

Executive Director's Statement | 總幹事報告



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“Attracting visitors means more than just identifying and targeting key markets and segments. We must also fulfil their needs in terms of service excellence, quality assurance and destination information.”

「我們認為，要吸引旅客來港，並不能單靠鎖定目標市場和客群，同時亦必須迎合旅客的需要，無論在服務水平、質素、提供旅遊資訊等各方面，都要做到盡善盡美。」

When planning for 2005/06, we knew that it would not be easy to build on our industry's extraordinary achievements in the previous year. Thanks to a largely positive macro environment, favourable policies in the Mainland – such as the expansion of the Individual Visit Scheme (IVS) and the Closer Economic Partnership Arrangement (CEPA) – and the magnificent efforts of our industry partners, arrivals to Hong Kong in 2004 had grown by a remarkable 6.3 million visitors over 2003, surpassing our previous record set in 2002 by almost one third.

While at the time we had every reason to celebrate, we realised that we would have a difficult task to retain and grow this vast base of visitors in 2005 – especially from the Mainland and in the face of fierce international competition. On the other hand, it was also evident that with a portfolio of major new tourism attractions coming on stream, 2005/06 would stand as a critical watershed in the growth and expansion of our tourism industry. In view of this scenario, we adopted a cautious outlook for the year, with a business plan designed to pace our arrivals increases in the immediate and medium term, while building for a long-term and sustainable future. Our strategies were aimed at further developing key segments and markets, while also focusing on the equally critical task of broadening Hong Kong's appeal and enhancing the experiences of our visitors.

Following many months of detailed planning, we unveiled the 2006 Discover Hong Kong Year global marketing campaign, which the Hong Kong Tourism Board (HKTB) progressively rolled out during 2005/06. The campaign was designed with the dual objectives of creating an effective growth platform, and maximising the benefits of tourism for our city.

In targeting segments, we had already set out to grow our family arrivals a few years ago, so as to pave the way towards the opening of such new attractions as Hong Kong Disneyland. These offered the opportunity both to creatively package Hong Kong's family-friendly assets and position this city as a "must-visit" destination for parents and children. Leveraging their potential, we also identified family travellers as one of the key targeted segments in 2006 Discover Hong Kong Year.

Although regional markets including the Mainland, Taiwan and Southeast Asia presented the greatest opportunities within the family segment, we also saw potential in such long-haul markets as Australia, which has grown in tandem with increases in air capacity on the "kangaroo route" to Europe. Ethnic segments in the United States and Canada also showed

香港的旅遊業績在2004年曾顯著增長，因此，我們為2005/06年度制訂工作目標時已深深明白到，必須加倍努力，方能推動旅遊業再進一步增長。在2004年，由於宏觀市場環境向好，內地又進一步延伸「個人遊」措施和推行「更緊密經貿關係安排」等政策，再加上旅遊業界不斷群策群力，令全年訪港旅客人次，較2003年大幅增加630萬，而且更比2002年刷新的紀錄，超出近三分之一。

這項佳績固然令人振奮，不過，我們同時亦了解，訪港旅客的基數，尤其是來自內地的旅客數字，其實已經非常大，而且，國際市場的競爭又相當激烈，所以，要令2005年的訪港旅客數字維持甚至超越2004年的水平，確實存在一定挑戰。另一方面，踏入2005/06年度，旅遊業將會邁進新的里程，多個大型旅遊項目相繼落成，將會有利旅遊業的長遠及持續發展。因此，我們為這年度制訂了謹慎的策略目標，務求旅客人次在短期至中期，保持穩定增長，同時亦希望為旅遊業奠定長遠而且持續發展的根基。為此，我們除了銳意開拓主要的客群和市場之外，亦致力向旅客展示香港包羅萬有的特色，讓他們享受更豐富的旅遊體驗。

經過多個月的詳細籌劃，香港旅遊發展局(旅發局)公佈了「2006精采香港旅遊年」全球推廣計劃，積極透過這個平台，推動旅遊業持續發展，並且盡量擴大旅遊業對香港經濟的貢獻。在2005/06年度，我們已分階段在全球各地推出這計劃。

在開拓客群方面，因應香港迪士尼樂園和一系列新景點開幕在即，早在數年前，我們已經開始部署，努力吸引更多家庭旅客來港。這些新景點投入服務，不但讓業界能發揮創意，重新包裝本港的家庭旅遊特色，而且有助將香港推廣為一家大小「必到」的旅遊勝地。正因為家庭旅客極具發展潛力，因此，這類客群順理成章成為「2006精采香港旅遊年」的目標之一。

在亞洲，內地、台灣和東南亞的家庭客群，發展潛力最為豐厚，至於長途市場，潛力也相當不俗。以澳洲為例，由於來往歐洲的航班載客量上升，家庭旅客亦隨之增加。而美國和加拿大的亞裔客群，發

promise. Of particular note in 2005/06 was the range of focused marketing programmes we undertook in the Mainland, where we partnered with education bureaux and schools to reach children, and also developed new family-oriented tour itineraries.

The results of this focus have been positive, with a marked growth in overnight family arrivals from the final quarter of 2005 sustained into the first half of 2006. In fact, the proportion of family travellers bringing children to Hong Kong increased from 22.7% in the first quarter of 2005 to 43.4% in the same three months of 2006. This has created a strong foundation for further growth in family visitors in 2006 and, just as important, also reinforced Hong Kong's appeal as a family-friendly destination in terms of safety, ease of getting around, and the wide choice of attractions and activities.

When identifying key segments, we not only assess growth potential and yield, but also specific behavioural patterns that we can leverage. Business travellers, for example, are increasingly drawn to Hong Kong by China's growing stature as an international trading partner, the positive global economic outlook, and this city's role as a major financial and commercial hub. To maximise the opportunities from these trends, we continued encouraging business visitors to extend their stay and increase their spending by taking part in more leisure activities, and bringing spouses and family members with them.

展前景亦極為理想。至於在內地，我們在 2005/06 年度曾進行一系列重點宣傳工作，與教育部門和學校合作向學童推廣，而且又推出新穎的家庭旅遊行程。

令人欣慰的是，我們以家庭旅客為目標的推廣，成績十分理想。在 2005 年最後一季至 2006 年上半年期間，訪港的過夜家庭旅客顯著增加。而帶同子女來港的家庭旅客比率，更由 2005 年第一季的 22.7%，增至 2006 年同期的 43.4%。這些推廣工作不但推動家庭客群在 2006 年進一步增長，而且亦有助鞏固香港的家庭旅遊形象，讓旅客知道，香港是個既安全、交通方便而又包羅萬有的渡假勝地。

在鎖定目標客群時，我們並非只著眼於客群的增長潛力或投資回報，同時亦深入研究不同旅客的旅遊模式，尋找新的機遇。以商務旅客為例，隨著中國在國際商貿領域的地位愈趨重要，加上全球經濟向好，而香港又擁有作為金融及貿易樞紐的優勢，因此，往來香港的商務旅客愈來愈多。為充分把握這趨勢，我們不斷鼓勵商務旅客在港參與消閒活動，或者與親友結伴來港，藉此推動他們延長留港和增加消費。

- ▶ Attendees at a major conference in Hong Kong visit the Peak Tower, one of this city's perennially popular tourism attractions
來港出席大型會議的旅客，前往一向備受歡迎的景點——山頂凌霄閣參觀



Within this segment, we paid special attention to high-yield MICE (meetings, incentives, conventions and exhibitions) visitors, and enjoyed several opportunities to further develop this segment in 2005/06. Indeed, our new venues, such as AsiaWorld-Expo and Hong Kong Disneyland, the strong global interest in the China market, and the growing attendance by Mainland visitors to recurrent exhibitions in Hong Kong all make this city an attractive choice for event organisers. With such major international events as the 88th Lions Clubs International Convention and the Sixth World Trade Organization Ministerial Meeting held in Hong Kong during 2005/06, I am delighted to report that overseas attendance at conventions and exhibitions during 2005 grew by 35% and 15% respectively, creating a strong base for future growth.

Looking ahead, the completion of new hotels and the extension of the Hong Kong Convention and Exhibition Centre augur well for Hong Kong's MICE industry, and the HKTb will leverage these developments and step up its efforts to grow this lucrative segment by targeting event organisers, international organisations and potential visitors.

In terms of market focus in 2005/06, the HKTb placed its major effort in the 18 key markets around the world that together provide more than 90% of our arrivals. And although we continue to capitalise on the boom in outbound travel from the Mainland, we always strive to maintain a good mix of visitors from all markets, so as to minimise risk and maximise return. This prudent measure also enables us to uphold Hong Kong's image as a sophisticated international destination.

其中，我們又特別注重高效益的會議、展覽及獎勵旅遊客群。事實上，在 2005/06 年度，這個客群類別有不少新的發展機會。除了極富吸引力的新場地，例如亞洲國際博覽館和香港迪士尼樂園落成之外，全球各地均將焦點集中於祖國，而且，愈來愈多內地旅客來港參與定期舉行的展覽，令香港極受活動籌辦商的歡迎。年內，連串國際盛事便曾經在港舉行，例如「第 88 屆國際獅子會年會」及「世界貿易組織第六次部長級會議」。總括而言，在 2005 年來港出席會議及展覽的旅客，分別增長 35% 及 15%，為未來的發展打穩根基。

展望未來，不少新酒店將會落成，香港會議展覽中心又會進行擴建，均有助本港進一步開拓會展及獎勵旅遊業務。旅發局將充分利用這些機會，分別以活動籌辦商、國際商貿機構及旅客為對象，努力發展這個高效益客群。

在客源市場方面，2005/06 年，旅發局繼續集中向全球 18 個主要市場推廣，這些市場合共佔訪港旅客超過九成。雖然內地的外遊市場蓬勃，令本港旅遊業亦隨之受惠，但旅發局一直以維持均衡客源市場組合為策略重點，這不但有助減低投資風險和取得最大回報，亦是維持本港多元化和國際形象的關鍵。



▲ Families from short-haul markets and business travellers are among the key targets of the HKTb's focus on high-yield segments
短途市場的家庭旅客及商務旅客，均是旅發局的高效益目標客群

To sustain our tourism growth, we must also extend our reach to potential visitors by exploring opportunities in new markets, identifying emerging segments in existing markets, and addressing new trends and preferences among our current targeted segments. Among the former, South Korea, Thailand and the Philippines offered strong potential. To enhance our presence in these markets, we appointed representatives in Thailand and the Philippines, and began preparing for the establishment of a branch office in South Korea. We also embarked on developing secondary cities, such as Busan in Korea and Cebu in the Philippines. These activities were reflected in record performances from Thailand (380,412 visitors, a growth of 20.0%) and South Korea (642,480 visitors, an increase of 19.2%), while the Philippines also registered strong growth (391,049 visitors, a rise of 16.2%) in 2005.

At the same time, we also nurtured our long-haul markets, which broaden the range of business opportunities for our trade partners and help strengthen our international appeal. The results were very encouraging, with record performances set by Australia, Canada, France, the UK and the US.

Closer to home, the Mainland remained our highest priority market, because of its substantial contribution to arrivals and its future growth potential. Hong Kong continued to benefit from the extension of the IVS to new cities during 2005/06, with almost half our total arrivals from the Mainland now travelling under the scheme.

要維持旅遊業的增長，我們必須不斷開發新市場，向更多旅客推廣香港，同時亦要在現有市場發掘新的客群類別，並且清楚目標客群的喜好和轉變。在發掘新市場方面，南韓、泰國和菲律賓的潛力十分優厚。為加強推廣力度，我們已分別在泰國和菲律賓委任代辦，並且在南韓籌備成立辦事處。我們也致力開發二線城市，例如南韓的釜山和菲律賓的宿霧。這些工作成效頗為顯著，2005年，以上三個市場的業績均刷新紀錄，來自泰國的訪港旅客為380,412人次，增長20%；來自南韓共642,480人次，升19.2%；而菲律賓則共391,049人次，升16.2%。

當然，我們亦致力發展長途市場。這類市場不但為旅遊業界帶來各種商機，而且，吸引長途旅客來港，對強化香港的國際形象十分重要。我們非常高興，這方面的工作成效也很理想，澳洲、加拿大、法國、英國及美國的業績，均打破以往紀錄。

至於祖國，則仍是香港最重要的客源，不但為我們帶來大量旅客，而且未來的增長潛力相當雄厚。年內，「個人遊」措施延伸至更多城市，繼續有利香港，而目前，來自內地的旅客當中，差不多一半都是以這形式訪港。



▲ The opening of a portfolio of major new tourism attractions offers a perfect opportunity to promote Hong Kong as a "must-visit" destination
連串嶄新的大型旅遊設施啟用，令旅遊業界可把握機會，將香港推廣為「必到」的旅遊勝地

While many consider Hong Kong as a “natural” destination for Mainland visitors, given our gateway position and the familiar “comfort zone” of language and culture that we offer, the international competition for China's outbound market is becoming more and more intense. Although in 2003 fewer than 30 destinations around the world had been granted Approved Destination Status (ADS) by the Central Government, by 2006 that number had risen to 81, including many Asia-Pacific countries and most member states of the European Union. Indeed, with new air routes constantly enhancing the Mainland's connectivity with the rest of the world, the interest of many other destinations in this booming source market is reflected in the growing number of national tourism organisation offices opening in Beijing and Shanghai.

To maintain our leading share of Mainland outbound visitors, we expanded the number of high-potential cities identified in our China market research study from 24 to 30 during 2005/06, a development strategy that increasingly leverages the opportunities in secondary cities. We also stepped up collaboration with tourism bureaux and the trade in the Pan Pearl River Delta region.

Of course, attracting visitors and retaining their loyalty mean more than just identifying and targeting key markets and segments, and creating aspirations to visit Hong Kong. We must also fulfil the needs and expectations of our guests in areas such as service excellence, quality assurance and destination information, while also offering them a memorable encounter with the city, its culture and its hospitality. Finally,

不少人都認為，香港與內地毗鄰，彼此的語言和文化又相近，因此，香港是內地旅客的「必然」選擇。但我們必須明白，世界各地都在爭奪內地這龐大市場，競爭已經愈趨白熱化。2003年，內地居民獲中央政府批核的外遊地點不到30個，但到了2006年，這數字已增至81，當中包括不少亞太區國家，以及大部分歐盟成員國。另一方面，隨著新航線增加，內地與國際的聯繫更加緊密。近年已有不少外國政府旅遊局紛紛在北京和上海設立辦事處，由此可見，世界各國均對內地這市場虎視眈眈。

香港在內地的外遊市場佔有率一直領先，為確保維持這優勢，在2005/06年度，我們根據中國市場研究的結果，將內地高潛力城市的數目由原來的24個增至30個，進一步研究開拓二線城市的潛力。我們又與泛珠三角區域的旅遊局和業界加強合作，營造更大的協同效應。

不過，單靠鎖定目標市場和客群，或者刺激旅客來港的意欲，並不能吸引旅客甚至鼓勵他們不斷重來。我們必須迎合旅客的需要，不負他們所望，無論在服務水平、質素、提供旅遊資訊等各方面，都要做到盡善盡美。此外，也要確保旅客來港後，對這個城市、這裡的文化和服務，均有愉快難忘的體驗。更重要的是，我們必須令每位旅客都對香港留



▲ As well as showcasing the city's legendary appeal for shoppers, the annual Hong Kong Shopping Festival also helps boost mid-year arrivals
每年一度的「香港購物節」，除了充分展示香港的購物樂趣外，亦有助刺激夏季期間的旅客人次



▲ Held each year, the HKTB-organised Best of the Best Culinary Awards highlight Hong Kong's reputation as Asia's culinary capital
旅遊局每年均舉辦「美食之最大賞」，突顯香港「亞洲美食之都」的地位

to accomplish our task, we must make sure that every visitor leaves Hong Kong with lasting, positive impressions. As our investment in advertising and promotions is wasted if we fail to offer visitors a totally satisfying, memorable experience, we make Experience Management a top priority.

As well as enriching visitors' experiences through our Mega Events programme, and increasing their confidence in Hong Kong through the Quality Tourism Services (QTS) scheme, we have channelled considerable effort into exploring and developing new avenues that offer flexible and convenient access to tourism information. We also capitalise on the power and reach of the Internet to provide comprehensive destination information through our DiscoverHongKong.com website, and also in a variety of targeted web marketing campaigns around the world.

To remain one step ahead in this fast-changing marketplace and sustain Hong Kong's competitive edge, we were also hard at work on developing new information platforms, such as our electronic guide for business visitors formatted for Personal Digital Assistants (PDAs) and the Hong Kong Mobile Host guide. Such platforms are not only tailored to visitors' lifestyles and interests, but also leverage the latest technologies and trends.

I mentioned earlier that the year 2005/06 represented a critical milestone for Hong Kong's tourism industry and for the HKTb. We believe our work has laid strong foundations, leaving us in better shape to face future challenges and capitalise on the opportunities ahead. In the event, we not only consolidated our huge base of arrivals in 2005, but also achieved

下美好而恒久的印象。倘若旅客得不到稱心滿意的體驗，任何廣告或宣傳推廣，均會徒勞無功。因此，提升旅客在港的旅遊體驗，一直是我們的首要任務。

一方面，我們借助大型活動，讓旅客享受到更豐富的體驗，另一方面，我們則透過「優質旅遊服務」計劃，務求旅客在港消費時更加放心。我們又積極尋找新途徑，以更靈活方便的渠道，為旅客提供旅遊資訊。互聯網的影響力無遠弗屆，所以，我們經由網站 DiscoverHongKong.com，不斷提供全面的旅遊資料，又在世界各地進行各種網上推廣活動。

旅遊市場瞬息萬變，要令香港永遠保持領先和優勢，旅遊資訊平台也要不斷推陳出新，因此，我們為商務旅客推出電子手帳版的旅遊指南，又透過流動電話提供「香港隨身旅遊大使」資訊服務。這些新的資訊發放平台，不但切合旅客的生活模式和喜好，而且也緊貼著科技和市場的最新趨勢。

正如我在先前所述，2005/06 年度是香港旅遊業和旅發局的新里程。我們深信在年內所做的各項工作，可以為旅遊業建立穩健的發展基礎，令旅遊業更加茁壯，有助我們迎接未來的挑戰，並且掌握日後的各種先機。總結2005年，我們不但穩守了龐大



▲ Shopping and dining at outlets accredited under the Quality Tourism Services (QTS) scheme offers visitors an assurance of quality, service and authenticity
旅客惠顧「優質旅遊服務」計劃的認證商舖和食肆，均可享有優質產品、服務和正貨的保證



▲ The HKTb's Visitor Information & Services Centre staff mark the beginning of 2006 Discover Hong Kong Year with stylish new uniforms
旅發局旅客諮詢及服務中心的服務人員換上全新制服，喜迎「2006 精采香港旅遊年」的來臨

growth from every key market. This is truly a tribute to the strength, cohesiveness and resilience of all our tourism partners, yet also marks the culmination of the HKTB's own transformation from an association serving its members to an information-based marketing organisation employing multiple channels and marketing skills for the benefit of the industry and the community.

As Hong Kong matures as a travel destination, and our visitor base becomes ever larger, we must add value to our investment by ensuring that we can sustain and develop visitors' interests, and thereby ensure they stay longer and make return visits. In short, we must enhance the "quality" of our visitor arrivals. In the last two years, we have seen encouraging results, with Total Expenditure Associated to Inbound Tourism registering double-digit growth of 14.1% in 2005 compared with 2004, and reaching a total of \$105.66 billion. We will work closely with our industry partners to generate greater business opportunities for them and, in turn, maximise their contribution to the overall economy.

As we move into this exciting new era, we will build on the close relationship we have developed with our partners to reap ever greater rewards for our city. We never forget that tourism is a truly co-operative effort, which involves Government, airlines, hotels, attractions, tour-planners and operators, cruise companies, retailers, the media and, indeed, the entire community – and in this respect I am delighted to note the increased awareness of this industry throughout our city, as more people, businesses and sectors are enjoying the benefits of tourism.

Once again, I would like to acknowledge the professionalism and quality of our partners in the tourism industry, the leadership and vision of our Chairman, and the magnificent counsel and guidance provided by our Board Members. And last, but certainly not least, I want to express my pride in the tireless efforts, dedication and commitment of the staff of the HKTB, who continue to do their utmost to ensure our city remains the preferred choice of many millions of visitors from around the world.

Clara Chong
Executive Director

的旅客基數，而且，每一個主要客源市場均有增長。能有此成績，一方面，是全賴整個旅遊業界奮發向前和團結一致，另一方面，亦反映旅發局由原來的會員制，重組成為以資訊為本的推廣機構後，可以借助更多推廣渠道及方法，為香港旅遊業及社會爭取最大的裨益。

香港已發展成為一個相當成熟的世界級旅遊勝地。隨著旅客基數愈來愈大，我們必須確保旅客維持對香港的興趣，吸引他們在這裡逗留更久，甚或再次光臨，這樣才可取得更大的投資回報。換句話說，我們應該設法提升訪港旅客的「質素」。過去兩年，這方面的工作已漸見成效。與2004年相比，2005年的「與入境旅遊相關的總開支」，錄得14.1%的雙位數字增幅，總額已升至1,056.6億港元。我們會繼續與業界緊密合作，開拓更多商機，令旅遊業為香港經濟帶來最大的貢獻。

旅遊業正邁進令人振奮的新里程，我們會繼續與業界合作無間，希望再次取得佳績。我們深深明白，旅遊業是一項全民事業，政府、航空公司、酒店、旅遊景點、旅行社、旅遊經營商、郵輪公司，以至零售界、傳媒及市民大眾的參與，均缺一不可。令人欣喜的是，近年，社會各界已愈來愈明白旅遊業對香港的重要，不斷群策群力，推動行業發展，並且一起分享豐碩的成果。

最後，我借此機會再次感謝所有業界夥伴，為旅客提供既專業而又具質素的服務。我亦感謝主席一直領導旅發局，為我們訂下遠大的目標，同時感謝旅發局成員不斷給予指引和意見。一直以來，局內每位員工均盡忠職守，為旅遊業盡心盡力，我實在為他們感到自豪。旅發局全體同仁會竭盡所能，確保香港繼續成為全球旅客的首選目的地。



總幹事
臧明華