

1. INTRODUCTION AND BACKGROUND

- 1.1.1 This Information Note provides background information on the Spa and Resort Study, as well as the initial findings of the Study, to facilitate the discussion at the workshop to be held by the Tourism Commission on 7 April 2005, and collection of public views by 7 May 2005.
- 1.1.2 In mid 2004, the Tourism Commission commissioned Urbis Limited to conduct a consultancy study to explore the demand for spa and resort facilities and to recommend the way forward for developing such facilities in Hong Kong.
- 1.1.3 The main objectives of the study are:
- To broaden the range of tourism attractions and to enhance Hong Kong's image and reputation as a tourist destination.
 - To examine the potential and demand for spa and related resort facilities, appropriate to Hong Kong's particular climatic context.
 - To identify potential resort sites and carry out a range of technical, environmental, economic and financial assessments.
 - To recommend the way forward.
- 1.1.4 A "resort" usually describes a location where individuals take their vacation. A resort hotel usually comprise a hotel within a resort that offers accommodation. The hotel may or may not include spa or wellness facilities. Resort hotels tend to be two varieties: 1. self-contained mega facilities with 300+ rooms or 2. smaller specialised resorts (eg. Spa resorts) located within a unique location.

1. 引言和背景

- 1.1.1 本資料文件提供有關水療及消閑度假設施研究的背景資料，以及初步研究結果，以便在旅遊事務署於 2005 年 4 月 7 日舉行的工作坊上討論，並在 2005 年 5 月 7 日前蒐集公眾意見。
- 1.1.2 在 2004 年年中，旅遊事務署委聘了雅邦規劃設計有限公司進行顧問研究，探討水療及消閑度假設施的需求，並就香港發展該等設施的未來路向作出建議。
- 1.1.3 這項研究的主要目標如下：
- 擴闊旅遊景點的種類，提高香港作為旅遊目的地的形象和聲譽。
 - 研究適合香港特殊氣候環境的水療及相關消閑度假設施的潛力和需求。
 - 物色可以發展消閑度假設施的地點，並進行一系列技術、環境、經濟及財務評估。
 - 建議未來路向。
- 1.1.4 “消閑度假設施”通常指旅客度假的地點。度假酒店通常指度假設施內提供住宿設施的酒店。這些酒店可能會有或沒有水療或保健設施。度假酒店主要分為兩大類：1. 設備齊全並有 300 個以上房間的大型設施；或 2. 位於獨特地點內的小型專門度假設施（例如水療度假設施）。



2. DEMAND STUDIES

2.1 Views from Industry

- 2.1.1 Key industry players have been consulted and these include Hong Kong Hotel Industry Association, Club Managers Association, major resort developers, Ocean Park Corporation, HK Jockey Club Kau Sai Chau, and major local hoteliers.
- 2.1.2 Those involved in the tourism industry agree that there is a market for resort developments. Implementation would be significantly contingent on public support. Whilst a spa would be a main element within the resort, it would have to have other attractions to be viable. The support facilities eg. conferences, spas, etc. would allow the resort to ensure that it is able to operate through the extremes in HK's weather.
- 2.1.3 Spas offering traditional Chinese Medicine (TCM), and Medical/Clinical based spas (comparable to Swiss's health and beauty treatments) are likely to be attractive to tourists throughout the year.
- 2.1.4 The tourism industry also considered that tourism zones would need to be established to ensure that resort development is successful. Direct road access was considered to be important. A recognisable brand name would be essential to attract visitors. This would bring certainty in terms of the product being offered.

2. 需求研究

2.1 業界意見

- 2.1.1 顧問已諮詢主要的業界人士，當中包括香港酒店業協會、香港會所管理協會、大型度假設施發展商、海洋公園公司、香港賽馬會滙西洲，以及本港大型酒店發展商。
- 2.1.2 旅遊業人士認同度假設施的發展項目具有市場。如何落實有關發展主要視乎公眾支持而定。雖然水療設施會是度假設施的主要元素，但亦要有其他具吸引力的設施方有利經營。會議場地、水療設備等支援設施，將可確保有關的度假設施在香港任何季節均能營業。
- 2.1.3 中藥及醫療／護理式水療設施（如瑞士的保健及美容療程），可能會全年都吸引到旅客光顧。
- 2.1.4 旅遊業亦認為須設立旅遊區，以確保度假項目發展成功。業界認為直通道路頗為重要。知名的品牌對吸引旅客亦很重要，因為名牌產品質素可靠。



2.2 Supply and Demand

2.2.1 The key findings are summarised as follows:

- There is a discernible growth in demand and supply of spa facilities in Hong Kong.
- Spa resorts have continued to develop through SE Asia. The market is increasingly competitive.
- A competitive resort product is likely to increase the growth and range of visitors to HK.
- Local market usership of the resort is expected to be high.
- Hong Kong is a relatively safe holiday destination that is convenient to visit.
- Corporate, convention and exhibition demand and usership is anticipated to be significant.

2.3 Market Requirements

2.3.1 Resort Hotel Developers typically require a critical mass of accommodation and particular facilities. This normally amounts to 300+ keys with full back of house facilities. However, this scale of development is space intensive and candidate sites are in short supply.

2.3.2 Some niche operators, however, prefer a smaller, boutique approach. This is a more risky investment but can generate higher returns. Business models rely on niche 'lifestyle' marketing to the market segment of couples with higher disposable income. Remote locations also encourage longer stays i.e. to make the journey worthwhile.

2.2 供求情況

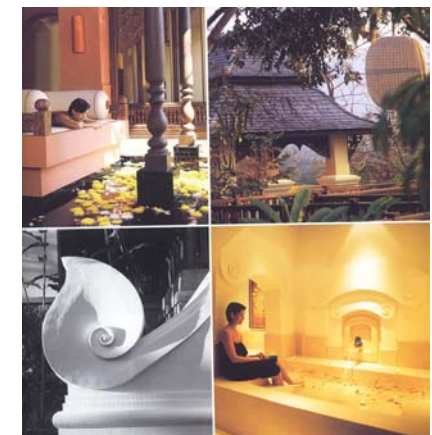
2.2.1 主要的研究結果扼述如下：

- 香港水療設施的供求均見增長。
- 水療度假設施在東南亞不斷發展，市場競爭日趨激烈。
- 具競爭力的度假產品會增加訪港旅客的人數和類型。
- 預期本地市場對這類度假設施的使用率頗高。
- 香港是一個較為安全而且旅遊方便的度假目的地。
- 預期團體、會議及展覽的需求殷切，使用率高。

2.3 市場要求

2.3.1 度假酒店發展商一般要求大型住宿及特殊設施，通常要有 300 個以上房間，會所設施一應俱全。不過，如此規模的發展項目所需空間頗多，而本港可供應用的地點卻很少。

2.3.2 一些旅館經營者卻屬意小型特色旅舍。雖然這類投資風險較大，但回報亦會較高。經營模式標榜旅館的“生活方式”，主要顧客為收入較高的夫婦。偏遠地點亦會促使這類旅客逗留較長時間，這樣旅程才值回票價。



2.3.3 Pampering spas are becoming more popular. These are richly decorated, with indoor-outdoor garden themes, cosy and cosseted environs and usually with a low-tech – high-touch approach to service.

2.4 Resort Hotels: International Case Studies

2.4.1 Six international case studies have been examined to develop design criteria for spa and resort development in Hong Kong. These include the Palm Island Golf Resort in Guangzhou (China), the Hyatt Regency Hotel in Macau, the Sentosa Hotel in Singapore, the Jebel Ali Golf and Spa Resort in Dubai, the Kulm Hotel St. Moritz in Switzerland, and the Windsor Toya Resort and Spa in Hokkaido, Japan.

2.5 Design Criteria

2.5.1 The following key features/design criteria were identified from the case studies:

- **Privacy and service:** All the resorts reviewed offer privacy and top service.
- **Location:** a quality private location is normally preferred.
- **Accessibility:** Most resorts are readily accessible and have good vehicular access.
- **Branding:** The use of well-known operators provides a degree of assurance for customers.
- **Naturalistic Design:** The extensive use of natural materials, colour & textures is increasingly used.
- **Water:** Swimming pools and water features set within lavish landscape treatments frequently form a core element of the resort design.

2.3.3 水療護膚越來越受歡迎。這類設施裝修華麗，內外庭園均予以悉心布局，環境舒適優雅，通常會有專人服侍，殷勤周到。

2.4 度假酒店：國際個案研究

2.4.1 顧問已研究 6 個國際個案，以制定香港發展水療及消閑度假設施的設計準則。這些個案包括中國廣州的棕櫚島高爾夫球會、澳門的凱悅酒店、新加坡的聖淘沙酒店、杜拜的傑貝阿里溫泉高爾夫球會、瑞士的聖模里茲山頂旅館，以及日本北海道的洞爺湖溫莎溫泉酒店。

2.5 設計準則

2.5.1 從上述個案研究中釐定主要特色／設計準則如下：

- **私隱和服務：**所有研究的度假設施均保障私隱，而且服務優良。
- **地點：**通常屬意優質的私人地點。
- **交通：**大部分度假設施交通便利，設有良好的車輛通道。
- **品牌：**選取知名營運商可令顧客覺得質素有所保證。
- **自然設計：**日益廣泛使用天然物料、顏色和結構。
- **水：**建於大型園景設施內的泳池和水飾，經常成為度假設施設計的核心元素。



- **Spa Features:** These are usually branded or marketed in a particular way. Each of the case studies examined incorporated individual forms of treatments.
- **Rooms and Suites:** Most provided a range of rooms and suites to cater for ranges of affordability.
- **Getaways:** Many of the resorts provide getaway locations for consumers living within fairly close proximity.
- **Responding to Climate:** To ensure all year round patronage all resorts provide attractions that can be enjoyed in either very hot or very cold months.
- **Conferences:** All resorts have associated conference facilities. This offsets drops in income during low seasons or at mid-week.
- **The Total Package:** Most case study resorts provided a wide range of activities (most included golf) and dining experiences designed to keep guests on site.

- **水療特色：**通常有獨特的品牌和市場。每一個案研究均包含特色療法。
- **房間及套房：**大部分都提供多類型房間及套房，以迎合不同負擔能力人士的需要。
- **自助遊：**很多度假設施均為附近居住的客戶提供自助旅遊點。
- **適應天氣：**為確保一年四季遊客不絕，所有度假設施均提供適宜酷熱或嚴寒月份享用的服務/設施。
- **會議：**所有度假設施均有相關的會議設施，以便彌補淡季或每周中期下降的收入。
- **套裝服務：**大部分研究個案的度假設施均提供各式各樣的活動（大部分包括哥爾夫球）和晚餐膳食，務求令顧客逗留該地。



3. POTENTIAL SITES

3.1 Criteria For Potential Site

3.1.1 The criteria for assessing potential sites are:

- **Site Suitability:** Sites should have a stimulating setting, visual containment and interesting outlook.
- **Accessibility:** It should be well served by road, or sea transport.
- **Environment:** Environmental impacts are to be avoided as far as practicable.
- **Availability of Infrastructure/ or Upgrading**
- **Economic and Social Benefits:** to both the operators and the wider community

3. 具發展潛力的地點

3.1 具發展潛力地點的評估準則

3.1.1 具發展潛力地點的評估準則如下：

- **地點合適程度：**須環境清幽、自成一區、外觀雅緻。
- **交通方便程度：**陸路或海路交通便捷。
- **環境：**盡可能避免對環境造成影響。
- **可供運用的基建設施／或改善基建設施**
- **經濟及社會效益：**對經營者及整體社會皆有好處。

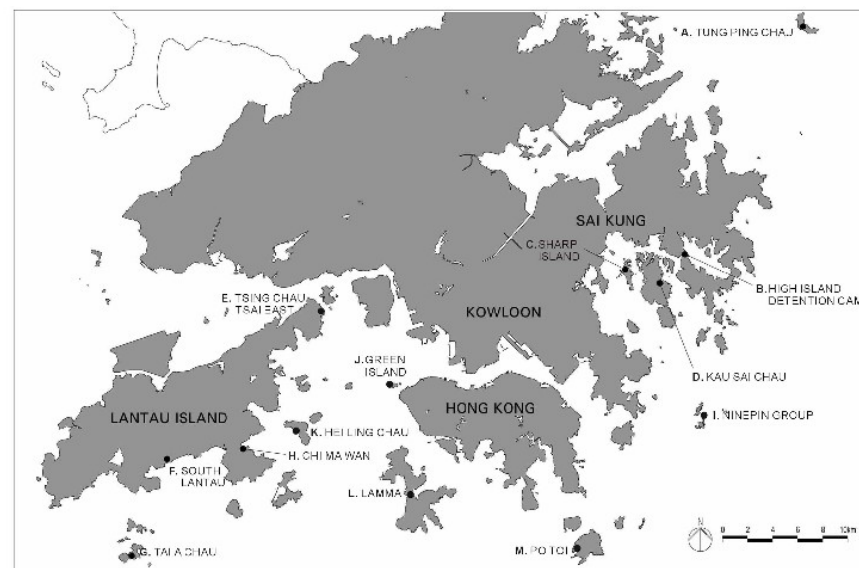


Figure 2.1

LONGLIST SITES FOR SPA / RESORT DEVELOPMENT



4. CASE STUDIES

4.1.1 The following sites are to be discussed as case studies at the workshop, applying the criteria for a potential site:

4.2 Case Study 1: High Island Detention Centre, Sai Kung

4.2.1 The 10 hectare site is located within a scenic setting within the Sai Kung East Country Park with proximity to water sports and recreational areas. It is a former refugee detention camp. The site is paved and mostly un-vegetated. The site is level and major infrastructure development would not be required.

4.2.2 The site is currently accessible by the MacLehose Trail Stage I and by the existing WSD access road. Road access would need to be upgraded in consultation with WSD/AFCD. Marine access is also possible.

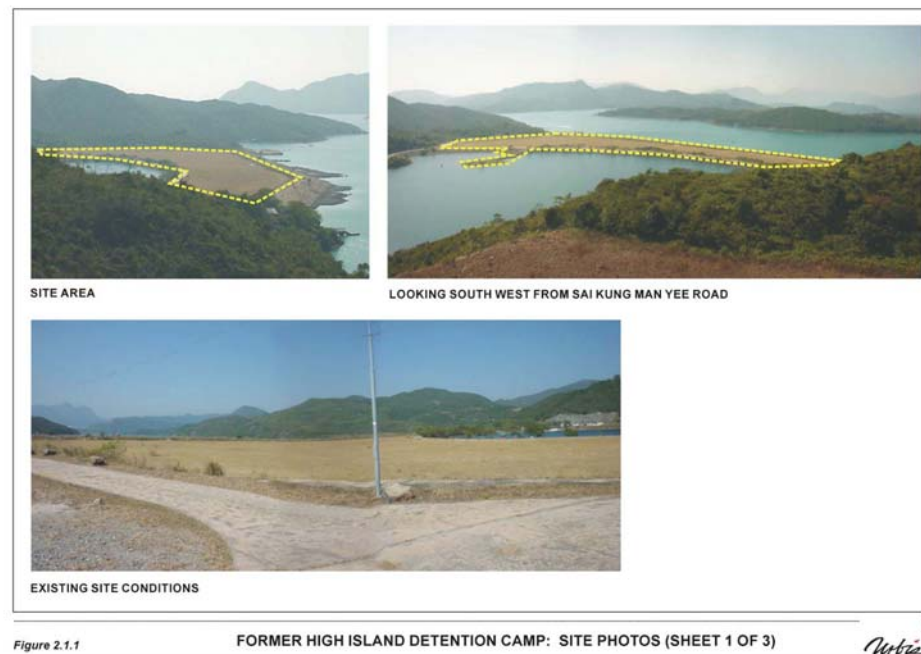


Figure 2.1.1 FORMER HIGH ISLAND DETENTION CAMP: SITE PHOTOS (SHEET 1 OF 3)



Figure 2.1.4 FORMER HIGH ISLAND DETENTION CAMP MASTER LANDSCAPE PLAN

4. 個案研究

4.1.1 工作坊將以個案研究的方式，按上述評估準則討論以下地點的發展潛力：

4.2 個案研究 1: 西貢萬宜羈留中心

4.2.1 該址原為難民羈留營，佔地 10 公頃，位於西貢東郊野公園，鄰近水上活動及康樂地區。路面已經鋪築，大致上沒有植物覆蓋。此外，地勢平坦，無須發展大型基建設施。

4.2.2 現可經麥理浩徑第一段及水務署通路進入。通路方面須與水務署／漁農自然護理署商討改善。此外，亦可經水路進入。

4.3 Case Study 2: Cheung Sha Beach, South Lantau

4.3.1 The Site is highly accessible to Tung Chung and Mui Wo, and is located by a long beach. This 4 hectare site has also been identified for a resort development under the Lantau Concept Plan. It is located in an area designated for recreation and leisure related developments. The site falls within an area zoned for “Coastal Protection Area” on the Outline Zoning Plan which restricts the types of uses permitted within the zone. Some upgrading of existing infrastructure will be required.



Figure 3.1.3

CHEUNG SHA BEACH MASTER LANDSCAPE PLAN



Figure 3.1.1

CHEUNG SHA BEACH: SITE PHOTOS (SHEET 1 OF 2)



4.3 個案研究 2: 南大嶼山長沙泳灘

4.3.1 該址依傍長灘，進出東涌及梅窩極為方便。根據大嶼山發展概念計劃，這幅佔地 4 公頃的土地已劃作康樂及消閑相關發展用途，建議可發展度假設施。該址所屬地區被納入分區計劃大綱圖的“海岸保護區”，因此區內土地用途將受到限制。現有基礎設施須作改善。

4.4 Case Study 3: Tai A Chau, Soko Islands

- 4.4.1 Tai A Chau (6 hectares), which is the former refugee detention camp, is located in a secluded location far from the urban areas of HK, offering a potential for true 'Retreat' resort. High speed ferry/boats would render it accessible from the Airport, Central, etc. It is set within a scenic and relatively high environmentally sensitive setting. Water and land recreation eg. sailing, hiking, snorkelling, etc. could be offered, subject to environmental assessments.
- 4.4.2 The marine area surrounding Tai A Chau has been earmarked for a proposed Marine Park. Environmental issues must be addressed and suitable development must be ensured if the site is to be further considered for development.
- 4.4.3 The island will require substantial infrastructure provision the cost of which could be significant.

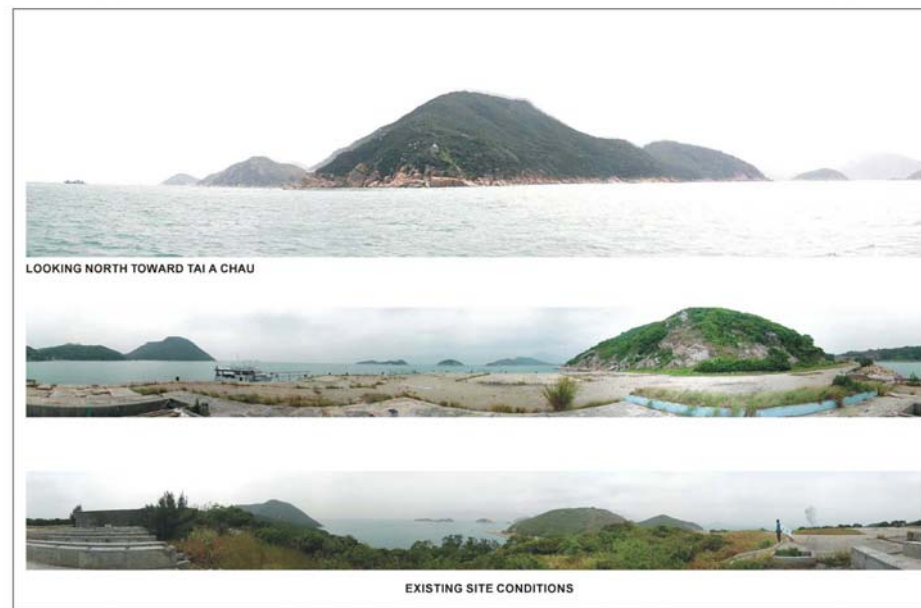


Figure 4.1.1

TAI A CHAU: SITE PHOTOS (SHEET 1 OF 1)

Urban



Figure 4.1.2

TAI A CHAU MASTER LANDSCAPE PLAN

Urban

4.4 個案研究 3：索罟群島的大鴉洲

- 4.4.1 原為難民羈留營的大鴉洲 (6 公頃)，地處偏僻，遠離香港鬧市，有潛力成為真正的“世外”度假勝地。可從機場、中環等地乘高速渡輪／船隻前往。該址風光明媚，屬環境較為敏感地區。可提供的海陸康樂活動包括風帆、遠足、徒手潛水等，但須視乎環境評估而定。
- 4.4.2 大鴉洲附近海域已劃作興建擬議中的海岸公園。如有意於該址發展其他用途，必須注意環保問題，並確保發展方案合適。
- 4.4.3 該島須要發展大量基建設施，成本龐大。

5. WAY FORWARD

5.1.1 The next step is to seek public views on the initial findings of the study, and to incorporate them into the study final reports.

5. 未來路向

5.1.1 下一步是徵詢公眾對初步研究結果的意見，並把意見納入本研究的最後報告。