為香港旅遊業診診脈

A diagnosis for Hong Kong tourism

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(編按：議會主席何栢霆先生五月初為《經濟日報》撰文剖析香港旅遊業的前景與隱憂。該文經修訂後刊載於此，以饗讀者。)
(Editor's note: The following is a revised version of an article written in early May by TIC Chairman Mr Ronnie Ho for the Hong Kong Economic Journal, *in which the future prospects and potential setbacks for Hong Kong tourism were explored.)*

今年頭三個月，來港旅客合共四百九十三萬人次，比去年同期增加百分之十四點六，旅遊業因而呈現一片樂觀的氣氛。假如市況持續穩步上揚，全年旅客人數可望首度超越二千萬。

還未是樂觀的時候

表面看來，旅遊業的確像是已從去年的沙士危機中完全復元了。可不是嗎？以去年旅客人數跌幅最大的三個月來說，四月至六月的旅客人數共有一百六十五萬，比二零零二年同期急挫百分之五十七，但今年頭三個月的旅客人數已有四百九十三萬了。可是，假如詳細分析有關數據，市況卻似乎未如表面樂觀。

表一列出二零零三及二零零四年第一季十大市場的來港旅客數字。在這十個市場中，升跌各佔一半；升幅以中國內地市場最為凌厲，高達百分之三十七，但下挫得最嚴重的日本市場，跌幅竟也達百分之三十二點四之巨。**由此可見，現在高談旅遊業全面復甦似乎言之尚早。相反，如果再深入研究有關數據，將發現一個不少業者還未察覺的重大隱憂。**

已失衡的客源結構

由於一九九七年是旅遊業幾十年來經歷的首次重挫，而二零零三年又出現沙士這個突發因素，因此，為免影響對過去幾年旅遊業形勢的分析，我們將剔除這兩年的數據，只比較一九九六年和二零零二年的十大市場旅客人數(表二)。

Optimism has prevailed in Hong Kong's tourist industry recently: a total of 4.93 million visitor arrivals were recorded in the first quarter of this year, representing a rise of 14.6% over the same period of last year. And if this trend of growth continues, the total arrivals for 2004 may surpass 20 million for the first time.

Too early for optimism

Hong Kong tourism, on the face of it, does look as if it has fully recovered from the SARS crisis of last year, doesn't it? Let's take a look at the three months that recorded the steepest plunge in visitor numbers last year: April, May and June.

表一： 二零零三及二零零四年第一季十大市場的來港旅客數字

Table 1: Visitor arrivals of the top ten markets for the first quarter of 2003 and 2004

客源市場 Source markets	2003 ('000)	2004 ('000)	增長率 Rate of growth
中國內地 mainland China	2,130.8	2,919.1	+37.0%
台灣 Taiwan	554.7	481.8	-13.1%
日本 Japan	325.4	220.0	-32.4%
美國 USA	212.6	219.3	+3.2%
南韓 South Korea	120.8	112.1	-7.2%
英國 UK	98.7	103.7	+5.1%
澳洲 Australia	83.5	86.6	+3.6%
新加坡 Singapore	71.8	74.9	+4.3%
菲律賓 Philippines	68.3	64.1	-6.0%
加拿大 Canada	63.2	58.8	-6.9%

資料來源：香港旅遊發展局
Source: Hong Kong Tourism Board

表二： 一九九六及二零零二年十大市場的全年來港旅客數字

Table 2: Annual visitor arrivals of the top ten markets for 1996 and 2002

客源市場 Source markets	1996 ('000)	2002 ('000)	增長率 Rate of growth
日本 Japan	2,758.5	1,395.0	-49.4%
中國內地 mainland China	2,389.3	6,825.2	+185.7%
台灣 Taiwan	2,024.0	2,428.8	+20.0%
美國 USA	832.7	1,000.8	+20.2%
南韓 South Korea	473.0	457.4	-3.4%
英國 UK	444.7	380.0	-14.6%
菲律賓 Philippines	398.2	329.6	-17.1%
新加坡 Singapore	395.4	426.2	+7.9%
澳洲 Australia	345.3	343.3	-0.6%
泰國 Thailand	336.6	259.3	-23.1%

資料來源：香港旅遊發展局
Source: Hong Kong Tourism Board

從這些數據來看，有三點特別值得關注。首先，一九九六年時，日本是香港的第一大客源市場，市場佔有率為百分之二十一點三，但到了二零零二年時，市場佔有率卻只得百分之八點四。事實上，**日本市場從一九九六年的高峰連續七年滑落，至今仍未有絲毫起色。**

第二，在一九九六年時，中國內地是香港的第二大客源市場，市場佔有率為百分之十八點四，但到二零零二年時佔有率已激增至百分之四十一點二。自從「個人遊」在去年中開始實施後，二零零三年中國內地的市場佔有率更進一步攀升至百分之五十四點五。隨着開放「個人遊」的內地城市陸續增加，內地旅客的比重勢必越來越大。這顯示出**我們必須勉力恢復客源結構的平衡，使旅客的比重再趨多元化。**

第三，在一九九六至二零零二年期間，十大市場中只有四個上升，其餘六個都下跌，顯示**多個傳統的主要市場都出了問題。**請別忘記，我們已把受沙士嚴重扭曲的二零

The total number for these three months was 1.65 million, a dive of 57% over the same period of 2002, whereas the first quarter of this year already saw 4.93 million visitors. The real state of affairs of Hong Kong tourism, however, may not warrant the degree of optimism shown by many if we try to analyse the situation in depth.

Table 1 compares the visitor numbers of the top ten markets for the first quarter of 2003 and 2004. Half of these markets were on the rise and half on the decline. Whereas mainland China registered the biggest upsurge of 37.0%, Japan was down by an equally significant margin of 32.4%. **From these figures, it is obvious that there is hardly any room for us to grow complacent about recovery. Quite the contrary, if we are to dig deeper into the relevant statistics, we will discern a serious problem not yet known to plenty of industry members.**

Unbalanced composition of visitors

Since 1997 was the first time the tourism industry had ever suffered a grave downturn for decades and 2003 saw an utterly unexpected impact of SARS, we will exclude these two years from our analysis of Hong Kong tourism during the past few years and make a brief comparison of the performance of the top ten markets in 1996 and 2002 instead (Table 2).

Looking at these figures, we are particularly concerned about three aspects. First, in 1996, Japan was Hong Kong's number one source market, with a market share of 21.3%. In 2002, its market share shrank to 8.4%. As a matter of fact, **the number of Japanese visitors has been declining for seven consecutive years since its zenith in 1996, and there is no sign of a reverse trend even for now.**

Second, mainland China was the second biggest market for Hong Kong in 1996, registering a market share of 18.4%, which leapt to 41.2% in 2002. With mainland visitors allowed to travel to Hong Kong individually in mid-2003, its market share further jumped to 54.5% in 2003, which is expected to continue to grow as more and more mainland cities are to be included in the individual travel scheme. This evidently shows that **a better balanced composition of visitors from a wide range of diversified source markets is badly needed.**

Third, of the top ten markets, only four were up between 1996 and 2002 and the remaining six were all down, indicating that **a considerable number of our traditional markets have run into trouble.** Don't forget that we have already excluded the figures of 2003, which were seriously distorted by SARS. If

零三年數據全部剔除，假如包括在內的話，更只有一個市場倖免於跌勢：中國內地。

倘若客源結構持續失衡，長遠而言對旅遊業並非好事。香港是亞洲區內屈指可數的國際大都會，多年來對日本、南韓、美國、歐洲、東南亞、台灣、澳洲、中國內地等市場的旅客都有莫大的吸引力。可是，現在卻好像只剩下中國內地一個市場似的，香港究竟出了甚麼問題？**為甚麼多個主要市場一直未能回復一九九六年的高峰？**

無可否認，一九九七年後政府對旅遊業採取了積極扶持的態度，致力發展多個旅遊項目以提升香港的競爭力，例如可媲美好萊塢名人大道的星光大道、在維多利亞港沿岸上演的多媒體燈光音樂匯演幻彩詠香江、香港濕地公園，以及萬眾期待的迪士尼公園等。可是，**正因為香港增加了吸引力，但這些吸引力卻似乎未能吸引旅客來港，當局及有關方面才更需要正視問題**，竭力找出每個主要市場的旅客卻步的原因，然後對症下藥，主動與業者攜手合作，針對不同市場展開重點宣傳。

往中國旅遊的第一站

有一點我們或許不願承認，在國際旅客眼中，香港的吸引力可能已比不上中國內地了。內地旅遊業在這十多年間發展驕人，無論是交通設施、衛生環境，還是酒店水平、服務素質，無不大為改善。嚮往中華文化的西方旅客，現在無須再顧慮內地的旅遊配套設施不足，可以逕赴中國尋找文化去了。而追求新舊糅合、中西薈萃的高消費旅客，現在也漸漸把目光移往內地；例如在短短幾年間重新崛起的上海，就已變成很多旅客心目中一個「不得不去」的內地城市。

香港旅遊業要再現往昔的光輝，單靠本身一向引以為豪的景點恐怕未必足夠，**必須突破以往的慣性思維，放棄獨善其身的觀念，與珠江三角洲的不同城市結成夥伴，把分散在香港和珠江三角洲內的景點發展成一串串的旅遊景點鏈**。此外，我們也要致力成為國際旅客前往內地的旅遊

those figures are also considered, there is only one market that soared in 2003: mainland China.

In the long run, it would hardly be healthy for Hong Kong tourism to continue to have such an unbalanced composition of visitors. For many years, Hong Kong, a truly international city in Asia where few cities are on a par with it, has been a magnet for visitors from Japan, South Korea, the USA, Europe, Southeast Asia, Taiwan, Australia, mainland China and many other countries. But now it seems to be attractive only to mainland China. What has gone wrong with Hong Kong? **Why do so many of our major markets fail to bounce back to their 1996 peaks?**

There is no denying that the post-1997 Government has taken a proactive approach to enhancing the competitive edge of Hong Kong tourism by developing many a tourism project such as the Avenue of Stars, Hong Kong's answer to Hollywood's Walk of Fame; A Symphony of Lights, a world class multi-media light and sound show along the waterfront of the Victoria Harbour; Hong Kong Wetland Park; and the much-awaited Disney theme park. However, **just because Hong Kong has increased its attractiveness and yet such attractiveness seems unable to be translated into visitor numbers, the authorities and every concerned party should try to tackle the problem head-on** by identifying the cause of the downswing in each major market and developing promotional campaigns to target visitors from these markets, with traders actively engaged.

Tourism gateway to China

Much as we may be reluctant to admit that Hong Kong pales before mainland China in the eyes of international travellers, the reality is that may be true. As China's tourism industry has shown remarkable improvements during the past decade or so in transport, hygiene, accommodation and service standard, Western travellers drawn to Chinese culture may now go direct to its birthplace without having to worry about sub-standard tourism facilities. And those high-end travellers who are after a confluence of new and old, East and West may begin to set their eyes on the mainland. A case in point is Shanghai, which has reinvented itself in just a few years, has already become a must-go for many travellers.

If Hong Kong tourism is to blossom again, the attractions and sights that we used to be proud of may not be enough. **We have to break away from the shackles of our conventional thought of self-reliance and strive instead to partner the Pearl River Delta region to develop strings after strings of tourist attractions scattering around Hong Kong and the delta region.** Apart from that, we should also devote ourselves to becoming the tour-

中心，為他們提供貼身剪裁的專業旅遊服務，幫助他們打點前往內地旅遊的各種需要，以及在發生事故時立即提供支援。

換言之，**我們要爭取成為各地旅客前往內地旅遊的第一站**，以香港獨有的魅力，使他們先在香港勾留幾天，然後再啟程到內地去。不過，在推動香港達成這個目標前，我們急需開拓更多往內地的航班，使香港保持區內航空樞紐的地位，以免被曼谷、漢城、新加坡等區內對手後來居上。

增加往來中港的航班

事實上，往來中國的航空交通似乎正逐漸轉移到亞洲區內的其他航空樞紐，像新加坡、曼谷、吉隆坡、漢城及東京等，甚至似乎有移往區外的趨勢。由於這些城市的本土航空公司已有飛往中國主要大城市的航班，最近更接連宣佈加強往來中國城市的服務，香港的航空樞紐地位已受到威脅。

過去兩年，區內不少機場積極擴展，而往內地航班的增長率比香港國際機場更快(表三)。由東京、大阪、新加坡、漢城、曼谷前往內地的座位數目在過去兩年間分別增加了百分之一百二十二點四、百分之五十五點一、百分之

ism gateway to mainland China by providing international travellers with professional travel services tailored to their personal needs, ensuring everything is well-prepared on their trip to the mainland and delivering instant support should any accident happen.

Put simply, **we have to position ourselves as the first stop for China-bound travellers** and try to make them stay in Hong Kong with our mesmerising qualities for a few days before they start off the second leg of their journey on the mainland. Before pushing for this goal, however, we have to operate more flights to mainland cities in an effort to strengthen Hong Kong's position as an aviation hub of the region and to pre-empt possible overtaking of our position by regional rivals such as Bangkok, Seoul and Singapore.

More flights between HK and China

In fact, air traffic to and from China appears to be gradually shifting to other regional aviation centres such as Singapore, Bangkok, Kuala Lumpur, Seoul and Tokyo, or even beyond the region. The strength of Hong Kong as an air hub is already under threat as the home carriers of these cities have already operated flights to major cities of the mainland and news of more services launched by these carriers for more Chinese cities is repeatedly heard.

During the past two years, many airports in the region have expanded their capacity and services to the mainland have grown at a pace faster than Hong Kong International Airport (see Table 3). Whereas Tokyo, Osaka, Singapore, Seoul and Bangkok have increased their respective seat capacity to mainland cities by 122.4%, 55.1%, 40.2%, 36.7% and 31.1% over

表三：飛往內地的客運服務

Table 3: Service of passenger flights to mainland China

城市 Cities	2003/04 冬季 Winter of 2003/04		2003/04 冬季與 2001/02 冬季的比較 Comparisons of winter of 2003/04 and that of 2001/02 — 增長率 Rate of growth	
	座位 No. of seats	班次 No. of flights	座位 No. of seats	班次 No. of flights
東京 Tokyo	54,998	195	+122.4%	+156.6%
大阪 Osaka	28,451	116	+55.1%	+73.1%
漢城 Seoul	51,897	246	+36.7%	+46.4%
新加坡 Singapore	25,974	111	+40.2%	+40.5%
曼谷 Bangkok	22,182	95	+31.1%	+28.4%
香港 Hong Kong	110,612	593	+16.8%	+22.0%

四十點二、百分之三十六點七和百分之三十一點一，但反觀香港，增幅卻僅有百分之十六點八。

再者，香港一直缺乏由同一家航空公司提供的往返內地及世界各地的航班服務，這無疑削弱了香港作為國際及內地旅客經港往返內地的中轉站地位。因此，**香港如要保持航空樞紐的地位，首要工作是爭取營辦更多往來香港與內地城市的航班。**

小心可能出現的危機

旅遊業過於倚賴內地市場，這個隱憂已如上述，**另一個隱憂是內地一批批消費力極高的旅客紛紛成為全球旅遊業的新寵兒。**

內地旅客初次來港，可能是要親眼看看這顆東方之珠，領略一下中西薈萃的氣氛，以及體驗資本主義現代都市的生活方式。可是，當這些旅客越來越富有、眼光越來越開闊之後，來過香港一次後會不會再來呢？會不會把興趣轉移到比香港更現代化的世界大都會呢？這些問題或許還未迫在眉睫，但我們必須居安思危，以免將來措手不及。

最後，我們務須注意旅遊服務的素質，因為旅遊業最關鍵之處，就是令旅客稱心滿意。旅客即使吃的、住的、玩的都非常滿意了，但只要有一個旅遊從業員表現不濟，惹怒旅客，那無數人的努力就都白費了。議會自從二零零二年起，受政府所託，負起監管全港入境旅行社的重任。**這兩年來，議會的資源雖然沒有增加，但仍推出多項措施，像十四天百分百退款保證計劃等，以保障來港旅客，成績斐然。**可是，來港旅客人數不住增加，而**議會的經費卻主要來自外遊旅行社繳付的印花徵費，以出境的印花費津貼入境旅遊的監管，這是否公平？**議會工作大增，但資源卻不變，長遠下去難以支持。當局是否應積極處理這種異常狀況，務求對旅客的保障日趨完善？TIC

the past two years, Hong Kong lagged behind with a less promising 16.8% rise.

Furthermore, Hong Kong has long been handicapped by its lack of connectivity between China flights and flights to the rest of the world operated by the same airline, which would hamper Hong Kong's position as a principal point through which international and mainland travellers pass en route to and from China. **It is therefore vital that Hong Kong continues to strive for more traffic to and from China in order to maintain its primal status as a key air hub in the region.**

Watch out for setbacks

Over-reliance on the China market is a hidden problem for Hong Kong tourism, which has been mentioned above, while **an ever increasing number of high-spending mainland visitors becoming the new darlings of tourism markets around the globe** is another.

When mainland travellers set foot on Hong Kong for the first time, they may wish to see for themselves this Pearl of the Orient, enjoy the ambience of a fusion of East and West, and experience the life style of a modern capitalist city. As these travellers become wealthier and more sophisticated, will they re-visit Hong Kong? Or will they then turn to other metropolises that boast a more modern outlook than Hong Kong? This problem may seem to be distant at the moment, but we definitely need to prepare ourselves lest we should be caught off guard one day in the future.

Finally, we should pay special attention to service quality, for the crux of tourism is to make visitors happy. Even if visitors are happy with their meals, hotels, sightseeing tours, etc, one single member of the trade who has delivered sub-standard service would be enough to nullify the combined efforts of numerous people. Since 2002, the TIC has been entrusted by the Government to monitor all inbound travel agents operating in Hong Kong. **Despite the lack of additional sources of income, the TIC has managed to introduce a number of measures, such as the 14-day, 100% refund guarantee scheme, to protect visitors, with prominent results.** None the less, with fast expanding visitor numbers and **the TIC mainly deriving its income from the levy on outbound tour fares, is it fair to subsidise the monitoring of inbound agents with the outbound tour levy?** Its revenues being steady yet workload always on the rise, the TIC could hardly keep on like this forever. Isn't it time that the authorities took the initiative in addressing this anomaly to ensure that protection for visitors will improve steadily? TIC