

香港旅游业概况

(2024年9月)

HONG KONG

TOURISM INDUSTRY SNAPSHOT

(SEP 2024)



HONG KONG
TOURISM BOARD
香港旅遊發展局

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- 本报告中引用到的统计资料均来自不同的公众来源 (如政府统计处、机场管理局等), 旅发局已尽力提供最准确及最新的统计资料。
- 于2019冠状病毒病疫情期间 (2020年至2022年) 的资料并不包括在本报告中, 而2018年的数据会被用作疫情前的参考。

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.

香港主要经济指标

HONG KONG KEY ECONOMIC INDICATORS



香港本地生产总值 (按年变动)

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

(数据来源: 政府统计处)

(Source: Census and Statistics Department)

2024年第2季

2024Q2

+3.3%

2024年第1季

2024Q1

+2.8%

2018年第2季

2018Q2

+3.3%



零售业总销货额

Total Retail Sales

(数据来源: 政府统计处)

(Source: Census and Statistics Department)

2024年第2季

2024Q2

HK\$90B (港币十亿元)

2024年第1季

2024Q1

HK\$101B

2018年第2季

2018Q2

HK\$118B



食肆总收益

Total Restaurant Receipts

(数据来源: 政府统计处)

(Source: Census and Statistics Department)

2024年第2季

2024Q2

HK\$27B (港币十亿元)

2024年第1季

2024Q1

HK\$28B

2018年第2季

2018Q2

HK\$29B

香港旅游业指标

HONG KONG TOURISM INDUSTRY



与入境旅游相关的消费

Tourism Expenditure Associated with Inbound Tourism (TEAIT)

(数据来源: 香港旅发局离境旅客研究计划)

(Source: HKTB Departing Visitor Survey)

2023年全年

2023 Full Year

HK\$178B (港币十亿元)

2018年全年

2018 Full Year

HK\$332B

*与入境旅游相关的消费 = 境内消费 + 国际客运服务消费 (详情请参阅第2页)

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



旅游业的增加价值

Value-added of Tourism Industry in GDP

(数据来源: 政府统计处)

(Source: Census and Statistics Department)

2023年全年

2023 Full Year

尚未公布

Not yet released

2018年全年

2018 Full Year

4.5%



旅游业的就业人数

Tourism Direct Employment

(数据来源: 政府统计处)

(Source: Census and Statistics Department)

2023年全年

2023 Full Year

尚未公布
Not yet released

2018年全年

2018 Full Year

258K (千人)



酒店房间供应数量

Hotel Room Supply

(数据来源: 香港旅发局酒店入住率调查)

(Source: HKTB Hotel Room Occupancy Survey)

2024年全年
(截至9月)2024 Full Year
(as of Sep)

92k (千间)

2023年全年

2023 Full Year

90k

2018年全年

2018 Full Year

81k



航空客运交通统计

Air Passenger Traffic

(数据来源: 机场管理局)

(Source: Airport Authority Hong Kong)

总旅客量 Passenger Throughput

(访港旅客 + 转机及过境 + 本地居民)

(Inbound Visitors + Transit-transfer + Local)

2024年9月

Sep 2024

4.1M (百万人次)

2023年9月

Sep 2023

3.3M

2018年9月

Sep 2023

5.6M

客运飞机起降量

Passenger Flight Movement

23k (千)

18k

28k



高铁西九龙站交通统计 High Speed Rail West Kowloon Station Traffic

(数据来源: 港铁公司)

(Source: MTR)

总乘客量 Passenger Throughput

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

2024年9月

Sep 2024

1.7M (百万人次)

2023年9月

Sep 2023

1.6M



访港旅客人次 Visitor Arrivals

(数据来源: 香港入境事务处)
(Source: Immigration Department)

		全部旅客 All Visitors	内地旅客 Mainland	非内地旅客 Non-Mainland
2024年1月至9月	Jan – Sep 2024	32.6M (百万人次)	25.2M	7.4M
与2023年同期比	year-on-year 2023	+40%	+35%	+59%
占2018年同期	% of 2018	70%	69%	73%



过夜旅客比例 Overnight Visitors %

(数据来源: 香港入境事务处)
(Source: Immigration Department)

		全部旅客 All Visitors	内地旅客 Mainland	非内地旅客 Non-Mainland
2024年1月至9月	Jan – Sep 2024	50%	45%	67%
2023年1月至9月	Jan – Sep 2023	51%	48%	64%
2018年1月至9月	Jan – Sep 2018	46%	40%	66%



在港逗留时间 Length of Stay

(数据来源: 香港入境事务处)
(Source: Immigration Department)

		全部旅客 All Visitors	内地旅客 Mainland	非内地旅客 Non-Mainland
2024年1月至9月	Jan – Sep 2024	3.2 Nights (晚)	3.2	3.3
2023年1月至9月	Jan – Sep 2023	3.7	3.6	4.0
2018年1月至9月	Jan – Sep 2018	3.1	3.1	3.2



酒店统计 Hotel Statistics

(数据来源: 香港旅发局酒店入住率调查)
(Source: HKTB Hotel Room Occupancy Survey)

		房间入住率 Occupancy	平均房租 (港币) Average Room Rate (HK\$)
2024年1月至9月	Jan – Sep 2024	84%	\$1.3k (港币千元)
2023年1月至9月	Jan – Sep 2023	81%	\$1.3k
2018年1月至9月	Jan – Sep 2018	91%	\$1.3k



旅客人均消费 Per-capita Spending

(数据来源: 香港旅发局离境旅客研究计划)
(Source: HKTB Departing Visitor Survey)

HK\$ (港币)

	全部旅客 All Visitors		内地旅客 Mainland Visitors	
	过夜旅客 Overnight	不过夜旅客 Same-day	过夜旅客 Overnight	不过夜旅客 Same-day
2024年1月至6月 Jan – Jun 2024	\$5.6k (港币千元)	\$1.2k (港币千元)	\$5.1k (港币千元)	\$1.3k (港币千元)
2023年7月至12月 Jul – Dec 2023	\$6.1k	\$1.3k	\$5.8k	\$1.4k
2018年全年 2018 Full Year	\$6.6k	\$2.2k	\$7.0k	\$2.4k



其他主要指标 Other Key Indicators

(数据来源: 香港旅发局离境旅客研究计划)
(Source: HKTB Departing Visitor Survey)

		整体满意度 (十分为满分) Overall Satisfaction (10 pt. scale)	重访意欲 (%) Revisit Intention (%)	推荐香港给亲友的意欲 (%) Recommendation (%)
2024年1月至6月	Jan – Jun 2024	8.7	94%	94%
2023年7月至12月	Jul – Dec 2023	8.7	93%	93%
2018年全年	2018 Full Year	8.6	92%	92%



过夜会展旅客 Overnight MICE Arrivals*

(数据来源: 香港旅发局离境旅客研究计划)
(Source: HKTB Departing Visitor Survey)

2024年1月至6月	Jan – Jun 2024	0.7M (百万人次)
2023年7月至12月	Jul – Dec 2023	0.7M
2018年全年	2018 Full Year	2.0M

*会展旅客包括会议、展览及奖励旅游

*MICE = Meetings, Incentives, Conventions and Exhibitions

*注: 旅客人均消费、其他主要指标及会展旅客的数据为每季发布。

*Note: Statistics of Per-capita Spending, Other Key Indicators and MICE Arrivals are published on quarterly basis.



主要客源市场表现

Performance of Key Source Markets

(数据来源: 香港入境事务处) (Source: Immigration Department)

市场排名 Market Ranking	主要客源地区/市场 Key Source Region/ Market	访港旅客人次 VISITOR ARRIVALS				过夜旅客人均消费 OVERNIGHT PER-CAPITA SPENDING		
		2018年全年 2018 Full Year	2023年7月至12月 Jul - Dec 2023	2024年1月至9月 Jan - Sep 2024		2018年全年 2018 Full Year	2023年7月至12月 Jul - Dec 2023	2024年1月至6月 Jan - Jun 2024
		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	港币千元 HK\$ thousand	港币千元 HK\$ thousand	港币千元 HK\$ thousand
	全部旅客 All Visitors	100%	100%	32,589k	100%	\$6.6k	\$6.1k	\$5.6k
#1	内地旅客 Mainland Visitors	78%	79%	25,236k	77%	\$7.0k	\$5.8k	\$5.1k
	非内地旅客 Non-Mainland Visitors	22%	21%	7,353k	23%	\$5.7k	\$7.0k	\$6.7k

非内地主要客源市场:

Non-Mainland Key Source Markets:

(按2024年1月至8月访港旅客人次排序)
(Ranked by visitor arrivals in Jan - Jun 2024)

排名	地区/市场	占非内地旅客 % of Non-Mainland Visitors	占非内地旅客 % of Non-Mainland Visitors	千人次 No. of Arrivals (in thousand)	占非内地旅客 % of All Visitors	港币千元 HK\$ thousand	港币千元 HK\$ thousand	港币千元 HK\$ thousand
#2	台湾 Taiwan	14%	11%	902k	12%	\$5.2k	\$7.0k	\$5.4k
#3	澳门 Macau SAR	8%	15%	872k	12%	\$4.2k	\$4.0k	\$3.7k
#4	菲律宾 Philippines	6%	11%	810k	11%	\$5.1k	\$7.9k	\$6.3k
#5	美国 USA	9%	9%	623k	8%	\$6.5k	\$7.6k	\$7.4k
#6	南韓 South Korea	10%	7%	593k	8%	\$4.5k	\$4.0k	\$4.7k
#7	日本 Japan	9%	5%	408k	6%	\$4.2k	\$5.3k	\$5.4k
#8	泰国 Thailand	4%	6%	377k	5%	\$7.1k	\$7.3k	\$8.2k
#9	新加坡 Singapore	4%	6%	349k	5%	\$6.5k	\$7.7k	\$7.9k
#10	印度 India	3%	3%	263k	4%	\$6.0k	\$8.3k	\$9.1k
#11	马来西亚 Malaysia	4%	4%	258k	4%	\$5.7k	\$7.0k	\$5.5k
#12	印度尼西亚 Indonesia	3%	4%	248k	3%	\$5.9k	\$6.4k	\$7.1k
#13	澳洲 Australia	4%	4%	247k	3%	\$6.9k	\$8.0k	\$7.9k
#14	加拿大 Canada	3%	3%	218k	3%	\$5.4k	\$7.4k	\$7.8k
#15	英国 United Kingdom	4%	3%	204k	3%	\$6.8k	\$8.6k	\$7.0k
#16	德国 Germany	2%	1%	116k	2%	\$5.5k	\$8.9k	\$6.1k
#17	法国 France	1%	1%	94k	1%	\$6.1k	\$7.3k	\$6.7k
#18	俄罗斯 Russia	1%	1%	85k	1%	\$8.0k	\$13.0k	\$6.9k
#19	荷兰 Netherlands	1%	1%	56k	1%	\$6.3k	\$8.7k	\$6.8k
#20	越南 Vietnam	0.4%	1%	39k	0.5%	\$7.3k	\$7.0k	\$7.2k
#21	海湾阿拉伯合作国家委员会* GCC Markets*	0.3%	0.3%	22k	0.3%	\$8.8k	\$11.3k	\$10.5k

注:

- 海湾阿拉伯合作国家委员会包括6个市场: 巴林、科威特、阿曼、卡塔尔、沙特阿拉伯及阿拉伯联合酋长国。

- 旅客人均消费的数据为每季发布。

Note:
- 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.

内地市场	Mainland China
短途市场	Short-haul Markets
长途市场	Long-haul Markets

第一部分: 香港主要经济指标

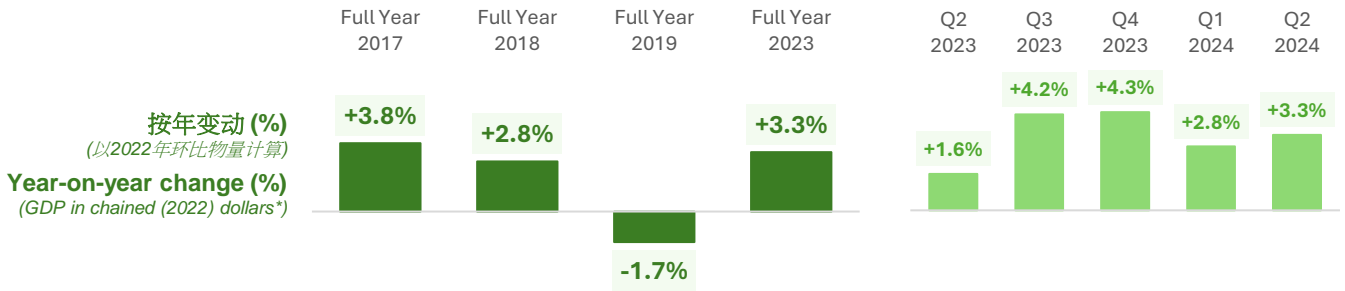
SECTION 1: HONG KONG KEY ECONOMIC INDICATORS



香港本地生产总值 HONG KONG GDP GROWTH

(数据来源: 政府统计处)

(Source: Census and Statistics Department)



*以环比物量计算的本地生产总值，其变动反映在扣除价格变动的影响后，不同期间所生产或购买的货品及服务的物量变动。

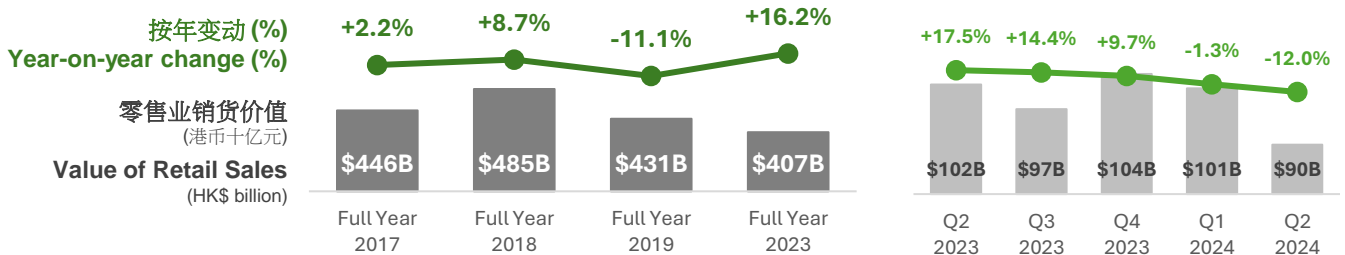
*Changes of chained dollar estimates of GDP reflect changes in the volume of production or consumption of goods and services from one period to another. The effect of changes in prices has been removed.



香港零售业总销货额 HONG KONG TOTAL RETAIL SALES

(数据来源: 政府统计处)

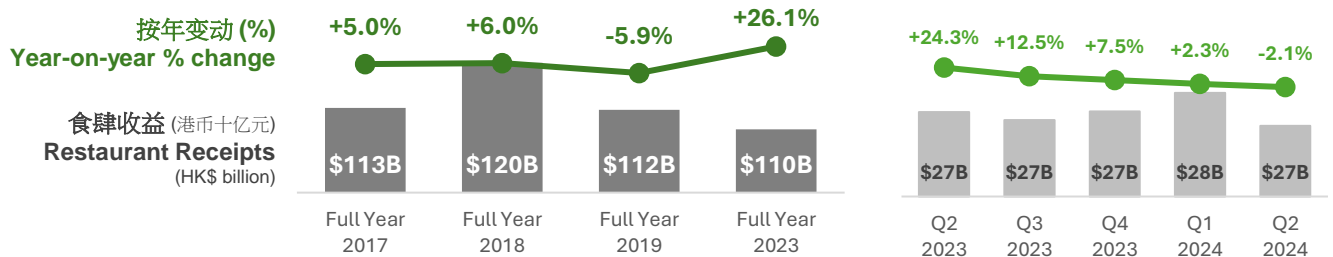
(Source: Census and Statistics Department)



香港食肆总收益 HONG KONG TOTAL RESTAURANT RECEIPTS

(数据来源: 政府统计处)

(Source: Census and Statistics Department)



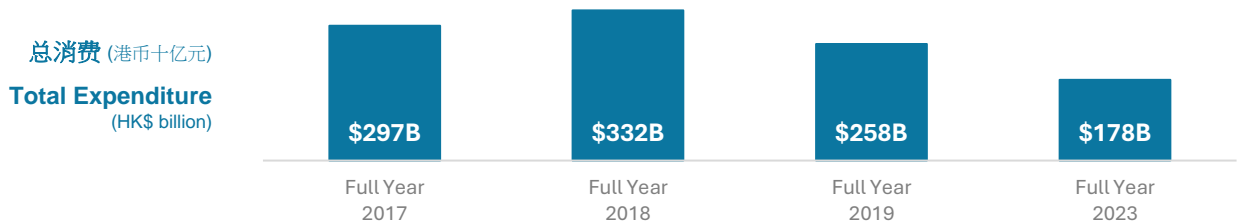
第二部分: 香港旅游业指标

SECTION 2: HONG KONG TOURISM INDUSTRY



与入境旅游相关的总消费* TOURISM EXPENDITURE ASSOCIATED WITH INBOUDN TOURISM (TEAIT)*

(数据来源: 香港旅发局离境旅客研究计划) (Source: HKTB Departing Visitor Survey)



*与旅游入境相关的消费包括两个主要组成部分: 1) 境内消费(所有到港旅客在香港消费时, 用于商品及服务方面的总额)及2) 国际客运服务消费(本港客运公司为非本港居民提供航空、海上及陆上的跨境客运服务所得的收益, 政府统计处编制)

*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: 香港旅游业指标 (续) SECTION 2: HONG KONG TOURISM INDUSTRY (CONT'D)



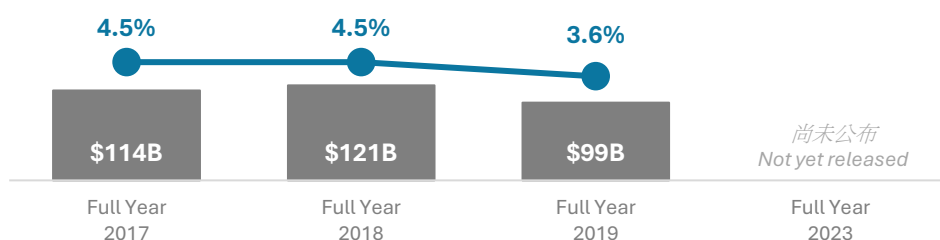
旅游业的增加价值 VALUE-ADDED OF TOURISM INDUSTRY IN GDP

(数据来源: 政府统计处) (Source: Census and Statistics Department)

占本地生产总值百分比
Share of value added in GDP

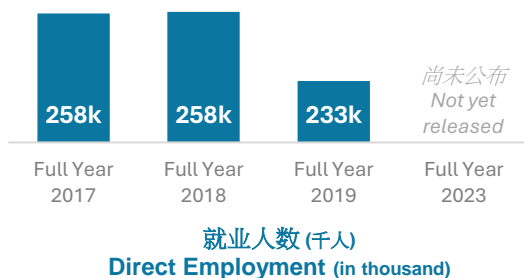
以当时价格计算的增加价值
(港币十亿元)

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



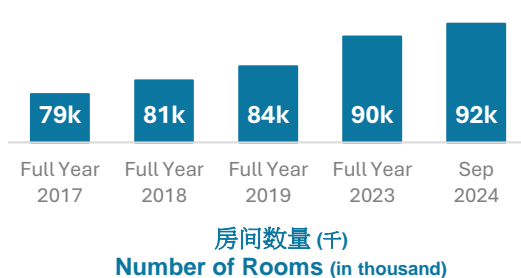
旅游业的就业人数 TOURISM DIRECT EMPLOYMENT

(数据来源: 政府统计处)
(Source: Census and Statistics Department)



酒店房间供应数量 HOTEL ROOM SUPPLY

(数据来源: 香港旅发局酒店入住率调查)
(Source: HKTB Hotel Room Occupancy Survey)



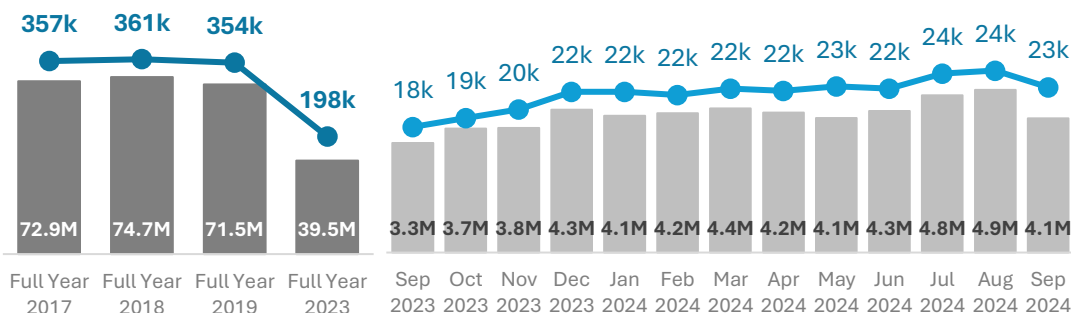
航空客运交通统计 AIR PASSENGER TRAFFIC

(数据来源: 机场管理局) (Source: Airport Authority Hong Kong)

客运飞机起降量 (千)
Passenger Flight Movement
(in thousand)

总旅客量 (百万人次)
(访港旅客 + 转机及过境 + 本地居民)

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

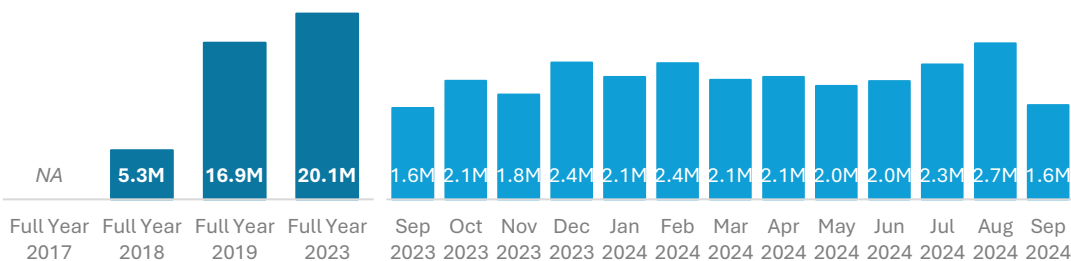


高铁西九龙站交通统计 HIGH SPEED RAIL WEST KOWLOON STATION TRAFFIC

(数据来源: 港铁公司) (Source: MTR)

总乘客量 (百万人次)
(访港旅客 + 本地居民)

Passenger Throughput
(Visitors + Local)



*注: 高铁香港西九龙站于2018年9月23日开始营运。

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

第三部分: 访港旅客统计 (每月)

SECTION 3: INBOUND VISITORS TO HONG KONG (MONTHLY)



访港旅客人次

VISITOR ARRIVALS

(数据源: 入境事务处)

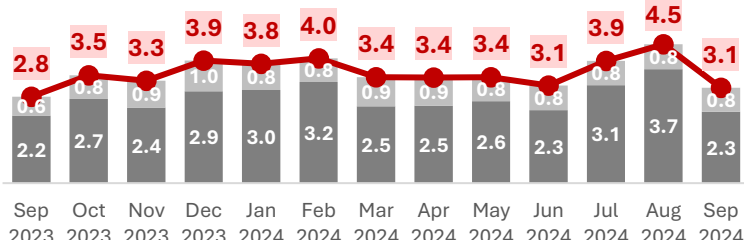
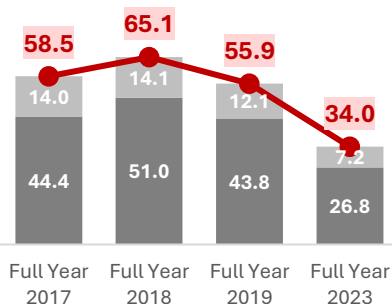
(Source: Immigration Department)

(百万人次 in million)

全部旅客 All Visitors

非内地旅客 Non-Mainland

内地旅客 Mainland



在港逗留时间

LENGTH OF STAY

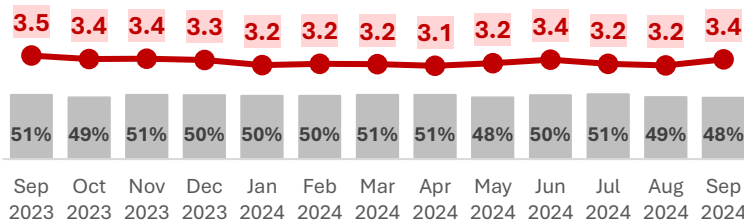
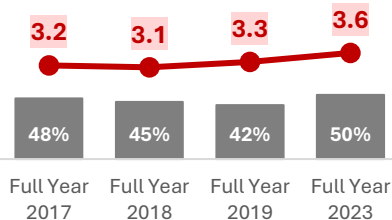
(数据源: 入境事务处)

(Source: Immigration Department)

全部旅客 ALL VISITORS

逗留晚数 No. of nights

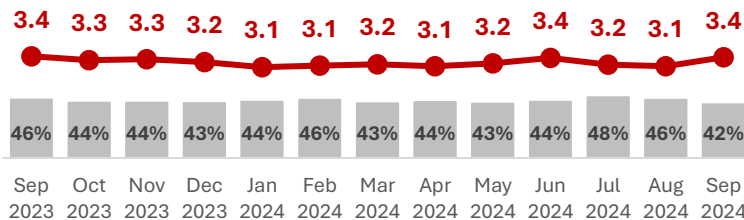
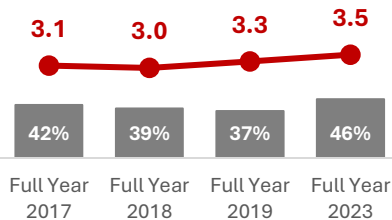
过夜旅客比例 (%) % Share of Overnight



内地旅客 MAINLAND VISITORS

逗留晚数 No. of nights

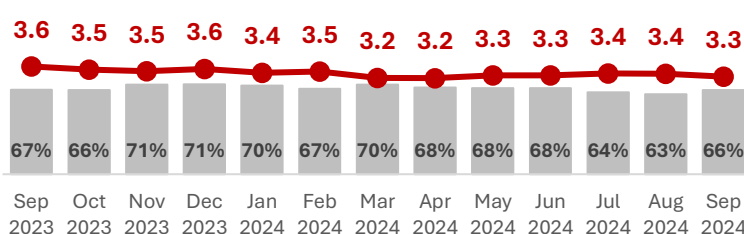
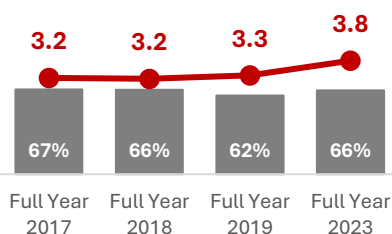
过夜旅客比例 (%) % Share of Overnight



非内地旅客 NON-MAINLAND VISITORS

逗留晚数 No. of nights

过夜旅客比例 (%) % Share of Overnight



酒店房间入住率及平均房租

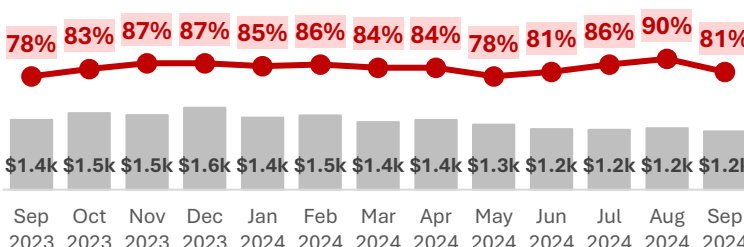
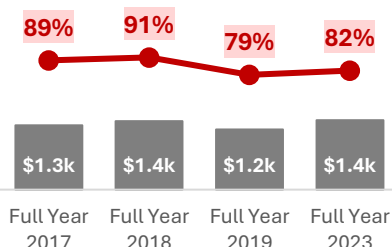
HOTEL OCCUPANCY & ROOM RATE

(数据源: 香港旅发局酒店入住率调查)

(Source: HKTB Hotel Room Occupancy Survey)

房间入住率 (%) Occupancy (%)

平均房租 (港币千元) Average Room Rate (HK\$ thousand)



第四部分: 访港旅客统计 (每季)

SECTION 4: INBOUND VISITORS TO HONG KONG (QUARTERLY)



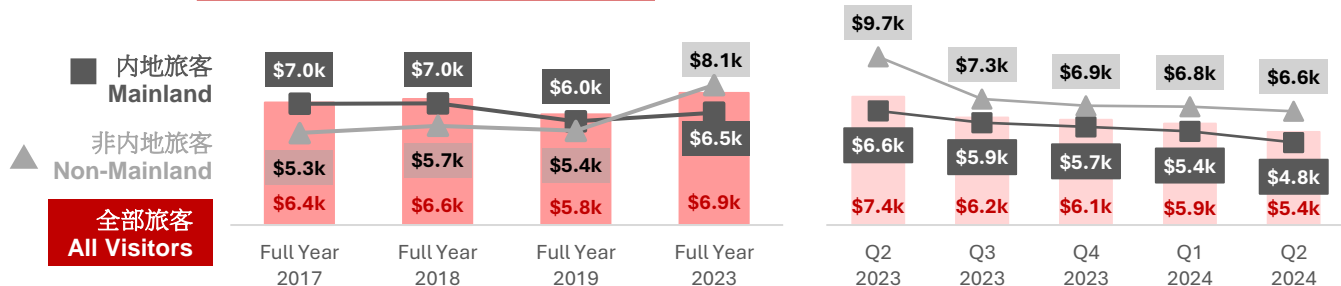
旅客人均消费

PER-CAPITA SPENDING

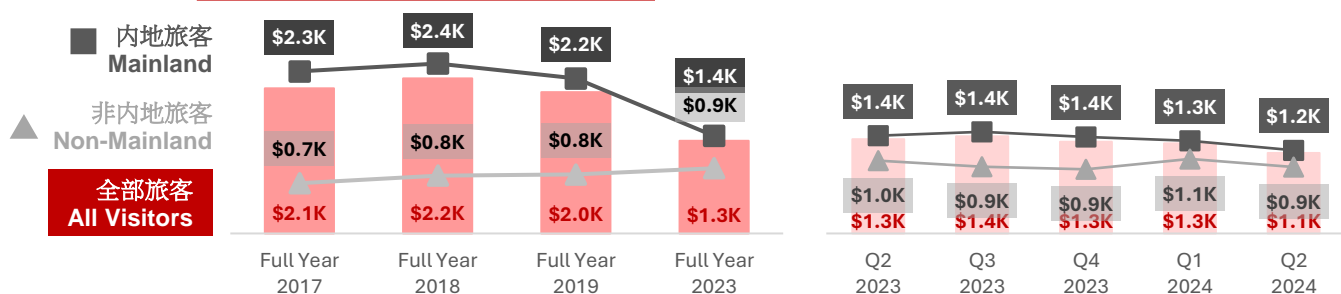
(数据来源: 香港旅发局离境旅客研究计划) (Source: HKTB Departing Visitor Survey)

过夜旅客 OVERNIGHT VISITORS

(港币千元 in HK\$ thousand)



不过夜旅客 SAME-DAY VISITORS



旅客整体满意度 (十分为满分)

OVERALL SATISFACTION (10 PT. SCALE)

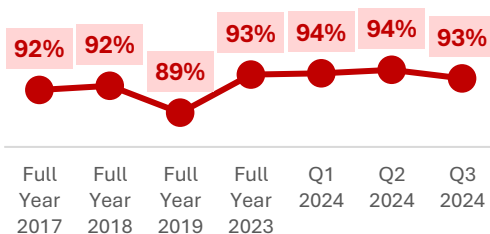
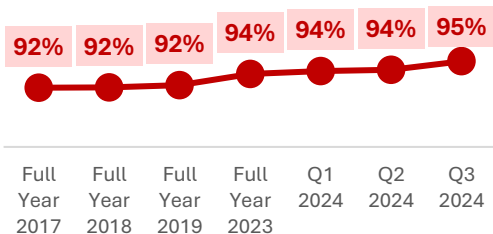
(数据来源: 香港旅发局离境旅客研究计划) (Source: HKTB Departing Visitor Survey)



旅客重访意欲 INTENTION TO REVISIT



推荐香港给亲友的意欲 RECOMMENDATION

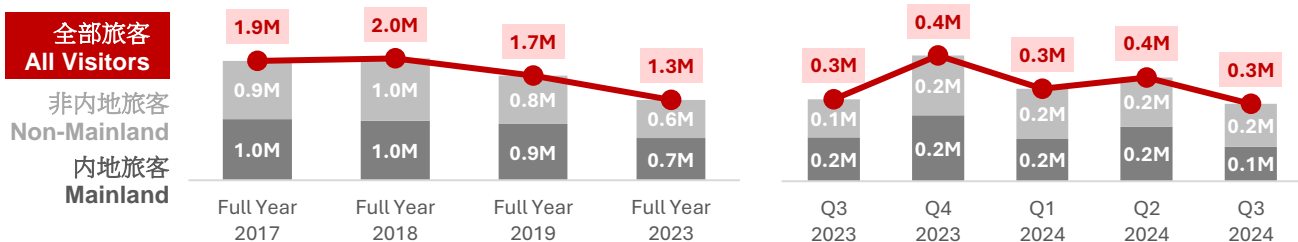


过夜会展旅客*

OVERNIGHT MICE ARRIVALS*

(数据来源: 香港旅发局离境旅客研究计划) (Source: HKTB Departing Visitor Survey)

(百万人次 in million)



*注: 会展旅客包括会议、展览及奖励旅游。

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

词汇表

GLOSSARY OF TERMS

酒店房间入住率

根据响应香港旅游发展局每月进行的酒店入住率问卷调查所提供可出租及已出租的客房数目，在维修中或翻新之房间并不包括在内。

酒店平均房租

根据响应香港旅游发展局每月进行的酒店入住率问卷调查所得之平均每日实收房租的平均数。实际平均房租不包括政府税项及与客房无关而附加在房租的组成项目，例如餐饮、洗衣、机场接送及服务费等。

过夜旅客

指入住本港的公众或私人住宿设施最少一晚的旅客。

入境不过夜旅客

指通过香港入境处，但没有在本港过夜的旅客。

与入境旅游相关的总消费

由以下两个主要部分组成：

- **境内消费** 是所有到港旅客 (如过夜旅客、入境不过夜旅客、过境旅客及机组人员) 在香港消费时，用于商品及服务方面的总额。
- **国际客运服务消费** 代表本港客运公司为非本港居民提供航空、海上及陆上的跨境客运服务所得的收益。这数据由香港特别行政区，政府统计处负责处理，是本地生产总值及国际收支平衡内，香港服务贸易的元素之一。

以上类别均符合世界旅游组织所列出的标准定义，以确保不同旅游目的地所汇报的旅游开支数据一致。

离境旅客研究计划

旅发局全年进行离港旅客研究计划，并透过面谈访问及电子问卷进行数据搜集，研究计划采用系统随机抽样法以收集旅客的主要访港目的、旅客的行程、消费和访港旅程满意度等。本年截至六月的样本数目约86,000人。电子问卷有15种语言可供选择，方便与来自世界各地的旅客进行访问。受访对象为16岁或以上经香港10个主要口岸离港的海外旅客 (即高铁西九龙、香园围管制站、香港国际机场、港珠澳大桥、中国客运码头、港澳客运码头、罗湖管制站、落马洲管制站、落马洲支线管制站、深圳湾管制站)。

离境旅客研究计划是一项大规模研究，故此，旅发局采用了一套完善的核查系统，确保所得资料的质量。这包括为访问员提供全面的训练、现场督导及核查、全面审核已完成的问卷，以及将编码、查验正误及审核等工作计算机化。

在新型冠状病毒肺炎疫情影响下，离境旅客研究计划于2020年至2022年间暂停，并于2023年起恢复。

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.