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Strategy



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Executive Director's Statement

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The year 2003-04 presented extraordinary challenges to Hong Kong and its tourism sector, offering stark proof of the vulnerability of travel to negative world events, and providing an object lesson to the travel industry that success can never be taken for granted. And yet it was also a time of significant achievement, when our tourism industry bounced back from a major crisis with surprising vigour, and also scored a number of firsts. In the final quarter of 2003, record monthly arrivals were set on two occasions, and arrivals from the Mainland exceeded one million in a single month for the first time. The per capita spending by overnight visitors also increased to a new high of HK\$5,502 in 2003. This rise in per capita expenditure was largely attributable to an increased percentage of business visitors during the year, and higher spending caused by the pent-up demand to travel due to Sars.

Year 2003 began with record January and February arrivals, and ended in similar fashion, with a 5.8% second-half growth compared with 2002. During the second quarter, however, the outbreak of Sars sent visitor numbers into freefall, with the loss of 1.81 million visitors in April and May. Despite this dramatic slump, Hong Kong went on to welcome 15.54 million visitors in 2003, a total just 6.2% down on the previous year. Its V-shaped recovery was faster and more acute than anywhere else in the region, where annual arrivals slipped by as much as 20.4%, according to the World Tourism Organization, and its strong second-half growth was sustained well into 2004.

Hong Kong's rapid resumption of its position on the world tourism map was largely achieved through the Hong Kong Tourism Board's Global Tourism Revival Campaign. Comprising response, reassurance and recovery phases, the campaign culminated in the adoption of the HKTB's current *Hong Kong – Live it, Love it!* global brand marketing platform, which re-packaged the city's strengths to change perceptions and rebuild long-term awareness of Hong Kong.

The success of the Global Tourism Revival Campaign was underpinned by the consistent support of Government for our tourism sector, and a remarkable spirit of co-operation between airlines, hotels, travel agents, tour operators, restaurants, the retail trade and tourist attractions. This was manifested in unbeatable offers, upgraded products, enhanced levels of service and improved standards of environmental hygiene. Such collaborative efforts will be a pre-requisite for growth in our increasingly competitive global environment, and must be incorporated into any strategies aimed at securing the long-term future of our tourism industry.

對香港及旅遊業界來說，2003-04年度是充滿挑戰的一年，顯現了旅遊業面對全球不利事件時脆弱的一面，亦同時讓旅遊業界明白到，過去取得的成功並非必然。然而，香港旅遊業在這一年成就卓越，不但在經歷重大事故後迅速復元，更能在多方面刷新紀錄。在2003年最後一季，每月訪港旅客人次兩度創單月的新高，內地旅客更首次在單月內突破100萬人次，而在2003年，過夜旅客的人均消費亦增至5,502港元的創新水平。人均消費增加，主要由於在年內商務旅客增長，而且發生「沙士」事件期間，各地市場累積外遊需求，事件結束後旅客亦樂意增加消費。

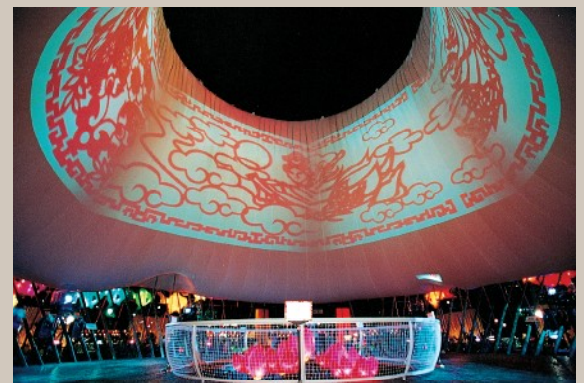
2003年香港旅遊業同時經歷起與落，1月及2月份訪港旅客人次與同期比較都錄得新高，在年底亦再次出現類似情況，下半年的旅客人次較2002年同期增長5.8%，然而「沙士」事件的出現，令第二季旅客人次大幅下滑，在4月及5月期間，香港損失181萬旅客。儘管業務遭逢突變，2003年全年訪港旅客仍達1,554萬人次，僅較2002年下調6.2%，香港旅遊業的V型反彈，比區內其他旅遊勝地都來得更快和更強勁，根據世界旅遊組織的資料，部分地區的全年旅客人次甚至下降20.4%，而香港在下半年的增長勢頭更持續至2004年。

香港能在全世界旅遊業版圖中迅速恢復領導地位，主要倚仗香港旅遊發展局(旅發局)在「沙士」事件後推出的「全球旅遊推廣計劃」，這計劃分應變期、鞏固期和復甦期，旅發局在第二階段推出的「香港 — 樂在此，愛在此！」全球品牌推廣平台，把香港的優勢重新包裝，改變旅客的觀感，重建旅客對香港長遠的認知，更把「全球旅遊推廣計劃」推至另一個高峰。

這計劃的成功，全賴特區政府持續支持香港旅遊業的發展，以及航空公司、酒店、旅行代理商、旅遊經營商、食肆、零售業界和旅遊景點等，發揮前所未有的團隊精神，包括推出難以抗拒的優惠，提升產品質素和服務，以及改善環境衛生水平等。在全球競爭日趨激烈的市場環境，這種團結一致的合作精神，是香港旅遊業持續發展的先決條件，在擬定任何策略時，亦必須融入這種力量，才能確保香港旅遊業未來長遠而穩健的發展。



Repackaging the city's strengths: the Hong Kong – Live it, Love it! global brand marketing campaign
「香港 — 樂在此，愛在此！」全球品牌推廣活動重新包裝香港的旅遊優勢



Total attendance of the month-long Mid-Autumn Lantern Celebration reached 758,000
為期一個月的「中秋綵燈慶全城」成功吸引758,000 觀眾參與

Equally noteworthy as the HKTb's own revival activities was the key role played by the Mainland in Hong Kong's rapid second-half recovery, the 24.1% increase in cross-boundary arrivals over 2002 considerably offsetting the postponement of travel plans by visitors from other markets. This sharp rise in Mainland arrivals was facilitated by further relaxations in travel restrictions, especially through the introduction of the Individual Visit Scheme (IVS). Implemented on a limited scale in July 2003 and expanded during the following 12 months to cover the whole of Guangdong province, Beijing, Shanghai and nine other cities, the scheme now permits individual visits to Hong Kong by some 158 million Mainland citizens. Bringing more than 1.6 million visitors to Hong Kong in the first half of 2004 alone, IVS is boosting immediate arrivals, while creating a sustainable platform for the long-term development of the Mainland market.

The Mainland will continue to drive travel to Hong Kong in other ways. As the first-choice destination for travellers from China, the leading international gateway to the Mainland and the region's premier aviation hub, Hong Kong will gain enormously from increases in outbound and inbound traffic. This two-way flow of visitors will be assisted by IVS and the Closer Economic Partnership Arrangement (CEPA), as well as the newly created Pan-Pearl River Delta (PPRD) agreement, which links Hong Kong, Macau and nine Mainland provinces in a joint-marketing partnership. Developments such as these significantly increase our access to the entire Mainland market, while offering countless opportunities to position Hong Kong as the anchor destination in China or regional itineraries.

Among Mainland consumers the HKTb will continue to target existing high-yield and high-potential segments. Increased spending and lengthier stays will be encouraged via specially tailored promotions and the results-proven Mega Events programme. We will also stimulate repeat visits by leveraging on IVS and promoting new infrastructure, such as the *Avenue of Stars* and *A Symphony of Lights*. Our research shows that Mainland visitors appreciate Hong Kong's cosmopolitan and sophisticated image, and we work hard to ensure that the wide range of attractions and activities available to them creates satisfying experiences for everyone.

Our experience-management activities are also aimed at deepening satisfaction, whether through the distribution of tailored information at Visitor Information & Services Centres and counters, or from the peace of mind assured by the HKTb-organised Quality Tourism Services (QTS) scheme. As for streamlining entry and exit procedures, the continued co-operation between the HKTb, the Central and Hong Kong SAR governments, immigration authorities and the travel industry ensures efficient cross-boundary processing at even the busiest periods.

除旅發局的全球推廣計劃外，同樣要注意的是，旅遊業能在下半年迅速復元，內地市場起了關鍵的作用，在年內，內地旅客人次較2002年增加24.1%，抵消了其他市場的旅客延遲訪港行程的影響。跨境旅客人次迅速上升，主要由於內地進一步放寬旅遊限制所帶動，特別是推出「個人遊」政策，這政策在2003年7月先以小規模推行，其後在12個月內逐步擴展至整個廣東省、北京、上海和其他9個城市，現時這些省市共有1.58億居民可以以個人身份來港旅遊，單在2004年上半年，已有超過160萬個人旅客來港，「個人遊」政策不但即時推動訪港旅客人次，更為香港長遠拓展內地市場建立一個持續發展的平台。

內地市場將會繼續從多方面推動旅客來港，香港作為內地旅客的首選旅遊勝地、進入內地的門戶城市，以及區內主要的航空交通樞紐，內地的出境和入境旅遊增加都會為香港帶來豐碩的成果，而「個人遊」政策、香港與內地的《更緊密經貿關係安排》，以及新成立由香港、澳門和內地9個省份攜手推廣的泛珠三角區域，都有助推動雙向旅客人流，這些發展讓我們能深入整個內地市場，把香港定位為內地或亞洲旅程中必到的城市帶來無限契機。

在內地的消費者中，旅發局將繼續重點吸引現時高收益和潛力優厚的客群。我們會繼續透過特別設計的宣傳活動，及舉辦已證實非常奏效的大型節目，鼓勵旅客增加消費和延長留港時間，我們更會把握「個人遊」政策，推介嶄新的項目如「星光大道」和「幻彩詠香江」，鼓勵旅客多次來港。我們的調查指出，內地旅客特別欣賞香港國際都會和多層次體驗的形象，我們會致力讓旅客享受多元化的景點和活動，令每一位訪港旅客都得到滿意的旅遊體驗。

我們提升旅遊體驗的活動，無論是透過在旅客諮詢及服務中心派發特別設計的資料，或是「優質旅遊服務」計劃令旅客更加安心及放心，都是以深化旅客的滿意程度為目標；我們亦會與中央及香港特區政府、處理出入境事務的部門，以及旅遊業界繼續緊密合作，簡化出入境手續，確保即使在最繁忙的時段，香港有效率的過關程序亦能為旅客帶來愉快體驗。

除內地市場取得成功外，同樣令我們鼓舞的是，其他主要客源市場亦回復實質增長。在市場復甦的過程中，旅發局致力維持各個客源市場的均衡發展，並集中推動16個佔訪港旅客9成以上的市場。這策略不僅審慎，更可加強旅客對香港的觀感，是一個充滿活力、多元化而具有國際都會魅力的旅遊勝地。



Trade missions visited the HKT's major markets during the Global Tourism Revival Campaign

旅發局組織業界代表團，在推動「全球旅遊推廣計劃」期間訪問多個主要市場



Olympic skater Michelle Kwan was among the many sporting celebrities who visited Hong Kong in 2003

多位國際名人在2003年訪港，包括奧運花式滑冰好手關穎珊



Santas line up to dispense seasonal cheer at the 2003 Hong Kong WinterFest 聖誕老人為「2003香港繽紛冬日節」增添節慶歡欣和喜悅

Equally encouraging as our successes in the Mainland, however, has been the return of Hong Kong's other key source markets to real growth. Throughout the recovery, the HKTB continued its efforts to maintain a balanced portfolio of visitors, by focusing on the 16 markets that provide more than 90% of arrivals to Hong Kong. This strategy is not only prudent, but it also reinforces perceptions of Hong Kong as a dynamic, diverse and cosmopolitan destination.

Renewed interest in the city following the roll-out of the *Hong Kong – Live it, Love it!* campaign in the latter part of 2003 contributed to a marked rebound in arrivals from around the world. The result was that by the second half of 2004, the majority of markets were exceeding 2002 growth levels, and though Japan and Taiwan had yet to achieve full recovery, the gap was steadily closing in both markets.

Ongoing strategies to further stimulate arrivals from Japan, Hong Kong's third-biggest market, include the *Hong Kong Shinhakken* ("Finding the New Hong Kong") campaign. Reinforced by media tie-ins, the campaign introduces new and little-known activities to Japanese visitors, and is proving particularly effective. The bright spot in North Asia is the sustained growth from South Korea, and the country will remain a priority market for the foreseeable future.

Elsewhere in Asia, India is performing well, especially in the business and family segments, while the Philippines and Thailand are growing strongly. Selective investment and a more targeted, cost-effective approach in other key Asian markets will continue to capture the rapid growth opportunities in intra-regional travel.

The positive trend in long-haul markets also persisted into the second half of 2004, with the US, the UK and Australia all delivering higher arrivals than in 2002. Recognising a growing trend towards multi-destination travel among long-haul visitors, the HKTB capitalises on Hong Kong's positions as a gateway and hub by packaging the city with complementary destinations in the Pearl River Delta, the Mainland and Southeast Asia.

Among high-yield and high-potential demographic segments, business travellers continue to make a major contribution to Hong Kong tourism. In 2003, the almost three million overnight business visitors represented some 31% of the total, and their HK\$6,300 per capita spending was around HK\$800 higher than the average. As 51% of business visitors are from non-Mainland markets, they also play a vital role in maintaining Hong Kong's balanced portfolio of visitors.

我們2003年底推出「香港—樂在此，愛在此！」宣傳活動，成功再次引起各地市場對香港的興趣，令訪港旅客人次顯著回升。至2004年下半年，大部分市場已超越2002年的水平，雖然日本和台灣仍未達致全面復甦，兩個市場的下調幅度已逐漸收窄。

為進一步刺激日本旅客人次，我們在這第三大客源市場推出持續推廣策略，包括「香港新發現」活動，這計劃配合廣泛的傳媒宣傳，向日本旅客介紹香港新穎又較鮮為人知的活動，成效非常顯著。南韓旅客人次持續上升，成為北亞地區的焦點，預計在可見的未來會繼續是香港首要的客源市場。

在亞洲其他地區，印度市場亦表現出色，商務及家庭客群尤其突出，菲律賓和泰國市場亦增長強勁，旅發局會在亞洲其他主要市場，以更針對性、更具成本效益的方針投放資源，繼續掌握區內旅遊快速增長的契機。

長途市場的增長趨勢亦延續至2004年下半年，美國、英國及澳洲的旅客人次均超越2002年水平。長途旅客傾向一程多站式的行程，旅發局亦把握這上升趨勢、香港作為內地的門戶城市及區內樞紐的定位，把香港包裝為珠江三角洲、內地及東南亞地區的配套旅遊勝地。

高收益及潛力優厚的客群之中，商務旅客對香港旅遊業作出重要貢獻，在2003年，約300萬商務旅客在香港逗留一晚或以上，約佔過夜旅客總數的31%，他們的人均消費約6,300港元，較一般旅客的平均消費約高800港元。由於51%的商務旅客來自內地以外的市場，這旅客層面對香港維持均衡客源組合尤其重要。

我們亦致力吸引更多旅客來港參加會議、展覽，及其他企業活動。在2003年，這些旅客的預算人均消費超過11,000港元，約是一般旅客的雙倍。這些會議、展覽和企業活動，能讓我們向來自全球的商界翹楚、業界專才、參與活動的人士及統籌機構，展示香港世界級的設施、服務及專才，旅發局會把握大型活動來港舉行的機會，如2005年舉行的「第88屆國際獅子年會」、2006年舉行的「國際電訊聯盟世界電訊展」、新的基建設施如「亞洲國際博覽館」落成，更會透過不同形式的刊物和公關活動，包括「香港—最佳會議之選」，強化香港作為亞洲最佳會議中心的地位。



More than 280,000 spectators attended the International Chinese New Year Night Parade
超過28萬觀眾夾道欣賞「新春國際匯演之夜」



January 2004 saw the launch of the nightly light and sound show, A Symphony of Lights
「幻彩詠香江」於2004年1月推出，每晚在維港上演燈光及音樂匯演

We also expend considerable effort in attracting visitors to conventions, exhibitions and other corporate events, whose intended per capita spending of more than HK\$11,000 in 2003 was roughly double that for all visitors. As conventions, exhibitions and meetings enable us to showcase Hong Kong's world-class facilities, services and expertise to local and visiting business leaders, event participants and organisers, the HKTB will leverage on such high-profile events as the forthcoming 88th Lions Club International Convention in 2005 and ITU Telecom World 2006, as well as forthcoming infrastructure, such as the AsiaWorld-Expo. We will also continue our above- and below-the-line activities, including the *Hong Kong – Meeting Your Choice* programme, reinforcing Hong Kong's position as Asia's centre of excellence for corporate events.

The HKTB encourages all business and corporate events visitors to extend their stays by combining a leisure element to a trip, to stimulate their spending, and to promote companion travel by partners and families. We co-operate overseas with airlines, hotels, credit-card companies and other partners in targeted promotions, while in Hong Kong our guidebooks and special-offer passports are aimed at enhancing satisfaction and stimulating the desire to return.

We also see great potential in family groups, and are encouraging the 46% of overnight vacation arrivals from the Mainland and 41% from all short-haul markets that are drawn from the segment to travel with their children and other family members. In this respect, forthcoming major tourism attractions, such as Hong Kong Disneyland, the Tung Chung Cable Car and Hong Kong Wetland Park, will clearly enhance Hong Kong's competitiveness and appeal, and create exciting new business opportunities among family visitors.

Our Mega Events programme remains a proven element in the HKTB's promotional platform to families, middle-aged and young couples, and young office ladies and men. Highlighting the four core strengths of shopping, dining, culture and heritage, and the city, harbour and green attractions that differentiate Hong Kong from other destinations, Mega Events reinforce Hong Kong's multi-faceted appeal, and will enable trade partners to repackage the city until our new tourism attractions come on stream from the second half of 2005.

With one HKTB study forecasting annual growth in the Asia-Pacific cruise market of up to 10% over 10 years, and the economic benefits to Hong Kong likely to reach HK\$3.3 billion by 2010, we will continue to build on the opportunities presented by this high-yield segment. International cruise lines consider Hong Kong a must-visit destination. At least 23 international ships are scheduled to call at Hong Kong in 2005, and several regional vessels are also based in the city.

旅發局鼓勵所有商務旅客及來港參與企業活動的旅客延長留港時間，在旅程中加入消閒活動項目，同時推廣與夥伴和家人結伴同遊的樂趣，我們在各地市場與航空公司、酒店、信用卡公司及其他業界夥伴合作，進行針對性的推廣活動，在本港則為這些旅客特別設計旅遊指南和旅客尊貴護照，務求提升旅客的滿意程度，並刺激他們重臨香港的意欲。

家庭旅遊亦具備優厚的發展潛力，約46%來自內地的過夜旅客，以及41%來自所有短途市場的過夜旅客屬於這個客群，旅發局鼓勵他們帶同子女及家人來港，在此，我們即將落成的旅遊設施，例如香港迪士尼樂園、東涌吊車及香港濕地公園必定能強化香港的競爭力及吸引力，在家庭客群之中營造源源商機。

我們舉辦的連串大型活動是各個推廣平台的重要元素，並針對家庭旅客、中年及年輕夫婦、年輕白領男女等客群積極推廣。這些大型活動能突顯香港的四項核心優勢，包括購物、美食、文化古蹟，以及都會、海港和郊野景致，正是這些優勢，令香港有別於其他旅遊目的地，不但鞏固香港不同層面的吸引力，更能讓業界夥伴在2005年下半年嶄新旅遊設施開幕前重新包裝香港。

旅發局的另一項研究顯示，在未來10年亞太區的郵輪旅遊市場會以每年10%迅速增長，至2010年可望為香港帶來高達33億港元的經濟收益，我們會繼續善用這個高收益客群帶來的商機。我們的研究亦指出，國際郵輪公司視香港為必到的旅遊勝地，現時最少有23艘國際郵輪落實在2005年訪港，多艘在區內往來的郵輪亦以香港為基地。

根據世界旅遊組織的資料，這個世紀的旅遊需求會以現時速度持續增長，並預計在1995至2020年間，全球的出境旅遊平均每年增長4.1%，單是內地出境旅遊的升幅會高達12.3%。該組織亦同時估計，到香港及內地的入境旅遊每年分別增長7.1%及7.8%，這增長趨勢為香港旅遊業創造無限契機，特別是配合短途旅客愈來愈傾向多次而較短時間的旅程，而長途旅客則傾向一程多站式的旅遊。



Andy Lau was among several Hong Kong stars who contributed to the HKTB's promotional efforts

劉德華及本港多位知名藝人鼎力支持旅發局推廣香港的工作



The cruise liner SuperStar Leo was welcomed back to its homeport, Hong Kong, in July 2003

獅子星號郵輪於2003年7月重返香港這個港口基地

According to the World Tourism Organization (WTO), demand for travel will continue its current surge well into the current century. While the WTO projects that between 1995 and 2020 global outbound travel will grow at an average 4.1% annually, it also estimates that departures from the Mainland alone will jump by 12.3%. WTO estimates also show inbound travel to Hong Kong and the Mainland rising by 7.1% and 7.8% per annum respectively. These positive trends should create boundless opportunities for Hong Kong's tourism industry, especially when allied to the increasing tendency in short-haul markets for more frequent, shorter-duration trips, and in long-haul markets for multi-destination travel.

However, competition from other regional destinations is intensifying, and the demands, destination preferences and travel patterns of consumers are constantly evolving. Meeting these challenges requires responsiveness and understanding, and we must put the difficult lessons learned from Sars to good use by quickly bringing to the marketplace new hardware, including infrastructure and support facilities, and software innovations, such as policies, services and security enhancements.

With growth robustly back on track, we now stand at the threshold of what may well turn out to be one of the most rewarding eras for our tourism industry. While we continue to devise strategies to capitalise on our exciting new infrastructure, the HKTB is also working with industry partners to maintain the existing momentum and sustain interest in Hong Kong. We are developing tactical promotions with complementary destinations, further enhancing our Mega Events and other destination-marketing initiatives, leveraging on the *Hong Kong – Live it, Love it!* platform to reinforce Hong Kong's image, boosting arrivals from high-yield segments such as business travellers and families, and raising the bar on quality service to assure a memorable experience for all visitors.

Travel is ultimately about people and, without the magnificent response of the entire community, Hong Kong would neither have weathered the storm so quickly, nor now be poised to achieve even greater success. My heartfelt thanks therefore go out to our partners in Government, the travel industry and the media for their consistent support, to the tourism-related trade, the business sector and the community at large, to our Chairman for her ceaseless championing of Hong Kong, and to our Board Members for their acumen and leadership. Last, but by no means least, I would like to acknowledge the dedication and professionalism of our staff, who gave their all to restore Hong Kong to its position among the world's preferred destinations during this most difficult and challenging of times.

Clara Chong

Executive Director

然而，香港與其他地區旅遊點的競爭日趨激烈，消費者的需求、對旅遊目的地的偏好和旅遊模式都不斷轉變。我們必須以靈活應變和設身處地的態度面對挑戰，並參考「沙士」事件汲取的經驗，盡快推出更多新的硬件，包括基建和配套設施，同時盡快提升政策、服務和保安等軟件的質素，以迎合市場需要。

復甦步伐持續，香港旅遊業收穫最豐盛的年代可能快將來臨，我們會繼續把握嶄新旅遊設施制定推廣策略，並與業界夥伴緊密合作，維持香港現有的增長動力，及保持旅客對香港的興趣。我們正與配套旅遊點合作發展策略性推廣活動，又會舉辦連串大型活動，並以「香港一樂在此，愛在此！」宣傳平台開展市場推廣工作，強化香港的形象，推動高收益客群，如商務和家庭旅客來港，更會不斷提升優質服務的標準水平，令每一位訪港旅客都有難忘的體驗。

旅遊是一項以人為本的行業，沒有整體社會的積極響應，香港不可能迅速克服惡劣的環境，也不能為爭取更佳的成绩作好準備。我謹此向政府有關部門的同仁、旅遊業界及傳媒、相關的業界，以至整個商界和香港社群致意，感謝各位一直以來的支持和協助；我更感謝主席晝夜不忘推動香港旅遊業發展，旅發局全體成員以敏銳的觸覺作出英明領導；更要感謝旅發局的全體員工，在香港最困難的時刻竭盡所能，並展示各位的專業精神，令香港再次躋身全球旅客首選旅遊勝地的領導地位。



總幹事

臧明華



Information and advice is offered at the HKT's Visitor Information & Services Centres and counters

旅發局的諮詢及服務中心，以及多個服務櫃台，為旅客提供多元化的旅遊資料和建議



A Tourism Host of the Tourism Orientation Programme (TOP) assists visitors to Hong Kong WinterFest

「香港繽紛冬日節」期間，「旅業英才」為訪港旅客提供協助和服務