(此函以傳真 2169 9426 及電郵 william.cheung@hktdc.org 發出)

立法會道1號 立法會綜合大樓 立法會秘書處

敬啟者:

#### 展覽場地需求研究報告

有關陳淑莊議員於 11 月 15 日的立法會工商事務委員會會議中,表示希望取得香港貿發局《展覽場地需求研究報告》的詳盡版本,包括本地與外地參展商及買家的意見。現隨函附上報告予 工商事務委員會閱覽。謝謝。

此致 立法會工商事務委員會秘書 余天寶女士

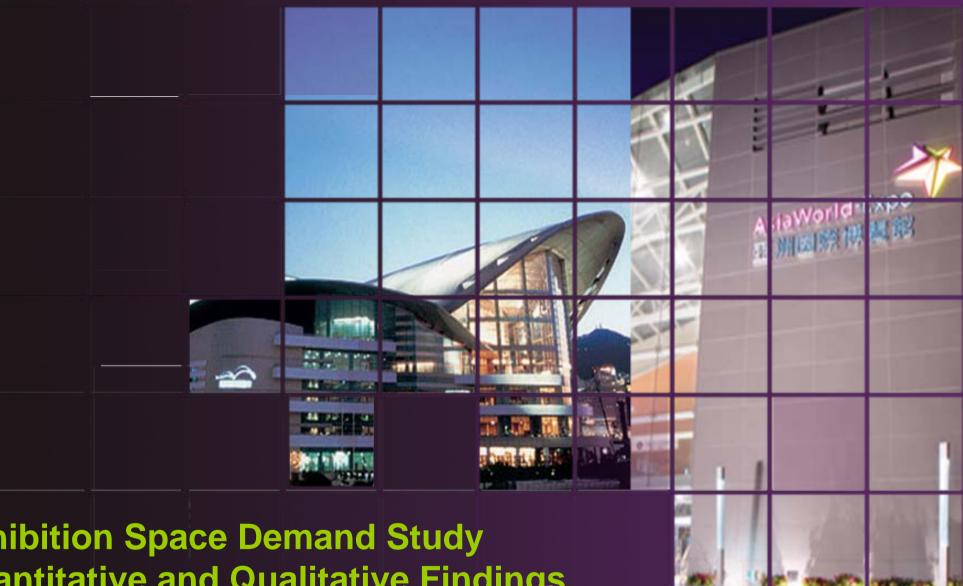


香港貿易發展局 傳媒及公共事務主管 張志輝 (關永祥代行) 2011年12月12日

#### 副本抄送:

商務及經濟發展局首席助理秘書長(工商)楊陳惠敏女士(傳真:2877 5650) 商務及經濟發展局旅遊事務助理專員馮浩賢先生(傳真:2121 8791) 香港旅遊發展局會議展覽及郵輪業務總經理黃鳳嫺女士 (傳真:2503 6136) 亞洲國際博覽館管理有限公司行政總裁哈永安先生(傳真:3606 8889)





**Exhibition Space Demand Study Quantitative and Qualitative Findings** 

Prepared for Hong Kong Trade Development Council Dec 2011

### RESEARCH BACKGROUND



- The number of exhibitions and trade fairs holding in Hong Kong is on an increasing trend over the past few years; some are even the largest in the world. Currently, the Hong Kong Convention and Exhibition Centre (HKCEC) is the main venue for these exhibitions and trade fairs. With a growing number of exhibitions, the pressure on exhibition space is also increasing, in particular in downtown area.
- To plan for the future supply of exhibition space, the Hong Kong Trade Development Council (HKTDC) would like to obtain opinions from "users" of the Hong Kong Exhibition and Convention Centre, namely the exhibitors and visitors of fairs, about their views towards exhibition space and their preference of venue.

# **RESEARCH DESIGN**



# On-site survey and telephone interviews

Exhibitors							
	Total	On-site	Tel				
Fringe Location (on-site)	195	195	NA				
Non-Fringe Location (on-site)	484	484	NA				
Wait List (tel)	67	NA	67				
Total	746	679	67				
Out of the above:							
- Hong Kong based	369	336	33				
- Non-Hong Kong based	377	343	34				

Visitors					
	On-site				
Americas	67				
Australia and Asia	82				
Chinese Mainland	75				
Europe	67				
Middle East and Africa	67				
Hong Kong	161				
Total	519				

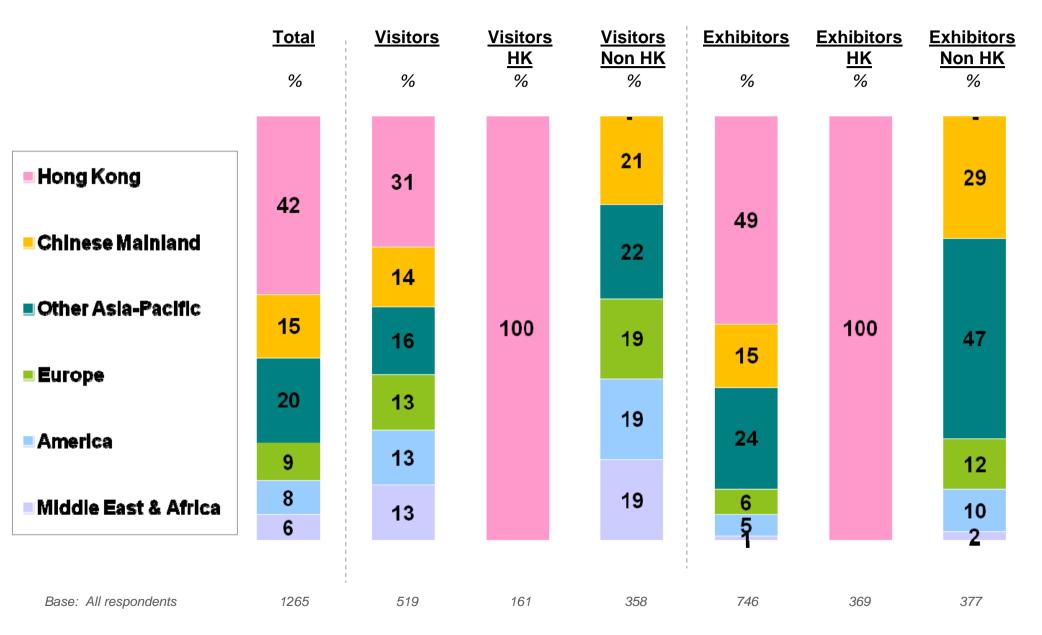
# RESPONDENTS' BACKGROUND INFORMATION





# **COMPANY BASE**





# MONTHS OF EXHIBITING/ VISITING TRADE FAIRS OF SIMILAR TOPICS IN HK



	<u>Total</u>	<u>Visitors</u>	<u>Visitors</u> <u>HK</u>	<u>Visitors</u> <u>Non HK</u>	<b>Exhibitors</b>	Exhibitors HK	Exhibitors Non HK
	%	%	%	%	%	%	%
January	5	6	4	7	4	6	3
February	2	3	0	5	1	*	1
March	31	32	32	32	30	31	29
April	65	62	63	61	67	67	68
Мау	3	4	3	5	1	1	1
June	13	15	19	13	11	13	9
July	3	4	7	3	3	3	3
August	1	2	3	2	*	*	*
September	27	26	29	25	28	29	27
October	43	39	42	37	47	46	48
November	4	3	4	3	4	7	2
December	1	2	4	1	1	1	*
No special pattern	3	4	4	5	1	1	1
				. !		•	•

\* Denotes < 0.5%

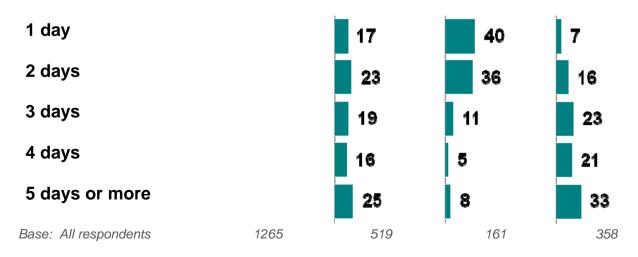
Base: All respondents 1265 519 161 358 746 369 377

# FREQUENCY OF EXHIBITING/ VISITING TRADE FAIRS OF SIMILAR TOPICS IN HK



	<u>Total</u> %	<u>Visitors</u> %	Visitors HK %	Visitors Non HK %	Exhibitors %	Exhibitors HK %	Exhibitors Non HK %
1 time	23	23	8	30	23	21	25
2 times	53	47	46	49	56	53	58
3 times	16	16	27	11	15	19	12
4 times	6	8	12	6	4	5	4
5 times or more	3	5	7	4	1	2	1
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# LENGTH OF STAY IN VISITING TRADE FAIRS IN HK (VISITORS)



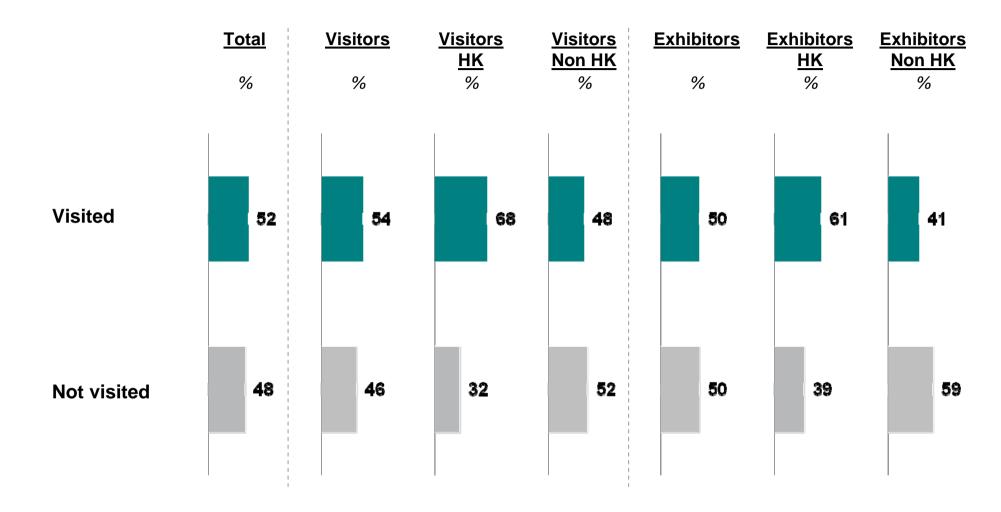
377

369

746

# PREVIOUS EXPERIENCE IN VISITING ASIA WORLD-EXPO





\* Denotes < 0.5%

Base: All respondents 1265 519 161 358 746 369

# VENUE SELECTION CRITERIA

- 1. LOCATION and ACCESSIBILITY are most important factors, especially to exhibitors.
- 2. Exhibitors and Visitors expect good QUALITY OF FACILITIES and decent CAPACITY OF VENUE but their requirements are quite basic.
- Supporting elements (e.g. dining, shopping and entertainment options) are less relevant.



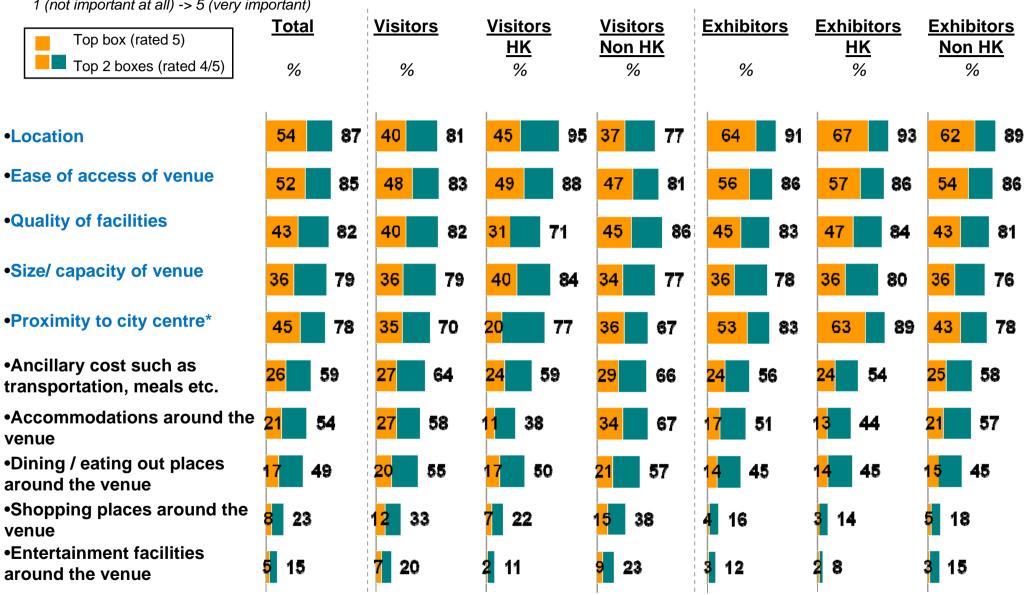
### **VENUE SELECTION CRITERIA**



#### Rating scale:

Base: All respondents

1 (not important at all) -> 5 (very important)



161

358

746

519

1265

369

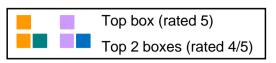
# VENUE SATISFACTION OF HKCEC AND AWE

- 1. Highly satisfied with HKCEC, as it meets all the important criteria of choosing an exhibition venue (location, accessibility, quality of facilities and size of venue).
- 2. Satisfaction of AWE is low. Its remote location is an obvious shortcoming, particularly when compared with HKCEC.
- 3. Decent hardware of AWE (quality of facilities and venue capacity) is the relative strength.



### SATISFACTION TOWARDS HKCEC AND AWE



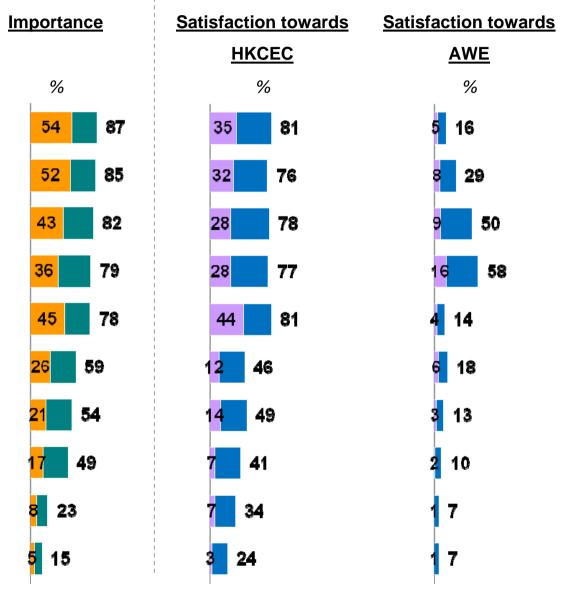


Rating scale for 'satisfaction;:
1 (not satisfied at all) -> 5 (very satisfied)

Rating scale for 'importance':

1 (not important at all) -> 5 (very important)

- Location
- •Ease of access of venue
- Quality of facilities
- Size/ capacity of venue
- Proximity to city centre\*
- •Ancillary cost such as transportation, meals etc.
- •Accommodations around the venue
- •Dining / eating out places around the venue
- Shopping places around the venue
- •Entertainment facilities around the venue



Base: All respondents
^Among those who have been to AWE

1265 1265 664^
\*"Proximity to city centre" was only asked in HKIJS, it is replaced by "Location" in EFSE and Gifts

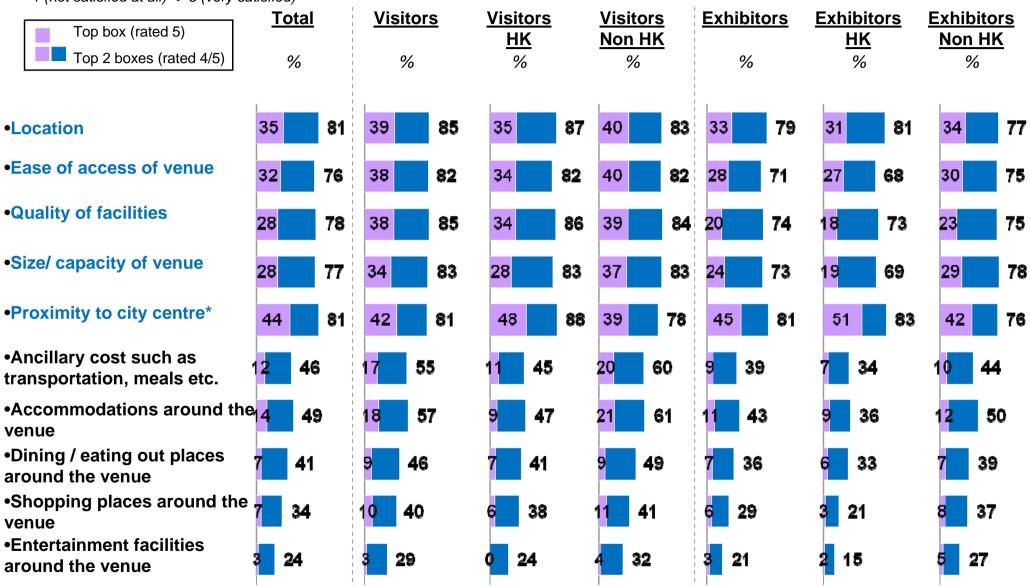


# SATISFACTION TOWARDS HKCEC



#### Rating scale:

1 (not satisfied at all) -> 5 (very satisfied)



Base: All respondents 1265 519 161 358 746 369

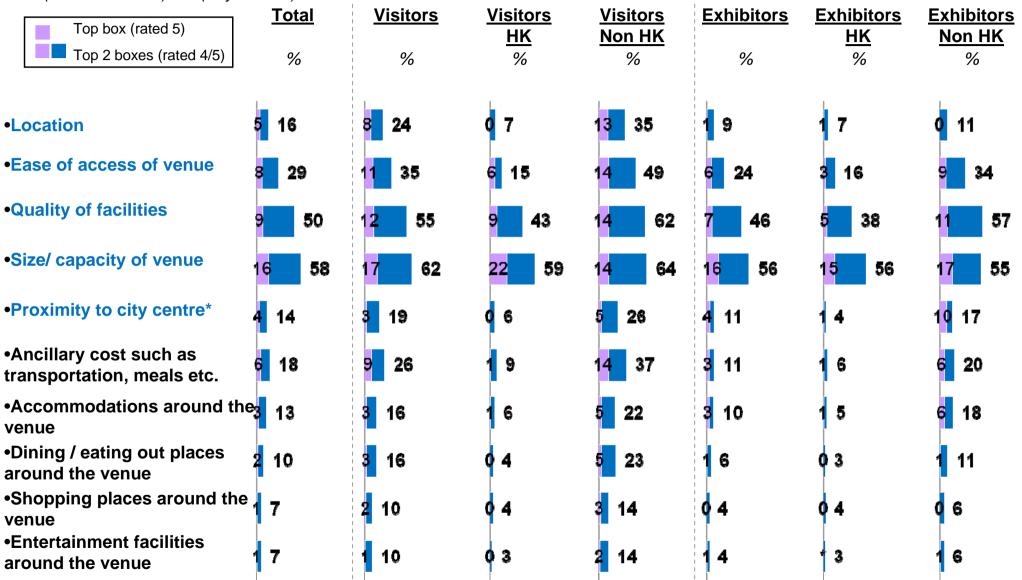


### SATISFACTION TOWARDS AWE



Rating scale:

1 (not satisfied at all) -> 5 (very satisfied)



Base: Those been to AWE

664

282

109

173

382

226

156



The sylvantity to city centre" was only asked in HKIJS, it is replaced by "Location" in EFSE and Gifts?

# PREFERENCE ON VENUE IF THIS TRADE FAIR GROWS

Over 80% of exhibitors and buyers show preference to keep the entire fair at one location at HKCEC if trade fairs grow in size.



# **OVERALL PREFERENCE ON VENUE**



	Total %	<u>Visitors</u> %	Visitors HK %	Visitors Non HK %	Exhibitors %	Exhibitors HK %	Exhibitors Non HK %
HKCEC	85	82	90	79	86	90	83
AWE	3	4	3	4	2	2	3
No particular preference towards HKCEC and AWE	7	10	5	13	6	4	7
Don't know / not sure	5	4	2	4	6	4	7
Base: All respondents	1265	519	161	358	746	369	377

# PREFERENCE ON VENUE IF TRADE FAIR GROWS



	Total %	Visitors %	<u>Visitors</u> <u>HK</u> %	Visitors Non HK %	Exhibitors %	Exhibitors HK %	Exhibitors Non HK %
The entire fair at one location at HKCEC	81	80	79	81	81	83	80
The entire fair at one location at AWE	4	5	6	4	4	4	4
Split into two locations at HKCEC and AWE	12	12	14	11	13	11	14
The entire fair at one location but at other nearby cities	2	3	1	4	2	2	2
Base: All respondents	1265	519	161	358	746	369	377

# VENUE PREFERENCE IF THIS HKTDC'S FAIR SPLITS

(among those respondents who prefer HKTDC as the sole fair organizer)

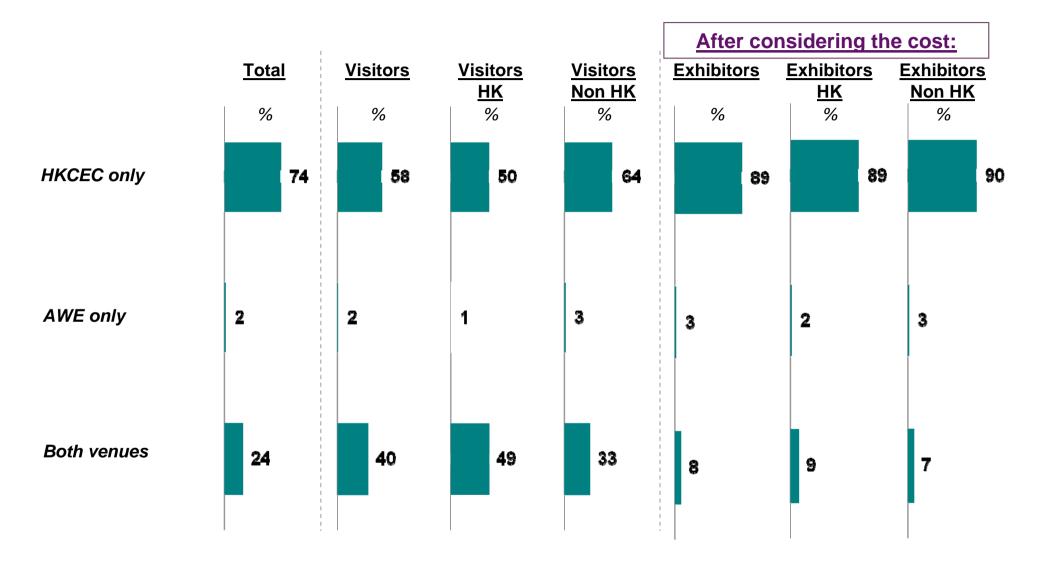
Exhibitors show reluctance to move to AWE, while visitors are less resistant.



### PREFERENCE ON VENUE IF THIS HKTDC'S FAIR SPLITS



(among those respondents who prefer HKTDC as the sole fair organizer)



Base: Those prefer HKTDC's fairs 1033 in EFSE and Gifts and all respondents excluding those would not exhibit/ visit in HKIJS

Prepared for Hong Kong Trade Development Council

152

253

628

335

293

405

<sup>\*</sup> Denotes < 0.5%

# THANK YOU



