tung  
Executive Director

Encl.

# **Code of Business Practice on Study Tours**

(revised)

## **1. Definition**

Any package tour which satisfies the following conditions is a study tour:

- (1) its major target participants are people under the age of 18; and
- (2) its major activities include language learning, education activities, cultural/academic/knowledge exchanges, skills training, enhancement of life experience, outdoor classroom/sightseeing activities for the purposes of broadening its participants' horizons, etc.

## **2. Regulations for study tours**

- (1) Registration of study tours with the TIC
  - (a) (i) Members shall register study tours with the TIC in a way similar to ordinary package tours, and shall provide the TIC with documentation issued by the receiving organisations or host organisations at the destination (e.g. ground operators, education institutions, universities and schools at the destination, etc) confirming that reception services will be provided for the study tours. Members shall also provide the TIC with information on the venues (including those for classes, activities and accommodation), schedules (including those for classes, activities, etc), etc of the study tours.
  - (ii) For study tours which stay at host families, members may file with the TIC information on the districts where the host families live when registering the tours with the TIC. Members shall then provide the TIC three days (excluding the departure day) before the departure of the study tours with such information as the exact addresses, contact telephone numbers and brief descriptions of members of the host families.
  - (iii) If the host families arranged by members do not live in the districts the information of which has already been filed with the TIC, and the tour participants' representatives (e.g. parents/guardians of tour participants or organisers of the tours such as schools in Hong Kong) do not accept such alterations, members shall handle the situation in accordance with rules regarding cancellation of package tours. (For details, please refer to Directive No. 143 concerning "cancellation of package tours for reasons beyond control" and the rules stipulated in the Code of Business Practice on Outbound Package Tours of the Codes of Conduct for Members concerning "cancellation and alteration [of package tours] for other reasons"; or

Attachment 1.)

- (b) After a study tour is registered with the TIC, if any of its arrangements (e.g. its receiving organisation or host organisation, itinerary, accommodation, school and course) has been altered, members shall immediately notify the TIC of such alterations.
  - (c) Registration of study tours may be exempted if they are deemed charter tours according to Directive No. 129 (please refer to Attachment 1). However, members shall file with the TIC information on such tours at least 48 hours before the departure of the tours.
  - (d) If members and organisers of study tours (e.g. schools in Hong Kong) are responsible for providing different services for the tours, members shall specify in their documentation filed with the TIC the services to be provided by each party.
- (2) Provision of comprehensive and accurate information for tour participants' representatives
- (a) Members shall provide comprehensive and accurate information on study tours for the tour participants' representatives. (Members may refer to Attachment 2 for the "Checklist of Important Components of Study Tours" (reference material) when compiling itineraries.)
  - (b)
    - (i) Information on accommodation stated in the itineraries shall specify the means/type (e.g. host families, dormitories, holiday camps, hotels, etc), room arrangements (e.g. room types, the number of people per room, etc) and correct address of the accommodation. The phrase "of the same grade" or words with similar meaning shall not be used in such information.
    - (ii) For study tours which stay at host families, members shall provide the tour participants' representatives three days (excluding the departure day) before the departure of the study tours with such information as the exact addresses, contact telephone numbers and brief descriptions of members of the host families.
    - (iii) If the host families arranged by members do not live in the districts the information of which has already been filed with the TIC, and the tour participants' representatives do not accept such alterations, members shall handle the situation in accordance with rules regarding cancellation of package tours. (For details, please refer to Directive No. 143 concerning "cancellation of package tours for reasons beyond control" and the rules stipulated in the Code of Business Practice on Outbound Package Tours of the Codes of Conduct for Members concerning "cancellation and alteration [of package tours] for other reasons"; or Attachment 1.)

- (3) Alteration of components of study tours
- (a) Arrangements of study tours shall accord with the information stated in the itineraries or provided for the tour participants' representatives by members.
  - (b) Before the departure of a study tour, if any of its arrangements (e.g. its receiving organisation or host organisation, itinerary, accommodation, school and course) has been altered, members shall immediately notify the tour participants' representatives and the TIC of such alterations.
  - (c) If the tour participants' representatives accept the alterations made to the arrangements of a study tour (e.g. its receiving organisation or host organisation, itinerary, accommodation, school, course), members shall request them to sign documentation for confirmation purposes. If they refuse to accept the alterations, members shall handle the situation in accordance with rules regarding cancellation of package tours. (For details, please refer to Directive No. 143 concerning "cancellation of package tours for reasons beyond control" and the rules stipulated in the Code of Business Practice on Outbound Package Tours of the Codes of Conduct for Members concerning "cancellation and alteration [of package tours] for other reasons"; or Attachment 1.)
  - (d) After the departure of a study tour, members shall immediately notify the tour participants' representatives and the TIC of any alterations in accommodation, including its means/type (e.g. host families, dormitories, holiday camps, hotels, etc), room arrangements (e.g. room types, the number of people per room, etc) and address. If such alterations are made for reasons beyond their control or at the request of the tour participants' representatives, members need not offer compensation; otherwise members shall offer 15% of the tour fare to the tour participants' representatives as compensation and such cases may be referred to the Consumer Relations Committee and/or the Compliance Committee. (For the definition of "reasons beyond control", please refer to Directive No. 136 or Attachment 1.)
  - (e) After the departure of a study tour, members shall handle alterations other than those concerning accommodation, including those in its receiving organisation or host organisation, itinerary, school, course, etc, in accordance with existing rules of the TIC. (For details, see the Code of Business Practice on Outbound Package Tours of the Codes of Conduct for Members concerning "material alterations to package tours for reasons beyond control of travel agents" and "cancellation and alteration [of package tours] for other reasons"; or Attachment 1.)
- (4) Optional/self-pay activities
- (a) Members shall provide consumers with a list of optional/self-pay activities before accepting their bookings for study tours.

- (b) The list of optional/self-pay activities shall contain a compilation date and information on all optional/self-pay activities, including:
  - (i) the fees and components of such activities (e.g. if the fees vary with the number of participants, members shall clearly specify as such); and
  - (ii) the conditions for such activities to be held, such as the number of participants needed and the time to be spent on the activities.
- (c) Before the departure of study tours, members shall ensure that the tour participants' representatives choose the optional/self-pay activities for the tour participants, and shall request them to sign documentation for confirmation purposes and pay the fees for the activities chosen.
- (d) Members shall not add any optional/self-pay activities to the itineraries or collect any charges after the departure of the tours.
- (e) Members shall allow the tour participants' representatives to choose freely whether the tour participants will join the optional/self-pay activities, and shall make appropriate arrangements for those tour participants who will not join.

(5) Tour-accompanying helpers

- (a) Members shall assign at least one tour-accompanying helper who holds a valid Tour Escort Pass issued by the TIC to each study tour. If the tour participants of a study tour are travelling on more than one tour coach, members shall assign at least one such tour-accompanying helper to each tour coach, except in such situations as when the tour participants are travelling on different means of transport because they are grouped with international students in classes or split into small groups for activities.

(For safety points to which tour-accompanying helpers who hold a valid Tour Escort Pass should pay attention, please refer to Attachment 3 for the "Safety Checklist for Package Tours" (reference material).)

- (b) Members shall specify in the itineraries the ratio of tour-accompanying helpers who hold a valid Tour Escort Pass issued by the TIC to tour participants.
- (c) If there are tour-accompanying helpers who do not hold a valid Tour Escort Pass issued by the TIC, members shall specify in the itineraries the ratio of such tour-accompanying helpers to tour participants and their scope of duties such as whether they are responsible for accompanying tour participants throughout the trip, or providing transfer or reception services for tour participants at the destination.

(According to the Guidelines on Study Tour Outside HKSAR issued by the Education and Manpower Bureau to schools, each study tour should be led by at least two adults, with each adult taking care of no more than

10 students. Please refer to Attachment 4 for details.)

(6) Inclusion of service charges in tour fares

Tour fares of study tours shall include service charges. Members shall not collect any extra charges from tour participants.

(7) Purchase of comprehensive travel insurance

(a) Members shall require all participants of study tours to purchase comprehensive travel insurance, and shall not allow those who do not purchase such insurance to join the tours.

(b) The comprehensive travel insurance policy concerned shall include such important areas as personal accident cover, medical expenses and emergency rescue service.

(c) If study tours have high-risk activities (e.g. bungee jumping, diving, water-skiing, skiing, mountaineering, horse-riding, outdoor survival activities, ballooning, parachuting, white-water rafting, off-roading, ice hockey, racing except on foot, etc), members shall not allow those who do not have insurance cover for such activities to join the tours.

(d) If the tour fare of a study tour includes comprehensive travel insurance provided by members for the tour participants, members shall inform in writing the tour participants' representatives of its scope of cover.

(8) Confirmation

(a) Members shall request the tour participants' representatives to sign a confirmation form for acceptance of all arrangements listed in the itineraries and for undertaking to observe all tour booking conditions.

(b) On the confirmation form, members may consider requesting parents/guardians of tour participants to authorise them to decide how to handle emergencies which might be faced by the tour participants during the trip. Members may refer to Attachment 5 for a sample of the confirmation form.

*Note:*

Apart from this Code of Business Practice on Study Tours, members organising study tours shall also comply with other relevant Codes of Conduct and Directives issued by the TIC. However, in the event that the regulations laid down in such Codes or Directives are different from those of this Code, the latter shall take precedence.

*Appendix:*

Attachment 1: I. Rules stipulated in the Code of Business Practice on Outbound Package Tours of the Codes of Conduct for Members concerning

- “cancellation and alteration [of package tours] for other reasons”
- II. Rules stipulated in the Code of Business Practice on Outbound Package Tours of the Codes of Conduct for Members concerning “material alterations to package tours for reasons beyond control of travel agents”
  - III. Directive No. 129
  - IV. Directive No. 136
  - V. Directive No. 143
- Attachment 2: Checklist of Important Components of Study Tours (reference material)
- Attachment 3: Safety Checklist for Package Tours (reference material)
- Attachment 4: Guidelines on Study Tour Outside HKSAR (reference material)
- Attachment 5: Confirmation form (sample)

## Attachment 1

- I. Rules stipulated in the Code of Business Practice on Outbound Package Tours of the Codes of Conduct for Members concerning “cancellation and alteration [of package tours] for other reasons”:

If a member cancels a package tour to any destinations (except within Guangdong province) prior to its commencement [not for reasons beyond his control], he shall notify his clients of the cancellation at least seven days in advance excluding the departure date. Failing that he shall make a full refund of all money received, and shall also offer to pay 15 per cent of the price of the relevant package tour but not exceeding HK\$1,000 to his clients as compensation within three working days.

If a member cancels a package tour destined for Guangdong province prior to its commencement [not for reasons beyond his control], he shall notify his agent and clients of the cancellation at least one day in advance excluding the departure date. Failing that he shall make a full refund of all money received, and shall also offer to pay 15 per cent of the price of the relevant package tour but not exceeding HK\$1,000 to his clients as compensation within three working days.

If a member makes a material alteration to a package tour after its commencement [not for reasons beyond his control], he shall not impose any additional charge to his clients as a result of an increase in operation costs; however, if such material alteration results in reducing the operation costs, he shall offer reasonable refund to his clients proportionate to such reduction.

- II. Rules stipulated in the Code of Business Practice on Outbound Package Tours of the Codes of Conduct for Members concerning “material alterations to package tours for reasons beyond control of travel agents”:

If a member makes a material alteration to a package tour prior to its commencement for reasons beyond his control and in which case it results in increasing the operation costs, he shall inform his clients without delay and shall give his clients the choice of either accepting the alteration with a reasonable adjustment in the tour price, or of receiving a full refund of all money paid within seven working days. However, if it results in reducing the operation costs, he shall offer a refund to his clients proportionate to such reduction in costs within seven working days.

If a member makes a material alteration to a package tour after its commencement for reasons beyond his control, he may impose any additional charge to his clients as a result of an increase in operation costs; however, if such material alteration results in reducing the operation costs, he shall offer a reasonable refund to his clients proportionate to such reduction in costs within one month after completion of the package tour.

- III. According to Directive No. 129, the itineraries and brochures of the following two types of charter tour are exempted from having to be registered with and approved by the TIC:

1. incentive tours the fares of which are paid in whole or in part by

2. employers/principals to act as an incentive for their employees/agents; and package tours that do not make use of media advertisements to openly and directly solicit customers.
- IV. According to Directive No. 136, “reasons beyond control” mean hostilities, political unrest, natural disasters, pestilences, bad weather, technical problems to transport, changes to the frequency or timetable of any means of conveyance by its operator without advance notice, strikes, industrial action, etc.
- V. According to Directive No. 143, members shall notify their customers as quickly as possible and offer them the following two options if a package tour is cancelled prior to departure for reasons beyond control (members may request their customers to make a decision within two weeks, counting from the day of notification of cancellation):
1. The customers may request the money paid by them, including the tour fare and such fees as Airport Passenger Departure Tax, fuel surcharges imposed by airlines and service charges imposed by members (visa charges shall be handled in accordance with paragraph 14 of the Code of Business Practice on Outbound Package Tours), to be refunded after paying a service fee no more than the amount stipulated in one of the following:
    - a. HK\$50, for package tours within Guangdong province;
    - b. HK\$150, for package tours which are within China but outside Guangdong province or which are bound for Zone 1 of Directive No. 151 (viz. Singapore, Malaysia, Thailand, Vietnam, Cambodia, Myanmar, Philippines, Taiwan, South Korea, North Korea, Indonesia and Brunei), and whose duration is five days or fewer; or
    - c. HK\$300, for package tours bound for any other areas.

In the event of transprovincial or transnational package tours, the service fee equals the higher/highest one pertaining to the above-mentioned area.

2. The customers may allow the members concerned to retain the paid tour fare and make use of the money to pay for other package tours or travel products which are to depart or to be used within six months (counting from the day of notification of cancellation) without having to pay any extra service fee. As regards any other paid fees such as Airport Passenger Departure Tax, fuel surcharges imposed by airlines and service charges imposed by members, members shall fully refund the money to their customers in seven working days. Visa charges shall be handled in accordance with paragraph 14 of the Code of Business Practice on Outbound Package Tours. Members shall also observe the following points:
  - a. Members shall not take back their customers’ franked receipts in order that they can enjoy the protection made available by the levy.
  - b. If the customers join another package tour and that package tour is also cancelled for reasons beyond control, members shall refund all the tour

fares retained to the customers within seven working days.

- c. If the customers join another package tour and that package tour is cancelled not for reasons beyond control, members shall refund the tour fare of that package tour to the customers within three working days. If notification of cancellation is made within seven days prior to departure, or if that package tour is guaranteed to depart, members shall compensate the customers in accordance with existing rules of the TIC.
- d. If the customers find that no package tour or travel product is suitable, or if they wish to change the decision of having the paid tour fare retained, they may request the money to be refunded after paying the above-mentioned service fee.
- e. The customers may make use of the tour fare retained on more than one occasion within the six-month period, and request the balance to be refunded within the six-month period after paying the above-mentioned service fee.
- f. The customers may make use of the tour fare retained together with their friends and relatives. However, the right to make use of the money is not transferable.

## **Checklist of Important Components of Study Tours**(Reference Material)

Members should try to provide consumers with as much information on study tours as practicable. Please refer to the following for such information.

### **1. Information on study tour operator**

- (1) Travel Agent's Licence number
- (2) Experience in organising study tours
- (3) Supporting services in Hong Kong and overseas
- (4) Scope of cover of comprehensive travel insurance purchased for tour participants

### **2. Programme**

- (1) Course
  - (a) Subject: theme and mode of instruction
  - (b) Teachers: teachers' qualifications and supporting staff
  - (c) Teaching hours: total hours, hours per week and timetable
- (2) Host organisation at destination
  - (a) Name
  - (b) Location
  - (c) Affiliation to professional bodies/educational institutions
  - (d) Campus on which the course is conducted: general information, address and location (e.g. urban or suburban district)
  - (e) Extra-curricular activities: instructors' qualifications, sightseeing/exchange/evening activities, fees required, optional activities and safety measures
- (3) Certificate
  - (a) Awarding institution
  - (b) Report on performance
- (4) Teaching arrangements
  - (a) Students: class size, age group and nationalities
  - (b) Medium of instruction

### **3. Accommodation**

- (1) Host families
  - (a) Selection criteria:  
E.g. association with local schools, with/without criminal record, etc.
  - (b) Background information:  
Family composition, number/age/occupation/language of family members, information on local guardian(s) and person(s) who will share a room with tour participants, contact telephone number, address, distance to school, transport means to school and provision of meals
- (2) Hall of residence
  - (a) Address and name
  - (b) Number of students: capacity, number of students in residence and number of students per room
  - (c) Facilities: room types, toilets, bathrooms, laundry rooms, kitchens, common rooms, and sports and recreation facilities
  - (d) Other services: meals, laundry services, etc.

- (3) Hotels/youth hostels
  - (a) Grade
  - (b) Address
  - (c) Room types and facilities
  - (d) Other facilities and services: e.g. toilets, bathrooms, laundry, meals, etc.

**4. Tour escorts and tour assistants**

- (1) Qualifications
- (2) Ratio of tour escorts/tour assistants to tour participants
- (3) Scope of duties of tour assistants: e.g. accompanying tour participants throughout the trip, transferring or providing reception services for tour participants at destination, etc.

**5. Transport**

- (1) Cross-boundary transport
  - (a) Means of transport
  - (b) Name of transport institution
  - (c) Grade
  - (d) Direct flight/transit flight
  - (e) Travelling time/arrival time
  - (f) Tax/fuel surcharge
- (2) Local transport

**6. Meals**

- (1) Types
  - (a) Full board
  - (b) Half board
- (2) Lunch
  - (a) Provided by host families
  - (b) Provided by schools

**7. Components not covered by tour fare**

**8. Handling of emergencies**

- (1) Contact information of host organisation, tour escort or local guardian(s) made known to tour participants
- (2) Emergency call numbers (e.g. local police stations, ambulance service, fire stations, etc)
- (3) Contact information of tour participants, host organisation, tour escort or local guardian(s) made known to parents/guardians of tour participants

**9. Others**

- (1) Travel documents and visas
- (2) Stay-behind arrangements
- (3) Vaccinations

**Safety checklist for package tours\* (Reference Material )**

Tour code: \_\_\_\_\_ Destination: \_\_\_\_\_ Date of departure: \_\_\_\_\_

Land operator: \_\_\_\_\_ Name of tourist guide: \_\_\_\_\_ Name of tour escort: \_\_\_\_\_

**A. TRANSPORT ARRANGEMENTS**

**(I) Tour coach** (The following items should be checked by the tourist guide before the tour group shows up; after the group has reached its destination, the tour escort should check again. If another tour coach is used during the trip, all the items should be checked again.)

|   | <b>Items for checking</b>  |  | <b>Appropriate action should be taken if the following are spotted:</b>                            |
|---|--|--|--|
| 1 | Conformity to legal requirements   | <input type="checkbox"/> Yes                     | <input type="checkbox"/> No; another tour coach should be requested                                |
| 2 | With vehicle licence   | <input type="checkbox"/> Yes (valid until _____) | <input type="checkbox"/> No; another tour coach should be requested                                |
| 3 | Physical appearance  | <input type="checkbox"/> Good / Acceptable       | <input type="checkbox"/> Too shabby to be acceptable; another tour coach should be requested       |
| 4 | No. of seats (as stated in relevant documents, such as the vehicle licence; seats for the driver and the tourist guide as well as jump seats not included) | _____ seats                                      |  |
| 5 | No. of people on board   | _____ people                                     |  |
| 6 | Windows of the tour coach  | <input type="checkbox"/> Undamaged               | <input type="checkbox"/> Safety-affecting cracks / Damaged; another tour coach should be requested |
| 7 | Ask the driver if safety checks on, e.g., the tread and air pressure of tyres, have been made in advance   | <input type="checkbox"/> Yes                     | <input type="checkbox"/> No; the driver should be reminded to do safety checks                     |
| 8 | Other matters that affect safety   | Details: _____                                   |  |

**(II) Tour coach driver and the way s/he drives** (Carefully monitored by the tour escort)

|   | <b>Items for checking</b>  |                              | <b>Either the driver should be asked to make improvement or appropriate action should be taken if the following are spotted:</b>                |
|---|--|------------------------------|---|
| 1 | The driver drinks alcohol during the trip  | <input type="checkbox"/> No  | <input type="checkbox"/> Yes; the driver should be stopped immediately  |
| 2 | The driver seems to be under the influence of alcohol or medicine  | <input type="checkbox"/> No  | <input type="checkbox"/> Yes; another driver should be requested  |
| 3 | The driver drives safely and obeys traffic rules   | <input type="checkbox"/> Yes | <input type="checkbox"/> No; the driver should be asked to make improvement, and if there is no improvement, another driver should be requested |
| 4 | The driver parks the coach in a safe place or uses a hand-free apparatus when using communications equipment | <input type="checkbox"/> Yes | <input type="checkbox"/> No; the driver should be asked to make improvement, and if there is no improvement, another driver should be requested |
| 5 | Other matters that affect safety   | Details:                     |   |

**(III) Charter vessel or other means of transport** (please specify if other means of transport is used: \_\_\_\_\_) (Carefully checked by the tour escort)

|    | <b>Items for checking</b>              |                                 | <b>Appropriate action should be taken if the following are spotted:</b>   |
|----|--|---------------------------------|---|
| 1  | Capacity (no. of people: _____)        | <input type="checkbox"/> Enough | <input type="checkbox"/> Overload; the tour group should not board the vessel   |
| 2a | No. of life jackets: _____             | <input type="checkbox"/> Enough | <input type="checkbox"/> Not enough; more life jackets should be requested; otherwise, the tour group should not board the vessel |
| 2b | Life jackets in positions easy to take | <input type="checkbox"/> Yes    | <input type="checkbox"/> No; warn the tour group  |
| 3  | Other matters that affect safety       | Details:                        |   |

**B. MEALS** (Carefully checked by the tour escort every day)

|   | Items for checking                                      |                               | Appropriate action should be taken if the following are spotted:                                      |
|---|---|-------------------------------|---|
| 1 | Hygiene   | <input type="checkbox"/> Good | <input type="checkbox"/> Bad; another dining place should be requested (Name of dining place: _____ ) |
| 2 | Dining place has emergency signs and fire escape routes | <input type="checkbox"/> Yes  | <input type="checkbox"/> No; report to the travel agent (Name of dining place: _____ )                |
| 3 | Other matters that affect hygiene and safety            | Details: _____                |   |

**C. HOTEL ACCOMMODATION** (The tour escort should carefully check the following items and remind the tour group to take note of instructions on emergency procedures. Whenever the tour group stays at another hotel, all the items should be checked again.)

|    | Items for checking  |                                    | Appropriate action should be taken if the following are spotted:  |
|----|---|------------------------------------|---|
| 1a | Maps showing fire escape routes / emergency exits, or emergency procedures posted | <input type="checkbox"/> Yes       | <input type="checkbox"/> No; the hotel should be asked to provide such information for the tour group (Name of hotel: _____ ) |
| 1b | Positions of such maps or procedures  | <input type="checkbox"/> Prominent | <input type="checkbox"/> Not prominent; remind the tour group (Name of hotel: _____ )   |

**D. OPTIONAL ACTIVITIES** (Bungee jumping, ballooning, water sports, etc) (Carefully checked by the tour escort)

|   | Item for checking                                 |                              | Appropriate action should be taken if the following is spotted:    |
|---|---|------------------------------|--|
| 1 | Approved and arranged by Hong Kong's travel agent | <input type="checkbox"/> Yes | <input type="checkbox"/> No; the activities should not be provided |

**The tour escort should consult the tourist guide or seek help from the land operator before taking any action. If necessary, the tour escort may report the situation to the tour operator in Hong Kong to seek instructions.**

Signed by tourist guide: \_\_\_\_\_

Date: \_\_\_\_\_

Signed by tour escort: \_\_\_\_\_

Date: \_\_\_\_\_

*\* Revised November 2006. For reference only. Travel agents are recommended to seek their own legal advice in Hong Kong and elsewhere where the outbound tours are to take place and modify the documents to address their particular requirements and concerns.*

## **Outbound tour operators' requests for partners outside Hong Kong<sup>#</sup>**

### **Hong Kong's tour operators should request their partners outside Hong Kong to:**

1. provide written information on their operation licence;
2. provide written information on their licensed area of operation;
3. provide written information on their duration of operation;
4. provide written information on the name and contact methods of their contact person / person-in-charge in case of emergency;
5. engage service providers which meet local legal requirements to provide services relating to means of transport, hotels, dining places, tourism and entertainment facilities, etc;
6. employ tourist guides who meet local legal requirements;
7. provide:
  - a. written information on the name of the tour coach companies;
  - b. written information on the average length of service of tour coaches; and
  - c. written confirmation that the specifications of the tour coaches to be used, and the credentials of the drivers and their schedule of work and rest, all conform to local legal requirements; and
8. ensure:
  - a. that written confirmation is provided by the land operators and service providers that they have purchased insurance policies to cover travellers in accordance with local legal requirements, and that written information on the coverage of the insurance policies and the amount insured is provided; and
  - b. that written confirmation is provided by the land operators to show that all service providers arranged by them, the services of which include meals, accommodation, tourism and entertainment facilities, charter vessels and other means of transport, etc, have taken out insurance in accordance with local legal requirements.

<sup>#</sup> January 2005 Version      For reference only.      Travel agents are recommended to seek their own legal advice in Hong Kong and elsewhere where the outbound tours are to take place and modify the documents to address their particular requirements and concerns.

## Guidelines on Study Tours Outside the HKSAR (Reference Material)

### Study Tours outside Hong Kong

This refers to activities designed and organized by schools in which students, in the care of the escorts appointed by schools, are arranged to make visits, exchange programmes, studies or services conducted outside the Hong Kong Special Administrative Region.

#### I. Planning and Preparation

- 1) All escorts in the study tour should have experience in leading students to take part in outdoor activities or overseas visits, with at least one of them being a member of the teaching staff of the school.
- 2) It is advisable that at least one of the escorts or participants has received training in first aid.
- 3) Each study tour should be led by at least two escorts, with each escort<sup>1</sup> taking care of no more than 10 students.
- 4) The capability of the participants<sup>2</sup> to take part meaningfully in the activity must be taken into consideration when deciding the destination, itinerary and duration of the tour.
- 5) Other factors including accessibility, language, condition of hygiene, accommodation and food of the place of visit should also be taken into account.
- 6) Places with potential hazards, such as political unrest, lax security, disease outbreaks, threats of earthquake or frequent occurrence of typhoon and flood, should be avoided.
- 7) Schools should draw up contingency plans in advance (e.g. procedures to deal with delay or cancellation of the tour in response to changes in weather conditions, political environment or transportation, and to handle withdrawals or accidents in the course of the tour) and inform the students and their parents of the plans. Schools should also set up an emergency contact system with the parents and the co-organizers/ host organizations to facilitate communication between these parties.
- 8) Information relevant to the itinerary, such as the addresses and telephone numbers of the lodging places, location of the local police stations, hospitals, clinics or first-aid units as well as the emergency call numbers en route, should be collected. Such information should be given to the parents and the responsible person of the school before the trip for emergency needs.

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<sup>1</sup> Escort(s) refer to school teacher(s)/staff and adult(s) appointed by the school, such as parents and alumni. They should have a good knowledge of the nature of the activity and of the problems likely to arise, and should undertake to take care of and supervise the students in the course of the tour.

<sup>2</sup> Participants include all members in the study tour.

- 9) Schools should organize a briefing session before the trip to inform the students, parents and the accompanying members of the details of the programme, duties of every party and rules and regulations to be followed by the students and parents as required by the schools. Students should be reminded of the need to follow the escorts' instructions and observe all the safety regulations throughout the trip.
- 10) Pre-tour training should be provided as far as possible, which should consider the following areas:
  - (i) orientation;
  - (ii) team-spirit;
  - (iii) discipline;
  - (iv) manners and behaviour;
  - (v) safety measures – protection against mosquito bites, fire precaution and escape, proper use of electrical appliances, food hygiene, road safety, protection of personal belongings, and what to do in case of lost or injury etc.;
  - (vi) immigration (customs) procedures;
  - (vii) luggage – clothing, medicine, money, etc.;
  - (viii) social customs and taboo of the place of visit;
  - (ix) points to note for travelling abroad;
  - (x) contingency plan.
- 11) It is preferable to arrange two students or more to live in a room when allocating accommodation. This will facilitate provision of support to fellow members. Once the accommodation arrangement is finalized, no student should be allowed to make any change without a proper reason to avoid causing confusion.
- 12) The school should study and comply with, as appropriate, travellers' health advice as detailed in the website of the Department of Health ([http://www.info.gov.hk/trhealth/e\\_HKTHS.htm](http://www.info.gov.hk/trhealth/e_HKTHS.htm)) regarding various health risks and advice as well as vaccinations.
- 13) The school should obtain a letter of consent and a health certificate from the parents of each student and also take note of the health condition of the students. If a participant is not feeling well before the trip, the school or the escort should persuade the participant to seriously consider his/her health condition and consult a doctor. The participant should not insist on joining the tour. If a participant shows symptoms of having contracted an infectious disease, it will be in the interest of the safety of the other group members that he/she should refrain from joining the tour.
- 14) The school should examine the travel documents of the participants as soon as possible and, if necessary, check their certificates of immunization. If their travel documents are not valid or the vaccination they have taken does not meet the requirements laid down by the place of visit, the school should remind the participants to get the necessary documents or health certificates as soon as possible.

- 15) Each participant of the study tour should prepare suitable travel and medical insurance.

## II. Points to Note during Study Tour

- 1) The escort should pay attention to the weather forecasts and news broadcasts of the place of visit. If there is any change in weather or other conditions, a contingency plan should be worked out as soon as possible.
- 2) The escort should have full knowledge of the health condition of each participant in order to determine whether specific participant(s) should not be allowed to take part in the activities of the day. He/she should take timely and appropriate action having regard to the circumstances of individual cases. The escort should also arrange for any sick member to see the doctor immediately and to take effective preventive measures according to the doctor's advice. If necessary, the escort should inform the parents and the school of the students' health conditions as soon as possible.
- 3) The escort should bring along with him/her the necessary safety equipment, for example, a first aid box, communications equipment (mobile phones), torches, etc.
- 4) Students should be divided into small teams. Each team is put under the care of an escort.
- 5) The overriding concern is the safety of the participants of the tour. Activities should preferably be conducted in one large group or in small teams. Lone ventures should be avoided as far as possible. Escorts should advise the participants to bring along with them copies of their travel documents for identification purpose where necessary. Moreover, if the students discover anything suspicious/ unusual during the visit, they should report it to their escort as soon as possible.
- 6) The participants should be fully briefed on the itinerary or details of the programme before the activities begin each day. After a day's activities, a meeting or a sharing session should be conducted to review the performance of the participants, the arrangement and the relevant safety measures, and to make preparations for the activities of the following day.
- 7) When travelling by any means of transport (including aeroplane, vessel, train or motor vehicle), participants should stay alert, obey the relevant safety regulations and acquaint themselves with the emergency escape routes or exits.
- 8) The escort should monitor the speed of the vehicle in which they are travelling to ensure it is within safety limits. He/she should remind the driver or the reception personnel of the importance of road safety when necessary. Moreover, the escort should be aware that the driver gets sufficient rest or works according to duty roster to avoid prolonged driving without breaks. It is not advisable to press ahead with the journey when the weather is bad or when the schedule is so tight.

- 9) After checking in a local hotel, the students should first find out where the “fire escape” is. They should also acquaint themselves with the exit direction, the escape route and the place of assembly in case of emergency.
- 10) The escort should carry with him/her information such as the full list of the group members and their respective hotel room number to facilitate assembly and checking of participants. The escort should also inform the participants of his/her room and telephone numbers to facilitate communication.
- 11) The escort should always remind the participants to take proper care of their travel documents and other personal belongings.
- 12) The participants should put the room key, a torch and other important items in a convenient position before going to sleep, so that they can get them at the first instance even in darkness.
- 13) The participants should pay attention to food hygiene and should not eat uncooked food and drink untreated water. They should not patronize unhygienic stall or restaurant.
- 14) The participants should wash their own clothing regularly and maintain good personal hygiene. They should avoid staying long in places which are crowded or have a high level of air pollution. If necessary, they should wear masks to reduce the risk of being infected by bacteria and viruses.
- 15) Each participant should carry a watch and take note of the time of assembly and return for all activities. They should arrive at the fixed assembly point punctually as instructed.
- 16) The participants should bring along with them long-sleeved shirts and long trousers, mosquito repellent and sun block, etc. to help prevent mosquito or insect bite and sunburn.
- 17) If a student needs to leave the tour temporarily, he/she must seek prior approval from the school through his/her parents. While he/she is away from the tour, the student must be accompanied by an appointed adult. The student must also inform the escort and other members of the tour where he/she wants to go, when he/she will return and how to contact him/her.
- 18) The participants must make sure they have sufficient rest so as to maintain physical fitness to engage in all the activities throughout the journey.
- 19) The escort must report regularly to the responsible person of the school in Hong Kong regarding the well being of the tour members and the progress of the activities in accordance with the agreed reporting mechanism. This is to keep the school informed of the latest movement of the tour, which will facilitate handling of inquiries from the parents.
- 20) Participants’ absolute safety should be accorded the highest priority and in no way be compromised. If there are happenings of certain incidents that warrant the involvement of local official authorities such as police, the escorts should act accordingly without any delay.

### III. Overall Considerations

- 1) In devising safety measures, the school should refer to the above guidelines and make necessary adjustments, having regard to the nature of the tour, the ability/condition of the participants and the environment of the place of visit. This is to strike a balance between the objectives of the activity and the principle of safety.
- 2) The school should make sure that all students, with or without disabilities, are given the same chance to participate in these study tours if the circumstances warrant. Moreover, the school should give those students with disabilities the assistance they required, for example, to prepare for them special “identification and S.O.S. cards” and to arrange the escort to keep their photographs and copies of their travel documents just in case they are needed.
- 3) The school should read carefully the EMB circular memorandum on the details and policy specifications of the Block Insurance Policy and follow the relevant guidelines and instructions strictly. Moreover, the school is requested to observe the following:
  - i) All escorts are to be appointed by the school. The person appointed as well as the programme, place and schedule of the visit must be approved by the school and recorded accordingly.
  - ii) If there is any query concerning the coverage of the Policy or if an accident occurs, the school should contact the insurance company at once.

Education and Manpower Bureau  
July 2003

**確認書**

(樣本)

本人\_\_\_\_\_ (團員家長 / 監護人姓名)，是\_\_\_\_\_ (團員姓名) 的家長 / 監護人，已經詳細閱讀、明白並接受遊學團行程表的所有資料，並承諾會遵守各項報團條款。

本人同意團員參加的自選 / 自費活動：\_\_\_\_\_

本人授權旅行社，在發生緊急事故的情況下，可以代本人決定及執行有關安排。

團員簽署：\_\_\_\_\_

家長 / 監護人簽署：\_\_\_\_\_

日期：\_\_\_\_\_

**Attachment 5**

**Confirmation form**

(Sample)

I, \_\_\_\_\_ (name of parent/guardian of tour participant), am the parent/guardian of \_\_\_\_\_ (name of tour participant), and have carefully read, understood and accepted all the arrangements listed in the itinerary of the study tour and undertake to observe all tour booking conditions.

The optional/self-pay activities which I agree to allow the tour participant to join are:

\_\_\_\_\_

I authorise the travel agent to decide and implement on my behalf such arrangements as may be needed in the event of emergencies.

Signature of tour participant: \_\_\_\_\_

Signature of parent/guardian of tour participant: \_\_\_\_\_

Date: \_\_\_\_\_