

香港會展業面臨考驗

Hong Kong's position in MICE market challenged

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會議展覽及獎勵旅遊業(以下簡稱「會展業」)不僅收益高，參與人士的消費大，而且能給整個區域或者當地帶來重要而豐厚的進賬。更加不可忽視的是，與會展業相關的消費能刺激一連串經濟活動，從而引發當地經濟中其他範疇的額外消費。此外，會展業對目的地還有間接的經濟貢獻，能夠帶來社會上與文化上的相關好處，加強思想交流，鞏固商業聯繫，有利於持續教育與培訓，並且促進科技轉移。基於上述的種種益處，各地政府都日益察覺到要吸引商業與經濟活動，會展場地是非常寶貴的媒介。

國際會議協會的資料顯示，在過去十年間，亞洲與中東是僅次於歐洲的第二大市場。二零零六年，以會議的數目而論，北京和香港都同樣晉身二十大之列，至於其他珠江三角洲內的城市(包括澳門在內)，排名都不入一百強，甚至榜上無名。近年來澳門和珠江三角洲都在推動會展業，香港還可不可以獨佔亞洲的鰲頭？

有學者去年指出，「會展業的市場可能正在向亞洲轉移」。鑒於新建的會展場地多數都座落亞洲，正好支持這個論點。除了香港的亞洲國際博覽館外，南韓自二零零零年起興建了九個新場地，包括首爾的COEX和濟州國際會展中心(ICC Jeju)；東南亞的會展場地也同樣紛紛落成，計有泰國曼谷的IMPACT展覽會議中心和曼谷國際貿易展覽中心(BITEC)，以及馬來西亞的吉隆坡會議中心(KLCC)等；而在中國內地，也可能出現了場地供過於求的情況。上述的市場轉移，一方面把區內的發展帶進新階段，另一方面也觸發了激烈的競爭。要瞭解香港當前的處境，必須先探究香港和周邊地區的整體情況。

MICE (Meetings, Incentives, Conventions and Exhibitions) tourism provides both high delegate spending and high yields, and represents an important and lucrative part of regional or local revenue generation. Most importantly, each dollar of MICE-related spending initiates a broad set of economic interactions that produces additional spending in other sectors of an economy. MICE tourism also contributes indirect economic benefits to the community. MICE activities can result in associated social and cultural benefits to a destination, enhance the exchange of ideas, foster business connections, provide forums for continuing education and training, and facilitate technology transfer. Because of the above benefits, governments are increasingly aware that MICE venues are an invaluable means of attracting business and economic activity.

According to the International Congress and Convention Association (ICCA), Asia and the Middle East remains the second largest market following Europe for the past decade. In 2006, Beijing and Hong Kong both ranked in the top 20 range in terms of the number of meetings while other cities in the Pearl River Delta (PRD) region, including Macau, ranked lower than 100 or even not listed. With the latest MICE development in Macau and the PRD region, can Hong Kong still be the focus of Asia?

A scholar commented last year that there was a "potential MICE market shift to Asia". This can be supported by the fact that new MICE venues are mainly in Asia. Besides the new AsiaWorld-Expo in Hong Kong, there are nine new venues opened in South Korea since 2000 including COEX at Seoul and the International Convention Centre (ICC) Jeju; an influx of venues in Southeast Asia including the IMPACT Exhibition and Convention Centre at Bangkok and the Bangkok International Trade and Exhibition Centre (BITEC) in Thailand, and the Kuala Lumpur Convention Centre (KLCC) in Malaysia; and a possible over-supply of venues in mainland China. This shift kicks off a new stage of development together with fierce competition in the region. To understand what situation Hong Kong is now in, the whole picture of Hong Kong and the surrounding area has to be considered.

香港會展業的發展

由於會展業能夠帶來可觀的收益，香港也利用興建新場地的策略來推動這個行業。香港政府於一九八五年指派貿易發展局興建一個世界級的會議展覽場館，這就是一九八八年開幕的香港會議展覽中心。會展中心於一九九七年完成了第二期擴建工程，旨在把香港推動成亞洲貿易展覽活動的樞紐。由於仍有需求未能滿足，香港政府於是在二零零四年九月採納了貿易發展局的建議，即重建和擴展會展中心的中庭部份，以增加一萬九千四百平方米的展覽場地，而在那時新的亞洲國際博覽館已預定於二零零五年十二月正式開幕了。

香港的會展業得以發展，連帶香港也從中獲益，這些場地可算居功厥偉。根據貿易發展局的估計，會展中心的最新擴展部份落成後，僅是首年營運就可帶來港幣十四億六千萬元的額外收益，並可創造三千六百三十個就業機會。由二零零九年工程完成時起，直到二零二五年止，額外進賬預計會累積至港幣四百億元，並且會創造累計九萬二千個新職位。香港展覽會議業協會的一項研究顯示，展覽業在二零零六年對香港的經濟貢獻為港幣二百六十四億元，除此之外，還為政府帶來了港幣九億七千萬元稅收，以及提供了相當於五萬八千五百個全職職位。

根據香港展覽會議業協會的最新數據，二零零五年淨展覽面積的增長率是百分之十，二零零六年則高達百分之五十。二零零六年是亞洲國際博覽館首年全面投入服務，這使全港總展覽面積倍增，因此造就了這個令人鼓舞的增長率。此外，展覽攤位租金的總收入也由二零零四年的港幣十五億四千萬元，增至二零零六年的港幣二十六億元。

香港會展業的壯大，除了受惠於展覽場地增加外，也有賴於參與人數持續上升。香港旅遊發展局的統計數字顯示，二零零六年來港參加會議及展覽的人數為七十七萬九千三百二十四人，比二零零五年增加了百分之二十三，與二零零三年相比更增加了一倍。不過，二零零六年參加會議及展覽的人數中，百分之三十一來自市場佔有率最大的

MICE development in Hong Kong

Because of the promise of high yields, Hong Kong also applied the strategy of developing MICE through building new facilities. In 1985, the Hong Kong Government assigned the Trade Development Council (TDC) to develop a new world-class convention and exhibition centre, which was to become the Hong Kong Convention and Exhibition Centre (HKCEC) opened in 1988. The phase II expansion of the HKCEC in 1997 was aimed at enhancing Hong Kong's position as a trade fair capital of Asia. To match unmet needs, the Hong Kong Government endorsed the TDC's proposal in September 2004 to rebuild and expand the HKCEC's atrium link to create an additional exhibition space of 19,400m² while the new AsiaWorld-Expo was to be officially opened in December 2005.

The importance of these venues is that they not only support the development of the MICE sector, but also bring benefits to the city. According to the TDC, with the HKCEC's latest expansion, HK\$1.46 billion in additional expenditure will be generated in the first year of operation. Meanwhile, 3,630 jobs will be created. The cumulative benefits from 2009 (when it is completed) to 2025 are expected to be HK\$40 billion in additional expenditure with 92,000 more jobs. A study conducted by the Hong Kong Exhibition and Convention Industry Association (HKECIA) shows that the exhibition industry contributed HK\$26.4 billion to the local economy in 2006, while leading to a fiscal income of HK\$970 million and creating 58,500 full-time equivalent jobs.

According to the HKECIA's latest figure, the growth rate in net exhibition space occupied by exhibitors jumped from 10% in 2005 to 50% in 2006. This encouraging figure was a direct result of the total exhibition space being doubled with AsiaWorld-Expo in its first full year of operation in 2006. Meanwhile, the total stand rental revenues also increased from HK\$1.54 billion in 2004 to HK\$2.6 billion in 2006.

Apart from an expansion of exhibition space, Hong Kong's MICE growth is also supported by the consecutive increase of attendees. Statistics from the Hong Kong Tourism Board show that the number of convention and exhibition arrivals in 2006 reached 779,324, which represented a 23% increase over 2005 and which also was double the number of such arrivals in 2003. Nonetheless, mainland China captured the largest market share of 31% in terms of convention and exhibition arrivals in 2006. Corporate event arrivals in 2006 also reached a new high of 828,511, which represented a 14% increase over 2005 and a 38% increase over 2003. Again, mainland

中國內地。至於來港參加企業活動的人數，二零零六年也同樣創出新紀錄，有八十二萬八千五百一十一人，與二零零五年比較，增幅是百分之十四，與二零零三年相比，增幅則是百分之三十八。同樣，中國內地的市場佔有率最大，達到百分之三十五。香港會展業近年之所以有長足發展，原因是在《內地與香港關於建立更緊密經貿關係的安排》(CEPA)之下，參加會議展覽的內地人數有所增加的緣故。

中國與澳門不容忽視

近年來中國內地的會展業火速發展。一九八零年代中期以前，中國雖然已推行了改革開放政策好幾年，但所舉行的會議及展覽，主要仍屬於國內性質。一九九二年，室內展覽場地面積在五萬平方米以上的世界級會議展覽中心，全國只有一個。但到了二零零三年，這樣的場地有十六個，室內場地面積合共一百二十九萬平方米，也就是說在十一年間急增了百分之八百零五；而全國則共有一百五十八個會議展覽場地，室內場地總面積達三百二十二萬平方米。在中國內地的主要會展場地之中，最主要的都座落於珠江三角洲，近年建成的場館更是這樣(見表一)。可以這麼說，珠江三角洲要憑藉興建新場館，來使會展業得以快速發展。

以會展活動而論，中國內地的會展業同樣迅速增長。中國自然資源豐富，文化遺產多采多姿，加上旅遊環境安全，又有四萬多家外資企業，因此會展業每年都增長百分之二十。國際會議協會、獎勵旅遊行政人員協會(SITE)、

表一：珠江三角洲的主要新場地

Table 1: Major new venues in the PRD

名稱 Name	地點 Location
廣東現代國際展覽中心 Guangdong Modern International Exhibition Centre	東莞 Dongguan
常平會展中心 Changping Exhibition Hall	東莞 Dongguan
東莞國際會展中心 Dongguan International Conference and Exhibition Centre	東莞 Dongguan
廣州國際會議展覽中心 Guangzhou International Convention and Exhibition Centre	廣州 Guangzhou
中國出口商品交易會流花路展覽館 Lihua Complex of the Chinese Export Commodities Fair	廣州 Guangzhou
廣州錦漢展覽中心 Guangzhou Jinhan Exhibition Centre	廣州 Guangzhou
深圳會展中心 Shenzhen Convention and Exhibition Centre	深圳 Shenzhen
珠海保稅區商品展示中心 Commodity Exhibition Centre of ZHFTZ	珠海 Zhuhai
中國國際航空航天博覽中心 China International Aviation and Aerospace Exhibition Centre	珠海 Zhuhai

China had the largest market share of 35%. The recent growth of MICE development in Hong Kong is attributed to the increase of mainland China arrivals as a result of CEPA (Mainland and Hong Kong Closer Economic Partnership Arrangement).

Challenges from China and Macau

The development of MICE in mainland China has surged in recent years. Even with the open door policy in place for a couple of years, there were mainly national conventions and exhibitions before the mid-1980s. In 1992, there was only one world-class convention and exhibition centre with over 50,000m² of indoor space in the country. However, there were 16 such venues in 2003, with a total indoor space of 1.29 million m², which represented an upsurge of 805% in 11 years. A total of 158 convention and exhibition centres, with a total indoor space of 3.22 million m², were recorded in 2003. Out of the major venues developed in mainland China, the focus is in the PRD region, especially the latest establishments (see Table 1). As a conclusion, the PRD area has aimed at boosting MICE development by means of developing new venues.

Activity-wise, mainland China has also grown fast in the MICE market. Because of its rich natural and cultural heritage, safe travel environment and over 40,000 foreign enterprises, mainland China has seen a 20% annual growth rate in the convention and exhibition sector. The ICCA, the Society of Incentive & Travel Executives (SITE) and Meeting Professionals International (MPI) predicted that mainland China's MICE industry would increase five-fold in 2020. A survey conducted by *CEI Asia Pacific* magazine showed that 37% of corporations picked mainland China as the MICE destination in 2006, thus

國際會議業專業人員協會(MPI)都預期到了二零二零年時，中國的會展業會比今天增長五倍。《亞太會議展覽及獎勵旅遊》(CEI Asia Pacific)雜誌的調查顯示，有百分之三十七的企業選擇了中國為二零零六年召開會議展覽及獎勵旅遊的地點，使中國超越了泰國，成為世界最熱門的會展地點。不過，中國的會展業發展仍然受到以下因素的制約：旅遊研究不足，欠缺世界級的基建工程，受過良好訓練的人才匱乏，投資於開發研究的款項短缺，社會環境有待改善等。

廣州和深圳都是中國內地嶄露頭角的會展新星。廣州是南中國的政治、經濟、文化中心。二零零四年，廣州接待了一百三十八萬名海外訪客，其中三十二萬人參加了中國出口商品交易會(由二零零七年起改稱「中國進出口商品交易會」)。廣州國際會議展覽中心是全球第二大、亞洲最大的會展場地。另一方面，單是二零零五年，深圳就舉行了面積在三萬平方米以上的展覽十二個，面積在四萬五千平方米以上的展覽八個，面積在六萬平方米以上的展覽六個，面積在十萬平方米以上的展覽兩個。廣州和深圳都毗鄰香港，兩者的競爭力大增，香港自然不應輕視。

香港是中國內地的門戶，與珠江三角洲的關係十分微妙。一方面，香港要保持領先地位，就不得不與珠江三角洲內興建了新場地的城市一爭長短，另一方面，珠江三角洲是中國的一部份，正好是香港的主要市場。除此之外，如果把澳門近年的發展也都列入考慮範圍，那麼珠江三角洲內的會展業可說群雄並舉，整體情況遠比以前複雜。簡單點說，香港四周的新對手正虎視眈眈。

雖然根據國際會議協會的統計數字，澳門在二零零六年只舉行了九個國際會議，但可以肯定的是，由二零零七年起，這個數字必定會大為不同。澳門目前擁有的會展場地包括澳門旅遊塔、澳門綜藝館、旅遊活動中心、澳門世界貿易中心、澳門文化中心、漁人碼頭。這些場地或許不是舉行大型國際會議及展覽的最佳地點，但由二零零七年開始，預計會有超過一萬間酒店房間投入服務，而多所主題酒店也接近完成階段。在三到五年內，澳門的酒店房間數目就會增加兩倍以上。單以今年八月開幕的澳門威尼斯

making the country climb up to the top of the world and surpass Thailand. However, lack of tourism research, lack of world-class infrastructure, lack of well-trained human resources, insufficient development investment and to-be-improved social environment still hinder mainland China's MICE development.

The rising stars of mainland China are Guangzhou and Shenzhen. Guangzhou is the political, economic and cultural centre of southern China. In 2004, there were 1.38 million overseas arrivals to Guangzhou, of whom 320,000 came for the Chinese Export Commodities Fair, renamed China Import and Export Fair since 2007. The Guangzhou International Convention and Exhibition Centre is the second largest venue in the world and the largest in Asia. Meanwhile, in 2005 alone, 12 exhibitions with the size of over 30,000m², eight exhibitions with the size of over 45,000m², six exhibitions with the size of over 60,000m² and two exhibitions with the size over 100,000m² were held in Shenzhen. Given Guangzhou and Shenzhen's proximity to Hong Kong, their enhanced competitiveness should not be neglected.

Hong Kong, being the gateway to mainland China, has developed an intricate relationship with the PRD region. While Hong Kong has to compete with all the cities with new venues in the PRD region to remain its leading position, the PRD region, being part of mainland China, is also Hong Kong's major market. With the latest development of Macau, the whole picture of the MICE market in the PRD region is polygonal and much more complicated than before. In a nutshell, Hong Kong is besieged by new challengers.

Although the ICCA's statistics show that Macau only held nine international meetings in 2006, this figure will definitely change from 2007 onwards. Existing MICE facilities in Macau include the Macau Tower, the Forum de Macau, the Tourism Activities Centre, the World Trade Centre, the Macau Cultural Centre and the Fisherman's Wharf, which may not be the best choices to support large-scale international conventions and exhibitions. However, it is expected that 10,000 plus hotel rooms are coming in 2007 with various themed hotels nearing completion. In three to five years, Macau's hotel room numbers will increase more than two-fold. Just the opening of The Venetian Macao in August 2007 alone has brought on the scene a 120,000m² net convention and exhibition space, a 15,000-seat event centre and 3,000 luxury suites. According to the Macau Government Tourist Office, total current investment in new entertainment complexes exceeds HK\$195 billion, which has also supported the development of MICE tourism. Table 2 shows

表二：澳門的新項目

Table 2: Up-and-coming projects in Macau

項目 Project	開幕日期 Opening Date
永利澳門酒店 Wynn Macau	二零零六年九月 September 2006
星際酒店 StarWorld Hotel	二零零六年十月 October 2006
澳門漁人碼頭 Macau Fisherman's Wharf	二零零六年十二月二十三日 23 December 2006
澳門皇冠酒店 Crown Macau	二零零七年第二季 second quarter of 2007
澳門威尼斯人酒店 The Venetian Macao	二零零七年八月二十八日 28 August 2007
澳門美高梅金殿 The MGM Grand Macau	二零零七年下半年 second half of 2007
十六浦主題公園 Ponte 16 Theme Park	二零零七年 2007
新葡京酒店 Grand Lisboa Hotel	二零零八年 2008
銀河大型娛樂度假酒店 Galaxy Mega Resort	二零零八年第一季 first quarter of 2008
夢幻之城 The City of Dreams	二零零八年下半年 second half of 2008

人酒店來說，就已經有十二萬平方米的淨會展場地，可容納一萬五千個座位的活動中心，以及三千間豪華套房。根據澳門政府旅遊局的資料，現時有不下於港幣一千九百五十億元的資金用來興建新的娛樂綜合設施，這也成了會展旅遊業的發展動力。表二列出了澳門的一些新項目。

新的一步：區內合作

看過香港周邊的發展全貌，以及澳門急增的會展場地後，我們不得不重新思索香港與珠江三角洲的關係，以及香港本身的市場地位。很明顯，提升競爭力是香港的首要任務。此外，各地與其正面交鋒，倒不如共建一支國家隊伍，這樣做或許更富潛力。香港將成為這支隊伍的核心，並會與珠江三角洲的其他城市建立策略聯盟，從而使市場有更多會展場地可供選擇。香港接着就可進而利用《更緊密經貿關係》的優勢，爭取北京當局支持香港舉辦大型國際會議及展覽，同時加強香港與珠江三角洲在會議展覽服務方面的合作，以期互補不足，共同推動發展。這樣一來，香港在招攬大型會議及展覽時，就可以推銷在多個場地甚至多個城市同時舉行會議及展覽了。[ITC](#)

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the details of up-and-coming projects in Macau.

A new step: cross-regional cooperation

The whole picture of the surrounding area, together with the drastic increase of supply in terms of MICE inventory in Macau, leads us to rethink Hong Kong's relationship with the PRD region as well as its market position. Enhancing competitiveness, obviously, is the top priority for Hong Kong. Moreover, instead of pure direct competition, possibilities also lie in building a national team through the formation of strategic alliances between Hong Kong, as the hub, and other cities in the PRD region in order to add more options to the whole MICE package. Hong Kong can then further utilise CEPA to complement both sides' developments by enhancing cooperation in convention and exhibition services with support from Beijing for large-scale international conventions and exhibitions to be organised in Hong Kong. In that way, Hong Kong can promote the idea of large-scale conventions and exhibitions that spread over different venues or even different cities. [ITC](#)

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