

領道

Leadership



英明

Chairman
The Hon Mrs Selina Chow GBS OBE JP
主席
周梁淑怡議員

Chairman's Message

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A note of optimism might seem unexpected at the end of one of the most challenging years our tourism industry has ever experienced. Yet thanks to the strong, V-shaped rebound that followed the Severe Acute Respiratory Syndrome (Sars) crisis of the second quarter of 2003, it is the year's many achievements that now overshadow the difficulties.

Little more than two months after the outbreak was declared at an end, Hong Kong recorded its best August arrivals total on record, going on to celebrate outright monthly records in both October and December. As a result, Hong Kong welcomed 15.54 million arrivals in 2003, a remarkable achievement considering the 2.34 million shortfall between April and July, and just 6.2% lower than the record set in 2002.

Although devastating, the crisis also taught us some valuable lessons. It underlined the key role played by tourism as a pillar of the Hong Kong economy, and the rapid return to growth could not have been achieved without unprecedented co-operation between Government, the industry and the community. This teamwork was instrumental in the reinvigoration of Hong Kong tourism in the second half of 2003, and it will continue to be essential in coming years as the city reaffirms its position among the world's leading destinations.

Of course, Sars was only one of a number of negative factors to affect world tourism in 2003. Conflict, terrorism and economic instability all took their toll, and many leading tourism destinations registered drops in arrivals. However, a mid-year rebound that has continued well into 2004 indicates a return to real growth.

A key driver of the upsurge in arrivals to Hong Kong was Mainland China, where the ongoing relaxation in travel restrictions and an unquenchable demand for outbound travel continue to offer extraordinary opportunities for our tourism industry. Mainland visitors to Hong Kong in 2003 numbered almost 8.47 million, a remarkable 24.1% increase on the previous year, while first-half growth in 2004 was almost double that for the same period in 2002. Given continued recovery across world markets during 2004, Hong Kong should also benefit from the renewed overseas demand for travel to the Mainland, through its roles as the premier gateway to China and the region's leading aviation hub.

香港的旅遊業經歷前所未有的嚴峻考驗之後取得樂觀成績，令人喜出望外，2003年第二季爆發嚴重急性呼吸系統綜合症(「沙士」)事件後，香港旅遊業迅速V型反彈，這年取得的多項卓越成就已經把一切困難掩蓋。

事件結束後短短兩個多月，8月份的訪港旅客人次刷歷年同月新高，10月和12月份又相繼創出單月最高紀錄，總結香港在2003全年共接待旅客1,554萬人次，考慮到4月至7月期間訪港旅客下跌234萬，與2002年創下的紀錄比較，業績只略為遜色6.2%，成績已經非常突出。

雖然「沙士」事件對香港構成嚴重影響，亦為我們提供寶貴的學習課題，這事件再一次強調旅遊業是香港經濟的重要支柱，而旅遊業能夠迅速回復增長，全賴政府、旅遊業界和廣大社群給予前所未有的支持和合作，這份團隊精神，不單令香港旅遊業在2003年下半年再次充滿活力，在肯定香港為全球最受歡迎旅遊勝地的定位方面，更是不可或缺的元素。

當然，在2003年，「沙士」只是其中一個影響全球旅遊業的負面因素，國際衝突、恐怖主義及經濟持續不穩都令多個主要旅遊勝地的旅客人次下調。然而，香港旅遊業由2003年中開始回升，並持續至2004年，反映旅遊業重現實質增長。

中國內地是推動香港旅遊業快速復元的一股主要動力；內地持續放寬出境旅遊限制，加上人民對出境旅遊的殷切需求，為香港旅遊業帶來額外的機遇。2003年，內地訪港旅客接近847萬人次，較2002年大幅增加24.1%，而2004年上半年更幾乎是2002年同期的一倍。隨著全球旅遊市場在2004年持續復甦，海外旅客前往內地旅遊的需求再見顯著，香港作為通往內地的門戶城市及亞洲區內的航空交通樞紐亦會從中受惠。

事實上，香港與內地關係密切，為旅遊業帶來多方面的裨益。2004年6月成立的泛珠三角區域，9個省份加上香港和澳門，同意在10個範疇，包括旅遊業及運輸業方面廣泛合作；此外，「個人遊」政策推行至今，整個廣東省以及內地其中11個最富裕城市超過1.58億居民都可以個人身份來港旅遊，而這些政策以及其他機制均有助香港旅遊發展局(旅發局)把香港定位為內地旅客出境，以及海外旅客進入內地的「必經」旅遊勝地，無論內地的出境或入境旅遊，香港都能從中享受「雙贏」。



Golden Bauhinia Square is a popular attraction among Mainland visitors
金紫荊廣場是備受內地旅客歡迎的旅遊景點



Business visitors accounted for more than 30% of overnight arrivals in 2003
2003年在港逗留一晚或以上的旅客超過30%是商務旅客



The Revitalising Asian Tourism conference underlined Hong Kong's role as the Events Capital of Asia

「博鰲亞洲論壇」選擇在香港舉行推動亞洲旅遊業復甦的會議，更顯香港「亞洲盛事之都」的地位

Indeed, our tourism industry derives a broad range of advantages from Hong Kong's relationship with the Mainland. In addition to the creation of the Pan-Pearl River Delta (or "9 plus 2") grouping in June 2004, in which the nine provinces in the region, plus Hong Kong and Macau, agree to co-operate in 10 areas of activity, including tourism and transport, we also benefit considerably from the Individual Visit Scheme (IVS). This now permits individual travel to more than 158 million citizens residing in Guangdong province and 11 of the Mainland's most prosperous cities. These and other mechanisms enable the Hong Kong Tourism Board (HKTB) to position Hong Kong as the "must-stop" destination, both for outbound Mainland travellers and inbound travellers from overseas – truly a "win-win" situation.

However, as the objective of maintaining a balanced portfolio of visitors from all major markets and demographic segments remains a cornerstone of the HKTB's strategies and activities, I am gratified to be able to report that by mid-2004, arrivals from the majority of major source markets had returned to pre-Sars levels. This positive trend reflects the HKTB's strenuous efforts to rebuild confidence in Hong Kong and re-establish its reputation as a leading international destination.

The HKTB also targets high-yield and high-potential global market segments, including business travellers, convention and exhibition visitors, corporate meetings and incentive travel, families and cruise passengers. Business travellers, for example, not only reliably account for more than 30% of Hong Kong's total overnight visitors, but also spend significantly more than the average. Families, too, are increasingly targeted for their high potential, and an even greater return on investment is expected once such major additions to our tourism infrastructure as Hong Kong Disneyland and the Tung Chung Cable Car open from the second half of 2005 onwards.

Also opening at this time is AsiaWorld-Expo, a major venue adjacent to Hong Kong International Airport, which will attract more high-profile events to Hong Kong, cementing its reputation as the Events Capital of Asia and a world-class centre for conferences, exhibitions and meetings. As for the cruise segment, the HKTB is leveraging on existing ship calls, Hong Kong's magnificent harbour, and its role as a regional hub to position the city as Asia's leading cruise port.

Looking further to the future, the HKTB will capitalise on the regional trend towards multiple short-break trips, a pattern encouraged by increased affluence and leisure time. Our Mega Events programme and activities in regional markets are designed to encourage repeat visits and maintain top-of-mind awareness for Hong Kong over competing destinations. Mirroring this trend in long-haul markets is a growing preference for multi-destination travel, and the HKTB is co-operating with complementary destinations to develop packages and itineraries anchored on Hong Kong. Further opportunities should arise from new air services that position Hong Kong as the preferred stopover between Europe and Australasia.

Other exciting new opportunities will undoubtedly arise, yet these will equally be available to our competitors. Low-cost airlines, for example, will make overseas travel affordable to thousands of consumers, but may also by-pass regional hubs completely – as may also be the case with ultra-long-haul flights. And in a world where vacation choices are increasingly determined by fashion, Hong Kong will face constant challenges from "hot" new destinations.

然而，維持均衡客源市場和客群組合這目標，一直是旅發局制定政策和活動的基石。我很高興向各位匯報，至2004年中，香港大部分主要客源市場已回升至「沙士」前的水平，這正面的增長趨勢，反映旅發局重建業界對香港的信心、鞏固香港作為全球最佳旅遊勝地美譽的堅毅和努力。

旅發局亦同時針對全球高收益和潛力優厚的客群，包括商務旅客、來港參與大型會議、展覽、企業活動及獎勵旅遊的旅客、家庭和郵輪旅客。以商務旅客為例，他們佔過夜旅客超過30%，這比例一向非常穩定，消費亦顯著較一般旅客高。家庭旅客亦日益被視為發展潛力優厚的客群，隨著香港主要的大型旅遊項目，例如香港迪士尼樂園和東涌吊車陸續在2005年下半年開始啟用，預計來自這客群的投資回報將更為可觀。

鄰近香港國際機場的一項大型設施「亞洲國際博覽館」，亦會在這期間開幕，將會吸引更多矚目的大型活動來港，有助鞏固香港「亞洲盛事之都」的美譽，以及是舉辦世界級大型會議、展覽和企業活動的中心。至於郵輪客群，旅發局正把握現時訪港郵輪的航班、維多利亞港的瑰麗美景，以及香港作為區內重要航運樞紐的優勢，把香港定位為亞洲主要郵輪旅遊的港口。

展望未來，區內市場日益富裕，一般人士的消閒時間增加，這些因素都促使旅客安排多次而短程的旅遊模式，旅發局會把握這趨勢帶來的契機。我們舉辦的大型盛事及在區內進行的市場推廣活動，均鼓勵旅客多次訪港，同時要令旅客在眾多競爭對手中選擇旅遊點時優先注意香港。另一方面，長途市場的旅客則傾向選擇一程多站的行程，旅發局正與配套旅遊點的業界夥伴合作，設計更多以香港為門戶城市的套票和行程。此外，嶄新的航線服務，亦有助把香港定位為歐洲和澳洲、新西蘭及南太平洋地區之間最佳的中途站，為香港旅遊業帶來更多機遇。

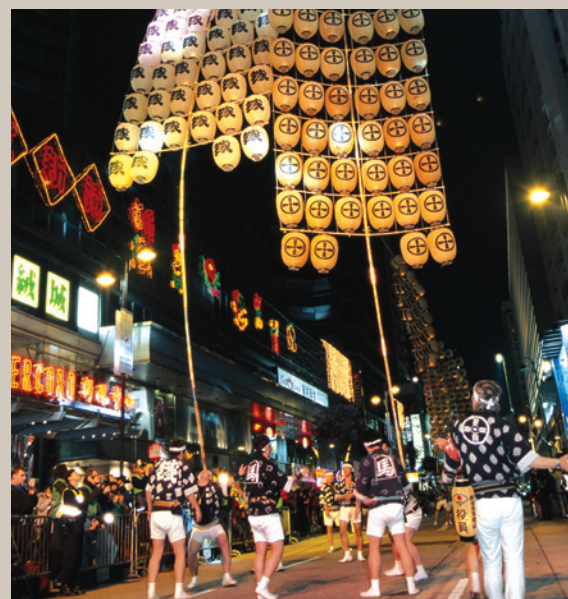
誠然新機會不斷湧現，但我們的競爭對手亦與我們一樣在這些契機中受惠，例如廉價航空公司及超長途航班的出現，一方面令更多消費者能負擔外遊，另一方面又可能繞過區內的交通樞紐。而且，在現時的市場環境，選擇渡假旅遊點愈來愈受時尚和形象影響，香港長期要面對新興旅遊「熱點」的挑戰。

面對挑戰，我們必須繼續投放資源興建新的旅遊景點和旅遊基礎設施，保存我們的文化古蹟和傳統，以及提升和維持香港旅遊業領導同儕的服務水平。我們要確保香港能超越每一位旅客的期望，向旅客保證香港這世界其中一個頂級的旅遊勝地，能為他們提供完美的優質卓越服務。



The multimedia *Strato-Fantasia* show was a highlight of the *Hong Kong Welcomes You!* promotion

採用多媒體技術的「香江明珠激光匯演」是「香港歡迎您！」推廣活動的重點節目



The *International Chinese New Year Night Parade* brought revelries to the streets of Tsim Sha Tsui

「新春國際匯演之夜」令尖沙咀一帶充滿熱鬧的賀歲氣氛



The *Mid-Autumn Lantern Celebration* was based around one of Hong Kong's most popular festivals

「中秋綵燈慶全城」向旅客推介中秋節這個重要傳統節慶

We must respond to these challenges by investing in new attractions and infrastructure, preserving our heritage and traditions, and developing and maintaining leading standards for our hospitality industry. We must ensure that Hong Kong surpasses the expectations of all visitors, and guarantee the impeccable standards of service that are required from one of the world's premier destinations.

To that end, the HKTB recently made significant enhancements to its Quality Tourism Services (QTS) scheme, tightening entry requirements and the monitoring of participating merchants, and strengthening complaints-handling procedures, with the aim of further assuring visitor confidence. The Government-funded and HKTB-managed Tourism Orientation Programme (TOP) also continues to significantly enhance our hospitality culture, while simultaneously creating a new generation of tourism professionals to lead the industry's future growth.

Earlier I mentioned the unprecedented co-operation between Government, the private sector and the community, which enabled Hong Kong to emerge from last year's crisis stronger and more united behind its tourism industry than ever. Indeed, as the majority of key source markets have now returned to growth, Hong Kong is in an even more advantageous position to build on the opportunities created by the positive global and regional environment, and the city's wealth of new tourism infrastructure.

The Hong Kong Tourism Board will continue to work responsively, innovatively and flexibly, while maximising opportunity, minimising risk and preparing for all contingencies – an essential *modus operandi* if Hong Kong is to achieve its projected goal of joining the ranks of the world's top five tourism destinations. This is no easy objective, but given the widespread support for tourism and for our efforts to spread the culture of hospitality throughout the community, I believe that it is not only attainable, but that we are poised to embark on what will prove to be the most challenging, exciting and rewarding era ever experienced by our tourism industry.

In spite of the challenges and the setbacks of 2003, I am proud to be able to reflect on our achievements with considerable satisfaction. In doing so, I wish to acknowledge the Government's steadfast support for Hong Kong's tourism industry, and the magnificent spirit of co-operation shown by our industry partners. My appreciation also goes out to fellow Members of the Board, for their wise counsel, vision and guidance. And, as ever, my thanks go to the staff of the HKTB, in Hong Kong and overseas, for their unwavering efforts and their outstanding commitment, not only to revive our tourism industry from the doldrums of our adversity, but also to maintain our position as a leading destination in Asia and in the world.

The Hon Mrs Selina Chow GBS OBE JP

Chairman

為達致這個目標，旅發局推動「優質旅遊服務」計劃進入新里程，包括提高申請認證的要求和密切跟進參與的商號，強化投訴處理程序，務求進一步提升旅客對香港的信心。與此同時，旅發局繼續透過政府資助舉辦的「旅業英才實習計劃」，顯著提升香港的服務文化，為香港旅遊業培訓具備專業水準的生力軍，並為旅遊業的未來發展作好準備。

我在前文指出，政府、私營機構，以及廣大社群發揮前所未有的團隊精神，引領香港旅遊業擺脫2003年的危機，令旅遊業比以往更加茁壯、業界更加團結。事實上，大部分主要客源市場已經回復增長，香港亦已準備就緒，把握全球及亞洲區內有利的市場環境，以及嶄新旅遊設施帶來的機遇，全速發展。

香港旅遊發展局會繼續努力，以迅速應變、創新和靈活的方法，把握和善用一切發展機遇，同時把風險減至最低，為不同的情況作好妥善準備，而要令香港躋身世界首五個最受歡迎旅遊勝地，這運作模式更是不可或缺。要達到目標並不容易，但憑著旅遊業界的廣泛支持，以及我們努力向廣大社群傳播好客文化，我深信，我們不但能達到這目標，更已準備就緒，迎接旅遊業最具挑戰性、最令人振奮和回報豐厚的未來。

儘管我們在2003年經歷嚴峻的考驗和挑戰，我回顧取得的業績仍然深感自豪。我謹此感謝政府對香港旅遊業的肯定和支持、業界夥伴發揮通力合作的精神，我更感謝旅發局每一位成員，以睿智和遠見給予英明的指導，以及旅發局香港和全球各地辦事處的各位員工，竭力為香港旅遊業作出貢獻，你們的堅毅努力和服務承諾，不但在逆境中重振香港的旅遊業務，更維持香港作為亞洲以至全球最佳旅遊勝地的領導地位，我謹此致以衷心的謝忱。



主席

周梁淑怡 議員



Top Hong Kong chefs vied for the honours in the 3rd annual Best of the Best Culinary Awards

來自多間食肆的頂級名廚角逐第三屆「美食之最大賞」各項殊榮



Enhancements to the HKTB's Quality Tourism Services (QTS) scheme were announced in December 2003

旅發局於2003年12月推動「優質旅遊服務」計劃邁進新里程



The Tourism Orientation Programme (TOP) raises hospitality standards while training front-line tourism staff

「旅業英才實習計劃」提升旅遊業的服務水平，更為業界訓練前線員工