

選定服務業產品統計數字 Product Statistics in Selected Service Industries

政府統計處自一九九七年開始搜集數據，以編製選定的服務業產品統計數字。本文簡要地介紹產品統計數字的基本概念，並分析一九九七及一九九八年服務業的選定產品統計數字。

The Census and Statistics Department has been collecting data for compiling selected service product statistics in Hong Kong since 1997. This article briefly introduces the basic concepts involved and analyses product statistics in the selected service industries of Hong Kong for the reference years 1997 and 1998.

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選定服務業產品統計數字

Product Statistics in Selected Service Industries

1. 緒言

1.1 產品統計數字是以個別產品為焦點的統計數字，用以反映產品各個不同方面的特性，其中包括由該產品所得的業務收益及生產該產品的機構單位數目。本文所討論的產品統計數字集中在產品的業務收益。

1.2 產品統計數字可涵蓋貨物及服務。在本文前半部分所討論的產品統計數字的基本概念，適用於製造業產品及服務業產品。

1.3 本文的後半部分會集中討論選定的服務業產品統計數字，其中包括：

- (一) 電訊服務、
- (二) 國際電腦網絡接駁服務、
- (三) 速遞服務、
- (四) 資料處理服務、
- (五) 運輸服務、
- (六) 酒店服務。

1.4 研究產品統計數字，可以增加對整個經濟體系中所生產的各種產品的認識，這對於商業決定及政府決策均很有幫助。尤其是在本文詳細討論的服務業產品統計數字，更能幫助發掘有競爭優勢的服務業產品作為推廣香港的服務業之用。

1. Introduction

1.1 Product statistics are statistics focusing on specific products. Many different aspects of a product can be covered by its product statistics, including the business receipts realized from that product and the number of establishments offering such product. In this article, statistics of the service product concentrate on the business receipts derived from rendering a particular service.

1.2 Product statistics can cover both goods and services. The conceptual issues related to product statistics, discussed in the first part of this article, are applicable to both manufactured goods and service products.

1.3 In the second part of this article, selected service product statistics will be presented and discussed in detail. These include:

- (i) telecommunications services;
- (ii) internet connection services;
- (iii) courier services;
- (iv) data processing services;
- (v) transport services; and
- (vi) hotel services.

1.4 The availability of product statistics enables a better understanding on the products produced by the economy, which contributes to business decision making and government policy formulation. In particular, the service product statistics discussed in this article can provide information in identifying the potential service products with a competitive edge for the purpose of services promotion of Hong Kong.

1.5 另外，產品統計數字亦在宏觀經濟分析中非常有用，可與其他經濟數據一同運用，從而瞭解各行業的結構特性。

2. 與行業統計數字的關係

2.1 如某一產品只由一個別行業生產，而該產品亦是該行業的唯一產品，則就該行業而言，產品統計數字（如產品的銷售額）相等於行業統計數字（如該行業的總收益）。

2.2 但行業和產品的關係可以是複雜的。若一項產品由多個行業生產或該產品只是某行業的眾多產品之一，該產品的產品統計數字便會與其相關的行業統計數字有別。在此情況下，產品統計數字對行業的經濟分析十分有用。

2.3 例如，酒店服務的業務若單以行業統計數字分析，便有所不足。這是因為大部分的酒店均提供膳食服務，同時又提供租房及其他酒店服務，所以個別酒店服務的營運特色，並不能單由酒店業的行業統計數字反映出來。在這方面，每項酒店服務的產品統計數字便非常有用。

3. 資料搜集

3.1 與製造業產品比較，服務業產品的量度會較為困難。因此，在開展搜集服務業的產品統計數字時，會首先集中於數個重要的服務業產品，而在選定該些服務業產品時，主要參考政府定下特意推廣的服務行業。

1.5 In addition, product statistics serve as a useful tool in macro-economic analysis in understanding the structural characteristics of different industries when analysed with other economic variables.

2. Relationship with Industry Statistics

2.1 If a product is produced uniquely by a single industry and the product is the only output of the industry concerned, then the product statistics (e.g. sales of the product) will be the same as the industry statistics (e.g. total sales in the industry) of that industry.

2.2 However, the relationship between industries and their products can be complex. If a product is produced by several different industries or is only one of the many outputs of an industry, the product statistics will be different from the corresponding industry statistics. Under this situation, product statistics will be very useful in the economic analysis of an industry.

2.3 As an example, it is inadequate to analyze the business of hotel services with industry statistics alone. It is because most hotels offer meal serving services in addition to room sales and other hotel services. As a result, the operating characteristics of each of those hotel services cannot be easily reflected by the statistics of hotels industry alone. Product statistics on each of the hotel services would then be very useful.

3. Data Collection

3.1 Compared with manufactured products, output of the service industries is more difficult to measure. As a start, a few important service products were first selected for data collection, with special reference to those products which are the major outputs of industries identified in the Government's Action Agenda for Services Promotion.

3.2 產品統計數字是依靠現有的按年經濟統計調查搜集資料。鑑於有些產品可由多個行業生產，故首先需確定有關產品的主要生產行業，然後在該些行業的問卷中加入有關該產品業務收益的問題。

3.3 例如，酒店服務便主要由酒店業的機構單位提供。在有關酒店業的按年統計調查的問卷內，便會加入用以搜集各項酒店服務的業務收益的問題。

3.4 在一九九七年前的統計調查，政府統計處曾嘗試從個別服務行業搜集產品數據，而在一九九七年度開始較全面地按年搜集。在一九九八年度，共選出三千三百五十個機構作為編制產品統計數字的樣本。以下摘要討論九七及九八年度有關服務行業的產品統計數字。

4. 電訊服務統計數字

4.1 經過九十年代初的大幅增長後，香港電訊業在一九九八年的業務收益較九七年下跌百分之八點二。對該行業內的各項服務加以詳細分析，可更瞭解該行業的發展。

4.2 電訊行業的營運機構提供多種不同的電訊服務，其中包括：

- (一) 公共本地電話/圖文傳真/電報服務、
- (二) 公共長途電話服務、
- (三) 公共長途圖文傳真/電報服務、
- (四) 流動電話服務、

3.2 The product statistics are then collected through the existing annual economic surveys conducted by the Census and Statistics Department. As a specific product may be produced by several industries, industries which are the major providers of the product concerned are first identified. Questions on business receipts derived from that product are then added to the questionnaires for those industries.

3.3 For example, major providers of hotel services are establishments in the hotels industry. Additional questions to collect business receipts data on each of the hotel services are then included in the questionnaire for the hotels industry.

3.4 Before the 1997 survey round, product statistics had been collected for a number of service industries on a trial basis. This was followed by more comprehensive data collection in the 1997 round and beyond. In the reference year of 1998, a total of 3350 establishments were selected for product statistics enumeration. The discussion below summarize the specific product statistics in the relevant service industries collected for 1997 and 1998.

4. Telecommunications Services Statistics

4.1 After robust growth in the early part of the 1990's, business receipts in the telecommunications industry in Hong Kong decreased by 8.2% in 1998 compared with 1997. A closer look at the various services offered by the industry can give more insight on the development of the industry.

4.2 Many different types of telecommunications services are rendered by operators in the telecommunications industry, including:

- (i) public local telephone/facsimile/telegraph/telegram services;
- (ii) public long distance telephone services;

- (五) 傳呼服務、
- (六) 其他電訊服務。

4.3 在一九九八年，以業務收益計算，公共長途電話服務所佔比重最高，達港幣一百七十六億八千五百萬元。其次是流動電話服務(港幣一百一十九億一千七百萬元)及公共本地電話/圖文傳真/電報服務(港幣七十億二千一百萬元)。此外，其他電訊服務亦佔相當的比重，達港幣八十六億九千三百萬元。該些服務包括國際電話卡服務、國際電腦網絡接駁服務(會於下一部分詳細討論)及人造衛星通訊服務。

4.4 一九九八年與一九九七年比較，大部分主要電訊服務的業務收益均下跌。傳呼服務及公共長途電話服務的業務收益分別下跌百分之二十八點二及百分之二十二點一，而流動電話服務的業務收益則下跌百分之六點三。

4.5 與電訊服務使用量的統計數字一起分析，傳呼服務及長途電話服務的業務收益下跌主要與使用量下跌有關。在一九九八年，傳呼服務的用戶數目下跌了百分之三十八點七，而對外電話通訊量下跌百分之四點七。至於流動電話服務的業務收益下跌是由於服務價格大幅下降，抵銷了用戶數目大幅上升百分之三十七點零的影響。

- (iii) public long distance facsimile/telegraph/telegram services;
- (iv) mobile telephone services;
- (v) paging services; and
- (vi) other telecommunications services.

4.3 In 1998, public long distance telephone services had the largest share in terms of business receipts, amounting to HK\$17,685 million. It was followed by mobile telephone services (HK\$11,917 million) and public local telephone/facsimile/telegraph/telegram services (HK\$7,021 million). Also, a significant share at HK\$8,693 million was contributed by other telecommunications services, which included international calling card services, internet connection services (which will be discussed in more detail in the section below) and satellite communications services.

4.4 Comparing 1998 with 1997, decreases in business receipts were found in most of the major telecommunications services. Business receipts of paging services and public long distance telephone services decreased by 28.2% and 22.1% respectively, while those of mobile telephone services decreased by 6.3%.

4.5 The decrease in business receipts from paging services and public long distance telephone services was largely attributable to reduced usage of these telecommunications services. Reflecting this, the number of subscribers of paging services dropped by 38.7% in 1998, while the volume of external telephone traffic decreased by 4.7%. As to the decrease in the business receipts of mobile telephone services, this was due to significant price cuts in mobile telephone services, which more than offset the effect of a robust growth of 37.0% in the number of mobile phone subscribers.

表一 電訊服務的業務收益
Table 1 Business Receipts from Telecommunications Services

	(百萬港元) (HK\$ million)	
	1997	1998
公共本地電話/圖文傳真/電報服務 Public local telephone/facsimile/telegraph/telegram services	6,166	7,021 (+13.9%)
公共長途電話服務 Public long distance telephone services	22,711	17,685 (-22.1%)
公共長途圖文傳真/電報服務 Public long distance facsimile/telegraph/telegram services	464	336 (-27.6%)
流動電話服務 Mobile telephone services	12,722	11,917 (-6.3%)
傳呼服務 Paging services	2,417	1,736 (-28.2%)
其他電訊服務 Other telecommunications services	7,832	8,693 (+11.0%)
總計 Total	52,312	47,388 (-9.4%)

註釋：括號內數字是與上年比較的變動百分率
 Note: Figures in brackets are percentage changes over the preceding year

5. 國際電腦網絡接駁服務統計數字

5.1 國際電腦網絡接駁服務的供應機構的資料，可從電訊管理局註冊紀錄中得知。該些註冊的供應機構在按年統計調查中會被問及有關國際電腦網絡接駁服務的產品統計數字。事實上，大部分國際電腦網絡接駁服務的供應機構均來自電訊業，但亦有來自其他行業，例如資料處理及製表服務業。

5.2 香港的國際電腦網絡接駁服務正經歷強勁增長。該服務在一九九八年的業務收益較九七年上升百分之九十四點二。這主要與電腦互聯網絡的使用量在九八年第四季較九七年第四季顯著增長百分之一百三十二點四有關。

5. Internet Connection Services Statistics

5.1 The providers of internet connection services are identified by the list of licensed internet services provider (ISP) maintained by Office of the Telecommunication Authority. Additional questions on internet connection services were included in the questionnaires of these establishments to collect the product statistics of internet connection services. In fact, most of those establishments were classified in the telecommunications industry but some were in other industries such as data processing and tabulating services industry.

5.2 Internet connection services in Hong Kong experienced a robust growth with business receipts surging by 94.2% in 1998 over 1997. A phenomenal rise in internet usage, by 132.4% in Q4 1998 as compared with Q4 1997, largely contributed.

5.3 雖然在一九九八年經歷急劇擴展，國際電腦網絡接駁服務的發展潛力仍然非常大。在九八年第一季，香港的住戶只有百分之十一點八透過家中的個人電腦接駁上國際電腦網絡。還有，在香港所有十二歲及以上人士中，只有百分之五點九曾在家中使用國際電腦網絡。

5.4 國際電腦網絡接駁服務分為多種不同的服務，其中有：

- (一) 入會/登記/開戶服務、
- (二) 撥號線路賬戶接駁服務、
- (三) 直駁專線賬戶接駁服務、
- (四) 儲存網站及有關服務、
- (五) 其他與國際電腦網絡有關的服務。

5.5 在各項國際電腦網絡接駁服務中，以撥號線路賬戶接駁服務的業務收益最大，在一九九八年達港幣六億五千九百萬元。其次為直駁專線賬戶接駁服務，達港幣三億八千二百萬元。

5.6 一九九八年與九七年比較，以下各項服務均大幅增長：儲存網站及有關服務上升百分之七百五十四點八、直駁專線賬戶接駁服務上升百分之一百三十九點五、及撥號線路賬戶接駁服務上升百分之五十二點零。

5.3 Even after the sharp expansion in 1998, there was still huge growth potential for the internet connection services. In Q1 1998, only 11.8% of all the households in Hong Kong had their personal computers at home connected to internet. Moreover, only 5.9% of all the persons in Hong Kong aged 12 and over had used internet at home.

5.4 Many different types of services are classified under internet connection services, including:

- (i) membership/registration/account set-up services;
- (ii) connection services for dial-up account;
- (iii) connection services for leased line account;
- (iv) website hosting and related services; and
- (v) other internet related services.

5.5 Amongst those services, the value of business receipts from connection services for dial-up account, which amounted to HK\$659 million, was the largest in 1998. This was followed by connection services for leased line account which amounted to HK\$382 million.

5.6 Comparing 1998 with 1997, robust growth was found in website hosting and related services (by 754.8%), connection services for leased line account (by 139.5%), and connection services for dial-up account (by 52.0%).

表二 國際電腦網絡接駁服務的業務收益
Table 2 Business Receipts from Internet Connection Services

	(百萬港元) (HK\$ million)	
	1997	1998
入會／登記／開戶服務 Membership/registration/account set-up services	9	7 (-23.1%)
基本接駁服務 Basic connection services		
- 撥號線路賬戶 for dial-up account	434	659 (+52.0%)
- 直駁專線賬戶 for leased line account	159	382 (+139.5%)
儲存網站及有關服務 Website hosting and related services	32	276 (+754.8%)
其他與國際電腦網絡有關的服務 Other internet related services	203	302 (+48.9%)
總計 Total	837	1,626 (+94.2%)

註釋：括號內數字是與上年比較的變動百分率
 Note: Figures in brackets are percentage changes over the preceding year

6. 速遞服務統計數字

6.1 速遞服務可分為兩種，包括：

- (一) 本地速遞服務、
- (二) 國際速遞服務。

6.2 在一九九八年，本地速遞服務的業務收益達港幣八億零五百萬元，而國際速遞服務的業務收益則達港幣四十七億七千四百萬元。

6.3 一九九八年與九七年比較，本地速遞服務及國際速遞服務的業務收益分別下跌百分之六點二及百分之二點七。

6. Courier Services Statistics

6.1 Two types of courier services are identified, including:

- (i) local courier services; and
- (ii) international courier services.

6.2 In 1998, business receipts from the local courier services amounted to HK\$805 million while those from international courier services amounted to HK\$4,774 million.

6.3 Comparing 1998 with 1997, business receipts from the local courier services and international courier services decreased by 6.2% and 2.7% respectively.

表三 速遞服務的業務收益
Table 3 Business Receipts from Courier Services

	(百萬港元) (HK\$ million)	
	1997	1998
本地速遞服務 Local courier services	858	805 (-6.2%)
國際速遞服務 International courier services	4,908	4,774 (-2.7%)
總計 Total	5,767	5,579 (-3.3%)

註釋：括號內數字是與上年比較的變動百分率
 Note: Figures in brackets are percentage changes over the preceding year

7. 資料處理及製表服務統計數字

7.1 資料處理及製表服務業的服務可再細分為以下服務類別：

- (一) 裝置電腦硬件的有關顧問服務、
- (二) 軟件推行服務、
- (三) 資料處理服務、
- (四) 辦公室機器及設備(包括電腦)的保養維修服務、
- (五) 其他電腦及有關服務。

7.2 在一九九八年，軟件推行服務的業務收益達港幣四十億三千七百萬元，是以上五種服務中最大的。其次是資料處理服務(港幣十一億七千七百萬元)及裝置電腦硬件的有關顧問服務(港幣六億五千七百萬元)。

7. Data Processing and Tabulating Services Statistics

7.1 As for the data processing and tabulating services industry, its services can be further broken down into the following:

- (i) consultancy services related to the installation of computer;
- (ii) software implementation services;
- (iii) data processing services;
- (iv) maintenance and repair services of office machinery and equipment including computer ; and
- (v) other computer related services.

7.2 In 1998, business receipts from software implementation services amounted to HK\$4,037 million, being the largest among the above five types of services. This was followed by data-processing services (HK\$1,177 million) and consultancy services related to the installation of computer (HK\$657 million).

7.3 一九九八年與九七年比較，資料處理服務的業務收益下跌百分之二十七點八，而軟件推行服務及裝置電腦硬件顧問服務的業務收益則分別上升百分之十二點六及百分之十點三。這反映資料處理及製表服務正由相對地簡單的資料處理服務轉為更複雜的顧問服務。

7.3 Comparing 1998 with 1997, business receipts from data processing services decreased by 27.8%, while business receipts from software implementation services and consultancy services related to the installation of computer increased by 12.6% and 10.3% respectively. This reflected a shift in the business of data processing and tabulating services from relatively simple data processing services to more syndicated consultancy services.

表四 資料處理及製表服務的業務收益
Table 4 Business Receipts from Data Processing and Tabulating Services

	(百萬港元) (HK\$ million)	
	1997	1998
裝置電腦硬件的有關顧問服務 Consultancy services related to the installation of computer hardware	595	657 (+10.3%)
軟件推行服務 Software implementation services	3,586	4,037 (+12.6%)
資料處理服務 Data processing services	1,630	1,177 (-27.8%)
辦公室機器及設備（包括電腦）的保養維修服務 Maintenance and repair services of office machinery and equipment including computer	373	314 (-15.7%)
其他電腦及有關服務 Other computer and related services	547	451 (-17.6%)
總計 Total	6,731	6,635 (-1.4%)

註釋：括號內數字是與上年比較的變動百分率
Note: Figures in brackets are percentage changes over the preceding year

8. 運輸服務統計數字

8.1 運輸服務可再細分為以下服務：

- (一) 客運服務、
- (二) 票務代理及旅行社的售票服務、
- (三) 貨運服務、
- (四) 出租運輸工具服務、
- (五) 其他運輸服務，例如隧道營運、停車場及貨運代理。

8. Transport Services Statistics

8.1 Transport services can be further broken down into the following services:

- (i) passenger transport services;
- (ii) sales of tickets by ticket selling and travel agents;
- (iii) freight transport services;
- (iv) rental of transport equipment; and
- (v) other transport services such as tunnel operation, parking and freight transport agency.

8.2 在一九九八年，貨運服務的業務收益達港幣一千零七十九億一千萬元，是以上五種服務中最大的。其次是客運服務(港幣四百五十六億七千二百萬元)及售票服務(港幣三百六十七億四千二百萬元)。

8.3 一九九八年與九七年比較，貨運服務及客運服務的業務收益同樣下跌百分之三點七，而售票服務的業務收益則下跌百分之十二點一。

8.4 貨運服務的業務收益下跌主要是因為外貿在一九九八年受地區性金融風暴的影響而減少。

8.5 再者，以上的數字與運輸流量的統計數字非常吻合。一九九八年與九七年比較，貨櫃吞吐量及貨物進出量分別下跌百分之二點二及百分之一點三。

8.6 客運服務及售票服務的業務收益下跌，主要是因為地區性金融風暴引致訪港旅客減少，及出外旅遊人士由長途旅行轉往短途旅行所致。

8.2 In 1998, business receipts from freight transport services amounted to HK\$107,910 million, being the largest among the above five services. This was followed by passenger transport services (HK\$45,672 million) and sales of tickets (HK\$36,742 million).

8.3 Comparing 1998 with 1997, business receipts from freight transport services and passenger transport services both decreased by 3.7% while sales of tickets dropped by 12.1%.

8.4 The decrease in business receipts from freight transport services was mainly due to the downturn in external trade in 1998 upon the impact of the regional financial turmoil.

8.5 The above finding was in line with the transport traffic statistics. The container throughput and cargo movements decreased by 2.2% and 1.3% respectively in 1998 compared with 1997.

8.6 The decreases in business receipts from passenger transport services and sales of tickets were mainly due to the decline in inbound tourism amidst the regional financial turmoil and a shift in outbound travel from long-haul destinations to short-haul destinations.

表五 運輸服務的業務收益
Table 5 Business Receipts from Transport Services

	(百萬港元) (HK\$ million)	
	1997	1998
客運服務 Passenger transport services	47,410	45,672 (-3.7%)
票務代理及旅行社的售票服務 Sales of tickets by ticket selling and travel agents	41,816	36,742 (-12.1%)
貨運服務 Freight transport services	112,036	107,910 (-3.7%)
出租運輸工具服務 Rental of transport equipment	4,347	4,824 (+11.0%)
其他運輸服務，例如隧道營運、停車場及貨運代理 Other transport services such as tunnel operation, parking and freight transport agency	31,766	36,548 (+15.1%)
總計 Total	237,374	231,696 (-2.4%)

註釋：括號內數字是與上年比較的變動百分率

Note: Figures in brackets are percentage changes over the preceding year

9. 酒店服務統計數字

9.1 酒店服務可再細分為以下服務：

- (一) 膳食服務、
- (二) 租房及其他酒店服務。

9.2 在一九九八年，膳食服務的業務收益達港幣六十二億四千萬元，而租房及其他酒店服務的業務收益達港幣八十億八千二百萬元。

9.3 一九九八年與九七年比較，膳食服務的業務收益下跌百分之十三點三，而租房及其他酒店服務的業務收益則下跌百分之三十七點六。

9. Hotel Services Statistics

9.1 Hotel services can be further broken down into the following services:

- (i) meal serving services; and
- (ii) room sales and other hotel services.

9.2 In 1998, business receipts from meal serving services amounted to HK\$6,240 million and business receipts from room sales and other hotel services amounted to HK\$8,082 million.

9.3 Comparing 1998 with 1997, business receipts from meal serving services decreased by 13.3% and business receipts from room sales and other hotel services decreased by 37.6%.

9.4 這與旅客的酒店消費在一九九八年大幅減少百分之三十非常脛合。雖然整體的酒店入住率在九七年及九八年均為百分之七十六，但甲級高價酒店的入住率卻由九七年的百分之七十五，下跌至九八年的百分之七十。同時，中價酒店的入住率由百分之七十二上升至百分之七十五。再者，房租普遍下調亦是收益下跌的部分原因。

9.4 These were in line with the substantial decrease of 30% in visitor spending on hotel bills in 1998. Although the overall hotel room occupancy rate remained at 76% in both 1997 and 1998, the occupancy rate of "high tariff A" hotels dropped from 75% in 1997 to 70% in 1998, while the occupancy rate of "medium tariff" hotels increased from 72% to 75%. In addition, the competitive cut in room tariff in general also partly contributed.

表六 酒店服務的業務收益
Table 6 Business Receipts from Hotel Services

	(百萬港元) (HK\$ million)	
	1997	1998
膳食服務 Meal serving services	7,198	6,240 (-13.3%)
租房及其他酒店服務 Room sales and other hotel services	12,956	8,082 (-37.6%)
總計 Total	20,154	14,323 (-28.5%)

註釋：括號內數字是與上年比較的變動百分率
Note: Figures in brackets are percentage changes over the preceding year