

Executive Director's Statement

總幹事報告

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If the financial year 2002/03 offered much that we at the Hong Kong Tourism Board (HKTB) could be satisfied with, and indeed proud of, the 12-month period also provided a timely reminder that the travel industry should never take its achievements for granted.

Equally important, however, were the abolition of tour group quotas on 1 January 2002, and the simultaneous expansion in the number of Mainland travel agents designated to handle Hong Kong tours, from four to 67. That number was increased even more dramatically to 528 in October.



Executive Director Clara Chong
總幹事 臧明華

Location: Courtesy of The Verandah at
The Repulse Bay
鳴謝：淺水灣影灣園露台餐廳
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At a time when growth remained negligible in the general economy, the strong performance of the Hong Kong tourism sector was a welcome highpoint, the record number of visitor arrivals in 2002 presaging a not dissimilar growth during early 2003. By the end of the 2002/03 financial year, however, Hong Kong's tourism had already been affected by the outbreak of Severe Acute Respiratory Syndrome (Sars), which went on to wreak havoc on the travel industry not only in the city, but also throughout the Asia-Pacific region. Although the full story of the Sars episode and its aftermath belongs to a later report, it does no harm to remind ourselves of how vulnerable global tourism can be to unforeseen events that are largely out of its control.

In 2002, however, Hong Kong benefited from an extraordinary growth in tourism at a time when the prevailing conditions were at best only mildly positive. The year began less than four months after the 11 September outrage and ended at a time when war in Iraq looked imminent. That Hong Kong experienced a 20.7% annual increase in the number of visitors at such a time is especially remarkable.

The star performing market remained Mainland China, whose 6.83 million arrivals represented a 53.4% increase on 2001. This rapid growth was largely driven by increased prosperity across the border and the relaxation of travel restrictions.

Impressive though the Mainland statistics were, the HKTB paid equal attention to its objective of retaining a balanced portfolio of visitor arrivals from across all key source markets and segments. Indeed, in spite of the persistent global uncertainty, growth was achieved across all key major source markets.

Despite being adversely affected by the US economic downturn, Taiwan nonetheless registered a modest increase of 0.4%, with 2.43 million arrivals, while those from South & Southeast Asia grew 9.1% to 1.91 million. Other key volume contributors to show significant growth in arrivals were North Asia, which rose by 5.1% to 1.85 million; The Americas, which increased by 7.0% to 1.35 million; Europe, Africa & the Middle East, which grew by 7.8% to 1.26 million; and Australia, New Zealand & South Pacific, whose 0.41 million visitors represented a 6.1% increase over 2001.

Visitor numbers, however, are just one of four key "pillars" that the HKTB addresses in its mission as the marketer and facilitator for tourism in Hong Kong. It also seeks to encourage positive developments in the areas of length of stay, spending and visitor satisfaction, and the year 2002 gave us grounds for optimism in all of these aspects.

As we believe that Hong Kong has so much to offer its visitors, we have long been encouraging them to spend more time in the city. During the year, the average length of stay increased to 3.6 nights from 3.1 in 2001, a rise that was largely due to the growing number of Mainland visitors, whose average 4.5-night stay is significantly longer than most. Visitors from Europe, Africa &

雖然香港旅遊發展局(旅發局)對2002/03財政年度旅遊業取得的成績感到滿意甚至自豪,但這12個月的業績同時提醒我們及整個旅遊業界,市場環境不斷轉變,成功並不是理所當然的。

在香港整體經濟仍然停滯不前的情況下,旅遊業強勁增長的確是一大喜訊。2002年訪港旅客總數創出新高,2003年初的增長幅度亦相去不遠,但到了2002/03財政年度的後期,旅遊業已開始受嚴重急性呼吸系統綜合症(「沙士」)事件所影響,香港以至整個亞太區的業務均遭受嚴重打擊。雖然有關「沙士」事件的整體情況及發展屬下一年度的報告範圍,我們也不妨藉此事件提醒自己,環球旅遊業在面對一些難以預見和控制的事件時,是何等的脆弱。

2002年的開始,與911慘劇距離不到四個月,而這年結束的時候,伊拉克戰事又如箭在弦,在這動盪的形勢下,香港旅遊業卻能成功爭取額外的增長,訪港旅客人次比2001年增加20.7%,實在是難能可貴。

年內表現最佳的仍然是內地市場,旅客總數達683萬人次,比2001年上升53.4%。旅客激增主要因為內地經濟迅速發展,以及有關當局放寬出境旅遊規定,而且內地由2002年1月1日起取消旅客參團來港的配額限制,同時大幅增加特許營辦「香港遊」的旅行代理商數目,由原來的4家增至67家,到10月更進一步激增至528家。

儘管內地旅客的統計數據理想,旅發局亦同樣注重要在各主要客源市場和客群之間維持一個均衡的旅客組合。事實上,雖然全球的市場形勢持續反覆,但所有的主要客源市場相對2001年均取得正面的增長。

美國經濟在年內持續下調,影響全球業績,然而台灣仍錄得0.4%的輕微增幅,訪港旅客達243萬人次;南亞及東南亞市場亦上升9.1%,旅客總數達191萬人次。旅客人次升幅顯著的其他主要市場包括:北亞,上升5.1%,共185萬人次;美洲增長7.0%,共135萬人次;歐洲、非洲及中東上升7.8%,共126萬人次;澳洲、新西蘭和南太平洋增長6.1%,共41萬人次。

旅發局肩負宣傳和推廣香港旅遊業的使命,訪港旅客人次只是旅發局衡量業績的四大範疇之一。我們亦不斷致力延長旅客的留港時間、增加他們在港的消費,以及對訪港旅程的滿意程度。在2002年,所有範疇都有所改善,令我們對前景感到樂觀。

我們有信心香港能為旅客提供無盡精彩的旅遊體驗,故一直鼓勵旅客延長留港時間。年內,旅客平均留港時間由2001年的3.1晚增加至3.6晚,主要由內地旅客上升所帶動,他們平均留港4.5晚,逗留時間較大部分旅客長。其他留港時間較長的旅客來自歐洲、非洲及中東,以及澳洲、新西蘭及南太平洋。旅客延長留港時間亦帶動年內的酒店平均入住率上升至84%,較2001年增加五個百分點。

Visitor Arrival Statistics
訪港旅客統計
1993-2002



Remarks:
From 1996 and onwards, figures include arrivals of non-Macau residents via Macau.

註:
由1996年起,旅客數字包括經澳門訪港的非澳門居民。

Middle East, and from Australia, New Zealand and the South Pacific also tended to stay longer than the norm. In a related development, hotel occupancy for the year averaged 84%, an increase of five percentage points on the previous year.

A parallel trend towards "same day in-town" visitors who did not spend a night in the city also persisted, accounting for 35.4% of visitors in 2002, compared with 35.2% in the previous year. Such a trend is inevitable, given Hong Kong's increasing importance as a regional aviation hub and a major gateway to China. The HKTB's challenge is to maximise satisfaction and spending during these brief visits, and to create the potential for longer-stay leisure visits in the future.

visitor needs and marketing opportunities, as well as identify potential problem areas. Based on the information gained, appropriate and relevant strategies can be continuously implemented to enhance the overall visitor experience.

Our research has also aided us to identify Hong Kong's four core strengths as a destination. Put simply, these comprise shopping, dining, culture and heritage, and Hong Kong's unique combination of city, harbour and countryside. The HKTB's marketing and promotional activities are aimed at showcasing these core strengths in a manner that also highlights the city's cosmopolitan diversity and sophistication.

The **City of Life: Hong Kong is it!** campaign continued into its second year as the HKTB's primary marketing and promotional platform, and focused on the city's four core strengths. Activities staged under the aegis of the campaign were divided into a programme of mega-events – including the HSBC Mega Hong Kong Sale and the Hong Kong WinterFest, supported by New World Development – and a monthly calendar of smaller and more community-based attractions. These activities were designed to reinforce the city's position as a shopper's paradise and the Events Capital of Asia, to attract immediate visitors, and also to stimulate interest among the trade and focus international media attention on Hong Kong as a tourism destination.

The Mega Hong Kong Sale, for example, was the city's longest-running and biggest-ever shopping promotion, involving more than 2,200 retailers. Held over 11 weeks from June to August 2002, the event helped to attract almost 3.5 million visitors to the city during what is traditionally a low season for the travel and retail sectors.

In addition to boosting visitor numbers, the mega-events programme achieved its wider aims of invigorating the local economy. The success of these events clearly demonstrated the HKTB's role change

Another key indicator is visitor spending, which also showed a marked increase in 2002. This again was largely due to the growth in arrivals from the Mainland, who not only travelled to Hong Kong in record numbers, but were also the highest spenders.

Under new methodology for compiling expenditure recommended by the World Tourism Organization (WTO), Mainland overnight visitors accounted for an average per capita spending of HK\$5,639, a 9.1% increase over the previous year and higher than the average figure across all markets, which grew 6.9% to HK\$4,904 in the same period.

It is also among the aims of the HKTB not only that visitors arrive in greater numbers, stay longer and spend more, but that they enjoy a memorable time when they are here, so that they will both wish to come back and recommend others to visit. Since the HKTB's reconstitution in 2001, we have continued to upgrade our planning and research capabilities, so that we are better able to identify



Launch of the HSBC Mega Hong Kong Sale
滙豐香港新世紀勁買
啟動儀式

與此同時，入境不過夜旅客的人次亦同步增加，在2002年，35.4%的訪港旅客入境後於同日離港，但在2001年，這比率僅為35.2%。香港作為亞洲區內的航空交通樞紐及進出內地門戶城市的地位日益重要，入境不過夜旅客增加是無可避免的趨勢，旅發局面對的挑戰是要盡量提升這些在港短暫停留的旅客對香港的滿意程度，增加在港消費，以及吸引他們將來再次來港觀光旅遊時逗留更長時間。

另一項重要指標 — 旅客消費，在2002年亦有可觀的增長，主要亦是由於內地旅客迅速增加，而他們同時是消費力最高的客群。根據世界旅遊組織建議統計消費開支的新系統計算，2002年內地過夜旅客的人均消費為5,639港元，較2001年上升9.1%，而同期所有客源市場的人均消費亦上升6.9%，達4,904港元。

旅發局的目標不僅是要令訪港旅客增加，留港時間更長，消費更多，更期望旅客在港期間享受愉快難忘的旅程，會再次來港及向親友推介香港。旅發局在2001年重組後，一直致力提升籌劃及研究方面的職能，以便能更有效地界定旅客的需求，繼而轉化成市場推廣契機，同時預先識別可能出現的問題。我們根據掌握的資料，能持續推行適當的策略，提升旅客在港的整體旅遊體驗。

經過詳盡的研究，我們為香港界定了四項作為旅遊目的地的核心優勢，即是：購物、美食、文化古蹟，以及集都會、海港和郊野景致於一身的獨有風貌。旅發局的市場推廣和宣傳活動，亦致力展現這些核心優勢，同時突顯香港萬象姿采、細緻深刻的都會特色。

為期兩年的**動感之都：就是香港！**大型旅遊推廣項目在2002年進入最後階段。作為旅發局的主要市場推廣和宣傳平台，這項目集中推廣香港的四項核心優勢；所推出的節目包括「滙豐香港新世紀勁買」及由新世界發展全力支持的「香港繽紛冬日節」等大型活動，以及每月以社區特色為焦點的多項較小型節目。舉辦和推廣這些活動的目的，是要鞏固香港作為「購物天堂」以及「亞洲盛事之都」的地位，吸引旅客立即來港，誘發旅遊業界積極向旅客推介香港，以及令國際傳媒以香港這個旅遊勝地為報道焦點。

例如在年內舉辦的「滙豐香港新世紀勁買」，是香港歷年來為期最長及規模最盛大的購物推廣活動，這項盛事由6月至8月一連11個星期舉行，參與的零售商戶超過2,200間，在這個旅遊業和零售業的傳統淡季幫助吸引接近350萬旅客來港。

除推動旅客人次上升外，連串大型活動亦成功達到振興本港經濟的目標，更印證旅發局重組後角色的轉變，不只局限於為會員爭取利益，而是要令全港的各行各業同時受惠。

Hotel Room Occupancy Rates

酒店入住率
1993-2002



since its reconstitution, no longer serving merely the interests of its members, but expanding the benefits of its efforts across the wider community.

Launched during 2001, the Recommendation of the Month programme was initiated by the HKTB in conjunction with related Government departments and Hong Kong's 18 Districts. Largely planned and



The flag raising ceremony at Golden Bauhinia Square has become a popular tourist activity

於金紫荊廣場舉行的升旗儀式現已成為廣受旅客歡迎的活動

organised within these local communities, the events programme highlighted activities and attractions unique to each neighbourhood. All of these were complemented by a further calendar of long-established cultural and sporting events, such

as the Hong Kong Arts Festival, the Rugby Sevens, the Hong Kong International Marathon and the International Horse Racing, which together reinforced Hong Kong's role as the Events Capital of Asia.

This combination of initiatives and events proved extraordinarily successful in helping Hong Kong to override the prevailing global volatility in 2002, but the outbreak of Sars in the first half of 2003 posed unprecedented challenges to Hong Kong's tourism industry. However, the crisis also provided valuable lessons that have enabled a re-invigorated tourism industry to emerge with a product that we believe is even stronger. The collaboration between the Government, the travel trade, the community and – just as crucially – our overseas partners has laid strong foundations for future growth.

The HKTB launched its two-phased Global Tourism Revival Campaign, which was planned during the crisis, as soon as Hong Kong was removed from the list of affected areas in late June. The first phase was aimed at reassuring visitors and enticing them back to Hong Kong. The second phase focused on sustaining the growth momentum.

A key element of the latter phase has been the creation and adoption of the new global campaign, **Hong Kong – Live it, Love it!**, which highlights the depth and breadth of Hong Kong's diversity. This marketing and promotional platform builds on the success of the preceding **City of Life: Hong Kong is it!** campaign, and is designed to achieve further growth in the four key "pillars" of visitor numbers, length of stay, spending and satisfaction over the long term.

Reinforcing that message, as well as Hong Kong's further development as the preferred destination in Asia, the HKTB will continue to hone its roles as a marketing organisation and a facilitator for the travel and tourism-related industries, whose neutral position enables it to maximise the contribution of tourism throughout the community. Central to these roles are our information-gathering and research capabilities, which have enabled us to identify Hong Kong's strengths as a destination, as well as to target key markets and segments in our visitor base, and to develop products and packages in collaboration with trade and tourism-related partners to cater to a diverse range of expectations. Our ongoing survey of departing visitors conducted at major exit points provides an invaluable and constantly updated guide to visitor preferences.

As a world-class destination in an increasingly competitive global environment, Hong Kong must not only respond to changing visitor demand and provide the appropriate tourism infrastructure, but it must also continually strive to deliver consistent and unmatched standards of service. The HKTB has worked hard to ensure that all visitors enjoy a most delightful and memorable experience from the moment they arrive until the time they leave, with such initiatives as the Quality Tourism Services (QTS) scheme, launched in 1999 and further enhanced since; the Tourism Orientation Programme (TOP), which began in May 2002; and other programmes and services undertaken by our partners and associates.

旅發局在2001年聯同有關的政府部門及全港18區合辦「每月推介」，為旅客串連多項由地區組織籌劃和舉辦的活動，重點突出每個地區的獨特節目和景點，再輔以多項廣受歡迎的文化和體育盛事，例如香港藝術節、香港國際七人欖球賽、香港馬拉松、香港國際賽事(賽馬)等，組成精彩豐富的旅遊日誌，強化香港「亞洲盛事之都」的美譽。

2002年全球旅遊業面臨重大考驗之際，這些大型活動和節目，成功推動香港再創佳績，但「沙士」事件在2003年上半年爆發，香港旅遊業要面對前所未有的挑戰，但事件同時亦帶來寶貴的經驗，令香港的旅遊業重新振作自強，而旅遊產品亦發展得更加成熟；政府、旅遊業界、社會各界，以至我們在世界各地的合作夥伴更團結一致，發揮高度的合作精神，為旅遊業的未來發展打好穩健的基礎。

旅發局在「沙士」期間已籌劃「全球旅遊推廣計劃」，至2003年6月底，有關方面正式宣佈香港從「沙士」疫區中除名後，旅發局隨即啟動這項計劃。第一階段工作的目的，是要恢復旅客對香港的信心，吸引他們盡快重臨香江；第二階段則要致力維持各地市場的增長動力。

第二階段的重點工作，是構思和推動全新的「香港－樂在此，愛在此！」全球廣告宣傳活動。這項市場推廣和宣傳平台以非常成功的**動感之都：就是香港！**大型旅遊推廣項目為基石，強調香港既深且廣的多元化旅遊特色，並以推動四大範疇，即旅客人次、留港時間、旅客消費及滿意程度的增長為長遠目標。

旅發局是推廣香港的法定組織，並以促進旅遊及與旅遊相關行業的發展為己任，我們中立的身份有助推動旅遊業為整體香港社群作出最大貢獻。我們會繼續履行既定的職能，在全球強化香港的訊息，進一步鞏固香港作為亞洲最受歡迎旅遊勝地的地位。在此，旅發局的資訊收集和研究的職能最為重要，能讓我們界定香港作為旅遊目的地的各項優勢，確立主要的目標市場和客群，以及與旅遊及相關的業界夥伴合作，設計合適的產品和配套行程，以迎合旅客不同的喜好和要求。旅發局持續在主要口岸向離港旅客進行的調查，正能就旅客的喜好定期提供寶貴而最新的資料。

全球旅遊市場競爭日趨激烈，香港作為世界級的旅遊勝地，不但要因應旅客不斷轉變的要求，提供合適的旅遊基礎設施，更要不斷提升服務質素。旅發局致力確保所有旅客由抵港一刻至旅程結束都有愉快難忘的體驗，透過多項活動令旅客享受稱心滿意的香港旅程，例如在1999年推出、最近進一步強化的「優質旅遊服務」計劃，在2002年5月開始推行的「旅業英才實習」計劃，以及透過業界夥伴及其他團體推出的活動和服務等。



The HKTB launched a two-phased Global Tourism Revival Campaign in June 2003
 旅發局於2003年6月啟動分兩階段進行的「全球旅遊推廣計劃」

The QTS scheme has garnered strong cross-industry support for its aims of continuously upgrading service standards and enhancing confidence, especially in the areas of shopping and dining, so that Hong Kong exceeds visitor expectations. The scheme offers peace of mind to visitors who patronise QTS-accredited merchants and restaurants, and an avenue for redress in cases of unsatisfactory service or purchases.



In view of the further relaxation of travel restrictions on Mainland visitors, the HKTB is working in partnership with the trade to encourage longer stays and repeat visits

鑑於內地進一步放寬出境旅遊限制，旅發局與旅遊業界緊密合作，鼓勵旅客延長逗留時間和多次訪港

Aimed at further enhancing the professionalism of the tourism industry, especially in the area of service standards, the TOP scheme is organised by the HKTB, with funding from the Government and support from the tourism industry. The scheme offers two one-year orientation programmes for 200

people interested in a career in tourism, and has the objective of producing a cadre of highly trained, customer-oriented professionals. Participants, known as Tourism Hosts, undergo training through structured courses and work experience in a variety of locations and roles, in collaboration with the scheme's industry partners, which include airlines, hotels, convention and meeting facilities, and tourism attractions.

The HKTB also welcomes the enactment of the Travel Agents (Amendment) Ordinance, which took effect from 1 November 2002. Aimed at protecting the interests of tour group visitors, the Ordinance requires inbound agents to be licensed and subject to a similar Travel Industry Council code of conduct as outbound agents, and provides the necessary assistance and support to tour group visitors, as well as the continued upgrade of services provided.

As a visitor's first impressions of a destination can be strong and lasting, the HKTB has also worked closely with various travel trade and key Government departments, through the co-ordination of the office

of the Tourism Commission, to reduce the potential for overcrowding at land entry points, especially during peak "Golden Week" holiday periods on the Mainland. Since 2002, this increased co-operation has resulted in a smooth flow of arrivals at all such peak times, creating a seamless travel experience between source and destination markets, and ensuring that a visit to Hong Kong begins on a positive note.

In view of the further relaxation of travel restrictions on Mainland visitors, and particularly for individual visitors (commonly known as "FITs"), the HKTB is also working in partnership with the trade to encourage longer stays and repeat visits. Special packages, as well as increased consumer education through trade shows and promotions on the Mainland, are all aimed at raising Hong Kong's profile in this crucially important market.

I have already mentioned the HKTB's aim of maintaining a balanced portfolio of visitors, both in terms of source markets and demographic segments. The across-the-board growth in the number of arrivals in 2002/03 is a vindication of this strategy, and the HKTB intends to cement Hong Kong's role as the preferred Asian destination in the longer term through the continued facilitation and fostering of its four core strengths.

While the above-mentioned measures relate to our tourism "software", the HKTB understands that constant revitalisation of Hong Kong's tourism infrastructure is necessary to sustain growth in the longer term and reinforce the city's image as the world's preferred destination in Asia. We are therefore delighted to see the Government's strong and continued support of tourism, which is most strongly expressed through the ongoing development of several major infrastructural projects. When completed, all will help heighten the depth and the breadth of the overall Hong Kong experience, and support our efforts to develop further and balance the visitor portfolio, in terms of the major regional markets and targeted demographic segments.

「優質旅遊服務」計劃得到業界的廣泛支持。整項計劃的目的，是鼓勵業界不斷提升服務水平，增強旅客對香港，特別是在港購物和飲食的信心，令香港超越旅客的期望。旅客惠顧這計劃的認可零售商戶和食肆會倍感安心，如服務或購買的產品未盡如意，旅客亦可以透過這計劃提出投訴。

為進一步提升旅遊業的專業水平，特別是業界的服務質素，旅發局得到政府的資助，以及旅遊業界的鼎力支持，舉辦「旅業英才實習」計劃，這項為期兩年的實習計劃，每年培育200位有志投身旅遊業的人才，為業界提供一支受專業訓練、以客為尊的生力軍。這些「旅業英才」透過修讀完善的啟導課程，以及在業界不同的工作崗位實習，獲取寶貴的工作經驗。參與這計劃的業界夥伴有航空公司、酒店、舉辦大型會議及企業會議的機構，以及旅客景點設施等。

另一方面，《旅行代理商(修訂)條例草案》在2002年11月1日正式生效，旅發局就此表示歡迎。這條例為保障入境旅遊團而設，規定經營到港旅遊業務的代理商必須申領牌照，遵守由香港旅遊業議會訂定與經營出境旅遊業務的代理商相同的專業守則，為參團來港的旅客提供協助和支持，並要不斷提升服務水平。

旅客對旅遊點的第一個印象可以非常持久而深刻，旅發局透過旅遊事務署的統籌，與業界及主要的政府部門緊密合作，致力疏導特別是內地「黃金周」期間，陸路入境口岸可能出現的擠塞情況。經過各界的通力合作，自2002年開始所有高峰期的旅客人流保持暢順，令內地旅客由出發以至抵港均有舒暢的旅遊體驗，一開始便對香港感到滿意。

鑑於內地進一步放寬出境旅遊限制，特別是讓部分省市的居民可以以個人身份來港，旅發局亦與旅遊業界緊密合作，鼓勵旅客延長逗留時間和多次訪港，透過業界推出的特色行程，以及在內地舉行的業界展銷會和推廣活動，加強內地消費者對香港的認識，務求在這個重要的市場提升香港的形象和吸引力。

我已在前文提及，旅發局的目標是要維持一個均衡的客源市場和客群組合，2002/03年度訪港旅客人次全面增長，正好印證這策略的成效，旅發局亦會進一步推動和促進香港四大核心優勢的發展，鞏固香港作為亞洲最受歡迎旅遊勝地的長遠地位。

上述措施均屬旅遊業的「軟件」，旅發局明白要令旅遊業持續增長，及鞏固香港這旅遊勝地的地位，必須不斷更新香港的旅遊基礎設施，在此方面，我們非常高興，得到政府大力支持旅遊業，特別是不斷發展多項主要基建項目，這些項目落成後，將會令旅客在香港享受到更深和更廣的旅遊體驗，令我們在主要地區市場和目標客群中維持一個均衡組合的工作更加奏效。



Organised by the HKTB, the Tourism Orientation Programme offers two one-year orientation programmes for 200 people interested in a career in tourism

旅發局舉辦的「旅業英才實習」計劃，為期兩年，每年培育200位有志投身旅遊業的人才

The Chairman has already referred to the importance of the high-yield business and family segments in her message. The year also saw considerable growth in the conventions, exhibitions and corporate events market, with significant increases not only in the number of participants, but also in their per capita spending, and the number of major events held in the city. In co-operation with the commercial sector and other related bodies, the HKTb expended considerable effort throughout the year to promote jointly and enhance Hong Kong's position in gaining a larger share of this particularly high-yield segment. The Hong Kong Convention, Exhibition and Corporate Events Marketing Forum was established in December 2002 to co-ordinate local efforts to attract further international events to the city.

Hong Kong's strategic location as the gateway to both Asia and China offers enormous advantages. To maintain our competitive edge, however, we are continuing to collaborate with other destinations in the region on a number of strategic alliances, aimed at both short- and long-haul markets.

For example, to cater to vacation visitors from regional markets such as Indonesia, Japan, South Korea, Malaysia, the Philippines, Singapore and Thailand, we have developed excursion packages with the travel trade to cities and attractions in the surrounding Pearl River Delta. For long-haul visitors, joint itineraries are offered with destinations such as Thailand and Malaysia, and we are also developing a strategic alliance with tourism authorities in Vietnam.



Hong Kong is seeking to become Asia's leading cruise hub
香港致力成為亞洲首屈一指的郵輪樞紐

The HKTb also recognises the increasing importance of the cruise market, which in 2001 accounted for a throughput of 840,000 passengers in the Asia-Pacific region, and has a projected annual growth of up to 10% during the next decade. Currently the region's second biggest cruise port, Hong Kong is seeking to become Asia's leading hub, an aim reinforced not only by its magnificent harbour, but also by Hong Kong's unmatched aviation links to the rest of the world and its role as Asia's preferred city.

Hong Kong also offers unique and growing opportunities in the area of green tourism, and ongoing developments in this field will contribute greatly to a sector that is likely to experience considerable growth as Hong Kong's visitor base continues to develop and mature.

The past two years have proved the axiom that success should never be taken for granted. However, they have also indicated just how resilient demand can be when the conditions are positive, how persistent is the appetite for travel and how strong is Hong Kong's appeal. If, after the highs of 2002, no one would have predicted the slump in early 2003, neither could they have foreseen just how fast Hong Kong would recover once the crisis was over.

For that, I would like to acknowledge not only the support of our firmly established partners in Government, the trade and the media, but also the entire community, without whose involvement this swift and remarkable recovery could not have been possible. More specifically, I wish to thank our Chairman once again for her tireless involvement as both a standard-bearer and an eloquent advocate for tourism, and the Commissioner for Tourism and our Board Members for their unqualified support. And as ever, I thank the staff of the HKTb, both in Hong Kong and abroad, for their professionalism and their dedication.

Clara Chong
Executive Director

主席在獻辭中已指出高收益的商務和家庭旅遊客群的重要性。年內，會議、展覽和企業活動市場亦有顯著增長，不但來港參與活動的人士大幅增加，他們的人均消費及在港舉行的活動數目亦有增長。年內，旅發局與商營機構及有關組織合作，致力在這高收益客群爭取更高的市場佔有率，提升香港的領導地位。在2002年12月成立的香港會議、展覽及企業活動市場推廣工作小組，就是要集結本港業界的力量，吸引更多國際盛事來港舉行。

郵輪旅遊是另一個日趨重要的市場，在2001年，亞太區郵輪旅客達840,000人次，預計在未來十年每年會增長最高達10%。香港現時已是亞洲區內第二大的郵輪港口，憑著我們優良的海港、連接世界各地的航空交通網絡，以及亞洲最受歡迎旅遊勝地的地位，香港更可躋身成為亞洲首屈一指的郵輪樞紐。

此外，香港的綠色旅遊亦擁有獨特而且不斷增加的發展機會。隨著香港的客群不斷擴展並日趨成熟，綠色旅遊將有可觀的增長，亦能為旅遊業作出更大的貢獻。

香港是通往亞洲和內地的門戶城市，這個策略性地理位置為香港帶來龐大的裨益。然而，為維持我們的競爭優勢，我們仍會繼續與亞洲區內其他旅遊目的地合作，針對短途和長途市場組成不同的策略聯盟。

例如，為迎合印尼、日本、南韓、馬來西亞、菲律賓、新加坡和泰國等亞洲市場度假旅客的喜好，我們與旅遊業界合作推出多款短線行程，前往珠江三角洲鄰近城市和旅遊景點；針對長途市場旅客，我們則聯同泰國和馬來西亞等地推出聯合行程，最近更與越南的旅遊推廣機構締結策略性聯盟。

過去兩年旅遊業的歷程印證了成功並非必然的道理，亦顯示出在理想的環境下，市場的需求異常龐大，旅客有強烈的外遊意欲，以及香港擁有令人難以抗拒的旅遊吸引力。2002年旅遊業取得理想成績，當時沒有人能預測2003年初情況會突然逆轉，同樣，亦沒有人能預知危機過後，香港能夠如此迅速地恢復元氣。

旅發局、政府、旅遊業界和傳媒長久以來已建立緊密的合作關係，在此，我要特別感謝各位夥伴，以至廣大社群一直以來給予的支持，全賴大家同心努力，旅遊業才得以迅速復甦。我要特別再次感謝主席，晝夜不忘積極推動旅遊業發展，並感謝旅遊事務專員及旅發局的各位成員，無限量給予支持和鼓勵，還有旅發局本港和全球辦事處的員工，以專業進取的精神，共同為推廣香港旅遊業而努力。



Hong Kong offers unique and growing opportunities for green tourism

香港的綠色旅遊擁有獨特而且不斷增加的發展機會



臧明華
總幹事