

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 本资料文件提供有关水疗及消闲度假设施研究的背景资料，以及初步研究结果，以便在旅游事务署于 2005 年 4 月 7 日举行的工作坊上讨论，并在 2005 年 5 月 7 日前搜集公众意见。

1.1.2 在 2004 年年中，旅游事务署委聘了雅邦规划设计有限公司进行顾问研究，探讨水疗及消闲度假设施的需求，并就香港发展该等设施的未来路向作出建议。

1.1.3 这项研究的主要目标如下：

- 扩阔旅游点的种类，提高香港作为旅游目的地的形象和声誉。
- 研究适合香港特殊气候环境的水疗及相关消闲度假设施的潜力和需求。
- 物色可以发展消闲度假设施的地点，并进行一系列技术、环境、经济及财务评估。
- 建议未来路向。

1.1.4 “消闲度假设施”通常指旅客度假的地点。度假酒店通常指度假设施内提供住宿设施的酒店。这些酒店可能会有或没有水疗或保健设施。度假酒店主要分为两大类：1. 设备齐全并有 300 个以上房间的大型设施；或 2. 位于独特地点内的小型专门度假设施（例如水疗度假设施）。



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 业界意见

- 2.1.1 顾问已谘询主要的业界人士，当中包括香港酒店业协会、香港会所管理协会、大型度假设施发展商、海洋公园公司、香港赛马会濠西洲，以及本港大型酒店发展商。
- 2.1.2 旅游业人士认同度假设施的发展项目具有市场。如何落实有关发展主要视乎公众支持而定。虽然水疗设施会是度假设施的主要元素，但亦要有其他具吸引力的设施方有利经营。会议场地、水疗设备等支援设施，将可确保有关的度假设施在香港任何季节均能营业。
- 2.1.3 中药及医疗 / 护理式水疗设施（如瑞士的保健及美容疗程），可能会全年都吸引到旅客光顾。
- 2.1.4 旅游业亦认为须设立旅游区，以确保度假项目发展成功。业界认为直通道路颇为重要。知名的品牌对吸引旅客亦很重要，因为名牌产品质素可靠。



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 供求情况

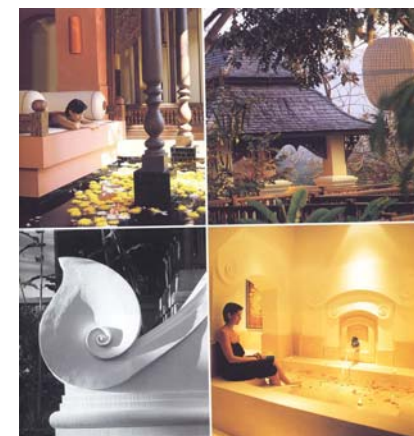
2.2.1 主要的研究结果扼述如下：

- 香港水疗设施的供求均见增长。
- 水疗度假设施在东南亚不断发展，市场竞争日趋激烈。
- 具竞争力的度假产品会增加访港旅客的人数和类型。
- 预期本地市场对这类度假设施的使用率颇高。
- 香港是一个较为安全而且旅游方便的度假目的地。
- 预期团体、会议及展览的需求殷切，使用率高。

2.3 市场要求

2.3.1 度假酒店发展商一般要求大型住宿及特殊设施，通常要有 300 个以上房间，会所设施一应俱全。不过，如此规模的发展项目所需空间颇多，而本港可供应用的地点却很少。

2.3.2 一些旅馆经营者却属意小型特色旅舍。虽然这类投资风险较大，但回报亦会较高。经营模式标榜旅馆的“生活方式”，主要顾客为收入较高的夫妇。偏远地点亦会促使这类旅客逗留较长时间，这样旅程才值回票价。



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 水疗护肤越来越受欢迎。这类设施装修华丽，内外庭园均予以悉心布局，环境舒适优雅，通常会有专人服侍，殷勤周到。

2.4 度假酒店：国际个案研究

2.4.1 顾问已研究 6 个国际个案，以制定香港发展水疗及消闲度假设施的设计准则。这些个案包括中国广州的棕栏岛高尔夫球会、澳门的凯悦酒店、新加坡的圣淘沙酒店、杜拜的杰贝阿里温泉高尔夫球会、瑞士的圣模里兹山顶旅馆，以及日本北海道的洞谷湖温莎温泉酒店。

2.5 设计准则

2.5.1 从上述个案研究中厘定主要特色 / 设计准则如下：

- **私隐和服务：**所有研究的度假设施均保障私隐，而且服务优良。
- **地点：**通常属意优质的私人地点。
- **交通：**大部分度假设施交通便利，设有良好的车辆通道。
- **品牌：**选取知名营运商可令顾客觉得质素有所保证。
- **自然设计：**日益广泛使用天然物料、颜色和结构。
- **水：**建于大型园景设施内的泳池和水饰，经常成为度假设施设计的核心元素。



- **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.

- **水疗特色:** 通常有独特的品牌和市场。每一个案研究均包含特色疗法。
- **房间及套房:** 大部分都提供多类型房间及套房，以迎合不同负担能力人士的需要。
- **自助游:** 很多度假设施均为附近居住的客户提供自助旅游点。
- **适应天气:** 为确保一年四季游客不绝，所有度假设施均提供适宜酷热或严寒月份享用的服务/设施。
- **会议:** 所有度假设施均有相关的会议设施，以便弥补淡季或每周中期下降的收入。
- **套装服务:** 大部分研究个案的度假设施均提供各式各样的活动（大部分包括高尔夫球）和晚餐膳食，务求令顾客逗留该地。



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. 具发展潜力的地点

3.1 具发展潜力地点的评估准则

3.1.1 具发展潜力地点的评估准则如下：

- **地点合适程度：**须环境清幽、自成一区、外观雅致。
- **交通方便程度：**陆路或海路交通便捷。
- **环境：**尽可能避免对环境造成影响。
- **可供运用的基建设施 / 或改善基建设施**
- **经济及社会效益：**对经营者及整体社会皆有好处。

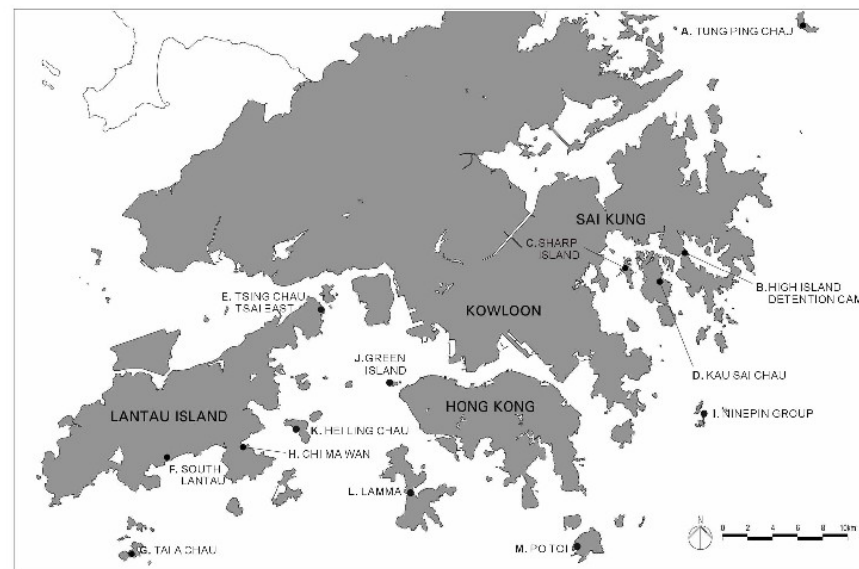


Figure 2.1

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. 个案研究

4.1.1 工作坊将以个案研究的方式，按上述评估准则讨论以下地点的发展潜力：

4.2 个案研究 1: 西贡万宜羁留中心

4.2.1 该址原为难民羁留营，占地 10 公顷，位于西贡东郊野公园，邻近水上活动及康乐地区。路面已经铺筑，大致上没有植物覆盖。此外，地势平坦，无须发展大型建设设施。

4.2.2 现可经麦理浩径第一段及水务署通路进入。通路方面须与水务署 / 渔农自然护理署商讨改善。此外，亦可经水路进入。

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 个案研究 2: 南大屿山长沙泳滩

4.3.1 该址依傍长滩，进出东涌及梅窝极为方便。根据大屿山发展概念计划，这幅占地 4 公顷的土地已划作康乐及消闲相关发展用途，建议可发展度假设施。该址所属地区被纳入分区计划大纲图的“海岸保护区”，因此区内土地用途将受到限制。现有基础设施须作改善。

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.

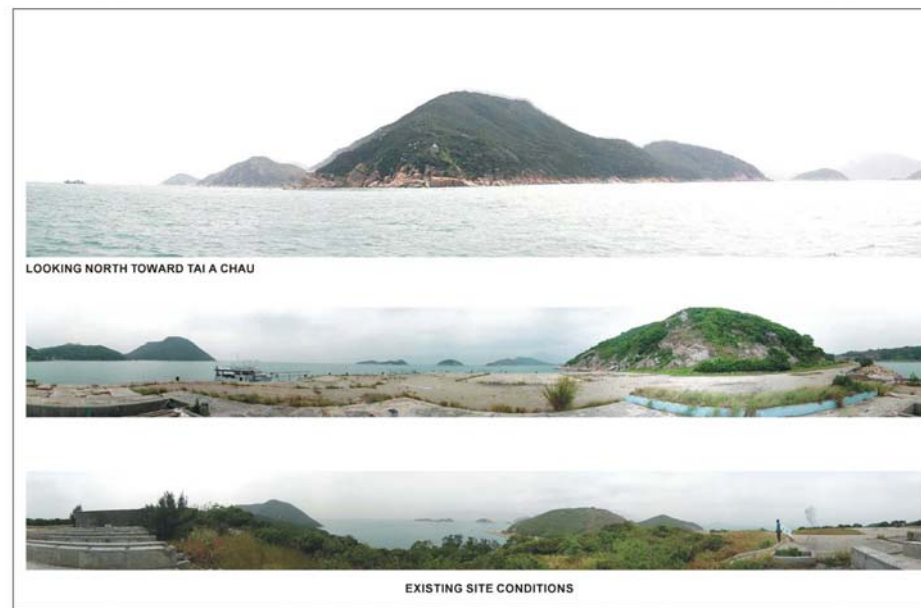


Figure 4.1.1

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

Urban



Figure 4.1.2

TAI A CHAU MASTER LANDSCAPE PLAN

Urban

4.4 个案研究 3：索罟群岛的大鸦洲

- 4.4.1 原为难民羁留营的大鸦洲 (6 公顷)，地处偏僻，远离香港闹市，有潜力成为真正的“世外”度假胜地。可从机场、中环等地乘高速渡轮 / 船只前往。该址风光明媚，属环境较为敏感地区。可提供的海陆康乐活动包括风帆、远足、徒手潜水等，但须视乎环境评估而定。
- 4.4.2 大鸦洲附近海域已划作兴建拟议中的海岸公园。如有意于该址发展其他用途，必须注意环保问题，并确保发展方案合适。
- 4.4.3 该岛须要发展大量建设设施，成本庞大。

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. 未来路向

5.1.1 下一步是征询公众对初步研究结果的意见，并把意见纳入本研究的最后报告。