# Landscape of Hong Kong: Ecotourism & Future of the Tourism Industry

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# Outline

- Tourism impacts in Hong Kong
- A key issue to be resolved for the future sustainability of Hong Kong's tourism industry
- Landscape ecotourism: insights for planning the future tourism of Hong Kong



# Tourism impacts in Hong Kong:

*Hong Kong: The Facts*
*Information Services Department, HKSAR Government 2015*

- Tourism contributed to 5% of Hong Kong's GDP in 2013
- It employs around 269,700 persons, accounting for 7.2% of total employment
- In 2014 visitor arrivals increased by 12% over 2013 to 6.8 million
- The total number of visitors in the first half of 2015 grew at a pace of 2.8% over the same period of 2014, and the Mainland continued to be the largest market, accounting for around 78% of the total



# Overnight Visitor Spending Pattern, 2008-2012

| 居住國家 / 地區 Country/Territory of Residence | 總額 Total | | 購物 Shopping | | 酒店帳單 Hotel Bills | | 酒店外膳食 Meals Outside Hotels | | 娛樂 Entertainment | | 觀光 Tours | | 其他 Other | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 百萬港元 HK$M | % | 百萬港元 HK$M | % | 百萬港元 HK$M | % | 百萬港元 HK$M | % | 百萬港元 HK$M | % | 百萬港元 HK$M | % | 百萬港元 HK$M | % |
| 短途地區市場 (不包括中國內地) Short Haul Markets (Exclude Mainland China) | 31,075.13 | 100.0 | 13,037.80 | 42.0 | 9,534.80 | 30.7 | 4,504.62 | 14.5 | 1,376.86 | 4.4 | 164.54 | 0.5 | 2,456.51 | 7.9 |
| **北亞 North Asia** | **7,852.30** | **100.0** | **2,833.18** | **36.1** | **2,791.59** | **35.6** | **1,280.74** | **16.3** | **312.83** | **4.0** | **74.15** | **0.9** | **559.81** | **7.1** |
| 日本 Japan | 4,757.81 | 100.0 | 1,704.97 | 35.8 | 1,741.38 | 36.6 | 796.04 | 16.7 | 183.17 | 3.8 | 39.06 | 0.8 | 293.19 | 6.2 |
| 南韓 South Korea | 3,094.49 | 100.0 | 1,128.21 | 36.5 | 1,050.21 | 33.9 | 484.70 | 15.7 | 129.66 | 4.2 | 35.09 | 1.1 | 266.62 | 8.6 |
| **南亞及東南亞 South & Southeast Asia** | **17,626.28** | **100.0** | **7,682.03** | **43.6** | **5,449.50** | **30.9** | **2,331.14** | **13.2** | **844.25** | **4.8** | **84.07** | **0.5** | **1,235.29** | **7.0** |
| 東南亞 Southeast Asia | 15,776.89 | 100.0 | 7,123.91 | 45.2 | 4,691.45 | 29.7 | 2,085.27 | 13.2 | 721.97 | 4.6 | 70.38 | 0.4 | 1,083.91 | 6.9 |
| 印尼 Indonesia | 2,681.21 | 100.0 | 1,385.36 | 51.7 | 721.41 | 26.9 | 287.76 | 10.7 | 110.75 | 4.1 | 17.54 | 0.7 | 158.39 | 5.9 |
| 馬來西亞 Malaysia | 2,528.22 | 100.0 | 1,110.63 | 43.9 | 723.75 | 28.6 | 368.04 | 14.6 | 124.94 | 4.9 | 9.41 | 0.4 | 191.45 | 7.6 |
| 菲律賓 Philippines | 3,257.44 | 100.0 | 1,459.87 | 44.8 | 957.41 | 29.4 | 412.51 | 12.7 | 182.08 | 5.6 | 16.98 | 0.5 | 228.59 | 7.0 |
| 新加坡 Singapore | 3,868.93 | 100.0 | 1,495.41 | 38.7 | 1,373.20 | 35.5 | 550.04 | 14.2 | 166.79 | 4.3 | 9.12 | 0.2 | 274.37 | 7.1 |
| 泰國 Thailand | 2,816.01 | 100.0 | 1,431.06 | 50.8 | 717.17 | 25.5 | 373.04 | 13.2 | 103.84 | 3.7 | 11.68 | 0.4 | 179.22 | 6.4 |
| 越南 Vietnam | 466.01 | 100.0 | 169.82 | 36.4 | 151.22 | 32.4 | 72.80 | 15.6 | 26.25 | 5.6 | 4.93 | 1.1 | 40.99 | 8.8 |
| 印度 India | 1,581.05 | 100.0 | 476.99 | 30.2 | 647.89 | 41.0 | 210.29 | 13.3 | 104.78 | 6.6 | 11.76 | 0.7 | 129.34 | 8.2 |
| **台灣 Taiwan** | **4,343.06** | **100.0** | **2,001.82** | **46.1** | **1,115.40** | **25.7** | **708.14** | **16.3** | **177.03** | **4.1** | **6.00** | **0.1** | **334.67** | **7.7** |
| 澳門特區 Macau SAR | 1,253.49 | 100.0 | 520.77 | 41.5 | 178.31 | 14.2 | 184.60 | 14.7 | 42.75 | 3.4 | 0.32 | * | 326.74 | 26.1 |
| 小計 Sub-total | 56,425.20 | 100.0 | [illegible] | [illegible] | 21,578.91 | 38.2 | 8,515.20 | 15.1 | 2,602.37 | 4.6 | 304.16 | 0.5 | 4,364.59 | 7.7 |
| 中國內地 Mainland China | 129,416.24 | 100.0 | 91,597.52 | 70.8 | 16,084.55 | 12.4 | 12,290.84 | 9.5 | 3,168.07 | 2.4 | 528.51 | 0.4 | 5,746.75 | 4.4 |
| **合計 Total** | **185,841.44** | **100.0** | **110,657.49** | **59.5** | **37,663.46** | **20.3** | **20,806.04** | **11.2** | **5,770.44** | **3.1** | **832.67** | **0.4** | **10,111.34** | **5.4** |

70.8%

# Same-day In-town Mainland Visitor Spending Pattern, 2008-2012

| 消費模式 Spending Category | 2008 | | 2009 | | 2010 | | 2011 | | 2012 | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 百萬港元 HK$M | 增長率 % Growth | 百萬港元 HK$M | 增長率 % Growth | 百萬港元 HK$M | 增長率 % Growth | 百萬港元 HK$M | 增長率 % Growth | 百萬港元 HK$M | 增長率 % Growth |
| 購物 Shopping | 14,410.49 | + 38.7 | 17,824.94 | + 23.7 | 23,905.23 | + 34.1 | 31,996.44 | + 33.8 | 45,381.65 | + 41.8 |
| 酒店帳單 Hotel Bills | 75.83 | + 5.4 | 86.17 | + 13.6 | 46.93 | - 45.5 | 125.93 | + 168.3 | 238.49 | + 89.4 |
| 酒店外膳食 Meals Outside Hotels | 753.63 | + 22.4 | 578.85 | - 23.2 | 815.60 | + 40.9 | [illegible] | [illegible] | [illegible] | [illegible] |
| 其他 Others | 754.09 | + 18.5 | 1,014.06 | + 34.5 | 1,163.46 | + 14.7 | 2,047.71 | + 76.0 | 2,138.11 | + 4.4 |
| **總額 Total** | **15,994.04** | **+ 36.6** | **19,504.02** | **+ 21.9** | **25,931.22** | **+ 33.0** | **35,360.21** | **+ 36.4** | **49,278.02** | **+ 39.4** |

93%

Source: Hong Kong Tourism Board, 2013

## 2007及2008年與入境旅遊相關的總消費分類
## Breakdown of Total Tourism Expenditure Associated to Inbound Tourism 2007 & 2008

| 旅遊消費來自 Tourism Expenditure from | | 2007 百萬港元 HK$ Million | *2008 百萬港元 HK$ Million* | 增長率 % Growth |
|---|---|---|---|---|
| 過夜旅客 | Overnight Visitors | 87,867.79 | ***94,205.54*** | + 7.2 |
| 入境不過夜旅客 | Same-day In-town Visitors | 13,615.29 | ***18,216.56*** | + 33.8 |
| 乘坐同一郵輪進出香港的郵輪旅客[4] | Cruise-in/Cruise-out Passengers[4] | 46.67 | ***56.55*** | + 21.2 |
| 軍人 | Servicemen | 170.36 | ***182.72*** | + 7.3 |
| 機組人員 | Aircrew Members | 1,313.99 | ***1,867.80*** | + 42.1 |
| 過境旅客 | Transit/Transfer Passengers | 2,798.48 | ***2,609.65*** | - 6.7 |
| 境內總消費 | Total Destination Consumption Expenditure | 105,812.58 | ***117,138.82*** | + 10.7 |
| 國際客運服務消費[1] | Passenger International Transportation Expenditure [1] | 36,437.00[2] | ***41,814.00[3]*** | + 14.8 |
| 與入境旅遊相關的總消費 | Total Tourism Expenditure Associated to Inbound Tourism | 142,249.58 | ***158,952.82*** | + 11.7 |

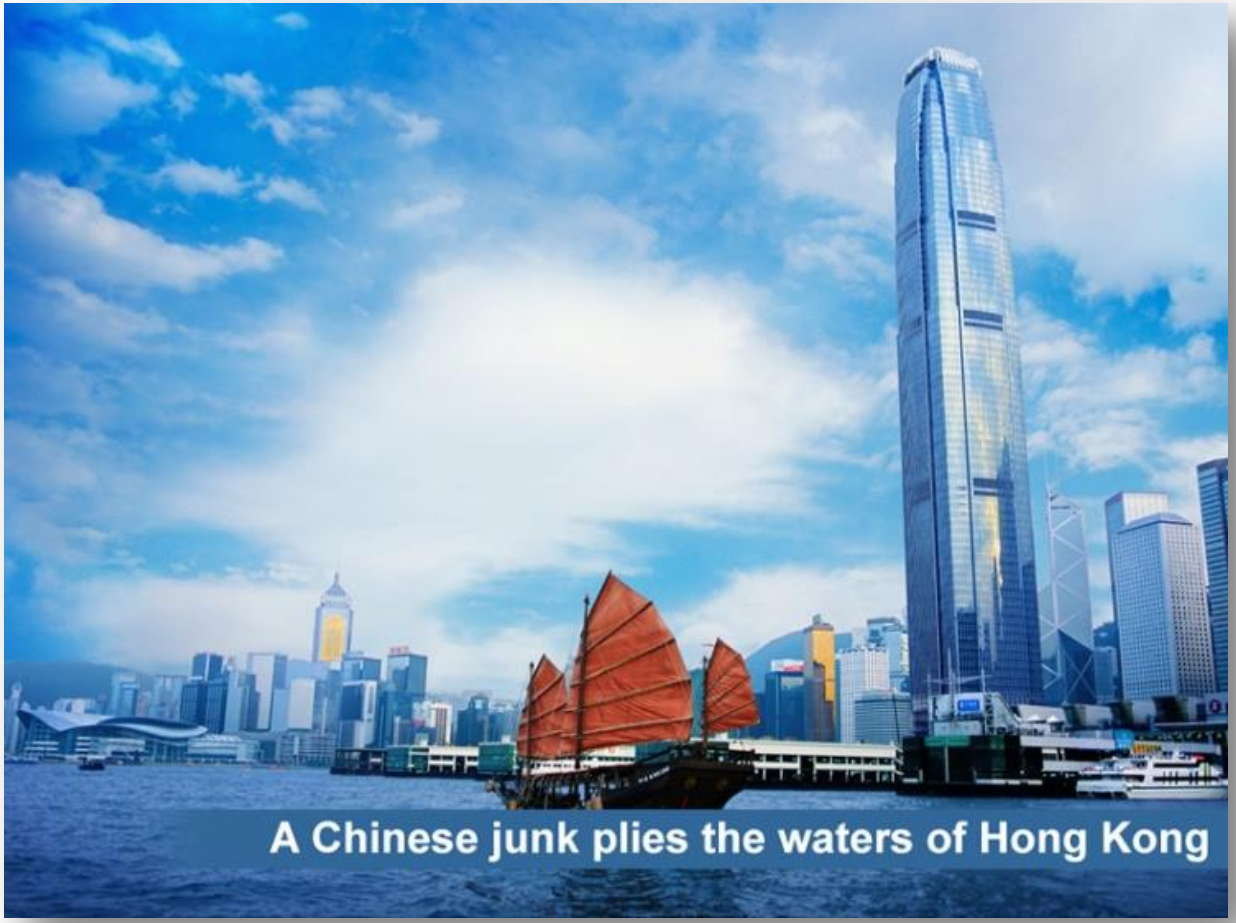
# A key issue to be resolved for the future sustainability of Hong Kong's tourism industry

- *Is it the form of shopping that dictates the nature of Hong Kong tourism industry or;*
- *Is it our city's nature that dictates how the tourism industry and the associated communal life should be shaped?*



# Landscape ecotourism:

## *Insights for planning the future tourism of Hong Kong*



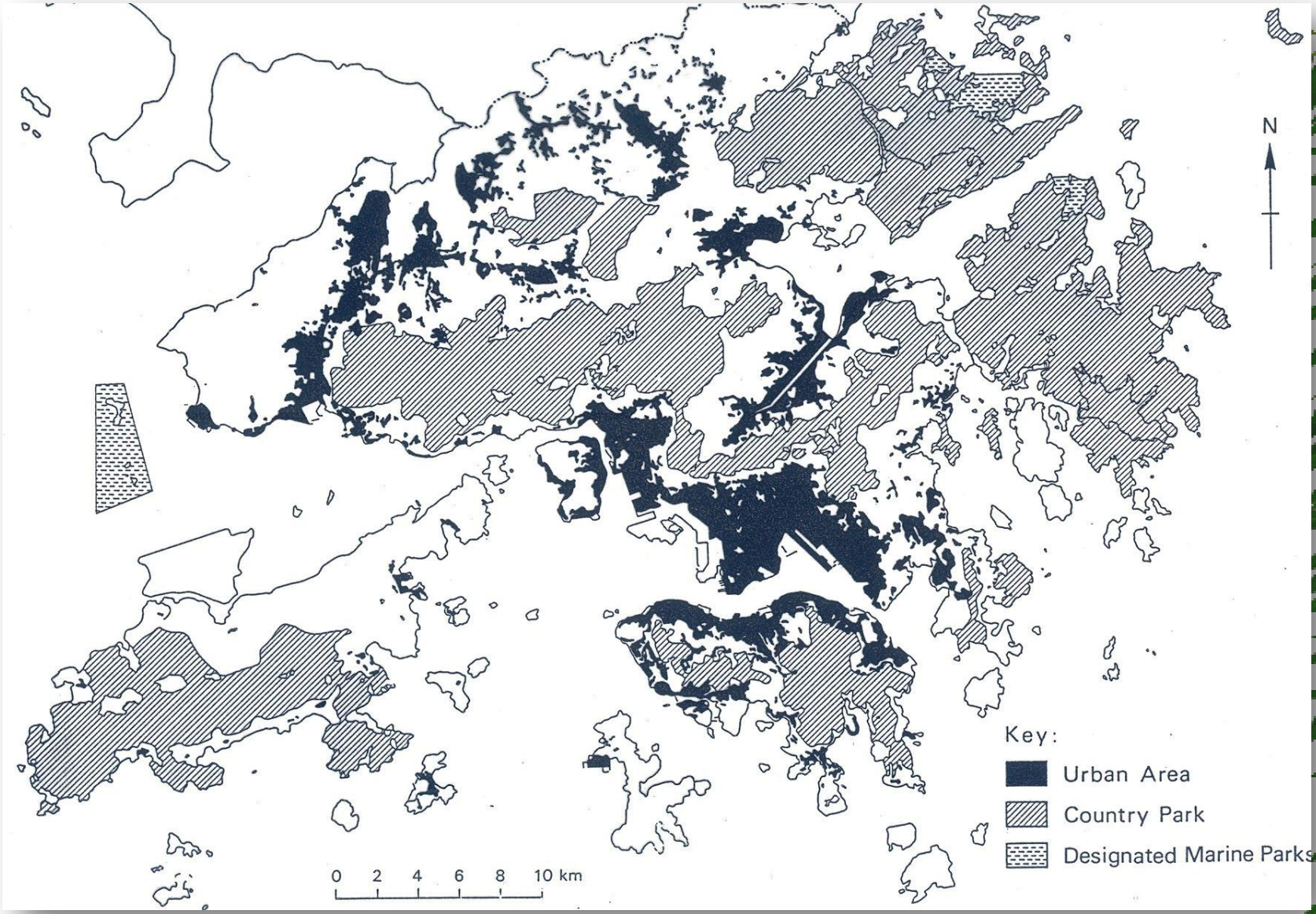
A Chinese junk plies the waters of Hong Kong

# Landscape ecotourism:

## *Insights for planning the future tourism of Hong Kong*



# Ecotourism resources in Hong Kong



# 香港的受保護地區
# Protected Areas of Hong Kong



# What is ecotourism?

- **4 criteria:**
- Nature based leisure activity
- Educational goal
- Sustainable development
- Entertainment business



# UNDERSTAND 4 CRITERIA OF ECOTOURISM IN LOCAL CONTEXT

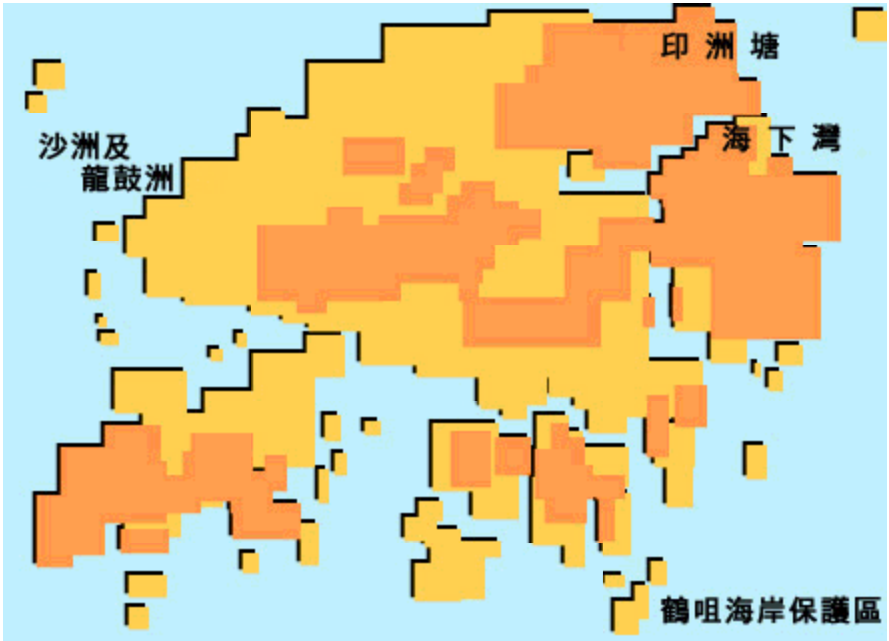
**1) Nature-based:**

*mainly natural areas: forest - flora & fauna; coral – marine & coast)*



# Ecotourism Potentials
## *nature-based perspective*)

- **Country Parks & Marine Parks**

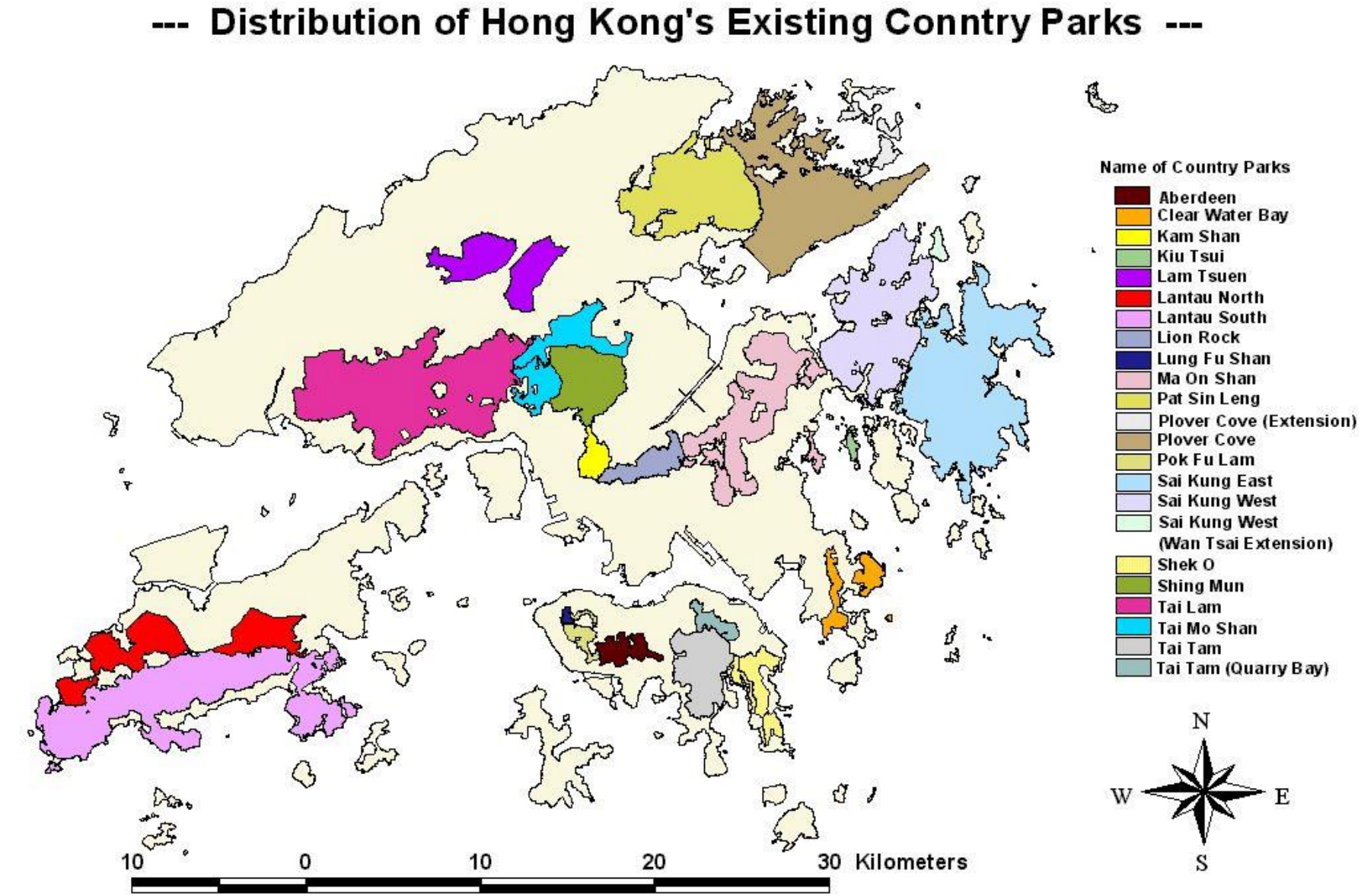








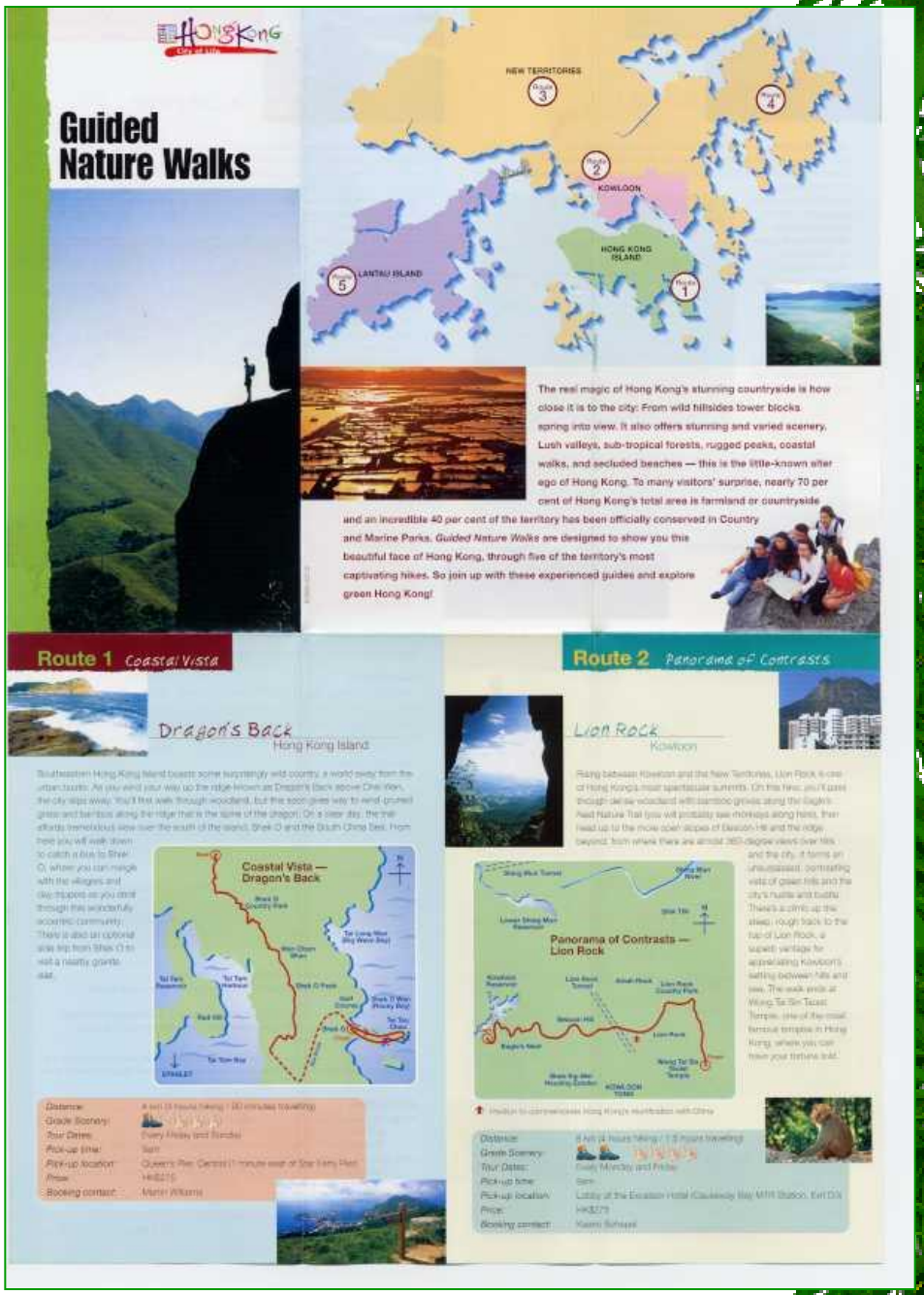
# Ecotourism Potentials



# Ecotourism Potentials *nature-based perspective*)

## Nature Walks





# Ecotourism Potentials
## *nature-based perspective*)

- **Mai Po Nature Reserve**








# 2) Educational & Environmentally Friendly

*(enhancing understanding and appreciation of natural features)*







# 3) Environmentally friendly

*(causes no or little nature damage)*



# 3) Environmentally friendly

*(causes no or little nature damage)*






GUANGDONG
DEEP BAY
EARL RIVER
ESTUARY
SHEKOU
TIN SHUI
WAI
Ping Shan
YUEN LONG




海滨生态公园





# 4) Contributes to local communities

*(socially and economically) as a form of tourism business*

**KEY: REVIEW IN LOCAL CONTEXT**

# 4) Contributes to local communities

*(socially and economically) as a form of tourism business*

**KEY: REVIEW IN LOCAL CONTEXT**

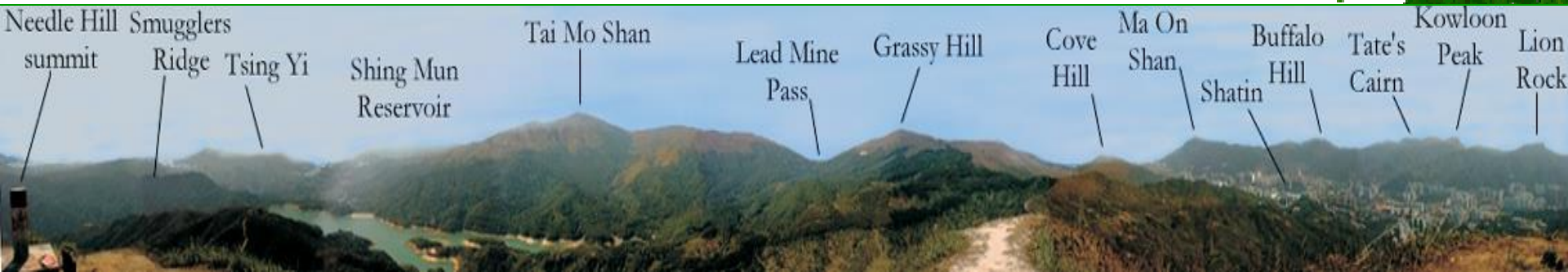



全力爭取沙頭角禁區開放
沙頭角慶春約七村村民
有
黃金番薯糖水
7元
＊可預


地質徑導賞時間
2PM – 3PM
歡迎報名參加
禁區開放
·10·
郊野公園之友會
荔枝窩地質教育中心
Friends of the Country Parks
Lai Chi Wo Geoheritage Centre

## Understanding 4 Criteria of Ecotourism in Local Context leads us to reflect about HK's landscapes:

- **Are** there potentials for *ecotourism*?
  - YES
- **Are** those opportunities being appreciated in HK's tourism development?



# Formation of HK's Landscapes:

## *2 basic elements: human and natural*

***Landscapes reflect both human & natural contributions***



Paved Trackways



Feng Shui



Beaches



Urban development



Slope stability

Geology – minerals & rocks





Rivers

# *Ecotourism with local features:* your insights please?

- *Opportunities*
- *Constraints*
- *Possibilities of reducing the constraints*



# Thank you!

