

內地個人遊旅客對香港的益處

The benefit of mainland individual visitors to Hong Kong

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—— 零零三年七月，在《內地與香港關於建立更緊密經貿關係的安排》的框架下，為內地旅客而設的「個人遊」計劃正式推行。在這之前，內地旅客來港旅遊必須參加旅行團，但在這計劃下則可以單獨來港了。最初只有廣東省的四個城市試行計劃，但隨着適用範圍多次擴展後，計劃現已涵蓋廣東全省、北京、上海、天津、重慶，以及江蘇省、浙江省和福建省的九個城市。

計劃實施後，雖然傳媒不時報導個人遊旅客一擲巨萬購買奢侈品的小故事，但專門針對這類旅客而進行的深入研究卻不多見。因此，當政府於二零零五年四月把首次對個人遊旅客進行的量化分析報告提交立法會時，很多業者都十分關注，因為既可從中瞭解這些旅客對香港的經濟帶來甚麼效益，又可清楚知道很多內地旅客喜好的這種來港旅遊模式究竟對業界有甚麼好處。

自從計劃於二零零三年七月實施以來，直至二零零四年底為止，共有四百九十三萬個人遊旅客來港。單是二零零四年，就有四百二十六萬個人遊旅客，佔內地旅客全年總數一千二百二十五萬人的百分之三十四點八。不過，按香港旅遊發展局的資料顯示，在二零零四年的四百二十六萬個人遊旅客之中，百分之四十二點七，即一百八十二萬人，是即使沒有個人遊計劃也會以其他模式來港的。換言之，實質因為個人遊計劃而來港的旅客只有二百四十四萬人，即內地旅客總數的百分之十九點九。

現在讓我們深入看看這二百四十四萬名實質的個人遊旅客。當中有一百七十七萬人(百分之七十二點四)在香港過夜，六十七萬人(百分之二十七點六)不過夜。平均而言，個人遊旅客在港逗留二點七天，而非個人遊旅客則逗留五點一天。這結果一點也不令人意外，因為個人遊計劃使內

Introduced in July 2003 under the Closer Economic Partnership Arrangement (CEPA) between mainland China and Hong Kong, the Individual Visit Scheme (IVS) was intended to allow mainland visitors to travel to Hong Kong individually rather than as members of tour groups, as had been previously required. Initially, there were only four Guangdong cities piloted under the IVS, which has been progressively extended so that it now covers the whole of Guangdong province, Beijing, Shanghai, Tianjin, Chongqing and nine cities in Jiangsu, Zhejiang and Fujian provinces.

Although there were a large number of anecdotal stories in the media about the spendthrift way IVS visitors snapped up luxuries, in-depth analyses of this particular kind of visitors are largely lacking. As such, when the results of the first quantitative analysis of IVS visitors ever conducted by the Government were released to the Legislative Council in April 2005, many traders were eager to know how much economic benefit these visitors have brought to Hong Kong and how they can benefit from this new trend of travel preferred by many mainland visitors.

Since its introduction in July 2003, 4.93 million mainland visitors travelled to Hong Kong under the IVS as at the end of 2004; and 2004 alone saw 4.26 million IVS visitors, accounting for 34.8% of the total 12.25 million mainland visitors. However, according to the Hong Kong Tourism Board, of the 4.26 million IVS visitors in 2004, 42.7%, or 1.82 million of them would still have visited Hong Kong in other modes of travel even without the IVS. Therefore, the number of net visitors induced by the IVS was 2.44 million, or 19.9% of the total number of mainland visitors.

Now, let us take a closer look at those 2.44 million net IVS visitors, of whom 1.77 million or 72.4% were overnight visitors and 0.67 million or 27.6% were same-day visitors. On average, IVS visitors spent 2.7 nights in Hong Kong, compared with 5.1 nights for non-IVS visitors, which is hardly surprising as increased convenience made possible by the IVS is expected to raise the frequency of travel and thus shorten the average length of stay.

表一：內地旅客在二零零四年每次來港旅程的消費

Table 1: Mainland visitors' spending per trip in 2004

旅遊模式 Mode of travel	個人遊旅客的消費(港元) IVS visitors' spending (HK\$)	非個人遊旅客的消費(港元) Non-IVS visitors' spending (HK\$)
過夜 Overnight	3,305	4,908
不過夜 Same-day	1,644	820

地旅客更容易來港，因此來港的次數會增加，而每次逗留的時間卻反而會縮減。

表一顯示內地旅客在二零零四年每次來港的消費。和逗留時間相似，過夜的個人遊旅客在港的消費遠遠少於非個人遊旅客的消費。這是因為來港旅遊變得容易之後，個人遊旅客就無須在一次旅程中把所有喜歡的東西都一下子買下來。至於不過夜的個人遊旅客，他們的消費卻是不過夜的非個人遊旅客的兩倍，主要原因是後者大多數只是過境旅客而已。

從個人遊旅客的消費模式(表二)看來，很明顯，他們在香港最喜好的活動是購物；在二零零四年，他們合共花了港幣四十五億六千七百萬元來購物。對購物的喜好，或許正是所有內地旅客的特質，不管是不是個人遊旅客都一樣：以二零零四年過夜旅客在港的消費而言，美國旅客用於購物的百分比是百分之二十七點七，英國旅客是三十一點六，東南亞旅客是百分之四十七點九，台灣旅客是百分之五十二，而內地旅客則是百分之六十八。

最後要問一問的，是那二百四十四萬名實質的個人遊旅客，在二零零四年為香港帶來多少經濟效益呢？根據政府的估計，他們令香港的本地生產總值增加了百分之零點三六，即港幣四十五億四千萬元。那旅行社又有多少益處呢？在政府的報告中，有一個行業類別稱為「其他個人服務」，包括「旅遊代理」、「票務代理」、「本地運輸」和「雜項個人服務」。個人遊旅客在二零零四年對這個行業類別的增值額是港幣二億六千五百萬元。由於金額沒有再分成細目，當中的旅行社行業究竟有多大益處，那就難以估計了。

Table 1 shows the spending per trip by mainland visitors in 2004. Similar to the length of stay, overnight IVS visitors spent much less than non-IVS visitors since ease of travel for IVS visitors means they need not buy all the things they want in a single trip. Same-day IVS visitors, however, spent twice as much as same-day non-IVS visitors mainly because a large proportion of the latter were transit passengers.

Judging from the spending pattern of IVS visitors (Table 2), it is evident that their most preferred activity in Hong Kong was shopping, on which they spent a total of HK\$4,567 million in 2004. This preference for shopping is perhaps the most prominent feature of all mainland visitors, whether they travel under the IVS or not: in 2004, American overnight visitors spent 27.7% of their total spending in Hong Kong, British visitors 31.6%, Southeast Asian visitors 47.9%, Taiwanese visitors 52.0% and mainland Chinese visitors 68.0%.

Finally, how much economic benefit did the 2.44 million net IVS visitors bring to Hong Kong in 2004? According to the Government's estimation, they raised Hong Kong's GDP by 0.36%, or HK\$4,540 million in 2004. How much benefit did travel agents get then? In the Government report, there is a sector called "other personal services", which covers "tour agents", "ticketing agents", "domestic transport" and "miscellaneous personal services", and the contribution of the IVS to this sector was HK\$265 million in 2004. Since there is not any breakdown in this sector, the benefit of the IVS to the travel agent industry can hardly be estimated.

表二：每名實質的個人遊旅客二零零四年在港的消費

Table 2: Per capita spending by net IVS visitors in Hong Kong in 2004

消費類別 Spending category	消費(港元) Spending (HK\$)	佔總數的百分比(%) Percentage of total
購物 Shopping	1,872	73.2
膳食 Meals	358	14.0
住宿 Accommodation	159	6.2
其他 Others	168	6.6
總額 Total	2,557	100.0