

疫後旅業何去何從？

Where should the post-SARS industry go?

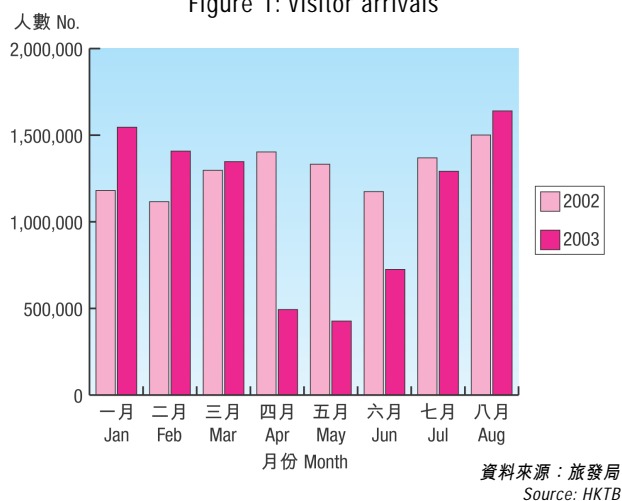
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在六年之內，香港旅遊業接連承受三次重挫：頭兩次分別肇因於亞洲金融風暴和九一一恐怖份子襲擊，最近這次困境則是非典型肺炎帶來的直接惡果，而且情況遠較前兩次嚴峻，入境和出境業同告陷落。話雖如此，對入境業來說，這次受挫或許不妨以急跌驟升來形容。

迅速反彈

由圖一可見，四至六月的訪港旅客人數平均下跌百分之五十七，但七月已微降百分之六，到八月更錄得約百分之十的增長。圖二的反彈模式也大體相類：三至五月的印花額平均急挫百分之七十六，而六至八月則只下降百分之十五而已。從這些統計數字看來，業界所受的衝擊並沒有事先擔憂的那麼巨大，而業績恢復到疫前水平的日子看來也已不遠了。

圖一：訪港旅客數字
Figure 1: Visitor arrivals



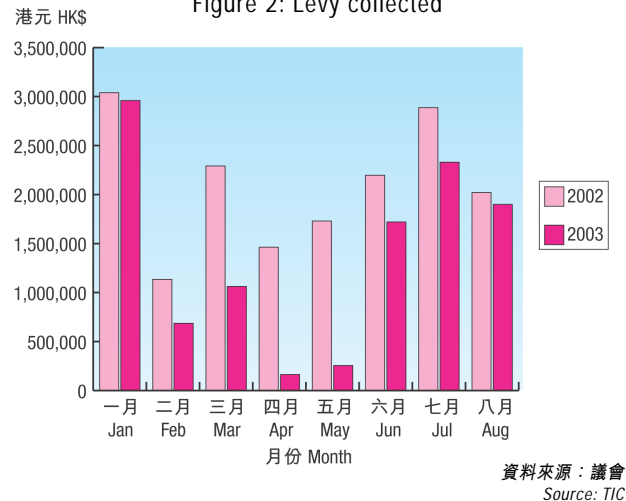
對於不知情的人來說，業績這般反彈好像有點不可思議，但實際上當可歸功於一項容許內地居民以個人身份來

In six years' time, Hong Kong's travel and tourism industry has suffered three major setbacks: the first two were due to the Asian financial crisis and the 9/11 terrorist attacks respectively, and the latest one is a direct consequence of SARS, whose impacts are far greater than the previous ones and on the inbound and outbound sectors concurrently. Nevertheless, business seems to rebound from the trough as quickly as it fell just a few months ago.

Quick recovery

Figure 1 shows that visitor arrivals dropped by an average of 57% for the three months to June, and then recorded a modest shortfall of 6% in July and finally an astonishing rise of about 10% in August. Figure 2 also illustrates a similar recovery pattern: for March to May, the levy collected plunged by an average of 76% year on year; and for June to August, it was down just 15% on average. From these statistics, it appears that the industry has fared much better than previously thought and a full recovery to pre-SARS levels may be just around the corner.

圖二：印花金額
Figure 2: Levy collected



To an uninformed observer, a recovery so quick may seem miraculous; but in fact it can largely be attributed to a new scheme, under which mainland residents would be allowed to

港旅遊的新措施。這項自由行措施是今年六月二十九日簽訂的《內地與香港關於建立更緊密經貿關係的安排》中的一個項目，原本只在東莞、中山、江門三市試行，並計劃在二零零四年七月一日前在廣東全省實施。不過，這措施後來卻加速推行：由七月二十八日起，除上述三市外，還加上佛山；接著由八月二十日起，再加上廣州、深圳、珠海、惠州等四個城市；而由九月一日起，連北京和上海的居民也可受惠於自由行的開放措施。至於廣東省，則由明年五月一日起在全省實施。

截至九月九日止，大約有三十萬內地居民已申請以個人身份來港旅遊。自從新措施推行以來，媒體不住報導內地旅客搶購珠寶、手錶等高級商品，甚至連股票、房地產也在搶購之列。內地旅客是否真的以好幾百萬元現金購下一個個住宅單位，這樣的報導雖然無法確定，但不可否認的是，大批手頭寬鬆的內地旅客四處逛街購物，的確有助香港人忘卻經濟困境，令事事順遂的心理再度出現，同時也的確能刺激零售市道。

帕雷托原理

《經濟學人》七月刊登的一篇文章認為，有兩類旅客的增長潛力特別巨大，一是五十歲以上的旅客，一是內地旅客。對全球旅遊業來說，內地旅客今後的增長可能很快速，但對香港旅遊業來說，內地旅客的增長現在就已很快速了。以二零零二年為例，香港約有六百九十萬名內地旅客，佔整體旅客的百分之四十一點二；至於今年的頭七個月，內地旅客有三百九十萬左右，佔整體的百分之五十四點三。圖三顯示內地旅客所佔的整體旅客百分比連年上升，而首度快速增長則在二零零二年一月一日撤除配額制度之後。現在實施了自由行措施，居住於全中國最繁榮、最富裕地方的市民可以自由來港旅遊，相信在未來好幾年內，內地市場會一直是香港旅遊業最重要的單一市場。

在這樣的情況下，香港是否已使出渾身解數，務求滿足這個市場旅客的需要呢？本地一個政黨八月委託的一項調查顯示，在北京和上海的一千名受訪者之中，約有半數

travel to Hong Kong individually instead of as members of tour groups. The scheme, stipulated in the mainland and Hong Kong Closer Economic Partnership Arrangement (CEPA) signed on 29 June 2003, originally planned to pilot three Guangdong cities, namely Dongguan, Zhongshan and Jiangmen, and would be extended to cover the whole of Guangdong province no later than 1 July 2004. It was, however, implemented in a much faster pace later: on 28 July 2003, on top of the three cities mentioned above, Foshan was also included, which was followed by four more cities, Guangzhou, Shenzhen, Zhuhai and Huizhou on 20 August, and then by Beijing and Shanghai on 1 September. From 1 May 2004, Guangdong province will also be covered by the scheme.

As at 9 September, about 300,000 mainland residents had already applied to visit Hong Kong under the individual travel scheme. Since the new measure has been in place, there is plenty of media coverage about mainland visitors snapping up luxuries, such as jewellery and watches, and even stocks and property. Whereas it is hard to ascertain whether flats worth millions of dollars were really bought, in cash, by visitors from across the border, it is unmistakable that large numbers of mainland visitors shopping around on their own with loose purse strings do help local people forget the economic woes, thereby making the feel-good factor return, and stimulate the retail market.

The Pareto Principle

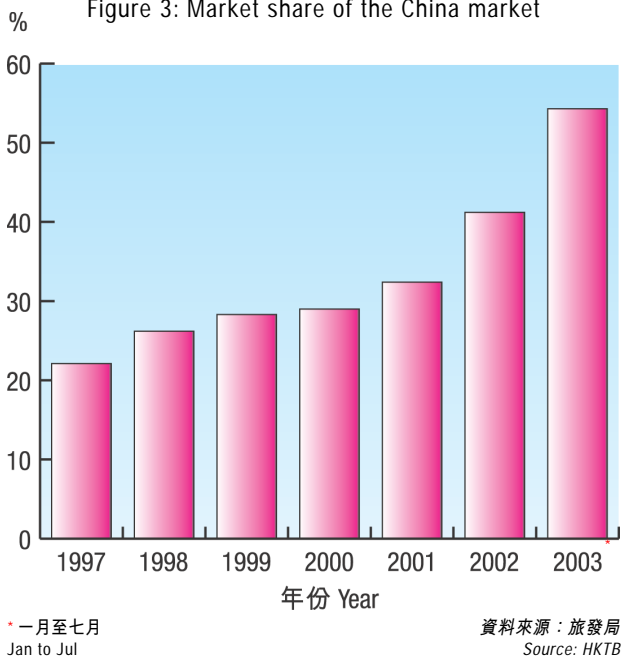
An article published in July by The Economist considers the over-50s and the Chinese to be two particularly enticing prospects for the industry. For the global market, Chinese tourists may be able to show strong growth in the long term, but for Hong Kong's tourism industry, their growth has already been very rapid: in 2002, visitor arrivals from mainland China were about 6.9 million, making up 41.2% of all arrivals; and from January to July 2003, there were about 3.9 million arrivals from China, which constituted 54.3% of total arrivals. Figure 3 shows that the market share of China has been increasing over the past years, with the scrapping of the quota system on 1 January 2002 turning into a first major boost to this market. Now that the individual travel scheme has been in place for residents living in the most prosperous and wealthy cities of China, it is beyond doubt that the China market will continue to be the most important single market for Hong Kong tourism for years to come.

In these circumstances, have we done whatever we could to tap the potential of this market? A survey commissioned by a local political party in August revealed that of the 1,000 respondents interviewed

表示在所居住的城市中，接收到的香港消費和潮流訊息並不足夠，而接近四成上海的受訪者更說來到香港後才知道香港旅遊部門推出的旅遊節目和優惠。

圖三：內地市場的佔有率

Figure 3: Market share of the China market



香港旅遊發展局是目前唯一負責推廣香港旅遊業的機構，二零零二年獲政府撥出超過港幣五億元為經費。事有湊巧，旅發局在香港總辦事處外共有十八個全球辦事處，而中國僅有的兩個辦事處正好在北京和上海。一名旅發局成員早前向報章表示，旅發局花在內地市場的宣傳費只佔整體推廣開支的百分之幾而已。如果真的是那樣的話，這裡或許就有一個活生生的「帕雷托原理」的例子了。帕雷托原理一般稱為「八十·二十法則」，本來指意大利百分之八十的土地由百分之二十的人口擁有，後來這原理的適用範圍不斷擴大，其中一個適用範圍指公司百分之八十的盈利由百分之二十的顧客身上賺取。由此而來的一個重要推論是：要增加盈利，最簡單的方法莫若把更多資源投放在能賺取最豐厚利潤的顧客身上了。當然，香港需要吸引世界各地的旅客，這看法沒有甚麼不妥；不過，香港用在各個市場的推廣開支看來也需要重新研究一下吧。

in Beijing and Shanghai, about half of them said that they did not have enough information on the latest trends and fashions in Hong Kong, and close to 40% of Shanghai respondents even remarked that they only learnt about events and discounts especially for tourists after arriving in Hong Kong.

At present, the Hong Kong Tourism Board (HKTB) is the only body tasked with promoting Hong Kong tourism and it received an annual government subsidy of more than HK\$500 million in 2002. Coincidentally, apart from its Hong Kong head office, it has 18 worldwide offices and the only two offices in China happen to be in Beijing and Shanghai. A member of the HKTB was recently reported as saying that only several per cent of the total promotion expenses were spent on the China market. If that is the case, we may have a telling example of the Pareto Principle here. Commonly known as the 80:20 rule, it originally described the phenomenon that 80% of the land in Italy was owned by 20% of the population and was later found to be valid in many areas as well. One such area is that companies earn 80% of their profits from 20% of their clients. One important corollary of the principle is that the simplest way to increase profits is to spend more resources on the most profitable clients. The argument that Hong Kong needs a more balanced composition of visitors of course stands, but perhaps some more thinking may also be needed as to how Hong Kong's promotion expenses should be allocated to different markets.

Know your customers

According to a definition adopted by the Small and Medium Enterprise (SME) Department of the World Bank, companies that employ up to 300 people belong to the category of SMEs. By this standard, Hong Kong may have just a handful of travel agents which are not SMEs. Just as flexibility being one of the strengths of SMEs is evident, lack of marketing research being one of their weaknesses is also evident. There are many reasons for this weakness, but lacking capital to do research on their own should be the principal one. Faced with a market which is getting more diversified and customers who are asking for more personalised services, travel agents which could not get rid of such a weakness would find themselves walking down a business path which is getting narrower.

It is almost without exception that when the disposable income of people has reached a certain threshold, they tend to become interested in travelling. The travel boom in mainland China is perhaps the most familiar example with Hong Kong's traders, but a similar boom can also be found in Russia and India. Inexperienced travellers are most likely to take packaged

熟悉顧客

按照世界銀行中小企業部的一項定義，凡僱用三百人以下的公司都屬於中小企業。以這標準來看，香港的旅行社大概沒有多少家不是中小企業。中小企業的一大長處雖然是緊貼市場變化，但缺乏市場研究卻同時是一大缺點。造成這缺點的原因有很多，但資金匱乏、難以自行研究應是主因。旅遊市場日益多元化，顧客又越來越希望能享用完全符合個人需要的服務，旅行社面對這樣的環境，假如不能解決上述的缺點，那麼往後的路可能會越走越難走了。

當人們的可動用入息超過某界線後，他們就會變得熱中於旅遊，這幾乎毫無例外。香港的業者對內地的旅遊熱可能最為熟悉，但同樣的熱潮也見於俄羅斯和印度。欠缺經驗的旅客起初多數會參加旅行團，但當他們的旅遊經驗逐漸豐富起來後，就可能不再滿足於事先安排妥當的旅行團，因為那表示他們的旅遊經驗和無數旅客一模一樣。換言之，經常出遊的旅客總希望自己的旅遊經驗獨一無二，難以被他人模仿。

這類旅客出門的次數一般比團體旅客多，而且價錢往往不是他們的主要考慮。為了要滿足他們的需要，「動態組團」的概念於是就日漸普及起來。簡單來說，動態組團就像點菜，旅客從菜單中選出喜歡的旅遊項目，包括航空公司、酒店、景點、活動等等，然後組合成一次行程。旅客既可親自聯絡各供應商，也可交由旅行社代辦。旅行社的工作當然不是僅僅訂機票和酒店而已，而是為每一個旅客提供切合個人需要的服務。

動態組團的一項困難是旅行社對顧客的瞭解並不透徹。經驗豐富的業者或許還可以捕捉到不時轉變的旅遊習慣和時尚，但捕捉不到也說不定呢。對外遊業者來說，抓緊旅客的喜好可能不是十分困難，因為他們和顧客畢竟住在同一個城市，說著同一種語言，擁有同一種文化背景。但入境業者卻未必那麼幸運了，特別是一向接待內地旅客的業者更是那樣。自由行措施現在已經啟動，越來越多自由行旅客會到了香港後才參加本地的一天團。究竟怎樣才能滿

tours at first, but when they have more chances to travel abroad, hardly would they be satisfied with tours which are pre-arranged for them, because that would mean sharing identical experiences with numerous travellers. In other words, experienced travellers always want to have travel experience which is unique and cannot be copied by others.

To cater to the needs of this kind of travellers, who usually travel more often than participants of package tours and whose primary consideration is rarely price, the concept of dynamic packaging has gradually gained momentum. Put simply, dynamic packaging is just like assembling an itinerary from an à la carte menu of travel components, which include airline, hotel, attraction, activity, etc. Travellers may either do it themselves or ask a travel agent to do it for them. The work of the travel agent is of course much more than just booking air tickets and hotel rooms; it has everything to do with providing personalised and tailor-made service for individual travellers.

One of many obstacles to dynamic packaging is that travel agents do not know what their customers really want. Veteran traders may be adept at catching changing travelling patterns and trends, and may be not. For outbound traders, grasping the preferences of travellers may not be too difficult since they and the customers they serve live in the same city, speak the same tongue and share the same culture after all. Inbound traders, especially those who have been providing services for mainland visitors, however, may be confronted with a much tougher job. Now that the individual travel scheme for mainland visitors has been effective, an increasing number of individual mainland visitors choose to come to Hong Kong and then join some day tours. How can traders understand their needs? In this respect, marketing research may help industry members to grasp the needs and preferences of travellers in order to design travel services which suit them exactly. Mainland tourists can now go to more than 20 countries and places, and Hong Kong has plenty of formidable rivals even for South East Asia alone. With its spending on research and development over HK\$10 million in 2002, perhaps the HKTB could provide more assistance for industry members?

Protection for tourists

Nine months before the Travel Agents (Amendment) Ordinance 2002, which empowered the TIC to regulate inbound agents, became effective in November 2002, the 100% refund guarantee scheme had already been introduced by the TIC to protect mainland visitors against dishonest retailers. Under the scheme, member agents must register those shops to which

足這些旅客的需要？要瞭解這些旅客的需要和喜好，從而為他們設計適切的旅遊服務，市場研究應可有所幫助。內地居民目前可以前往二十多個國家和地方旅遊，單以東南亞來說，香港就有不少勁敵。旅發局去年用於研究與發展的經費超過港幣一千萬元，或許在市場研究方面對業者能提供多些幫助？

保障旅客

二零零二年十一月，《2002年旅行代理商(修訂)條例》正式生效；但早在這之前九個月，議會就已推出「百分百退款保證計劃」，以保障內地旅客免受不良店舖欺騙。保證計劃規定，會員必須先向議會登記店舖資料，然後才可以帶團隊前往購物。獲登記的店舖必須承諾，假如旅客不滿意所購買的物品而於十四天內交還的話，就要全數退款。在截至二零零三年八月三十一日為止的一年內，議會共收到三百五十三個入境旅客投訴，其中三百二十一個投訴與購物有關。儘管超過百分之七十的購物投訴得以解決(有很多原因導致投訴無法解決，投訴人提供的資料不足就是其中之一)，但隨著越來越多內地旅客以個人身份來港，那就意味著百分百退款保證計劃沒有先前那麼有效了，因為他們無須參加任何旅行團，可以自由逛街購物。

香港沒有全面的消費者保障法例，因此旅客萬一購物被騙，要取回款項恐怕並非易事。即使受騙的旅客能夠循法律途徑取回款項，但他們還有心情繼續渡假嗎？即使有心情繼續渡假，還會再來港旅遊嗎？預防勝於治療，根除零售業的害群之馬必定遠勝於協助受騙旅客追回款項。議會只有監管旅行社的權力，因此警方、消費者委員會、經濟發展及勞工局都責無旁貸，必須認真處理旅客購物被騙的問題。

非典型肺炎在未來幾個月內會不會再度肆虐？雖然目前沒有任何專家可以確定地回答這問題，但九月中新加坡出現了一個非典型肺炎的新病例，似乎提醒所有業者，非典型肺炎或其他新的疾病都可能再次侵襲香港。居安思危，業者或許現在就應想想有甚麼應變計劃了。TTC



they intend to take their tour groups with the TIC. And the registered shops must undertake to fully refund to the tour members who are not satisfied with their purchases and return them to the shops within 14 days. For the year ending 31 August 2003, inbound visitors lodged 353 complaints with the TIC, and 321 of them were related to shopping. Although over 70% of the shopping complaints were resolved (insufficiency of information was one reason, among many, as to why a complaint could not be solved), the introduction of the individual travel scheme for mainland visitors means that the refund guarantee scheme may not be as effective as it was before since individual visitors no longer need to join any package tours and can therefore shop around on their own and buy from any retail outlets they like.

Hong Kong does not have any comprehensive consumer protection law. And as such tourists having been cheated by shops may find it difficult to have their money back. But even if they could get back their money quickly through some legal procedures, would they be in holiday mood? Even if they were still in holiday mood, would they return to Hong Kong? As prevention is always better than cure, getting rid of the black sheep of the retail industry is always better than helping tourists get back their money after they have been fleeced. The TIC being entrusted with monitoring the practice of travel agents only, the police, the Consumer Council and the Economic Development and Labour Bureau have every responsibility to take the problem more seriously.

Will SARS recur in the coming few months? Although no scientists could answer this question with any certainty at the moment, a new SARS case in Singapore confirmed in mid-September reminds every member of the industry that SARS or some other new diseases might strike Hong Kong again. Plan for the worst when the times are good. It is hoped that industry members will devise some contingency plans when they still have time to do so. TTC