



Tourism in Hong Kong

ISSH27/17-18

Figure 1 – Visitor arrivals to Hong Kong, 2010-2017

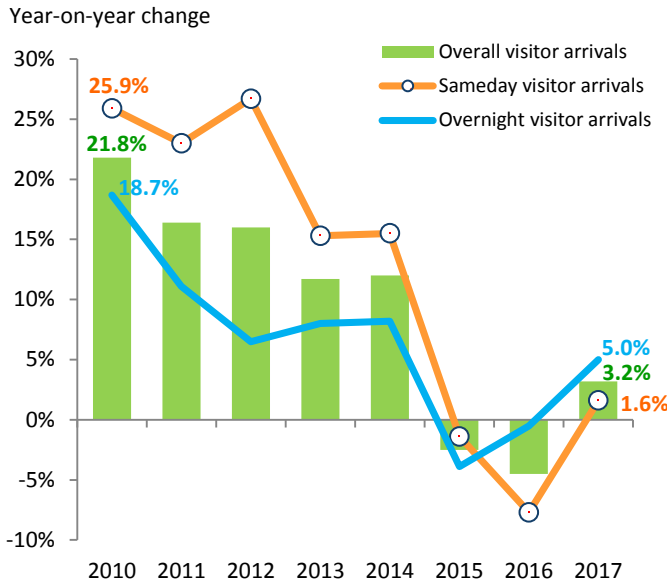
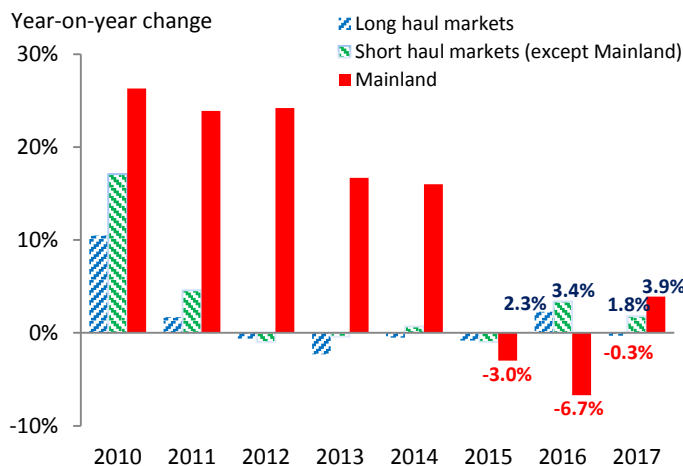


Figure 2 – Hotel occupancy and room rate in Hong Kong, 2010-2017

	No. of hotels	No. of rooms	Occupancy rate	Average achieved hotel room rate
2010	175	60 428	87%	HK\$1,165
2011	190	62 830	89%	HK\$1,356
2012	211	67 394	89%	HK\$1,489
2013	225	70 017	89%	HK\$1,447
2014	244	72 721	90%	HK\$1,473
2015	253	73 846	86%	HK\$1,337
2016	263	74 868	87%	HK\$1,287
2017	277	78 935	89%	HK\$1,288

Figure 3 – Visitor arrivals by markets, 2010-2017



Highlights

- Tourism is one of the four pillar industries in Hong Kong, accounting for 4.7% of Gross Domestic Product and 6.9% of total employment in 2016. After two consecutive years of contraction during 2015-2016, inbound tourism has resumed growth. In 2017, overall visitor arrivals rose modestly by 3.2% year-on-year (**Figure 1**) to 58.5 million, supported largely by the return of overnight visitors, which registered a 5% increase.
- With the rebound of overnight visitors, the hotel industry has seen signs of gradual recovery. The overall hotel occupancy rate rose by two percentage points to 89% in 2017 (**Figure 2**). Increased occupancy rate has not driven up the room rate, which remained steady in 2017, due probably to a greater supply of hotels. During the year, there were 14 new hotels in operation, bringing the total number to 277.
- Uptick of visitor arrivals mirrored largely the increased inflow of Mainland visitors. As shown in **Figure 3**, following the slump of 6.7% in 2016, visitor arrivals from the Mainland recorded a notable rebound of 3.9% in 2017. Nevertheless, non-Mainland source markets remained rather sluggish. In 2017, visitor arrivals from the short haul markets increased by a mere 1.8% year-on-year, lower than 3.4% recorded in 2016. For the long haul markets, there was even a drop of 0.3%.

Tourism in Hong Kong (cont'd)

Figure 4 – Per capita spending of visitors, 2013-2017

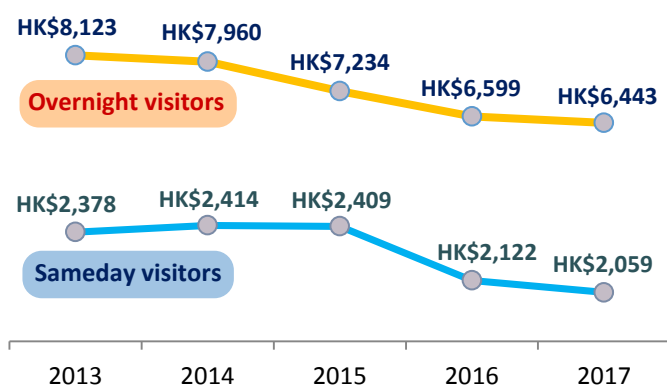


Figure 5 – Selected shopping items purchased by sameday visitors, 2015-2016[^]

	Mainland (84%)*		Short Haul Markets (11%)*		Long Haul Markets (5%)*	
	2015	2016	2015	2016	2015	2016
Foodstuff, alcohol & tobacco	53%	53%	22%	21%	8%	9%
Cosmetics & skin care/perfume	33%	32%	5%	4%	4%	4%
Garments/fabrics	18%	16%	10%	9%	6%	5%
Leather/synthetic goods	11%	8%	5%	4%	2%	2%
Electrical/photographic goods	10%	5%	2%	2%	2%	2%

Notes: (^) Figures indicate the percentage of visitors having purchased the respective items.

(*) Figures refer to the percentage share of the overall sameday visitor arrivals in 2016.

Figure 6 – Selected places visited or activities taken by overnight visitors, 2015-2016[^]

	Mainland (65%)*		Short Haul Markets (22%)*		Long Haul Markets (13%)*	
	2015	2016	2015	2016	2015	2016
Shopping	88%	86%	78%	75%	57%	55%
Dining & sightseeing	39%	36%	68%	68%	69%	67%
Cultural attractions	6%	7%	15%	15%	17%	19%
Green treasures	3%	3%	2%	3%	6%	9%

Notes: (^) Figures indicate the percentage of visitors having visited/participated in the respective places/activities.

(*) Figures refer to the percentage share of the overall overnight visitor arrivals in 2016.

Highlights

- Despite stronger inbound tourism, visitors' spending continued to exhibit a downtrend. In 2017, per capita spending of overnight visitors decreased further by 2.4% year-on-year to HK\$6,443. As for sameday visitors, the drop was most markedly in 2016. In 2017, it dipped further by 3% to HK\$2,059 (Figure 4).
- Notable reduction of per capita spending for sameday visitors was also reflected in the shopping activities. According to the latest available survey information, Mainland visitors, accounting for over 80% of sameday visitor arrivals, appeared less enthusiastic to shop in Hong Kong, as indicated by the shrinking share of visitors spending in various items, e.g. leather/synthetic goods and electrical/photographic goods, as shown in Figure 5. This was considered attributable to the growing popularity of e-commerce, among other economic and behavioural factors.
- Likewise, for overnight visitors, the traditional activities of shopping, dining and sightseeing were seen to be less attractive than before. In contrast, cultural and green attractions have gained popularity, especially among visitors from long haul markets. In 2016, 19% of them visited cultural attractions, while 9% visited green treasures, compared to the respective figures of 17% and 6% in 2015 (Figure 6). In the tourism blueprint published by the Government in 2017, developing cultural and green tourism is one of the short- to long-term initiatives to boost further development of tourism in Hong Kong.

Data sources: Latest figures from the Hong Kong Tourism Board.

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