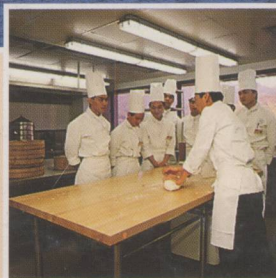
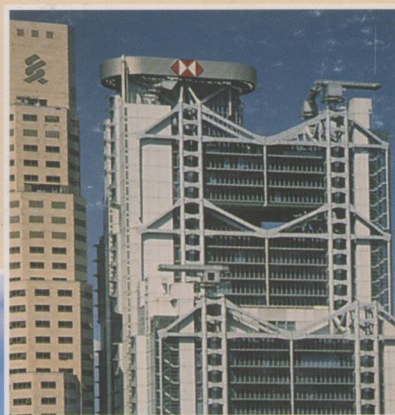


服務業統計摘要

Statistical Digest of the Services Sector

二零零四年版

2004 Edition



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香港特別行政區 政府統計處
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please see page A7 of this publication.

二零零四年七月
July 2004

《服務業統計摘要》由政府統計處出版，就香港十四個主要服務行業／界別提供最新的統計資料，方便各界查閱。

出版本統計摘要的主要目的，是提供一九九三年至二零零三年的統計資料，大致上以最近五年和先前第十一年的數字顯示，以助讀者比較過去十年的發展。並在適當之處輔以二零零三年第四季的数字，提供有關服務業的最新短期經濟指標。十四個主要服務行業／界別以個別章節闡述，資料分門別類，就每個服務行業／界別，提供各類統計數字，以供參考對照，並輔以圖表，以便翻查及理解。

本刊登載的統計資料主要來自政府統計處和其他政府部門。在適當地方亦引用了其他機構發表的統計數字。

本刊中某些資料項目是根據有限數據而作出的粗略估計，在日後得到更多資料時可能會作頗大的修訂。這些項目以「**」標明在統計表內。使用這些統計數字時應小心留意這點。

The Statistical Digest of the Services Sector is published by the Census and Statistics Department. It is designed to provide a handy source of up-to-date statistical information about fourteen major service industries/domains of Hong Kong.

The main objective of this Statistical Digest is to provide statistical data for the period from 1993 to 2003, in the form of most recent five years and the last eleventh year to facilitate comparison over the past decade. Where appropriate, the statistics for the fourth quarter of 2003 are supplemented to provide some latest short-term economic indicators on the services sector of Hong Kong. The data are organized in respect of each of the fourteen leading service industries/domains in a way that different types of statistics for a specific service industry/domain are collated in a dedicated section, supported by graphical presentations, for easy reference and interpretation.

The principal sources of the statistical data presented in this publication are official statistics compiled by the Census and Statistics Department and other government departments. Statistics produced by other organizations are also referred to as appropriate.

It should also be noted that there are data items which are crude estimates compiled based on limited data. They may be subject to considerable revisions when more data become available. Such items are marked with a “**” sign in the statistical tables. In using such statistics, users must take special care.

由於本地生產總值統計於二零零二年八月作出主要修訂，本刊載列的相關數字亦已作相應修訂，因此與較早期號刊載的數字或有不同。主要修訂的目的是提高香港本地生產總值數據的質素，以作國際性的比較。二零零二年度的主要修訂包括：

- (i) 採納經改良的編製方法及新的資料來源；
- (ii) 採用最新的國際統計標準；以及
- (iii) 將以固定市價計算的本地生產總值數列的基年更新至二零零零年。

有關詳情已刊載於《本地生產總值統計特刊》。

自二零零四年第一季開始，業務收益指數的基年已由一九九六年改為二零零零年。

每章節均附有「概念及方法」部分，詳述統計資料的範圍和性質，以及本刊內所用的用語及定義。

使用個別統計表的數字時，讀者須注意相應的註釋，以便了解在這十年間有關定義、涵蓋範圍、計算方法及點算規則方面的變化，以及資料的局限性。任何上述變化均可能令整段期間內的數列不能作全面的比較。

除另有註明外，每節的「其他有關刊物」所述的刊物是由政府統計處編製。

由一九九七年七月一日開始，香港成為中華人民共和國的特別行政區。就本刊登載的統計資料而言，自一九九七年七月起，「香港」是指香港特別行政區。

As a result of the major revision to the Gross Domestic Product (GDP) introduced in August 2002, relevant figures presented in this report have been revised accordingly and hence may be different from those presented in earlier issues. The objective of the major revision to GDP is to enhance the quality and international comparability of GDP statistics in Hong Kong. The 2002 round of major revision was achieved through

- (a) incorporating improved estimation methods and new data sources;
- (b) implementing latest international statistical standards; and
- (c) updating the base year of constant price GDP series to 2000.

The details are published in the “Special Report on Gross Domestic Product”.

As from the first quarter of 2004, the base year of business receipts indices has been changed from 1996 to 2000.

Description of the scope and nature of the statistical data and terms and definitions used in the publication are provided in the “Concepts and Methods” part in each section.

When using figures from each individual table, readers should pay attention to the corresponding footnotes which describe as far as possible changes in the definitions, coverage, methods of calculation and counting rules over the decade as well as limitations of data. Any change may render the data series not fully comparable over the whole period.

Unless otherwise specified, the publications in “Further References” of each section are produced by the Census and Statistics Department.

On 1 July 1997, Hong Kong became a Special Administrative Region of the People’s Republic of China. In respect of statistics in this publication, “Hong Kong” stands for the Hong Kong Special Administrative Region with effect from July 1997.

代號

本刊內各代號的含意如下：

- 不適用
- * 修訂數字
- ** 粗略估計數字
- N.A. 沒有數字

計量單位

1 立方米	=	219.969 英加侖
1 公頃	=	10 000.000 平方米
1 公斤	=	2.205 磅
	=	1.653 斤
每小時 1 公里	=	0.540 浬
1 平方米	=	10.764 平方呎
1 公噸	=	2 204.623 磅
	=	0.984 噸
每秒兆比特	=	每秒 1×10^6 比特
1 兆比特	=	1×10^{12} 比特

貨幣數字

本刊內所有引述的貨幣數字，除特別聲明外，均為港元。港元是香港特別行政區的法定貨幣。

匯率

自一九八三年十月十七日起，政府透過一項有關發行紙幣的措施，將港元與美元聯繫，由發鈔銀行以 7.8 港元兌 1 美元的固定匯率發行紙幣。自此，港元兌美元的匯率在外匯市場僅有窄幅變動。

數字的進位

由於進位原因，統計表內個別項目的數字加起來可能與總數略有出入。

Symbols

The following symbols are used throughout the Digest :

- not applicable
- * revised figures
- ** crude estimates
- N.A. not available

Units of Measurement

1 cubic metre (cu.m.)	=	219.969 imperial gallons
1 hectare	=	10 000.000 square metres
1 kilogram (kg)	=	2.205 pounds
	=	1.653 catties
1 kilometre/hour (km/h)	=	0.540 knot
1 square metre (sq.m.)	=	10.764 square feet
1 tonne (t)	=	2 204.623 pounds
	=	0.984 ton
1 megabit per second (Mbps)	=	1×10^6 bits per second
1 terabit	=	1×10^{12} bits

Monetary Figures

All monetary figures quoted are in Hong Kong dollars unless otherwise specified. Hong Kong dollar is the legal tender in the Hong Kong Special Administrative Region.

Exchange Rate

As from 17 October 1983 the Hong Kong dollar has been linked to the US dollar through an arrangement in the note issuing mechanism permitting note issuing banks to issue Hong Kong dollar notes at a fixed rate of HK\$7.80=US\$1.00. Since then, the exchange rate of Hong Kong dollar against the US dollar in the foreign exchange market has moved only within a narrow range.

Rounding of Figures

There may be a slight discrepancy between the sum of individual items and the total as shown in the tables owing to rounding.

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在過去十年，香港的經濟體系經歷明顯的結構性轉變，服務業的地位變得非常重要。這結構性轉變明顯地反映在服務業於本地生產總值中所佔的比重。服務業對本地生產總值的貢獻由一九九三年的 81.2% 上升至二零零二年的 87.5%。

服務業包括批發、零售、進出口貿易、飲食及酒店業；運輸、倉庫及通訊業；金融、保險、地產及商用服務業以及社區、社會及個人服務業。

在服務業內的主要經濟活動⁽¹⁾中，批發、零售、進出口貿易、飲食及酒店業合計在二零零二年佔本地生產總值的 26.9%，其次是社區、社會及個人服務業(22.2%)，金融、保險、地產及商用服務業(22.2%)，運輸、倉庫及通訊業(10.6%)。服務行業所佔比率在一九九

Over the past decade, the Hong Kong economy has undergone a remarkable structural transformation. Services have gained great prominence. This structural transformation has already been reflected in the share of contribution of the services sector to the Gross Domestic Product (GDP). The contribution of the services sector to GDP increased from 81.2% in 1993 to 87.5% in 2002.

The services sector includes wholesale, retail and import/export trades, restaurants and hotels; transport, storage and communications; financing, insurance, real estate and business services; and community, social and personal services.

Among the major economic activities in services sector⁽¹⁾, wholesale, retail and import/export trades, restaurants and hotels together contributes 26.9% of the GDP in 2002, followed by community, social and personal services (22.2%), financing, insurance, real estate and business services (22.2%), and transport, storage and communications (10.6%). While the

(1) 在國民經濟核算中，除了上一段所提及的服務外，服務業還包括「樓宇業權」及「非直接計算的金融中介服務調整」這兩個項目。「樓宇業權」被視為一項經濟活動，這包括業主以個人身分為租客提供的租賃服務及住戶、政府及私人非牟利機構等以業主身分為自己提供的同類服務。另一方面，「金融中介服務」是指金融中介機構(如銀行和接受存款公司)對借貸者提供的服務。這些金融中介機構對其所提供的服務並沒有明確地收取服務費，而是賺取借貸的利息差額。在計算本地生產總值時，非直接計算的金融中介服務的價值，會加入金融服務業的生產總額內，因而亦包括在其增加價值之內。這做法亦等於必須把這類服務費用從使用這項服務的行業的增加價值中扣除。不過，在實行上要設立準則以進行這個計算，是十分困難的，而國際認可的做法是把這項收費總額從所有生產者的總增加價值中扣除，以調整本地生產總值的數字。

(1) Apart from the services mentioned in the above paragraph, two other components "ownership of premises" and "adjustment for financial intermediation services indirectly measured" are also covered under the services sector in the context of national accounts. "Ownership of premises" is treated as an economic activity in the national accounts and covers the leasing services provided to tenants by owners of premises in their individual capacity and those leasing services which owners of premises like households, government and private non-profit institutions, provide to themselves. On the other hand, "financial intermediation services" are services provided by financial intermediaries (such as banks and deposit-taking companies) to lenders and borrowers. These financial intermediaries do not charge explicitly on the services they provide. They earn from paying and charging different interest rates to lenders and borrowers. In compiling GDP, the value of financial intermediation services indirectly measured (FISIM) is added to the gross output and consequently to the value added of financing services industry. Having done this, it is necessary to deduct such from the value added of other industries which are charged for the use of services. However, in practice it is very difficult to establish a basis for this to be done, and the internationally accepted practice is to adjust the GDP by deducting the value of FISIM from the aggregated value added of all producers.

三年至二零零二年間均有所增加，製造業的相對重要性則下降，它對本地生產總值的貢獻由一九九三年的11.1%下降至二零零二年的4.5%，反映製造業活動轉移至貿易活動，這個發展跟香港廠商在中國內地蓬勃發展的外發加工活動有很大關係。在這些業務的帶動下，對香港其他支援服務的需求，例如陸上運輸、航運、貿易融資、保險和各類專業服務，亦相應大幅增加。

服務業亦提供了香港的主要就業機會。服務業就業人數在總就業人數中所佔的比率在過去十年顯著上升，由一九九三年的72.5%增至二零零三年的85.3%。在二零零三年，整體就業人數共有323萬人，而整個服務業共僱用了275萬人。在就業人數增加的同時，服務業的機構單位數目亦由一九九三年的239 000間增至二零零三年的272 000間。

服務業對保持本港對外貿易平衡，發揮極大作用。在二零零三年，服務輸出總額達3,474 億元，與一九九三年比較，平均每年增長率達5.7%。在二零零三年，商貿服務及其他與貿易相關的服務是服務輸出組成部分中最重要的一項，佔服務輸出總額的37.0%。緊隨的兩個重要組成部分是運輸和旅遊，在二零零三年，兩者各佔服務輸出總額的30.4%及16.0%。在一九九三年，這三個部分佔服務業的百分比則分別為19.8%，36.3%及26.0%。

把十四個主要服務行業/界別納入本摘要，反映我們確認其對本港經濟的重大貢獻。事實上，這些行業/界別合共佔本地生產總值一個相當大的比例。

service subsectors registered increases in shares of the GDP over the period from 1993 to 2002, the relative importance of manufacturing has declined, as reflected by its contribution to the GDP, which went down from 11.1% in 1993 to 4.5% in 2002. This reflects the shifting of manufacturing activities to trading activities, which are much related to the growing prominence of outward processing activities in the mainland of China. This has also generated considerable demand for other support services from Hong Kong in areas such as land transport, shipping, trade financing, insurance and various professional services.

The services sector also become our principal source of employment. The share of the services sector in total employment has increased markedly over the past decade, from 72.5% in 1993 to 85.3% in 2003. In 2003, the services sector as a whole employed 2.75 million persons out of the 3.23 million overall employment. Along with the growth in employment, the number of establishments in the services sector also increased from 239 000 in 1993 to 272 000 in 2003.

The services sector is a major contributor to our external trade balance. In 2003, the value of exports of services reached \$347.4 billion, representing an average annual growth rate of 5.7% over 1993. In 2003, merchanting and other trade-related services was the most important component, contributing 37.0% to total exports of services. Transportation and travel were the other two important components coming after, contributing 30.4% and 16.0% respectively to total exports of services in 2003. In 1993, the respective percentage shares of these three components in the services sector were 19.8%, 36.3% and 26.0%.

The inclusion of the 14 leading service industries/domains in this Digest reflects our recognition of their economic contribution. They together account for the lion's share of the services sector's contribution to the GDP.

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概要

由於頻繁的貿易和旅遊業務，香港已成為亞洲的主要航運中心。香港國際機場是全球其中一個最繁忙的機場，亦是四間國際航空公司(國泰航空公司、港龍航空公司、華民航空公司和中富航空有限公司)的總部。

航空運輸業包括以香港為根據地的航空公司和直升機公司、海外航空公司駐港辦事處、航空貨運代理公司及為航空運輸提供輔助服務的公司。二零零三年，從事航空運輸業的機構單位有 777 間，就業人數約 35 000 人。

在二零零二年，航空運輸業為香港帶來約 326 億元的增加價值，佔本地生產總值的 2.7%。與受著整體經濟放緩及九一一事件影響的零一年比較，這行業的增加價值上升 18%。

在二零零三年，共有 80 間航空公司為香港提供與超過 130 個城市的來往定期航班服務。他們合共提供了 183 845 班定期國際班機及 3 659 班不定期國際班機。平均每星期有 1 842 班來港的定期載客班機，提供共 490 842 個機位。

二零零三年的航機升降次數(包括載客和載貨航班)較零二年下跌 9.3% 至 187 508 班次。在一九九三年至二零零三年期間，總航機升降次數每年平均上升達 3.3%。

Highlights

Through its busy trade and tourist activities, Hong Kong has become a leading aviation hub in the region. Our Airport is one of the busiest airports in the world, and is home to four international airlines (Cathay Pacific Airways Limited, Hong Kong Dragon Airlines Limited, AHK Air Hong Kong Limited and CR Airways Limited).

The air transport industry included Hong Kong based airline and helicopter companies, local representative offices of overseas airline companies, air cargo forwarding companies and firms providing supporting services to air transport. In 2003, there were 777 establishments, engaging about 35 000 people, in the air transport industry.

The value added generated by the industry was about \$32.6 billion, or 2.7% of the Gross Domestic Product (GDP) of Hong Kong in 2002. Compared with 2001, when there were general economic slow down and the tragic 9-11 incident, the value added of the industry rebounded by 18%.

A total of 80 airlines provided scheduled services to Hong Kong from over 130 cities in 2003. Together, they operated 183 845 scheduled international flights and 3 659 non-scheduled international flights. On average, there were 1 842 incoming scheduled passenger flights per week, providing a total seat capacity of 490 842.

A decrease of 9.3% in aircraft movements (including passenger and cargo flights) was recorded in 2003 compared with 2002, bringing the annual total to 187 508. From 1993 to 2003, total aircraft movements had increased at an average annual rate of 3.3%.