

Chairman's Message

主席獻辭

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The year 2002/03 again proved a record-breaking time for tourism in Hong Kong. Milestones were set in almost every aspect, cementing our position as Asia's preferred destination and providing a firm base for future development and expansion.



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

Location: Courtesy of Hong Kong
Museum of Art
鳴謝：香港藝術館提供攝影場地

Visitor arrivals hit record numbers in several months, contributing to a total of 16.57 million in 2002, an increase of 20.7% on the previous year and significantly higher than the Hong Kong Tourism Board's original forecast of 14.8 million. August 2002 alone saw the arrival of 1.5 million visitors, the first time Hong Kong welcomed such a number in a single month. These excellent results affirmed the city's standing as

the world's preferred travel destination in Asia.

Taken in isolation, these figures would be remarkable enough, but for Hong Kong to achieve such success at a time when the global tourism industry continued to be beset by difficulties – deriving from the fallout from the 11 September outrage, a sluggish US economy, the invasion of Afghanistan, the terrorist bombing in Bali and the increasing likelihood of war in the Middle East – is especially noteworthy. During the same period, world tourism arrivals rose by a modest 2.7%, with arrivals in the Asia-Pacific region growing by 8.4%.

As in the previous year, sustained economic growth in Mainland China proved crucial to the surge in Hong Kong visitor arrivals. Mainland arrivals to Hong Kong numbered some 6.83 million, which represented more than 41% of the total number

of visitors and a remarkable increase of 53.4% on the 2001 total of 4.45 million. Thanks partly to steadily growing prosperity across the border, the gradual relaxation of visa formalities for its citizens, and their relative isolation from negative geo-political and economic events, the Mainland has become the fastest-growing travel market in the world. Hong Kong continues to be a major beneficiary of this trend.

Demand from the Mainland grew steadily throughout the year, keeping visitor arrivals to the city buoyant even during the early months of 2002, when global tourism remained slack in the wake of the 11 September terrorist attacks on the US. Monthly arrivals from the Mainland passed the half-million mark for the first time in April, and were especially strong during the peak "Golden Week" holiday periods.

Visitors from the Mainland not only arrived in Hong Kong in record numbers, but their expenditure also increased, providing a welcome boost for a wide cross-section of the local economy, including hotels, retailers and restaurateurs, as well as transportation and service industries. Total expenditure associated to inbound tourism in 2002 was HK\$77.41 billion, a 25.3% increase on the previous year.

Important though the Mainland was in 2002, the HKTB also kept its marketing and promotional focus trained on all major markets. It has long been our objective to maintain a balanced portfolio of visitors from different markets and segments, and just as Mainland visitor numbers grew strongly, so they did from all major markets. By the end of 2002, arrivals from all source markets had returned to pre-11 September levels, while the three long-haul markets had grown by at least 6% on 2001, stimulated by HKTB initiatives in partnership with overseas travel suppliers to develop growth in the longer-term once confidence had returned.

2002/03年度，香港旅遊業再一次刷新紀錄，在多方面的發展都邁進新里程，令香港作為亞洲最受歡迎旅遊勝地的地位更加穩固，亦為旅遊業的未來發展建立穩健根基。

2002年訪港旅客總數達1,657萬人次，較2001年上升20.7%，遠超過旅發局原先預期的1,480萬人次，其中多個月更刷新紀錄，如2002年8月，訪港旅客達150萬人次，是香港單一個月份的最高紀錄，這驕人成績進一步確定香港是備受全球旅客歡迎之亞洲旅遊勝地。

如撇開其他因素，單看以上數字已足以令人鼓舞；事實上，全球旅遊業在2002年面對種種困難，包括911慘劇的陰影仍然揮之不去、美國經濟疲弱、阿富汗的戰事、峇里島的恐怖襲擊、中東地區戰雲密布等，全球旅遊業的旅客總數在年內只有2.7%的輕微增長，亞太區的旅客總數亦只上升8.4%，而香港卻能在這期間取得豐碩佳績，更顯得出色。

近年內地經濟持續增長，對訪港旅客大幅上升起了關鍵作用。2002年內地旅客達683萬人次，佔訪港旅客總數超過41%，亦較2001年的445萬人次大幅增加53.4%。內地經濟穩步發展，並逐漸簡化國民出境旅遊的簽證手續，加上受國際間政治和經濟事件帶來的負面影響相對較低，已經成為全球增長最快的主要客源市場，香港亦繼續在這大趨勢下從中受惠。

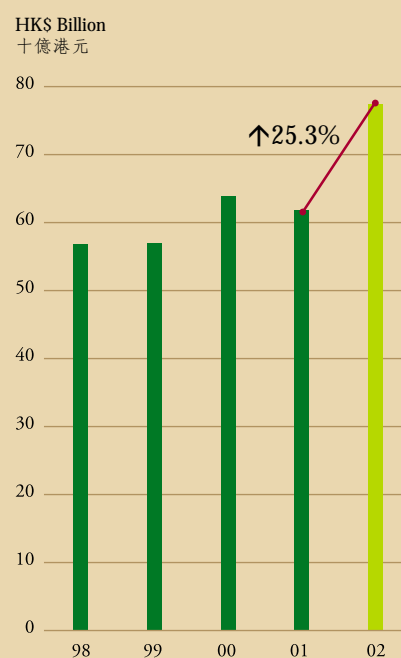
在2002年初的數個月，雖然全球旅遊業仍然在美國911恐怖襲擊的陰影下停滯不前，但內地市場卻未受影響，而且在年內穩步發展，推動香港整體旅客人次再創新高。內地旅客人次在2002年4月首次突破50萬大關，在「黃金周」假期更是強勁增長。

內地市場不但在人次方面刷新紀錄，旅客在港的消費亦同時增加，為全港各行各業，包括酒店、零售和飲食、交通運輸，以至有關的服務業注入動力。2002年，與入境旅遊相關的總開支達774.1億港元，較2001年上升25.3%。

雖然內地市場在2002年佔據重要地位，旅發局在所有主要市場的宣傳和推廣攻勢並沒有鬆懈。我們一直以維持一個均衡的市場和客群組合為目標，內地市場大幅增長的同時，所有其他主要市場亦一樣有良好的表現。我們聯同國際旅遊業界在市場恢復信心的時候舉辦不同的活動，推動業務長遠發展，截至2002年底，所有客源市場的訪港旅客人次已回升至911事件前的水平，而且三個長途市場的表現更較2001年增長6%以上。

所有市場均表現出色，不但彰顯香港作為世界級旅遊勝地的優勢，更證明旅發局的市場推廣和宣傳策略非常奏效，特別是在2002年進入第二階段的**動感之都：就是香港！**大型旅遊推廣項目。

Total Tourism Expenditure Associated to Inbound Tourism 與入境旅遊相關的總開支 1998-2002



Remarks:

To align with a new system recommended by the World Tourism Organization, the previous computation of "Tourism Receipts" has been replaced by a new and more comprehensive set of data entitled "Tourism Expenditure Associated to Inbound Tourism".

註：

為配合世界旅遊組織建議的新系統，以往沿用的「旅遊收益」現已由一套新的及更全面的數據「與入境旅遊相關的開支」替代。

The remarkable across-the-board growth in Hong Kong's arrival statistics was not only proof of the city's strengths as a world-class destination, but also a vindication of the HKTb's marketing and promotional strategies. Chief among these was the **City of Life: Hong Kong is it!** campaign, which entered the second phase of its two-year cycle in 2002.

Aimed at increasing the depth and breadth of the visitor experience, the two-year campaign was based around a calendar of five mega-events, as well as a co-ordinated programme of attractions and events organised in conjunction with district and community bodies, which introduced visitors to facets of our vibrant city and culture that they might not normally have encountered. As in the previous year, I would like to thank the Government departments and District Councils for their invaluable input and support, as well as the Hong Kong Jockey Club's Charities Trust, the principal sponsor of the **City of Life: Hong Kong is it!** campaign.

of continued record visitor numbers were dashed by the outbreak of Severe Acute Respiratory Syndrome (Sars). The event provided a salutary warning on how quickly established trends can be reversed, although the rapid recovery during the second half of the year demonstrated just how resilient was Hong Kong's appeal.

With the benefit of hindsight, we can reflect with some satisfaction on the successful containment of the crisis, which involved the adoption of heightened cleanliness and hygiene measures by Hong Kong hotels, restaurants, shopping malls, and transport and tour operators that have since become standard operating procedures. The Government, the travel industry and the community co-operated to an unprecedented degree, not only to contain the outbreak, but also to attract visitors once it was over.

Launched on 15 September 2003, the new **Hong Kong – Live it, Love it!** global advertising campaign was aimed not only at sustaining the tourism recovery, but also at building arrivals in the long term by further drawing on the city's many-faceted strengths. The campaign's endlessly extendable theme, which highlights the exciting and multi-dimensional range of experiences available in this most diverse and cosmopolitan of destinations, can be turned to spotlight every facet of Hong Kong. Inviting visitors to immerse themselves in the city's intoxicating lifestyle, **Hong Kong – Live it, Love it!** creates a powerful emotional appeal for the destination, in addition to providing a strong and yet highly adaptable marketing platform.

The Mainland market has proved crucial in the regeneration of tourism and will continue to drive short-haul arrivals in the foreseeable future. This continuous growth in visitor numbers confirms Hong Kong's position as the destination of choice for Mainland visitors, and represents an enormous opportunity for our tourism and retail sectors.



An annual briefing session for the travel industry on the achievements of 2002 and overview for 2003

旅發局舉行年終簡報會與業界分享2002年的成果及2003年的展望

The HKTb worked hard to leverage activities both within the local community and in key markets around the world, maximising the synergies available and augmenting its effectiveness as the leading marketing and promotional arm of tourism in Hong Kong.

We also continued to co-operate closely with the Government in driving policies, regulatory requirements and infrastructural developments that are designed to support Hong Kong's position as the preferred tourism destination in Asia.

Extraordinary though the growth in arrivals was in 2002, it also highlighted the need to define new goals, refine ongoing activities and address potential areas of concern in the future. This was given added emphasis in the first half of 2003, when projections

這旅遊推廣項目圍繞五項大型活動，並串連全港多個地區團體及組織聯合推廣各區的景點和節目，目的是要令訪港旅客享受既深且廣的旅遊體驗，讓他們感受香港多層面的城市活力和地道文化，體會平常難得一見的香港特色。在此，我要再次感謝有關的政府部門及區議會積極支持和參與**動感之都：就是香港！**，更感謝香港賽馬會慈善信託基金作為主要贊助機構。

旅發局努力運用所有在香港及全球主要市場舉行的活動，加以宣傳和推廣，盡量發揮其協同效應和成效，從而成為宣傳香港旅遊業的重要工具之一。我們會繼續與政府緊密合作，推動與旅遊有關的政策、規定及基建發展等，務求強化香港作為亞洲最受歡迎旅遊勝地的地位。

2002年訪港旅客人次強勁增長，亦同時顯示我們要為旅遊業制訂新的目標，檢討定期舉行的活動，以應付未來可能出現的情況。2003年上半年突然爆發嚴重急性呼吸系統綜合症，即「沙士」事件之後，訪港旅客人次不能如期再次刷新紀錄，令我們加倍重視這方面的工作。「沙士」事件給予我們一個啟示，提醒我們縱使是已建立穩健的形勢亦可能在極短時間之內逆轉。儘管如此，香港旅遊業在下半年迅速回升，亦足以顯示香港旅遊的確具備雄厚的實力。

回顧整件事件，旅發局能成功處理危機，全賴香港的業界，包括酒店、食肆、商場、交通運輸機構及旅遊經營商等，採取更嚴格的清潔和衛生措施，這些措施日後更成為業內的標準運作守則。政府、旅遊業界和社會各界亦發揮空前的團結精神，不但成功控制疫情，更同心協力吸引旅客盡快來港。

我們在2003年9月15日正式啟動全球的廣告宣傳活動「**香港 — 樂在此，愛在此！**」，不僅是要確保旅遊業持續復甦，更要進一步突顯香港多方面的優勢，長遠地推動訪港旅客人次上升。這宣傳活動之主題可以從不同的角度突出香港是個多元化的國際大都會，能為旅客帶來多層面並充滿驚喜的旅遊體驗。「**香港 — 樂在此，愛在此！**」宣傳活動，為香港這個旅遊勝地營造感性形象，邀請旅客全情投入令人陶醉的城市生活節拍，更為旅發局和業界提供一個強而有力、具備高度靈活性的市場推廣平台。

事實證明內地市場對重振香港旅遊業舉足輕重，在可見的未來會繼續帶動短途市場的業績增長。內地旅客人次持續上升，確證了香港是他們首選的旅遊目的地，亦為本港旅遊業和零售業帶來龐大商機。



Launch of the Hong Kong –
Live it, Love it! global
advertising campaign
「香港 — 樂在此，愛在此！」全球
廣告宣傳活動啟動儀式

Symptomatic of this trend is the liberalisation of tourism, exhibition and convention services, which is one early result of the Closer Economic Partnership Arrangement (CEPA) between Hong Kong and China, signed in June 2003. By January 2004, CEPA permitted residents of Beijing, Shanghai and 14 cities in Guangdong Province to visit Hong Kong as individual travellers, and the arrangement should gradually be extended to other areas of the Mainland.

The HKTB will continue to co-operate with the Hong Kong and Central Governments, not only to enable more Mainland citizens to travel independently, but also to streamline visa and cross-border formalities. We have been working in concert with immigration authorities and the travel industry to manage the flow of visitors at busy holiday periods, as well as to enhance their awareness of the relevant measures and procedures. We are also co-operating with our partners in the trade to deliver a more diverse range of packages and services, and to develop awareness of Hong Kong through a heightened presence at consumer and trade shows.

As always, however, the HKTB is committed to retaining a balanced portfolio of Mainland and international visitors and segments to maintain Hong Kong's image as a sophisticated and vibrant world city, and we are continuing to hone our marketing and promotional activities in all major markets. In this respect, our strategic location as the natural gateway to and from the Mainland and, indeed, the entire East Asian region offers unique advantages.

The demand for travel in the Mainland is projected to grow so fast that the country is expected to become the world's biggest travel market within the next 20 years. Although Hong Kong is ideally placed to reap great benefits from this, we are also in competition with other destinations in the region,

all of which are eager for a share of this huge and growing market.

However, our strongest regional competitors are also among our closest friends and partners. As 57% of our overnight leisure arrivals visited an average of 2.6 destinations during the same trip, we are continuing to develop strategic alliances with other regional destinations, especially those that can provide a complementary experience.

Tourism is among the cornerstones of the Hong Kong economy and a key strand of the HKTB's underlying philosophy has been to encourage and facilitate co-operation between the industry, the Government and the wider community, united in the aim of demonstrating the sheer diversity of attractions available in this compact but truly cosmopolitan international city. Looking ahead, we are devising further strategies to ensure that the city retains its position as the most popular destination in Asia.

Business travellers not only find Hong Kong enterprising and energetic, but also equally attractive as a leisure destination. This affluent sector remains one of the foundations of our arrivals base, but we must still work closely with trade partners to encourage such visitors to stay longer and experience the increasing variety of our attractions. Meanwhile, the enhancement of our exhibitions infrastructure will reinforce the city's reputation as one of the world's leading destinations for meetings, exhibitions and conventions, a high-yield segment that we are continuing to develop.

The HKTB is also working to attract further the family market, especially from regional destinations where there is a pronounced trend for families to travel as a single unit. With the support of airlines, hotels, ground operators, retailers and restaurants, we are in the process of developing a range of packages and promotions aimed at family groups,



The HKTB is committed to maintaining a balanced portfolio of visitors in terms of source markets and demographic segments

旅發局致力維持一個均衡的客源市場和客群組合

香港與內地已在2003年6月簽訂「更緊密經貿關係安排」，隨著有關當局放寬與旅遊、展覽及會議服務業有關的限制，內地市場蓬勃發展這趨勢亦更加明顯。截至2004年1月，北京、上海和廣東省14個城市的居民可以以個人身份來港旅遊，有關措施更會逐步推展至內地其他省市。

旅發局會繼續與香港及中央政府密切聯繫，讓更多內地居民可以自由來港旅遊，並簡化有關的簽證和過關手續。我們一直與入境事務有關的部門及旅遊業界緊密合作，特別在主要的假期妥善疏導人潮，同時加強旅客對有關措施及程序的認識；我們又與業界夥伴通力合作，為旅客提供更多元化的旅遊行程和服務，並透過積極參與消費者和業界展銷會，提升香港的知名度。

一如以往，旅發局致力維持一個均衡的市場組合，令內地、國際以至不同層面的客群均衡發展，維持香港細緻深刻、充滿朝氣和活力的國際都會形象。與此同時，我們繼續在所有主要市場展開宣傳和推廣攻勢，在此，香港憑著其天然策略性地利，作為進出內地以至整個東亞地區的門戶城市，在區內享有獨一無二的優勢。

內地對出境旅遊的需求將會快速增長，預計在未來20年，內地將成為全球最大的旅遊市場。儘管香港在地理上佔據優勢，可從中取得最大的裨益，但亞洲區內其他旅遊目的地亦渴望從內地這個龐大和迅速發展的市場分一杯羹，香港正要面對這些對手的激烈競爭。

然而，區內強大的競爭對手亦同時是我們的親密戰友和合作夥伴。在訪港的過夜消閒旅客中，57%在同一行程中平均前往2.6個旅遊目的地，正因如此，我們繼續與亞洲區內其他旅遊目的地締結策略聯盟，特別是那些能與我們互相補足、能豐富旅客體驗的目的地。

旅遊業已成為香港經濟的重要基石之一，旅發局其中一項重要理念，是要鼓勵和促進旅遊業界、政府和社會各界同心協力，向全球展示這個國際都會既深且廣的旅遊吸引力。放眼未來，我們會繼續努力，進一步制訂策略，維持香港作為亞洲最受歡迎旅遊勝地的地位。

商務旅客不但看見香港積極進取和充滿活力的一面，同時亦認同這裡是消閒旅遊的好去處，這類較富裕的客群在訪港旅客總數之中已穩佔重要席位，但我們必須繼續與旅遊業界緊密合作，鼓勵這類旅客在港逗留更長時間，體驗這裡精彩繽紛的旅遊吸引力。與此同時，香港不斷改善與展覽活動有關的基建設施，能進一步強化香港作為全球舉行會議及展覽活動首選地點的美譽，事實上，來港參與這些會議和展覽活動的旅客，亦正是我們致力開拓的高收益客群。



The HKTB will continue to work closely with trade partners to encourage business visitors to stay longer and experience the diversity of our attractions

旅發局會繼續與旅遊業界緊密合作，鼓勵商務旅客在港逗留更長時間，體驗這裡精彩繽紛的旅遊吸引力

but a milestone in the development of this market will be the opening of Hong Kong Disneyland, which will not only be a major attraction in itself, but also act as a catalyst for other activities.

Hong Kong's balance of city, harbour and countryside offers unique opportunities in the green tourism segment, which will become increasingly important as our markets mature. Our green back gardens, such as the country parks on the Sai Kung peninsula and Lantau Island, are valuable tourism resources that require both effective stewardship and promotion.



The HKTB strives to grow the family segment, which offers considerable market potential

旅發局正進一步開拓具市場發展潛力的家庭旅遊市場

There will, of course, be further challenges to overcome and unforeseen events to manage in the future. Although the economy of Mainland China continues to grow strongly and that of the United States appears finally to be pulling out of recession, we still face an uncertain geo-political

environment. The Bali bombing in October 2002, followed by a similar incident in Jakarta in August 2003, are clear evidence that this part of the world is not immune to terrorism. However, Hong Kong's reputation as one of the safest large cities in the world remains not merely untarnished, but if anything enhanced in the light of recent events.

Therefore it is with confidence and pride that I am delighted to invite the world to visit and experience our dynamic home, Hong Kong, to live its thrilling array of surprises and to love its cosmopolitan lifestyle.

The Hon Mrs Selina Chow, GBS, OBE, JP
Chairman

旅發局亦正進一步開拓家庭旅遊市場，特別是在亞洲，闔家旅遊已經成為明顯趨勢。我們得到航空公司、酒店、接待旅行社、零售商舖和餐廳食肆的鼎力支持，正籌劃連串以家庭旅客為對象的行程和推廣活動，香港迪士尼樂園的落成將會成為家庭旅遊市場的里程碑，它不但是一個重要的旅遊景點，更會推動其他相關的旅遊活動蓬勃發展。

香港的城市面貌、海港景致和青蔥郊野和諧共融，為發展綠色旅遊提供獨特的良機，隨著市場日趨成熟，生態旅遊亦顯得日益重要。香港的後花園，例如西貢半島和大嶼山的郊野公園是我們珍貴的旅遊資源，同時亦需要有效的保育和宣傳推廣。

展望未來，我們當然還要積極面對考驗，迎接挑戰。雖然內地經濟繼續蓬勃發展，美國經濟亦有跡象復甦，但多個地區的政治氣候仍然不明朗，2002年10月峇里島的炸彈襲擊，2003年8月在雅加達發生的同類事故，都清楚說明亞洲地區亦籠罩著恐怖主義的陰霾，然而，香港作為全球其中一個最安全的城市，並沒有因這些連串事件而褪色，反而更加鞏固。

我對香港充滿信心，並引以為傲。謹此誠意邀請世界各地旅客蒞臨香港，親身體驗我們這個充滿朝氣的家——香港，享受這裡呈獻的歡樂和喜悅，愛上這裡時尚繽紛的都市潮流。



周梁淑怡議員
主席