

## INFORMATION NOTE

### Some Updated Information on Hong Kong's Ties with Neighbouring Jurisdictions

#### 1. Background

1.1 The Parliamentary Liaison Subcommittee of the House Committee will meet on 4 May 2001 to discuss whether a parliamentary visit to the National Assembly of Thailand or the legislatures of other jurisdictions should be organized before the end of the 2000-2001 Legislative Council session.

1.2 In order to ascertain whether Thailand should be accorded high priority over other jurisdictions as a place to be visited by a Legislative Council delegation, the Subcommittee requested the Research and Library Services Division to update the report entitled *Hong Kong's Ties with Neighbouring Jurisdictions (RP02/98-99)* published in September 1998. The report above mentioned covered external trade, direct investment, banking, tourism, and cultural exchanges. We are unable to cover cultural exchanges in this study owing to time constraint.

#### 2. Methodology

2.1 This study is based on the information obtained from the Census and Statistics Department, Hong Kong Trade Development Council, Hong Kong Tourism Board, and Hong Kong Monetary Authority.

2.2 Neighbouring jurisdictions in this study refer to Mainland China, Taiwan, South Korea, Malaysia, the Philippines, Singapore, Thailand, and New Zealand. This is the same as in the previous report (*RP02/98-99*) mentioned in paragraph 1.2 above.

### 3. External Trade

#### Hong Kong's Total Trade<sup>1</sup>

3.1 Mainland China (ranking 1)<sup>2</sup> has been Hong Kong's largest trading partner since 1985. The Mainland's share of Hong Kong's global trade increased from 9.3% in 1978 to 38.9% in 2000. In 2000, the bilateral trade (trade value) between Hong Kong and China totaled HK\$1,257,968 million (see Table 1).

3.2 Taiwan (ranking 2) was Hong Kong's fourth largest trading partner in 2000. The total trade value increased by 22.9% over 1999 to reach HK\$163,972 million.

3.3 Singapore (ranking 3) was Hong Kong's fifth largest trading partner in 2000. Its 2000 trade value with Hong Kong amounted to HK\$111,742 million.

**Table 1 - Hong Kong's Total Trade in 2000**

	<b>Total Trade Value (HK\$ million)</b>	<b>Percentage Share of Total Trade Value (%)</b>	<b>Percentage Change over 1999 (%)</b>	<b>Ranking Among the Neighbouring Jurisdictions</b>
Mainland China	1,257,968	38.9	+19.0	1
Taiwan	163,972	5.1	+22.9	2
Singapore	111,742	3.5	+20.9	3
South Korea	109,232	3.4	+26.0	4
Malaysia	51,971	1.6	+26.8	5
Thailand	42,306	1.3	+21.4	6
Philippines	31,840	1.0	+23.4	7
New Zealand	5,851	0.2	+11.8	8

Source: Census and Statistics Department

<sup>1</sup> Total trade comprises domestic exports, re-exports, and imports.

<sup>2</sup> This refers to the rank among the neighbouring jurisdictions as defined in this information note.

### Hong Kong's Total Exports<sup>3</sup>

3.4 Mainland China (ranking 1) was Hong Kong's largest export market in 2000. Hong Kong's total exports to Mainland China increased by 20.8% over 1999 to reach HK\$542,981 million (see Table 2). Such total accounted for 34.5% of Hong Kong's global exports. About 52% of Hong Kong's total exports to Mainland China related to outward processing<sup>4</sup>.

3.5 Taiwan (ranking 2) was the sixth largest export market of Hong Kong in 2000. The total export value increased by 20.8% over 1999 to HK\$39,800 million mainly due to the strong demand of intermediate goods such as semi-conductors, and parts and accessories of office machines and computers.

3.6 Singapore (ranking 3) was the seventh largest export market of Hong Kong in 2000. The total export value increased by 13.4% over 1999 to HK\$36,744 million. Hong Kong's total exports to Singapore were mostly intermediate goods, including parts and accessories of office machines and computers, semi-conductors, telecommunications equipment and parts, and electronic valves and tubes.

**Table 2 - Hong Kong's Total Exports in 2000**

	<b>Total Export Value (HK\$ million)</b>	<b>Percentage Share of Total Export Value (%)</b>	<b>Percentage Change over 1999 (%)</b>	<b>Ranking Among the Neighbouring Jurisdictions</b>
Mainland China	542,981	34.5	+20.8	1
Taiwan	39,800	2.5	+20.8	2
Singapore	36,744	2.3	+13.4	3
South Korea	28,632	1.8	+34.5	4
Philippines	15,593	1.0	+15.5	5
Thailand	14,305	0.9	+18.6	6
Malaysia	14,065	0.9	+28.1	7
New Zealand	2,713	0.2	+9.4	8

Source: Census and Statistics Department

<sup>3</sup> Total exports comprise domestic exports and re-exports.

<sup>4</sup> Exports to Mainland China for outward processing refer to raw materials or semi-manufactures exported from or through Hong Kong to Mainland China for processing with a contractual arrangements for subsequent re-importation of the processed goods into Hong Kong.

### Hong Kong's Imports

3.7 Mainland China (ranking 1) was also Hong Kong's largest supplier in 2000. The 2000 total import value rose by 17.7% over 1999 to HK\$714,987 million (see Table 3). Major imports included telecommunications equipment and parts, toys, clothing, footwear, and textiles.

3.8 Taiwan (ranking 2) was Hong Kong's third largest supplier in 2000. The total import value reached HK\$124,172 million in 2000, which accounted for 7.5% of Hong Kong's global imports. Major imports were semi-conductors, parts and accessories of office machines and computers, and textiles.

3.9 South Korea (ranking 3) was Hong Kong's fifth largest supplier in 2000, with an import value amounting to HK\$80,600 million. Major imports included semi-conductors, and telecommunications equipment and parts.

**Table 3 - Hong Kong's Imports in 2000**

	<b>Import Value (HK\$ million)</b>	<b>Percentage Share of Import Value (%)</b>	<b>Percentage Change over 1999 (%)</b>	<b>Ranking Among the Neighbouring Jurisdictions</b>
Mainland China	714,987	43.1	+17.7	1
Taiwan	124,172	7.5	+23.6	2
South Korea	80,600	4.8	+23.2	3
Singapore	74,998	4.5	+25.0	4
Malaysia	37,906	2.3	+26.3	5
Thailand	28,001	1.7	+22.8	6
Philippines	16,247	1.0	+32.0	7
New Zealand	3,138	0.2	+14.0	8

Source: Census and Statistics Department

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## 4. Direct Investment

4.1 In March 2000, the Census and Statistics Department published direct investment<sup>5</sup> statistics of Hong Kong for 1998. This was the first time that a complete set of direct investment statistics was available. The present set of direct investment statistics covers both inward and outward direct investment. As from reference year 1998, both inward and outward direct investment statistics will be available annually.

4.2 Direct investment refers to direct investment between Hong Kong resident enterprises and non-resident enterprises. Direct investment in Mainland China made by individual investors in Hong Kong is also covered.

### Stock of Inward Direct Investment

4.3 Inward direct investment refers to direct investment in a Hong Kong enterprise by a non-Hong Kong resident. An example of inward direct investment is the setting up of subsidiaries and branch offices by multinational corporations in Hong Kong.

4.4 Stock of inward direct investment refers to the value of investment in Hong Kong valued at market price.

4.5 At the end of 1999, the stock of Hong Kong's inward direct investment amounted to HK\$3,149.8 billion at market value, 80.6% higher than at end-1998. The increase in the stock of Hong Kong's inward direct investment in 1999 was mainly attributable to the gain in market values of some prominent listed companies in Hong Kong upon the surge in their share prices. The stock of inward direct investment at market value at end-1999 was 28.1% higher than at end-1998 if the investment in these prominent companies were excluded.

4.6 Analyzed by the source of investment, British Virgin Islands and Bermuda accounted for 29.4% and 8.9% of the stock of inward direct investment at end-1999. This reflected in part a common practice of Hong Kong enterprises in setting up non-operating companies in offshore financial centres<sup>6</sup> (commonly known as tax haven economies) for channelling direct investment funds back to Hong Kong, and in part indirect channelling of funds by foreign enterprises to Hong Kong.

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<sup>5</sup> Direct investment covers investment which allows investors in one economy, on a long term basis, to influence or have an effective voice in the management of an enterprise in another economy. For statistical purpose, an effective voice is taken as equivalent to a holding of 10% or more of the equity in an enterprise.

<sup>6</sup> Some other important offshore financial centres include Cayman Islands, Panama, and Bahamas.

4.7 Table 4 shows the stock of inward direct investment of Hong Kong which was channelled from the neighbouring jurisdictions at market value at end-1999. It can be seen that Mainland China (ranking 1) was an important source of inward direct investment in Hong Kong, which amounted to HK\$814.8 billion (or 25.9% of the stock of inward direct investment) at end-1999. Mainland China's investment in Hong Kong covered a wide range of economic activities, including wholesale/retail and import/export trades, banking, investment holding, and real estate.

4.8 Singapore's direct investment in Hong Kong (ranking 2) amounted to HK\$143.1 billion, accounting for 4.5% of the total. Its major investment activities were wholesale/retail and import/export trades, and banking.

4.9 Taiwan's direct investment in Hong Kong (ranking 3) amounted to HK\$18.0 billion, accounting for 0.6% of the total. Details of Taiwan's major investment activities were not published in the Census and Statistics Department survey results.

**Table 4 - Stock of Inward Direct Investment of Hong Kong at Market Value at end-1999**

	<b>Stock of Inward Direct Investment at Market Value at end-1999 (HK\$ billion)</b>	<b>Ranking Among the Neighbouring Jurisdictions</b>
Mainland China	814.8	1
Singapore	143.1	2
Taiwan	18.0	3
South Korea	13.9	4
Thailand	3.9	5
Malaysia	Not Available	6
Philippines	Not Available	6
New Zealand	Not Available	6

Note: Data for Malaysia, the Philippines, and New Zealand have been suppressed for confidentiality reasons as their stock of inward direct investment values were less than HK\$3 billion.

Source: Census and Statistics Department

#### Stock of Outward Direct Investment

4.10 Outward direct investment refers to direct investment by a Hong Kong resident in a non-resident enterprise. Stock of outward direct investment refers to the value of investment that Hong Kong invests abroad valued at market price.

4.11 At the end of 1999, the stock of Hong Kong's outward direct investment increased by 44.1% over 1998 to HK\$2,499.9 billion at market value. The increase was largely due to the surge in market values of the international affiliates of some prominent Hong Kong enterprises. Taking investment in these affiliates apart, the stock of outward direct investment at market value at end-1999 was up by 5.5% from end-1998.

4.12 Indirect channelling of investment through tax haven economies was also a distinct feature of outward direct investment in 1999, with British Virgin Islands accounting for 55.8% of the total stock of outward direct investment at end-1999. Bermuda and Cayman Islands took up another 3.7% and 3.4% respectively.

4.13 Table 5 shows the stock of Hong Kong's outward direct investment in the neighbouring jurisdictions at market value at end-1999. Mainland China (ranking 1) was an important destination for Hong Kong's outward direct investment, accounting for 24.8% of the stock at end-1999. Hong Kong's outward direct investment to Mainland China mostly went to Guangdong Province, accounting for 59.6% (or HK\$369.8 billion) of the total for Mainland China. The most common activities undertaken by direct investment enterprises in Mainland China were manufacturing, investment holding, real estate, and communications.

4.14 New Zealand and Singapore ranked second and third, representing shares of 1.3% and 0.7% respectively. Details of major investment activities of these two countries were not published in the Census and Statistics Department survey results.

**Table 5 - Stock of Hong Kong's Outward Direct Investment at Market Value at end-1999**

	<b>Stock of Outward Direct Investment at Market Value at end-1999 (HK\$ billion)</b>	<b>Ranking Among the Neighbouring Jurisdictions</b>
Mainland China	620.6	1
New Zealand	31.5	2
Singapore	18.9	3
Malaysia	13.0	4
Thailand	12.7	5
Philippines	6.8	6
Taiwan	5.7	7
South Korea	4.0	8

Source: Census and Statistics Department

### Regional Representation by International Companies in Hong Kong

4.15 Hong Kong's increasing role as an intermediary of international trade has attracted multinational companies to set up regional headquarters or regional offices in the territory. By making use of Hong Kong's well-developed trade-related services, these companies can expand their operations in the region.

4.16 According to the findings of an annual survey conducted by the Census and Statistics Department in June 2000<sup>7</sup>, there were 3 001 regional operations in Hong Kong, comprising 855 regional headquarters<sup>8</sup> and 2 146 regional offices<sup>9</sup>.

#### *Regional Headquarters*

4.17 Table 6 presents the number of companies outside Hong Kong with regional headquarters in Hong Kong in June 2000. It can be seen that the most important source was Mainland China (ranking 1; 69 regional headquarters). Singapore and Taiwan both ranked second (21 regional headquarters).

**Table 6 - Number of Companies Outside Hong Kong with Regional Headquarters in Hong Kong in June 2000**

	<b>Number of Companies Outside Hong Kong with Regional Headquarters in Hong Kong</b>	<b>Ranking Among the Neighbouring Jurisdictions</b>
Mainland China	69	1
Singapore	21	2
Taiwan	21	2
South Korea	15	4
Malaysia	6	5
Thailand	Less than 5	6
Philippines	Less than 5	6
New Zealand	Less than 5	6

Note: The Census and Statistics Department will not release the exact number of regional headquarters if such figure is less than five for confidentiality reasons.

Source: Census and Statistics Department

<sup>7</sup> Census and Statistics Department, *2000 Survey of Regional Offices Representing Overseas Companies in Hong Kong*, 2000.

<sup>8</sup> Regional headquarters are defined as organizations which have control over the operation of one or more other offices or subsidiaries in the region without the need to make frequent referrals to, or consult with, the parent companies or headquarters.

<sup>9</sup> Regional offices are companies which are responsible for general business activities in Hong Kong and other countries/territory in the region for the parent companies.



*Regional Offices*

4.18 Table 7 shows the number of companies outside Hong Kong with regional offices in Hong Kong in June 2000. The major source countries/territory were Mainland China (ranking 1; 160 regional offices), Taiwan (ranking 2; 113 regional offices), and Singapore (ranking 3; 76 regional offices).

**Table 7 - Number of Companies Outside Hong Kong with Regional Offices in Hong Kong in June 2000**

	<b>Number of Companies Outside Hong Kong with Regional Offices in Hong Kong</b>	<b>Ranking Among the Neighbouring Jurisdictions</b>
Mainland China	160	1
Taiwan	113	2
Singapore	76	3
South Korea	71	4
Malaysia	15	5
Thailand	13	6
Philippines	6	7
New Zealand	Less than 5	8

Note: The Census and Statistics Department will not release the exact number of regional offices if such figure is less than five for confidentiality reasons.

Source: Census and Statistics Department

## 5. Banking

5.1 Hong Kong's favourable geographical position, bridging the time gap between North America and Europe, its strong links with Mainland China and other economies in Southeast Asia and excellent telecommunications with the rest of the world have helped Hong Kong's development into an important international financial centre. The absence of any restrictions on capital flows into and out of Hong Kong is another important factor leading to Hong Kong's accession to an international financial centre.

5.2 Hong Kong has a very strong presence of international banks. In March 2001, there were 155 licensed banks<sup>10</sup> and 117 local representative offices of banks from more than 40 countries/territory conducting business in Hong Kong.

### Licensed Banks

5.3 Table 8 shows the number of licensed banks in Hong Kong in March 2001. Mainland China (ranking 1; 12 licensed banks) was the leader, followed by Taiwan (ranking 2; 6 licensed banks) and Singapore (ranking 3; 4 licensed banks).

**Table 8 - Number of Licensed Banks in Hong Kong in March 2001**

	Number of Licensed Banks	Ranking Among the Neighbouring Jurisdictions
Mainland China	12	1
Taiwan	6	2
Singapore	4	3
South Korea	3	4
Philippines	2	5
Malaysia	1	6
Thailand	1	6
New Zealand	Nil	8

Source: Hong Kong Monetary Authority

<sup>10</sup> Licensed banks can operate current or saving accounts. They can also accept deposits of any size and any maturity from the public.

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### Local Representative Offices

5.4 In March 2001, banks from Taiwan (ranking 1) had 13 local representative offices in Hong Kong (see Table 9). Mainland China, with banks having six local representative offices of banks, ranked second. The banks from South Korea and the Philippines (both ranking 3) each had one local representative office.

**Table 9 - Number of Local Representative Offices of Banks in Hong Kong in March 2001**

	<b>Number of Local Representative Offices</b>	<b>Ranking Among the Neighbouring Jurisdictions</b>
Taiwan	13	1
Mainland China	6	2
South Korea	1	3
Philippines	1	3
Singapore	Nil	5
Malaysia	Nil	5
Thailand	Nil	5
New Zealand	Nil	5

Source: Hong Kong Monetary Authority

## 6. Tourism

### Visitor Arrivals

6.1 Visitor arrivals in 2000 increased by 15.3% to 13 059 477 over 1999. Mainland China was the biggest source market for inbound tourism for Hong Kong in 2000. Visitor arrivals from Mainland China (ranking 1) made up 29.0% of all visitor arrivals to Hong Kong, and the total number of visitor arrivals from this source was 3 785 845 (see Table 10).

6.2 In 2000, visitor arrivals from Taiwan (ranking 2) increased by 18.3% compared with 1999 to 2 385 739. Visitor arrivals from Singapore (ranking 3) increased 21.7% to 450 569.

**Table 10 - Visitor Arrivals in 2000**

	<b>Number of Visitor Arrivals</b>	<b>Percentage Share of the Total (%)</b>	<b>Percentage Change over 1999 (%)</b>	<b>Ranking Among the Neighbouring Jurisdictions</b>
Mainland China	3 785 845	29.0	+18.1	1
Taiwan	2 385 739	18.3	+15.6	2
Singapore	450 569	3.4	+21.7	3
South Korea	372 639	2.9	+28.0	4
Malaysia	314 857	2.4	+13.5	5
Philippines	278 460	2.1	+1.4	6
Thailand	228 774	1.7	+17.0	7
New Zealand	58 185	0.4	+13.5	8

Source: Hong Kong Tourism Board

### Tourism Receipts

6.3 The tourism receipts in 2000 increased by 9.2% over 1999 to HK\$59,283 million. The travel and tourism industry has been one of the largest foreign exchange earners among all exports of services in Hong Kong.

6.4 In 2000, the tourism receipts from China amounted to HK\$18,288 million (ranking 1) and the tourism receipts from Taiwan (ranking 2) were HK\$11,432 million (see Table 11).

**Table 11 - Tourism Receipts in 2000**

	<b>Tourism Receipts (HK\$ million)</b>	<b>Percentage Share of the Total (%)</b>	<b>Percentage Change over 1999 (%)</b>	<b>Ranking Among the Neighbouring Jurisdictions</b>
Mainland China	18,288	30.8	+30.5	1
Taiwan	11,432	19.3	+1.2	2
Singapore	1,835	3.1	+10.6	3
Philippines	1,412	2.4	-14.5	4
South Korea	1,373	2.3	+11.0	5
Malaysia	1,123	1.9	+23.8	6
Thailand	1,090	1.8	+10.8	7
New Zealand	227	0.4	-7.0	8

Source: Hong Kong Tourism Board

### Hong Kong Resident Departures by Destination

6.5 In 2000, the total number of Hong Kong resident departures increased by 10.8% over 1999 to 58.9 million. The number of Hong Kong resident departures to Mainland China was around 50.1 million, which accounted for 85.0% of the total (see Table 12).

6.6 The next two important destinations for Hong Kong residents were Thailand (ranking 2) and Taiwan (ranking 3).

**Table 12 - Hong Kong Resident Departures by Destination in 2000**

	<b>Hong Kong Resident Departures</b>	<b>Percentage Share of the Total (%)</b>	<b>Percentage Change over 1999 (%)</b>	<b>Ranking Among the Neighbouring Jurisdictions</b>
Mainland China	50 083 105	85.0	+10.9	1
Thailand	528 125	0.9	+8.7	2
Taiwan	468 688	0.8	+11.6	3
Singapore	339 333	0.6	+12.3	4
Philippines	286 210	0.5	-5.6	5
South Korea	278 708	0.5	-11.0	6
Malaysia	215 663	0.4	+25.2	7
New Zealand	30 289	0.1	-3.3	8

Note: On departing from Hong Kong, a resident may also be travelling to other places apart from the destination claimed.

Source: Hong Kong Tourism Board

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## 7. Analysis

7.1 We summarize Hong Kong's ties with the neighbouring jurisdictions in Table 13. It can be seen that Mainland China ranks first in 11 of 12 categories of activities listed.

7.2 In order to assist Members in considering whether Thailand should be accorded high priority over other jurisdictions as a place to be visited by a Legislative Council delegation, we compare the present rankings<sup>11</sup> of Thailand with those in the previous report published in September 1998 (see Table 14). It can be noticed that the present rankings of Thailand remain relatively the same compared to those in 1998.

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Prepared by Mr Jackie WU  
2 May 2001  
Tel: 2869 7735

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<sup>11</sup> We are unable to compare the rankings in the field of direct investment since the Census and Statistics Department began publishing these statistics in March 2000.

**Table 13 - Summary of Hong Kong's Ties with Neighbouring Jurisdictions**

Ranking	External Trade (2000)			Direct Investment (end-1999)		Regional Representation (June 2000)		Banking (March 2001)		Tourism (2000)			
	Total Trade	Total Exports	Imports	Stock of Inward Direct Investment of Hong Kong	Stock of Hong Kong's Outward Direct Investment	Regional Headquarters	Regional Offices	Licensed Banks	Local Representative Offices	Visitor Arrivals	Tourism Receipts	Outbound Travel	
1	Mainland China	Mainland China	Mainland China	Mainland China	Mainland China	Mainland China	Mainland China	Mainland China	Taiwan	Mainland China	Mainland China	Mainland China	
2	Taiwan	Taiwan	Taiwan	Singapore	New Zealand	Singapore and Taiwan	Taiwan	Taiwan	Mainland China	Taiwan	Taiwan	Thailand	
3	Singapore	Singapore	South Korea	Taiwan	Singapore		Singapore	Singapore	Singapore	South Korea	Singapore	Singapore	Taiwan
4	South Korea	South Korea	Singapore	South Korea	Malaysia	South Korea	South Korea	South Korea	Philippines	South Korea	Philippines	Singapore	
5	Malaysia	Philippines	Malaysia	Thailand	Thailand	Malaysia	Malaysia	Philippines	Singapore, Malaysia, Thailand, and New Zealand	Malaysia	South Korea	Philippines	
6	Thailand	Thailand	Thailand	Malaysia, Philippines, and New Zealand	Philippines	Thailand, Philippines, and New Zealand	Thailand	Malaysia and Thailand		Philippines	Philippines	Malaysia	South Korea
7	Philippines	Malaysia	Philippines		Taiwan		Philippines	Philippines		Thailand	Thailand	Thailand	Thailand
8	New Zealand	New Zealand	New Zealand	New Zealand	South Korea	New Zealand	New Zealand	New Zealand	New Zealand	New Zealand	New Zealand	New Zealand	



**Table 14 - A Comparison of the Present Rankings of Thailand with Those in the Previous Report Published in September 1998**

<b>External Trade</b>		
	<b>2000 Ranking</b>	<b>1997 Ranking</b>
Total Trade	6	6
Total Exports	6	6
Imports	6	6
<b>Regional Representation</b>		
	<b>2000 Ranking</b>	<b>1997 Ranking</b>
Regional Headquarters	6	6
Regional Offices	6	5
<b>Banking</b>		
	<b>2001 Ranking</b>	<b>1998 Ranking</b>
Licensed Banks	6	6
Local Representative Offices	5	5
<b>Tourism</b>		
	<b>2000 Ranking</b>	<b>1997 Ranking</b>
Visitor Arrivals	7	6
Tourism Receipts	7	6
Outbound Travel	2	2

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