

一九八八年至一九九八年的訪港旅遊業回顧

A Review of Inward Tourism in Hong Kong, 1988 – 1998

隨着香港經濟結構轉型，訪港旅遊業的豐厚經濟潛力成爲發展服務行業的其中一股強大推動力。作爲一項研究課題，旅遊業本身涉及多個不同的範疇。本文介紹編製旅遊業統計數字的有關概念，以及在一九八八年至九八年期間訪港旅遊業表現的概要。

Following the structural changes in Hong Kong's economy, the enormous economic potential of inward tourism becomes one of the major propellants to the development of the service sectors. As a field of study, tourism cuts across many different disciplines. This article presents the conceptual issues related to the compilation of tourism statistics and an overview of the performance of inward tourism for the period 1988 to 1998.

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1. 引言

1.1 香港位處亞洲中樞，是許多外地旅客心目中的一個熱門旅遊目的地。旅遊業因而成為香港賺取外匯的其中一個主要來源，對本地經濟擔當着重要的角色。

1.2 訪港旅遊業在經過過往十年強勁增長後，於一九九七年下半年開始進入鞏固期。由於受到亞洲金融風暴的影響，香港的旅遊業近兩年來經歷了放緩。

1.3 由於旅遊業與香港經濟體系中各個組成部分的關係密切，因此旅遊業本身的表現對經濟增長的潛在影響亦受到廣泛關注。本文旨在回顧訪港旅遊業在一九八八年至九八年期間的表現，以及討論編製有關旅遊業統計數字的問題。

2. 概念與架構

2.1 「旅遊業」在統計上是一個難以定義的概念，非一般簡單直接的方法可以量度。事實上，我們不能以某一個「行業」的標準架構來套用於「旅遊業」，因為行業之間的分類，可根據其產出及投入的特徵而區分，但旅遊業的狀況則有所不同。

2.2 為克服上述困難，我們採用了「服務界別」這名稱。「服務界別」有別於服務業，它包括由不同行業所從事而與同一個主題相關的經濟活動部分。旅遊服務是「服務界別」的典型例子，原因是旅遊業本身涉及極多元化的經濟活動，包括旅遊營辦商、運輸業、酒店業、飲食業、零售業及其他有關的服務行業。

1. Introduction

1.1 Located at the heart of Asia, Hong Kong is a popular place of visit to many foreign visitors. Tourism is one of the major foreign exchange earners, and is taking an important role in the economy of Hong Kong.

1.2 While enjoying sustained growth in the past decade, tourism in Hong Kong entered into a period of consolidation since the middle of 1997. Affected by the financial turmoil in Asia, inward tourism in Hong Kong witnessed a downturn in the past two years.

1.3 Given the close economic relationship between tourism and other sectors of Hong Kong's economy, the performance of tourism industry has been attracting great concern over its possible impact on economic growth. This article presents a review of the performance of inward tourism in Hong Kong from 1988 to 1998. The issues of compiling statistics related to tourism would also be addressed.

2. Conceptual Framework

2.1 "Tourism" is a difficult concept to define statistically, and to measure in a simple and straight-forward way. In fact, the term "tourism industry" does not fit into the standard framework of an "industry". While industries can be differentiated from each other because of the distinguishing features of their output and input, the situation is different for tourism.

2.2 To get around the problems, the notion of a "service domain" is adopted. A service domain differs from a service industry in that a domain comprises those parts of economic activities straddling different industries but somehow related to a common purpose. Tourism is a typical example of "service domain". This is because tourism involves a host of multi-facet activities that cut across different sectors of the economy, including travel operators, transport, hotels, restaurants, retail and many other related service industries.

2.3 在概念上，衡量旅遊業在經濟方面的重要性，最佳的指標是旅遊業相對於本地生產總值的貢獻。然而，與旅遊有關的服務行業涉及極多元化的經濟活動；而當中每一項也可能包含與訪港旅遊、離港旅遊或本地旅遊有關的經濟活動。所以實際上，有關訪港旅遊、離港旅遊或本地旅遊在各項經濟活動中所佔的比重是難以分割。再者，任何旅遊消費均會在經濟體系內刺激其他間接消費。因此，現時並沒有一個簡單直接的方法以量度旅遊界別在本地生產總值中所佔的貢獻。

2.4 基於以上種種原因，關於旅遊業的統計分析通常分為需求面和供應面兩大主流。訪港旅客人數和旅遊業收益的統計資料可作為需求面的指標；而與旅遊業有關的服務業統計數字，則可從供應面反映該行業對旅遊業所提供的設備及服務。以下段落主要從需求面和供應面分析訪港旅遊及其相關行業。

3. 一九八八年至九八年旅遊業回顧

3.1 由於區內經濟氣候轉好，香港旅遊業漸有復甦跡象。縱使旅遊業在過往兩年間表現不振，但在一九八八年至九八年的十年期間，訪港旅客的平均按年升幅仍有 4.5%。

3.2 一九九六年是香港旅遊業大放異彩的一年，共接待了 1 170 萬名旅客。但受到亞洲金融風暴的影響，自九七年下半年起，訪港旅客數字開始下跌。全年祇有 1 040 萬人，較九六年下跌 11.1%。九八年的訪港旅客人數更較九七年再下滑 8.0%。單以日本一地計算，旅客人數在這兩年的按年跌幅分別為 43%及 31%。換言之，日本旅客訪港人數在兩年間大幅下跌 60%。(表一)

2.3 Conceptually, the economic significance of tourism may be best assessed in terms of its contribution to Gross Domestic Product (GDP). However, in the case of tourism, the related service trades fall into a wide spectrum of economic activities. Each of these activities may contribute to inward tourism, outward tourism or domestic tourism. In practice, it is difficult to delineate the proportion of activity that is attributable to each category of tourism. Moreover, initial tourist expenditure will percolate through the economy, stimulating further indirect expenditure. Hence, there is no simple measure of the prominence of the tourism domain in terms of its contribution to GDP.

2.4 In view of the above-mentioned factors, statistical analysis of tourism usually falls into the regime of demand and supply. While statistics on visitor arrivals and tourism receipts are indicators on the demand side, the capacity of facilities and services provided by tourism-related sectors could reflect the supply side. The following paragraphs mainly focus on the analysis of **inward tourism** and related business within the framework of demand and supply.

3. Overview of Tourism, 1988-1998

3.1 With an improving economy in the region, there has been sign of recovery in the tourism of Hong Kong. Despite the slack performance of tourism in the last two years, the economy enjoyed an average annual growth of 4.5% from 1988 to 1998 in terms of visitor arrivals.

3.2 The year 1996 was a remarkable year for tourism, attracting some 11.7 million visitors to Hong Kong. A downturn in the second half of 1997 was however noted, partly as a result of the Asian financial turmoil. In 1997, the number of visitor arrivals was 10.4 million, a drop of 11.1% compared with 1996. In 1998, the figure further dropped by 8.0%. Compared with the previous year, visitors from Japan alone slashed 43% in 1997 and a further 31% in 1998. In other words, the number of visitors from Japan dropped significantly by 60% in two years. (Table 1)

3.3 在過去十年間，另一個明顯的現象是訪港旅客來源地的分佈變化。來自日本的旅客人數，佔所有訪港旅客的比率，由一九八八年的 20.1% 下降至九八年的 9.9% (表一)。另一方面，來自中國內地旅客人數所佔比率，則由八八年的 11.1% 大幅上升至九八年的 27.1%。在一九九八年，列首四位的訪港旅客來源地，分別為中國內地(27.1%)、台灣(18.9%)、日本(9.9%)和美國(8.1%)。

3.3 Another noticeable observation was the shift in the mix of Hong Kong tourists by source in the past decade. Over the period from 1988 to 1998, the number of visitors from Japan turned from a prominent share of 20.1% in 1988 to 9.9% in 1998 (Table 1). On the other hand, a surge of visitors from the mainland of China was recorded, with the percentage share of total visitor arrivals rose from 11.1% to 27.1% during the same period. In 1998, the four top major sources of incoming tourists were: mainland of China (27.1%), Taiwan (18.9%), Japan (9.9%) and USA (8.1%).

表一 按主要居住國家/地區劃分的訪港旅客人數
Table 1 Visitor Arrivals by Major Country/Territory of Residence

居住國家/地區 Country/Territory of residence	千人 Thousand										
	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998
美國 USA	749 (12.1)	624 (10.4)	612 (9.3)	620 (9.1)	694 (8.7)	756 (8.5)	776 (8.3)	749 (7.3)	751 (6.4)	801 (7.7)	773 (8.1)
日本 Japan	1 240 (20.1)	1 176 (19.7)	1 332 (20.2)	1 260 (18.5)	1 324 (16.5)	1 281 (14.3)	1 441 (15.4)	1 691 (16.6)	2 383 (20.4)	1 369 (13.2)	945 (9.9)
台灣 Taiwan	1 094 (17.7)	1 133 (18.9)	1 345 (20.4)	1 298 (19.1)	1 640 (20.5)	1 777 (19.9)	1 665 (17.8)	1 761 (17.3)	1 821 (15.6)	1 783 (17.1)	1 813 (18.9)
中國內地 The mainland of China	684 (11.1)	730 (12.2)	754 (11.5)	875 (12.9)	1 149 (14.3)	1 733 (19.4)	1 944 (20.8)	2 243 (22.0)	2 311 (19.7)	2 297 (22.1)	2 597 (27.1)
所有訪港旅客 Total visitor arrivals	6 167	5 985	6 581	6 795	8 011	8 938	9 331	10 200	11 703	10 406	9 575

註釋： 括號內數字表示佔所有訪港旅客的百分率

Note: Figures in bracket denote the percentage share to total visitor arrivals

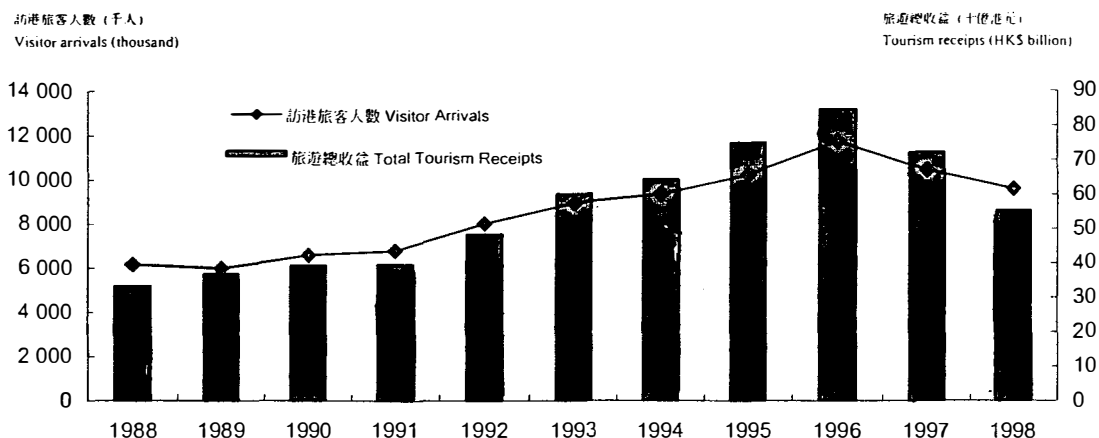
資料來源： 香港旅遊協會

Source: Hong Kong Tourist Association

3.4 繼一九九六年的高增長後，九七年的旅遊總收益祇有 721 億港元，較九六年下跌 14.7%；而訪港旅客人均消費亦下跌至 6,722 港元，跌幅為 4.6%。在一九九八年，旅遊總收益及訪港旅客人均消費這兩項統計數字，更較九七年分別下跌 23.4% 及 17.5%，分別為 553 億港元及 5,544 港元。與一九八八年的 333 億港元旅遊總收益比較，旅遊業總收益在這十年間平均每年上升 5.2%。(圖一)

3.4 After an exceptionally good year in 1996, tourism receipts for 1997 recorded a decline of 14.7% to \$72.1 billion. The amount each visitor spent on average also fell 4.6% to \$6,722. The decline continued in 1998, with total receipts further dropping by 23.4% to \$55.3 billion and spending per visitor, by 17.5% to \$5,544. Compared with the corresponding figure of \$33.3 billion in 1988, the average annual growth rate over the ten-year period was 5.2%. (Chart 1)

圖一 一九八八年至九八年訪港旅客人數及旅遊總收益
Chart 1 Visitor Arrivals and Tourism Receipts, 1988 – 1998



資料來源：香港旅遊協會

Source: Hong Kong Tourist Association

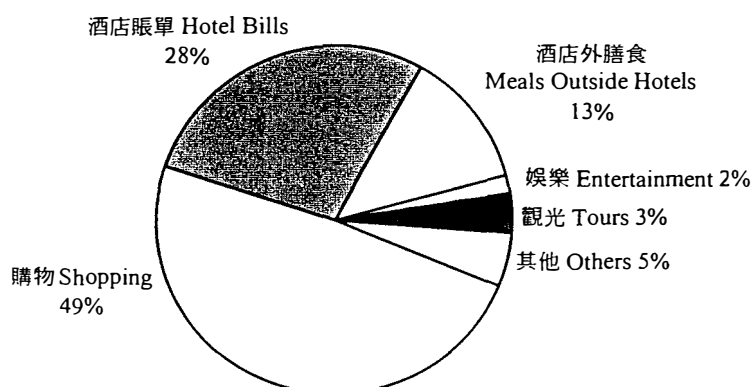
3.5 按訪港旅客來源地分析，在一九九八年的旅客消費中，源自首四位來源地的旅客消費已超過整體旅客消費的 65%，這四個旅客來源地分別為中國內地(27%)、台灣(20%)、日本(10%)和美國(9%)。與一九八八年的旅客消費資料相較，顯示了十年間來源地組合的轉變。當年日本(28%)、美國(16%)和台灣(15%)這三個來源地共佔整體旅客消費的 59%(八八年的數字不包括來自中國內地訪港旅客的消費)。

3.5 Analyzed in terms of source mix, over 65% of the receipts from visitors in 1998 was accounted for by visitors from the mainland of China (27%), Taiwan (20%), Japan (10%) and USA (9%). The changes in source were reflected by the receipts from visitors in 1988, of which visitors from Japan (28%), USA (16%) and Taiwan (15%) contributed 59% of total receipts from visitors (Figures in 1988 exclude spending of visitors from the mainland of China).

3.6 一九八八年至九八年這段期間，訪港旅客的消費模式大致保持穩定。在九八年來港旅客的消費中，前三位的消費項目分別為購物(49.0%)、支付酒店賬單(28.0%)，以及在酒店外膳食(12.7%)。相對於一九八八年，這三項所佔的比重，分別為 54.0%、28.6%和 9.0%。(圖二)

3.6 The visitor spending profile remained relatively stable from 1988 to 1998. In 1998, the top three items that visitors spent most money were shopping (49.0%), hotel bills (28.0%) and meals outside hotels (12.7%); and the corresponding percentage shares in 1988 were 54.0%, 28.6% and 9.0% respectively. (Chart 2).

圖二 一九九八年訪港旅客消費模式
Chart 2 Visitor Spending Pattern, 1998



資料來源：香港旅遊協會

Source: Hong Kong Tourist Association

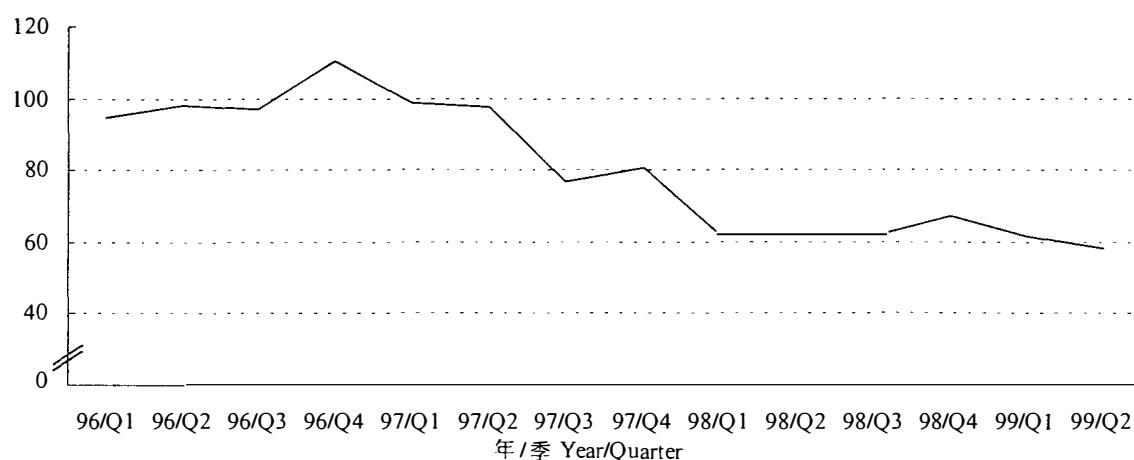
3.7 除了由香港旅遊協會編製的旅遊業收益統計數字之外，政府統計處由一九九六年第一季開始，亦編製有關旅遊、會議及展覽服務界別的按季業務收益指數。該指數可反映經營與旅遊服務有關業務的本地機構單位，以及本地會議及展覽主辦機構總收益的變動。

3.7 In addition to the tourism receipts statistics compiled by the Hong Kong Tourist Association (HKTA), a quarterly business receipts index is compiled by the Census and Statistics Department in respect of the tourism, convention and exhibition services domain as from the first quarter of 1996. The index serves to reflect changes in total receipts of local establishments engaged in tourism related businesses and of local convention/exhibition organizers.

3.8 受到訪港旅客人數及訪港旅客消費大幅下降的影響，來自旅遊、會議及展覽服務界別的業務收益，自九七年第二季開始亦見下降。然而，此降幅在近數季似有緩和跡象。(圖三)

3.8 In line with the considerable setback in tourist arrivals and spending, the business receipts of the tourism, convention and exhibition services domain was on a downward track since the second quarter of 1997. The decline, however, seemed to have eased off in the recent quarters. (Chart 3).

圖三 旅遊、會議及展覽服務界別業務收益指數 (1996=100)
Chart 3 Business Receipts Index of Tourism, Convention and Exhibition Services Domain (1996=100)



資料來源：政府統計處 經銷及服務業統計組(二)甲

Source: Distribution and Services Statistics Section (2)A, Census and Statistics Department

4. 與旅遊業有關的業務

4. Business related to Tourism

4.1 與旅遊業相關的行業貢獻者，可根據其對旅遊業的依賴程度，以及直接從旅遊業賺取盈利的比重來界定。在眾多與旅遊業有關的服務行業中，酒店業、運輸業和零售業可說是其中表表者。

4.1 The trade contributors to tourism can be structured in terms of their direct inter-dependence and the level of direct earnings from tourism. Among the various tourism-related sectors, hotels, transport and retail are the more prominent ones.

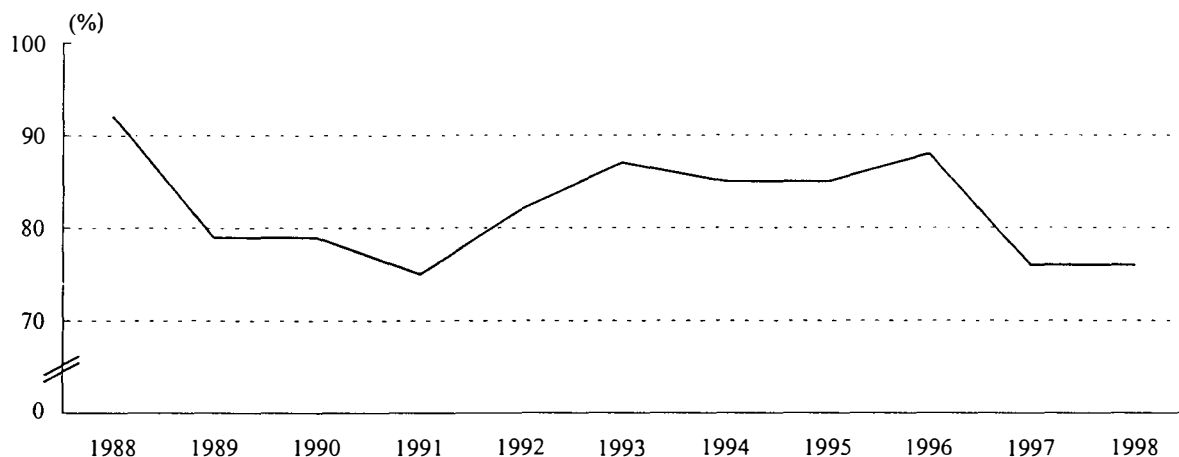
4.2 酒店房間供應數字是一個重要的指標，反映香港接待旅客的能力。根據香港旅遊協會編製的酒店業統計數字，香港在一九九八年共有 88 間酒店，提供 33 981 個房間，相對於八八年由 65 間酒店所提供的 22 882 個房間，房間數目上升達 48.5%。

4.2 Statistics on hotel room supply situation is a critical indicator reflecting the capacity of Hong Kong to accommodate visitors. According to the hotel statistics compiled by the HKTA, there were 88 hotels providing 33 981 rooms in 1998, representing an increase of 48.5% in hotel rooms as compared with the 1988 figures of 22 882 rooms in 65 hotels.

4.3 在一九八八年至九八年這段期間，全年酒店平均入住率最低為九一年的 75%，最高則為八八年的 92%。縱使近年面對不利的外圍環境，酒店平均入住率，仍較全球平均酒店入住率的 68% 為高。(圖四)

4.3 Over the period from 1988 to 1998, the average hotel room occupancy rate ranged from the lowest of 75% in 1991 to the highest of 92% in 1988. Despite the unfavourable situation in recent years, the average hotel room occupancy rates were still above the world's average of about 68% over the period. (Chart 4)

圖四 一九八八年至九八年酒店入住率
Chart 4 Hotel Room Occupancy Rate, 1988 – 1998



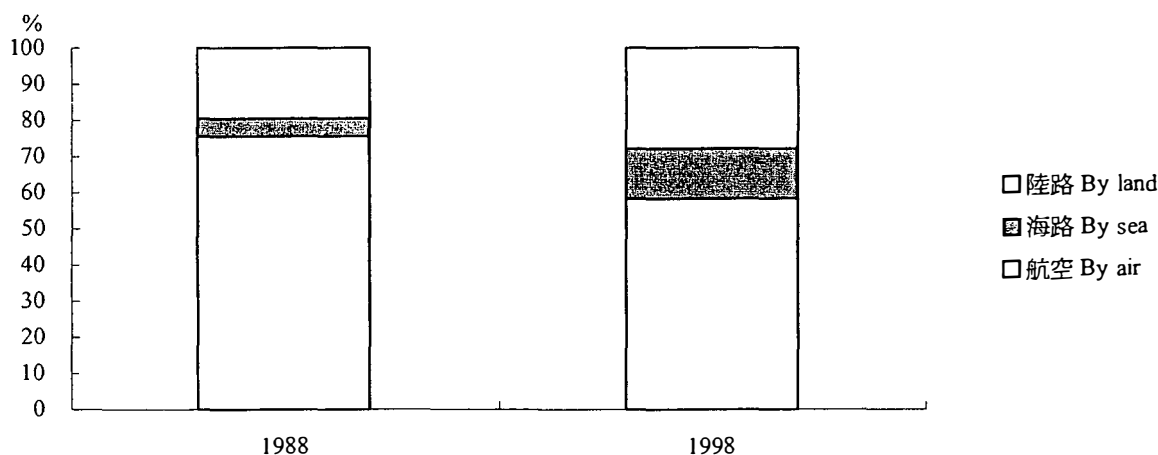
資料來源：香港旅遊協會

Source : Hong Kong Tourist Association

4.4 運輸業（特別是航空業）是另一個與旅遊業關係密切的核心行業。按一九九八年訪港旅客所使用的交通工具計，比率分別為：航空(58.2%)、海路(14.3%)和陸路(27.5%)；八八年的相對數字則為：航空(75.4%)、海路(5.4%)和陸路(19.2%)。這顯示在過去十年間，旅客循海路和陸路入境的比率有上升的趨勢，這與近年越來越多來自中國內地的旅客有關。事實上，在一九九八年，此類旅客有 19.7% 循海路入境，而循陸路入境的比率更達 44.2%。儘管如此，航空仍是最多訪港旅客採用的入境途徑。(圖五)

4.4 The transport sector, particularly the airlines, is another core sector closely related to tourism. In 1998, the percentage shares of visitor arrivals by mode of transport were: by air (58.2%), by sea (14.3%) and by land (27.5%). The corresponding figures in 1988 were: by air (75.4%), by sea (5.4%) and by land (19.2%). The trend of increasing use of sea transport and land transport by passengers was mainly attributable to the increase in number of visitors from the mainland of China over the decade. In fact, 19.7% of them arrived at Hong Kong by sea and 44.2% by land in 1998. Nevertheless, the air transport mode is still the most popular mode of transport adopted by arriving visitors. (Chart 5)

圖五 一九八八年至九八年的訪港旅客所使用交通模式
Chart 5 Visitor Arrivals by Mode of Transport, 1988 – 1998



資料來源：香港旅遊協會

Source : Hong Kong Tourist Association

4.5 一個高效率的機場是發展旅遊業的其中一項基礎建設。事實上，香港國際機場是世界上最繁忙的機場之一，而航空交通流量亦按年有大幅增長。在一九八八年至九八年的十年期間，航機升降次數和客運量的平均按年增長率分別為 6.5%和 5.9%。此外，九八年啓用的赤鱘角新國際機場當可為航空運輸業注入新動力，有利於各經濟活動以及旅遊業的發展。(表二)

4.5 An efficient airport is one of the basic infrastructures to develop tourism. In fact, the airport in Hong Kong is among the busiest in the world and the demand on air traffic has been growing substantially over the years. Over the ten-year period from 1988 to 1998, total aircraft movements and total passenger throughput had been increasing at an average annual rate of 6.5% and 5.9% respectively. Furthermore, the opening of the airport in Chek Lap Kok in 1998 would add impetus to more active air transportation, which would benefit various economic activities including tourism. (Table 2)

表二 一九八八年至九八年進出香港的航機升降次數及客運量
Table 2 Inward and Outward movements of aircraft and passenger throughput, 1988 – 1998

	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998
航機升降總計 ⁽¹⁾ Total aircraft movements ⁽¹⁾	87 024	94 300	105 782	109 718	120 968	135 092	143 251	150 118	158 797	165 154	163 223
客運量 ⁽²⁾ (千人) Passenger throughput ⁽²⁾ (Thousand)	15 277	16 204	18 688	19 158	22 061	24 421	25 248	27 424	29 543	28 318	27 209

註釋：(1) 包括載客及載貨班機
 (2) 包括轉機乘客但不包括過境乘客及空勤人員

Notes: (1) Including passenger and cargo flights
 (2) Including transfers but excluding transit passengers and crew members

資料來源：民航處

Source : Civil Aviation Department

4.6 在各行業中，零售業的收益，部分是直接受惠於旅客的消費。近年區內的經濟不景，不但打擊與旅遊業相關的核心行業，如航空業、酒店業等，亦同時影響到零售業的表現。一九九八年的零售業銷貨價值更下跌至近年來的最低點。

4.6 The retail sector is among the sectors that draw part of business income directly from visitors' spending. The financial turbulence in the region in recent years not only adversely affected the core tourism sectors of airlines and hotels, but also the retail sector. The value of retail sales in 1998 fell to the lowest point in recent years.

4.7 旅遊業對本港零售業的重要性，可由旅客購物的消費額顯示出來。根據香港旅遊協會統計數字，在一九九八年，旅客用於購物的消費收益為260億港元，而同期零售業總銷貨價值則為1,957億港元。以這些統計數字相較，可大致算出一九九八年旅客用於購物消費的收益約佔零售業總銷貨價值的13.3%，此比率為八八年至九八年期間的最低水平。(表三)

4.7 The economic significance of tourism to the retail sector can be reflected by the amount that tourists spend on shopping. According to HKTA's statistics, receipts from visitors' spending on shopping amounted to HK\$26.0 billion in 1998. Over the same period, the value of total retail sales was HK\$195.7 billion. Comparing these statistics, the proportion of retail sales attributable to tourists' spending could be broadly estimated as 13.3% in 1998, which was the lowest during the period from 1988 to 1998. (Table 3)

表三 一九八八年至九八年零售業總銷貨額及旅客購物消費
Table 3 Value of Total Retail Sales and Visitors' Spending on Shopping, 1988 – 1998

	十億港元 HK\$ billion										
	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998
零售業總銷貨額 ⁽¹⁾ Total retail sales ⁽¹⁾	101.9	107.5	115.4	135.4	159.5	179.8	201.1	210.6	223.9	234.9	195.7
旅客購物消費 ⁽²⁾ Visitor's spending on shopping ⁽²⁾	17.5	18.1	19.4	20.1	24.8	29.6	32.5	37.1	40.9	34.4	26.0
所佔百分比 % share	17.2%	16.9%	16.8%	14.8%	15.6%	16.5%	16.1%	17.6%	18.2%	14.7%	13.3%

資料來源： (1) 政府統計處
(2) 香港旅遊協會

Sources: (1) Census and Statistics Department
(2) Hong Kong Tourist Association

5. 總結

5.1 以上是從不同的角度分析香港的旅遊界別。透過分析一系列有關旅遊業需求面和供應面的統計數字，概括了旅遊業在這期間的表現。政府統計處將在此範疇繼續進行研究，發展更全面的統計指標。

5. Concluding Remarks

5.1 The above analyses study the tourism domain in Hong Kong from various perspectives. They are based on a range of statistics on the demand and supply sides, intending to provide a broad picture of the performance of tourism over the period. Continuous research will be conducted by the Census and Statistics Department to develop more comprehensive statistical indicators on the subject.