

香港旅遊業概況

(2024年10月)

HONG KONG

TOURISM INDUSTRY SNAPSHOT

(OCT 2024)



HONG KONG
TOURISM BOARD
香港旅遊發展局

Tel 電話 : 2807 6543 Fax 傳真 : 2503 6397
Internet 網頁 : www.discoverhongkong.com/ partnetwork.hktb.com
Email 電郵 : research@hktb.com

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Notes:

- This document includes statistics extracted from a variety of public sources. HKTB has made every effort to quote the most recent and accurate data from these sources.
- Figures during COVID-19 (2020 – 2022) are not available in this report, and 2018 is used as the reference year of pre-pandemic.

香港主要經濟指標

HONG KONG KEY ECONOMIC INDICATORS



香港本地生產總值 (按年變動)

Hong Kong GDP Growth (year-on-year change)

(資料來源: 政府統計處) (Source: Census and Statistics Department)

2024年第3季

2024Q3

+1.8%

2024年第2季

2024Q2

+3.2%

2018年第3季

2018Q3

+2.6%



零售業總銷貨額

Total Retail Sales

(資料來源: 政府統計處)

(Source: Census and Statistics Department)

2024年第3季

2024Q3

HK\$90B (港幣十億元)

2024年第2季

2024Q2

HK\$90B

2018年第3季

2018Q3

HK\$114B



食肆總收益

Total Restaurant Receipts

(資料來源: 政府統計處)

(Source: Census and

Statistics Department)

2024年第3季

2024Q3

HK\$27B (港幣十億元)

2024年第2季

2024Q2

HK\$27B

2018年第3季

2018Q3

HK\$30B

香港旅遊業指標

HONG KONG TOURISM INDUSTRY



與入境旅遊相關的消費

Tourism Expenditure Associated with Inbound Tourism (TEAIT)

(資料來源: 香港旅發局離境旅客研究計畫)

(Source: HKTB Departing Visitor Survey)

2023年全年

2023 Full Year

HK\$178B (港幣十億元)

2018年全年

2018 Full Year

HK\$332B

*與入境旅遊相關的消費 = 境內消費 + 國際客運服務消費 (詳情請參閱第2頁)

*TEAIT = Destination Consumption Expenditure + Passenger International Transportational Expenditure (please refer to p.2 for details)



旅遊業的增加價值

Value-added of Tourism Industry in GDP

(資料來源: 政府統計處)

(Source: Census and Statistics Department)

2023年全年

2023 Full Year

尚未公佈

Not yet released

2018年全年

2018 Full Year

4.5%



旅遊業的就業人數

Tourism Direct Employment

(資料來源: 政府統計處)

(Source: Census and

Statistics Department)

2023年全年

2023 Full Year

尚未公佈
Not yet released

2018年全年

2018 Full Year

258K (千人)



酒店房間供應數量

Hotel Room Supply

(資料來源: 香港旅發局酒店入住率調查)

(Source: HKTB Hotel Room Occupancy

Survey)

2024年全年

(截至10月)

2024 Full Year

(as of Oct)

92k (千間)

2023年全年

2023 Full Year

90k

2018年全年

2018 Full Year

81k



航空客運交通統計

Air Passenger Traffic

(資料來源: 機場管理局)

(Source: Airport Authority Hong Kong)

總旅客量 Passenger Throughput

(訪港旅客 + 轉機及過境 + 本地居民)

(Inbound Visitors + Transit-transfer + Local)

2024年10月

Oct 2024

4.5M (百萬人次)

2023年10月

Oct 2023

3.7M

2018年10月

Oct 2023

6.2M

客運飛機起降量

Passenger Flight Movement

24k (千)

19k

31k



高鐵西九龍站交通統計 High Speed Rail West Kowloon Station Traffic

(資料來源: 港鐵公司)

(Source: MTR)

總乘客量 Passenger Throughput

(訪港旅客 + 本地居民) (Inbound Visitors + Local)

2024年10月

Oct 2024

2.2M (百萬人次)

2023年10月

Oct 2023

2.1M



訪港旅客人次 Visitor Arrivals

(資料來源: 香港入境事務處)
(Source: Immigration Department)

		全部旅客 All Visitors	內地旅客 Mainland	非內地旅客 Non-Mainland
2024年1月至10月	Jan – Oct 2024	36.7M (百萬人次)	28.4M	8.3M
與2023年同期比	year-on-year 2023	+37%	+33%	+54%
佔2018年同期	% of 2018	70%	69%	72%



過夜旅客比例 Overnight Visitors %

(資料來源: 香港入境事務處)
(Source: Immigration Department)

		全部旅客 All Visitors	內地旅客 Mainland	非內地旅客 Non-Mainland
2024年1月至10月	Jan – Oct 2024	49%	44%	68%
2023年1月至10月	Jan – Oct 2023	50%	47%	64%
2018年1月至10月	Jan – Oct 2018	45%	39%	66%



在港逗留時間 Length of Stay

(資料來源: 香港入境事務處)
(Source: Immigration Department)

		全部旅客 All Visitors	內地旅客 Mainland	非內地旅客 Non-Mainland
2024年1月至10月	Jan – Oct 2024	3.2 Nights (晚)	3.2	3.3
2023年1月至10月	Jan – Oct 2023	3.6	3.5	3.9
2018年1月至10月	Jan – Oct 2018	3.1	3.0	3.2



酒店統計 Hotel Statistics

(資料來源: 香港旅發局酒店入住率調查)
(Source: HKTB Hotel Room Occupancy Survey)

		房間入住率 Occupancy	平均房租 (港幣) Average Room Rate (HK\$)
2024年1月至10月	Jan – Oct 2024	84%	\$1.3k (港幣千元)
2023年1月至10月	Jan – Oct 2023	81%	\$1.4k
2018年1月至10月	Jan – Oct 2018	91%	\$1.3k



旅客人均消費 Per-capita Spending

(資料來源: 香港旅發局離境旅客研究計畫)
(Source: HKTB Departing Visitor Survey)

		全部旅客 All Visitors		內地旅客 Mainland Visitors	
		過夜旅客 Overnight	不過夜旅客 Same-day	過夜旅客 Overnight	不過夜旅客 Same-day
2024年上半年	2024 H1	\$5.6k (港幣千元)	\$1.2k (港幣千元)	\$5.1k (港幣千元)	\$1.3k (港幣千元)
2023年下半年	2023 H2	\$6.1k	\$1.3k	\$5.8k	\$1.4k
2018年全年	2018 Full Year	\$6.6k	\$2.2k	\$7.0k	\$2.4k



其他主要指標 Other Key Indicators

(資料來源: 香港旅發局離境旅客研究計畫)
(Source: HKTB Departing Visitor Survey)

		整體滿意度 (十分為滿分) Overall Satisfaction (10 pt. scale)	重訪意欲 (%) Revisit Intention (%)	推薦香港給親友的意欲 (%) Recommendation (%)
2024年上半年	2024 H1	8.7	94%	94%
2023年下半年	2023 H2	8.7	93%	93%
2018年全年	2018 Full Year	8.6	92%	92%



過夜會展旅客 Overnight MICE Arrivals*

(資料來源: 香港旅發局離境旅客研究計畫)
(Source: HKTB Departing Visitor Survey)

2024年上半年	2024 H1	0.7M (百萬人次)
2023年下半年	2023 H2	0.7M
2018年全年	2018 Full Year	2.0M

*會展旅客包括會議、展覽及獎勵旅遊 *MICE = Meetings, Incentives, Conventions and Exhibitions

*注:
- 訪港旅客人次按國籍/地區劃分。
- 旅客人均消費、其他主要指標及會展旅客的數據為每季發佈。

*Note:
- Visitor arrivals by key source market is classified according to Nationality/ Region.
- Statistics of Per-capita Spending, Other Key Indicators and MICE Arrivals are published on quarterly basis.



主要客源市場表現

(資料來源: 香港入境事務處)

Performance of Key Source Markets

(Source: Immigration Department)

市場排名 Market Ranking	主要客源地區/市場 Key Source Region/ Market	訪港旅客人次 VISITOR ARRIVALS				過夜旅客人均消費 OVERNIGHT PER-CAPITA SPENDING		
		2018年全年 2018 Full Year	2023年下半年 2023 H2	2024年1月至10月 Jan – Oct 2024		2018年全年 2018 Full Year	2023年下半年 2023 H2	2024年上半年 2024 H1
		占全部旅客 % of All Visitors	占全部旅客 % of All Visitors	千人次 No. of Arrivals (in thousand)	占全部旅客 % of All Visitors	港幣千元 HK\$ thousand	港幣千元 HK\$ thousand	港幣千元 HK\$ thousand
	全部旅客 All Visitors	100%	100%	36,679k	100%	\$6.6k	\$6.1k	\$5.6k
#1	內地旅客 Mainland Visitors	78%	79%	28,384k	77%	\$7.0k	\$5.8k	\$5.1k
	非內地旅客 Non-Mainland Visitors	22%	21%	8,294k	23%	\$5.7k	\$7.0k	\$6.7k

非內地主要客源市場:

Non-Mainland Key Source Markets:

(按2024年1月至10月訪港旅客人次排序)
(Ranked by visitor arrivals in Jan – Jun 2024)

	占非內地旅客 % of Non-Mainland Visitors	占非內地旅客 % of Non-Mainland Visitors	千人次 No. of Arrivals (in thousand)	占非內地旅客 % of All Visitors	港幣千元 HK\$ thousand	港幣千元 HK\$ thousand	港幣千元 HK\$ thousand
#2 台灣 Taiwan	14%	11%	1,029k	12%	\$5.2k	\$7.0k	\$5.4k
#3 澳門 Macau SAR	7%	14%	947k	11%	\$4.2k	\$4.0k	\$3.7k
#4 菲律賓 Philippines	6%	11%	920k	11%	\$5.1k	\$7.9k	\$6.3k
#5 美國 USA	9%	9%	703k	8%	\$6.5k	\$7.6k	\$7.4k
#6 南韓 South Korea	10%	7%	673k	8%	\$4.5k	\$4.0k	\$4.7k
#7 日本 Japan	9%	5%	448k	5%	\$4.2k	\$5.3k	\$5.4k
#8 泰國 Thailand	4%	6%	417k	5%	\$7.1k	\$7.3k	\$8.2k
#9 新加坡 Singapore	4%	5%	334k	4%	\$6.5k	\$7.7k	\$7.9k
#10 印度 India	3%	3%	311k	4%	\$6.0k	\$8.3k	\$9.1k
#11 馬來西亞 Malaysia	4%	4%	305k	4%	\$5.7k	\$7.0k	\$5.5k
#12 印尼 Indonesia	3%	4%	282k	3%	\$5.9k	\$6.4k	\$7.1k
#13 澳洲 Australia	4%	3%	281k	3%	\$6.9k	\$8.0k	\$7.9k
#14 加拿大 Canada	3%	3%	254k	3%	\$5.4k	\$7.4k	\$7.8k
#15 英國 United Kingdom	4%	3%	238k	3%	\$6.8k	\$8.6k	\$7.0k
#16 德國 Germany	2%	1%	137k	2%	\$5.5k	\$8.9k	\$6.1k
#17 法國 France	2%	1%	117k	1%	\$6.1k	\$7.3k	\$6.7k
#18 俄羅斯 Russia	1%	1%	104k	1%	\$8.0k	\$13.0k	\$6.9k
#19 荷蘭 Netherlands	1%	1%	66k	1%	\$6.3k	\$8.7k	\$6.8k
#20 越南 Vietnam	0.4%	0.5%	40k	0.5%	\$7.3k	\$7.0k	\$7.2k
#21 海灣阿拉伯合作國家委員會* GCC Markets*	0.2%	0.2%	13k	0.2%	\$8.8k	\$11.3k	\$10.5k

注:
 - 訪港旅客人次按國籍/地區劃分。
 - 海灣阿拉伯合作國家委員會包括6個市場: 巴林、科威特、阿曼、卡達、沙烏地阿拉伯及阿拉伯聯合大公國。
 - 旅客人均消費的數據為每季發佈。

Note:
 - Visitor arrivals by key source market is classified according to Nationality/ Region.
 - GCC Markets include 6 markets: Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and United Arab Emirates.
 - Statistics of Per-capita Spending, Other Key Indicators and MICE Arrivals are published on quarterly basis.

內地市場	Mainland China
短途市場	Short-haul Markets
長途市場	Long-haul Markets

第一部分: 香港主要經濟指標

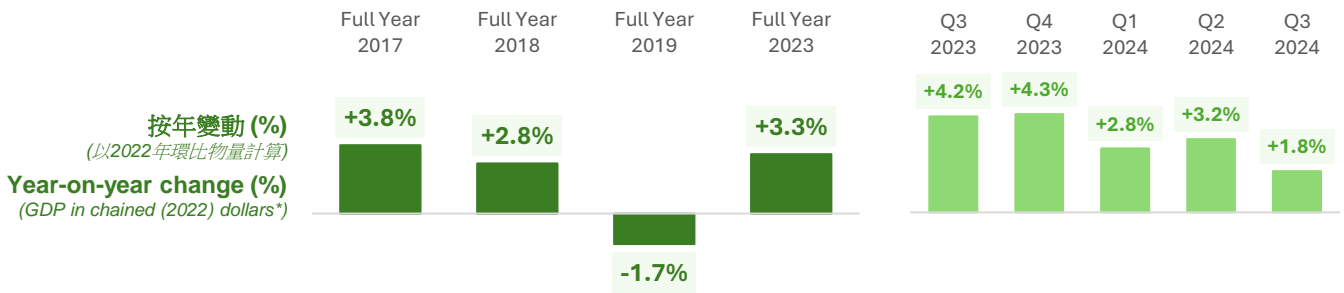
SECTION 1: HONG KONG KEY ECONOMIC INDICATORS



香港本地生產總值 HONG KONG GDP GROWTH

(資料來源: 政府統計處)

(Source: Census and Statistics Department)



*以環比物量計算的本地生產總值，其變動反映在扣除價格變動的影響後，不同期間所生產或購買的貨品及服務物量變動。

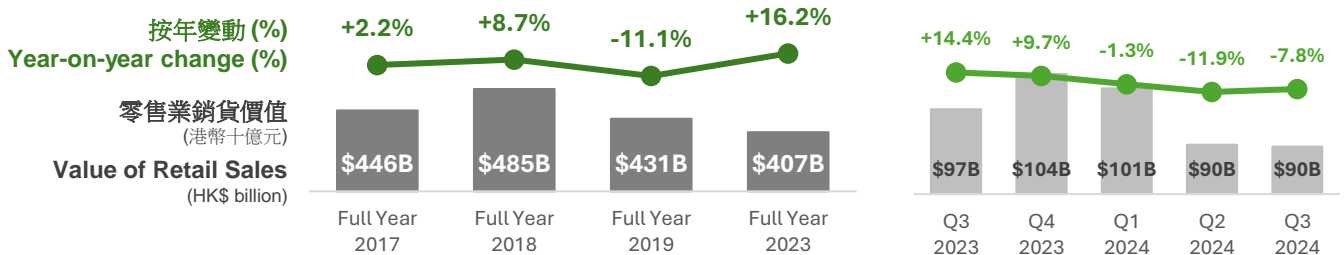
*Changes of chained dollar estimates of GDP reflect changes in the volume of production or consumption of goods and services from one period to another. The effect of changes in prices has been removed.



香港零售業總銷貨額 HONG KONG TOTAL RETAIL SALES

(資料來源: 政府統計處)

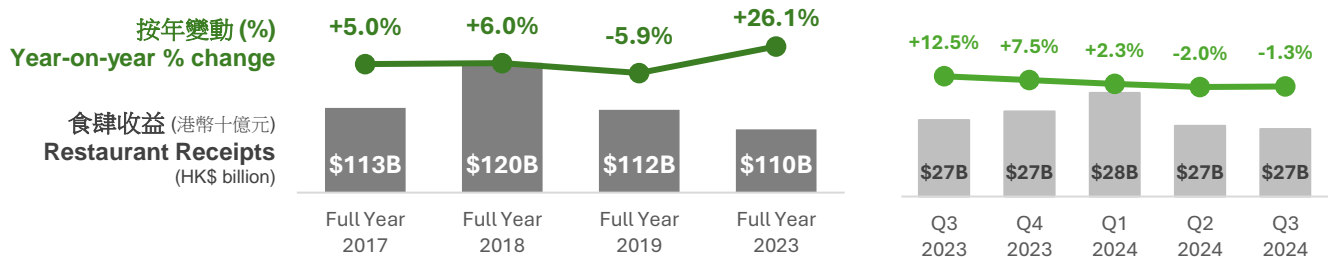
(Source: Census and Statistics Department)



香港食肆總收益 HONG KONG TOTAL RESTAURANT RECEIPTS

(資料來源: 政府統計處)

(Source: Census and Statistics Department)



第二部分: 香港旅遊業指標

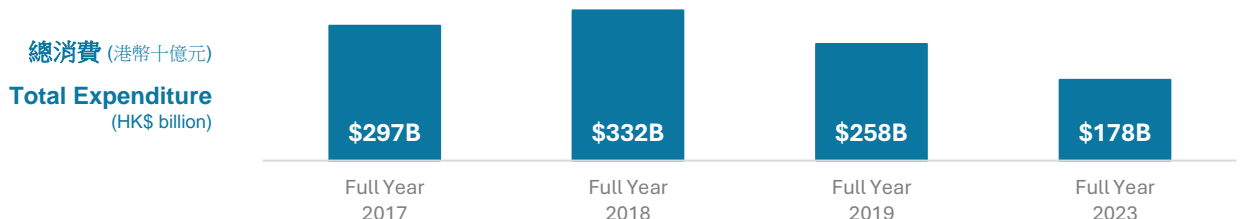
SECTION 2: HONG KONG TOURISM INDUSTRY



與入境旅遊相關的總消費* TOURISM EXPENDITURE ASSOCIATED WITH INBOUDN TOURISM (TEAIT)*

(資料來源: 香港旅遊局離境旅客研究計畫)

(Source: HKTBD Departing Visitor Survey)



*與旅遊入境相關的消費包括兩個主要組成部分: 1) 境內消費(所有到港旅客在香港消費時, 用於商品及服務方面的總額)及 2) 國際客運服務消費(本港客運公司為非本港居民提供航空、海上及陸上的跨境客運服務所得的收益, 政府統計處編制)

*TEAIT, comprises two main components, 1) Destination Consumption Expenditure (sum of payments made by all inbound visitors and travellers for goods and services that they consume in HK) and 2) Passenger International Transportation Expenditure (receipts of HK based carriers for the cross-boundary transportation of nonresident visitors by air, sea or land, compiled by Census and Statistics Department).

第二部分: 香港旅遊業指標 (續) SECTION 2: HONG KONG TOURISM INDUSTRY (CONT'D)



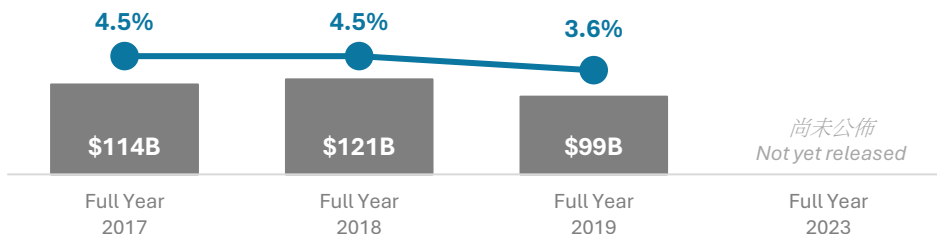
旅遊業的增加價值 VALUE-ADDED OF TOURISM INDUSTRY IN GDP

(資料來源: 政府統計處) (Source: Census and Statistics Department)

占本地生產總值百分比
Share of value added in GDP

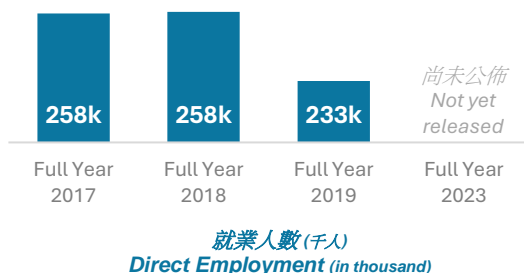
以當時價格計算的增加價值
(港幣十億元)

Value-added in GDP at
current prices (HK\$ billion)



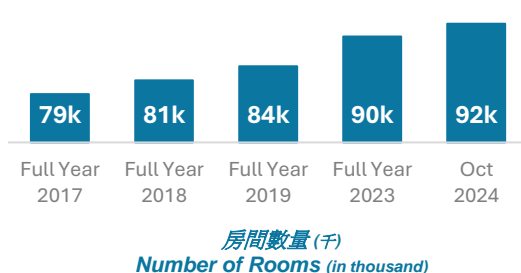
旅遊業的就業人數 TOURISM DIRECT EMPLOYMENT

(資料來源: 政府統計處)
(Source: Census and Statistics Department)



酒店房間供應數量 HOTEL ROOM SUPPLY

(資料來源: 香港旅發局酒店入住率調查)
(Source: HKTB Hotel Room Occupancy Survey)



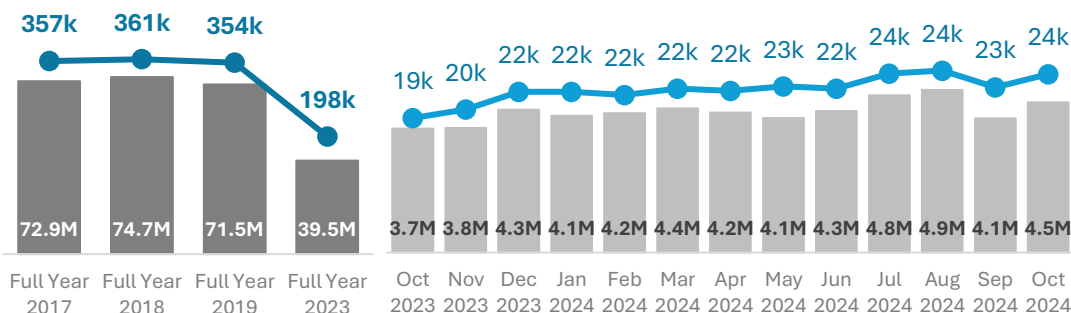
航空客運交通統計 AIR PASSENGER TRAFFIC

(資料來源: 機場管理局) (Source: Airport Authority Hong Kong)

客運飛機起降量 (千)
Passenger Flight Movement
(in thousand)

總旅客量 (百萬人次)
(訪港旅客 + 轉機及過境 + 本地居民)

Passenger Throughput
(Inbound Visitors + Transit-Transfer + Local)

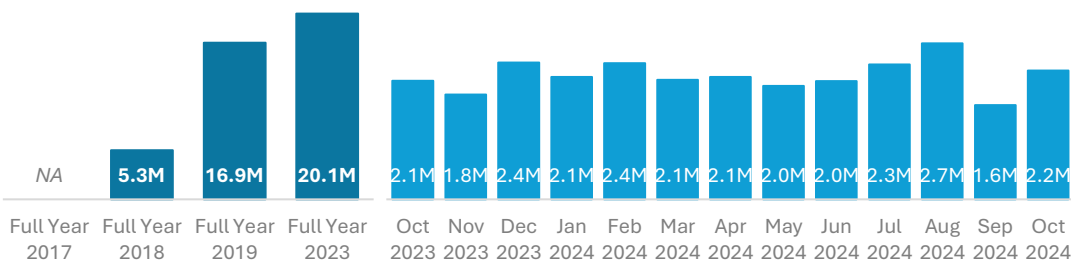


高鐵西九龍站交通統計 HIGH SPEED RAIL WEST KOWLOON STATION TRAFFIC

(資料來源: 港鐵公司) (Source: MTR)

總乘客量 (百萬人次)
(訪港旅客 + 本地居民)

Passenger Throughput
(Visitors + Local)



*注: 高鐵香港西九龍站於2018年9月23日開始營運。

*Remark: High Speed Rail Hong Kong West Kowloon Station started operation on 23 Sep 2018.

第三部分: 訪港旅客統計 (每月)

SECTION 3: INBOUND VISITORS TO HONG KONG (MONTHLY)



訪港旅客人次

VISITOR ARRIVALS

(資料來源: 入境事務處)

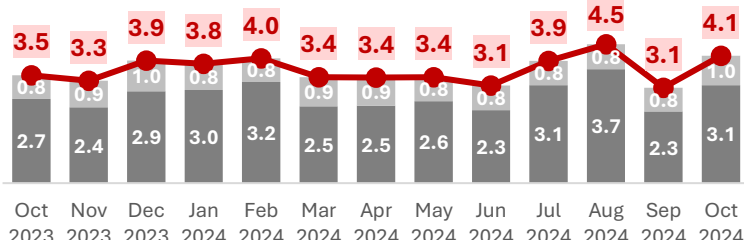
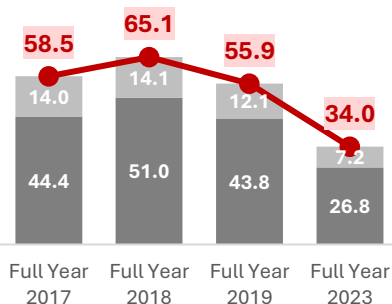
(Source: Immigration Department)

(百萬人次 in million)

全部旅客 All Visitors

非內地旅客 Non-Mainland

內地旅客 Mainland



在港逗留時間

LENGTH OF STAY

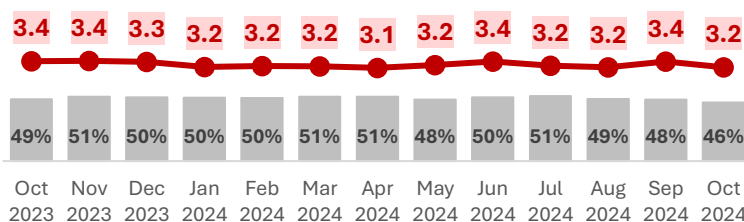
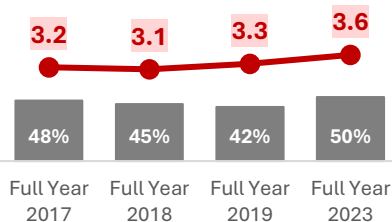
(資料來源: 入境事務處)

(Source: Immigration Department)

全部旅客 ALL VISITORS

逗留晚數 No. of nights

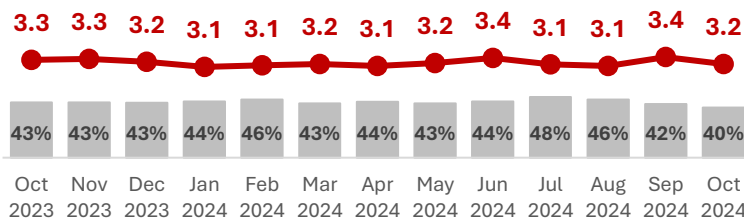
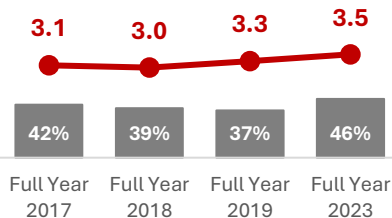
過夜旅客比例 (%) % Share of Overnight



內地旅客 MAINLAND VISITORS

逗留晚數 No. of nights

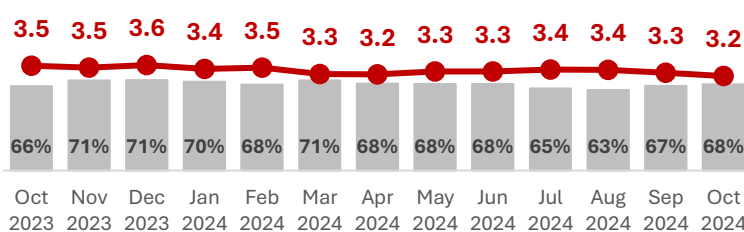
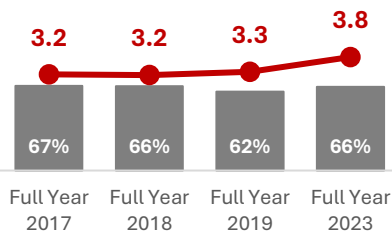
過夜旅客比例 (%) % Share of Overnight



非內地旅客 NON-MAINLAND VISITORS

逗留晚數 No. of nights

過夜旅客比例 (%) % Share of Overnight

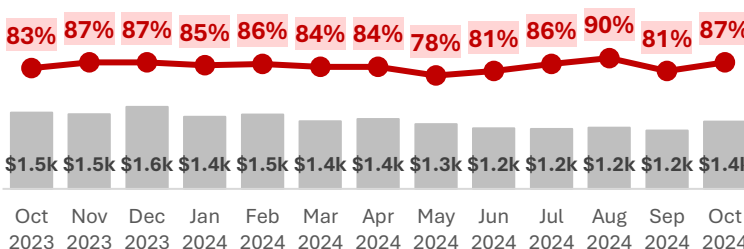
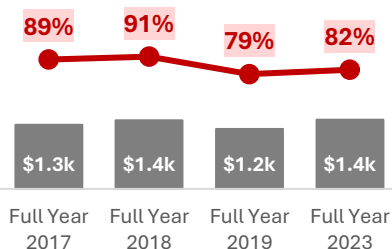


酒店房間入住率及平均房租 HOTEL OCCUPANCY & ROOM RATE

(資料來源: 香港旅發局酒店入住率調查) (Source: HKTB Hotel Room Occupancy Survey)

房間入住率 (%) Occupancy (%)

平均房租 (港幣千元) Average Room Rate (HK\$ thousand)



*Note:

- 訪港旅客人次按國籍/地區劃分。
- 旅客人均消費、其他主要指標及會展旅客的數據為每季發佈。

*Note:

- Visitor arrivals by key source market is classified according to Nationality/ Region.
- Statistics of Per-capita Spending, Other Key Indicators and MICE Arrivals are published on quarterly basis.

第四部分: 訪港旅客統計 (每季)

SECTION 4: INBOUND VISITORS TO HONG KONG (QUARTERLY)



旅客人均消費

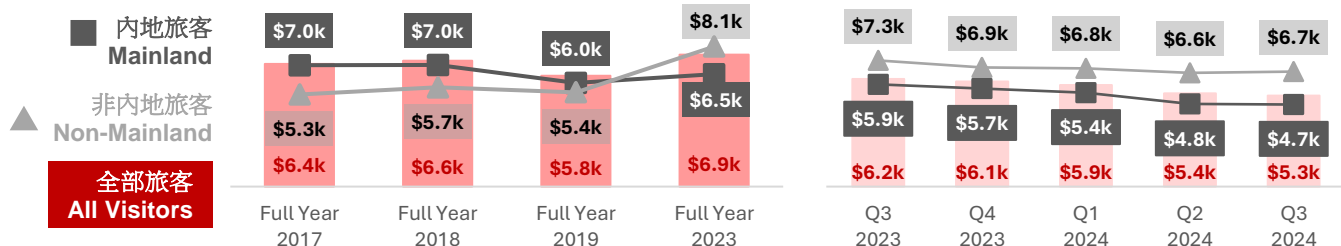
PER-CAPITA SPENDING

(資料來源: 香港旅遊局離境旅客研究計畫)

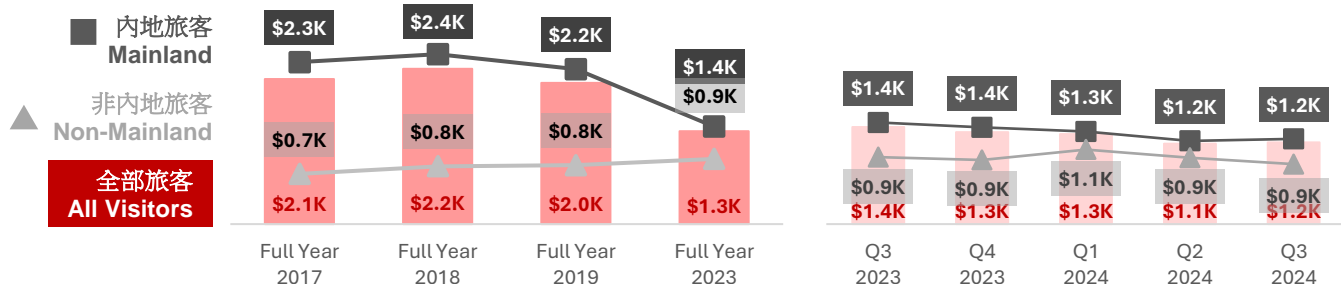
(Source: HKTB Departing Visitor Survey)

過夜旅客 OVERNIGHT VISITORS

(港幣千元 in HK\$ thousand)



不過夜旅客 SAME-DAY VISITORS



旅客整體滿意度 (十分為滿分)

OVERALL SATISFACTION (10 PT. SCALE)

(資料來源: 香港旅遊局離境旅客研究計畫)

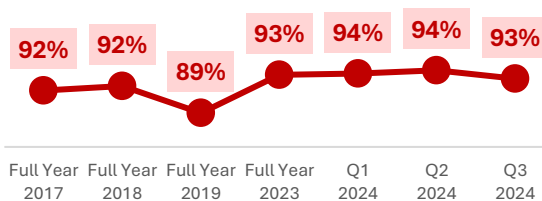
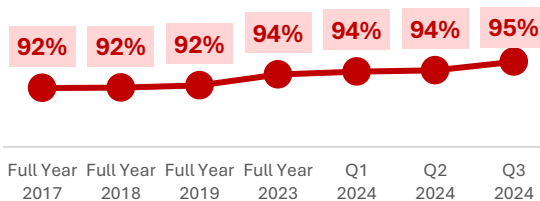
(Source: HKTB Departing Visitor Survey)



旅客重訪意欲 INTENTION TO REVISIT



推薦香港給親友的意欲 RECOMMENDATION



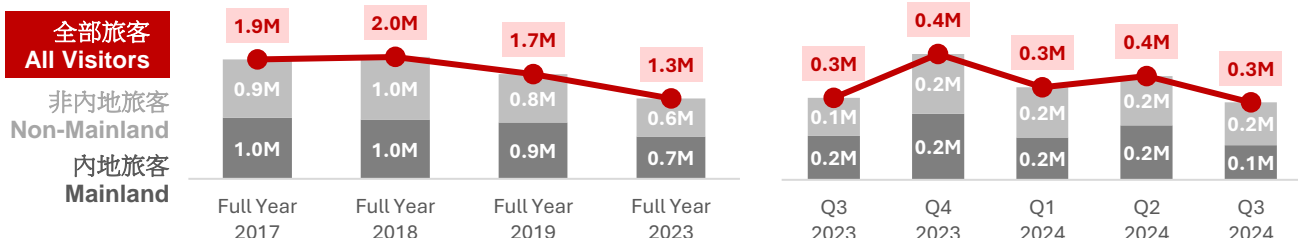
過夜會展旅客*

OVERNIGHT MICE ARRIVALS*

(資料來源: 香港旅遊局離境旅客研究計畫)

(Source: HKTB Departing Visitor Survey)

(百萬人次 in million)



*注: 會展旅客包括會議、展覽及獎勵旅遊。

*Remark: MICE visitors refer to those coming for Meetings, Incentives, Conventions and Exhibitions.

*注: 訪港旅客人次按國籍/地區劃分。

* Notes: Visitor arrivals by key source market is classified according to Nationality/ Region

詞匯表

GLOSSARY OF TERMS

酒店房間入住率

根據回應香港旅遊發展局每月進行的酒店入住率問卷調查所提供可出租及已出租的客房數目，在維修中或翻新之房間並不包括在內。

酒店平均房租

根據回應香港旅遊發展局每月進行的酒店入住率問卷調查所得之平均每日實收房租的平均數。實際平均房租不包括政府稅項及與客房無關而附加在房租的組成項目，例如餐飲、洗衣、機場接送及服務費等。

過夜旅客

指入住本港的公眾或私人住宿設施最少一晚的旅客。

入境不過夜旅客

指通過香港入境處，但沒有在本港過夜的旅客。

與入境旅遊相關的總消費

由以下兩個主要部分組成：

- **境內消費** 是所有到港旅客(如過夜旅客、入境不過夜旅客、過境旅客及機組人員)在香港消費時，用於商品及服務方面的總額。
- **國際客運服務消費** 代表本港客運公司為非本港居民提供航空、海上及陸上的跨境客運服務所得的收益。這數據由香港特別行政區，政府統計處負責處理，是本地生產總值及國際收支平衡內，香港服務貿易的元素之一。

以上類別均符合世界旅遊組織所列出的標準定義，以確保不同旅遊目的地所匯報的旅遊開支數據一致。

離境旅客研究計劃

旅發局全年進行離境旅客研究計劃，並透過面談訪問及電子問卷進行資料搜集，研究計劃採用系統隨機抽樣法以收集旅客的主要訪港目的，旅客的行程，消費和訪港旅程滿意度等。本年截至六月的樣本數目約86,000人。電子問卷有15種語言可供選擇，方便與來自世界各地的旅客進行訪問。受訪對象為16歲或以上經香港10個主要口岸離境的海外旅客(即高鐵西九龍、香園圍管制站、香港國際機場、港珠澳大橋、中國客運碼頭、港澳客運碼頭、羅湖管制站、落馬洲管制站、落馬洲支線管制站、深圳灣管制站)。

離境旅客研究計劃是一項大規模研究，故此，旅發局採用了一套完善的核查系統，確保所得資料的質量。這包括為訪問員提供全面的訓練、現場督導及核查、全面審核已完成的問卷，以及將編碼、查驗正誤及審核等工作電腦化。

在新型冠狀病毒肺炎疫情影响下，離境旅客研究計劃於2020年至2022年間暫停，並於2023年起恢復。

Hotel Room Occupancy Rate

Based on daily rooms occupied against daily rooms available for sales of responded hotels and guesthouses to HKTB Monthly Hotel Room Occupancy Survey. Rooms under repair or being refurbished are excluded.

Average Achieved Hotel Room Rate (ARR)

The average of ARR of responded hotels and guesthouses to HKTB Monthly Hotel Room Occupancy Survey. ARR excluded Government tax and all non-room related components such as F&B, laundry, airport transfer, service charges, etc., which have been built into the room rate.

Overnight Visitors

Visitors who stay at least one night in collective or private accommodation in Hong Kong.

Same-Day Visitors

Visitors are those who pass through Hong Kong Immigration, but do not spend a night in Hong Kong.

Tourism Expenditure Associated to Inbound Tourism (TEAIT)

Comprises below two main components:

- **Destination Consumption Expenditure** is the sum of payments made by all inbound visitors and travellers (e.g. overnight and same-day visitors, transit/ transfer passengers and aircrew members) for goods and services that they consume in Hong Kong.
- **Passenger International Transportation Expenditure** represents the receipts of Hong Kong based carriers for the cross-boundary transportation of non-resident visitors by air, sea or land. It is compiled by Census and Statistics Department, the Government of Hong Kong Special Administrative Region as one of the components of trade in services for the Gross Domestic Product and Balance of Payments statistics.

All the above categories are fully in line with the standard definitions laid down by the World Tourism Organisation (UNWTO) to ensure uniformity of tourism expenditure reporting across different destinations.

Departing Visitor Research Project

The HKTB Departing Visitor Research Project is conducted throughout the year. Data are collected during face-to-face interviews, at which respondents are requested to complete an electronic questionnaire. The Project aims at studying visitors' main purpose of travelling to Hong Kong, travel itineraries, spending, satisfaction of their trip, etc. The sample size of the Project up to June is about 86,000. Questionnaires are available in 15 languages to facilitate the interview with visitors from all over the world. Target respondents are overseas visitors aged 16 or above departing from ten major control points in Hong Kong (i.e. Express Rail Link West Kowloon, Heung Yuen Wai, HK International Airport, HK-Zhuhai-Macao Bridge, HK-China Ferry Terminal, HK-Macau Ferry Terminal, Lo Wu, Lok Ma Chau, Lok Ma Chau Spurline, Shenzhen Bay).

Given the scale of the Project, a comprehensive checking mechanism is adopted to ensure the quality of the data collected. This includes comprehensive training of interviewers, on-site supervision and spot check, verification of completed questionnaires, and computerisation of data coding, validation and editing work.

Owing to the pandemic of COVID-19, the Project was suspended during 2020 - 2022 and has resumed in 2023.