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香港的文化及創意產業

The Cultural and Creative Industries in Hong Kong

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文化及創意產業是香港最具活力的經濟環節之一，有助促進經濟增長和創造就業機會。文化及創意產業涵蓋一組知識型活動，通過創意及以智力資本為基本投入要素，而生產具文化、藝術和創意內容的貨品和服務。本文提供香港文化及創意產業在 2014 年的最新統計數字。

The cultural and creative industries (CCI) are among the most dynamic sectors in Hong Kong, contributing to both economic growth and job creation. CCI comprise a set of knowledge-based activities that deploy creativity and intellectual capital as primary inputs and deliver goods and services with cultural, artistic and creative contents. This article provides the latest statistics of CCI in Hong Kong in 2014.

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# 香港的文化及創意產業

## The Cultural and Creative Industries in Hong Kong

### 1. 引言

1.1 文化及創意產業是香港最具活力的經濟環節之一，有助促進經濟增長和創造就業機會。文化及創意產業涵蓋一組知識型活動，通過創意及以智力資本為基本投入要素，而生產具文化、藝術和創意內容的貨品和服務。

1.2 在 2010 年，政府統計處完成對香港文化及創意產業統計架構的檢討。在 2011 年，政府統計處發布了 2008 年及 2009 年文化及創意產業的總體行業統計數字（增加價值和就業人數）。在 2012 年，政府統計處發布了 2005 年至 2010 年文化及創意產業 11 個組成界別的詳細行業統計數字。在 2013 年，除行業統計數字外，政府統計處亦進一步公布了 2005 年至 2011 年的選定文化及創意貨品和服務貿易的統計數字。

1.3 本文提供香港的文化及創意產業以及選定文化及創意貨品和服務貿易在 2014 年的最新統計數字，與過往年份的相應數字。它是在過往年份就此課題所發布的同類文章的更新版。

### 2. 概念及定義

2.1 在國際間，文化及創意產業是一個較新的課題，其概念及定義仍在演化當中。不同的國際組織和國家／地區分別使用「文化及創意產業」、「創意產業」、「文化產業」和「版權產業」等詞彙去描述文化及創意產業。

2.2 香港文化及創意產業的涵蓋範圍和分類，是根據聯合國所倡議的國際統計指引所訂定，並因應香港的經濟情況作出適當調整。

### 1. Introduction

1.1 The cultural and creative industries (CCI) are among the most dynamic sectors in Hong Kong, contributing to both economic growth and job creation. CCI comprise a set of knowledge-based activities that deploy creativity and intellectual capital as primary inputs and deliver goods and services with cultural, artistic and creative contents.

1.2 In 2010, the Census and Statistics Department (C&SD) completed a review of the statistical framework for CCI in Hong Kong. In 2011, C&SD released aggregate industry statistics (value added and employment) of CCI for 2008 and 2009. In 2012, C&SD released detailed industry statistics for the 11 component domains of CCI for 2005 to 2010. In 2013, apart from industry statistics, C&SD further released trade in selected cultural and creative goods and services statistics from 2005 to 2011.

1.3 This article provides the latest statistics of CCI and trade in selected cultural and creative goods and services in Hong Kong for 2014, along with those in preceding years. It is an update of similar articles on the subject published in preceding years.

### 2. Concept and definition

2.1 In the international community, the subject of CCI is a relatively new one. Its concept and definition are still evolving. The terms “cultural and creative industries”, “creative industries”, “cultural industries” and “copyright industries” are used by different international organisations and countries/territories to describe CCI.

2.2 The coverage and classification of CCI in Hong Kong are drawn up with reference to international statistical guidelines promulgated by the United Nations, with appropriate adaptation to cater for the economic situation in Hong Kong.

2.3 具體而言，文化及創意產業包括以下 11 個組成界別：

- 藝術品、古董及工藝品；
- 文化教育及圖書館、檔案保存和博物館服務；
- 表演藝術；
- 電影及錄像和音樂；
- 電視及電台；
- 出版；
- 軟件、電腦遊戲及互動媒體；
- 設計；
- 建築；
- 廣告；及
- 娛樂服務

2.4 政府統計處採用了國際間所建議的「價值鏈」模式，以量度文化及創意產業的經濟貢獻。每個組成界別的涵蓋範圍，與「香港標準行業分類 2.0 版」相關的行業配對，從而劃定有關文化及創意貨品和服務於價值鏈內涉及內容創作、生產以至分銷等環節的特定經濟活動。

2.5 「香港標準行業分類」是一個統計分類系統，用以編製和發布行業統計數字。「香港標準行業分類 2.0 版」是香港標準行業分類的最新版本，以聯合國的「所有經濟活動的國際標準行業分類修訂本第 4 版」為藍本加以編訂，使其切合本地需要。

2.6 例如，文化及創意產業當中電影及錄像和音樂界別涵蓋了有關價值鏈內的各類活動，包括電影製作；影片編輯、處理、特別效果和動畫製作；影片轉錄和分銷；戲院營運；錄像影碟的生產和轉錄；錄像的批發零售；錄像影碟租賃等。因此，文化及創意產業的每一個組成界別所涵蓋的經濟活動可能橫跨「香港標準行業分類」內不同的行業。

2.3 Specifically, CCI comprise 11 component domains as follows:

- art, antiques and crafts;
- cultural education and library, archive and museum services;
- performing arts;
- film, video and music;
- television and radio;
- publishing;
- software, computer games and interactive media;
- design;
- architecture;
- advertising; and
- amusement services

2.4 To measure the economic contribution of CCI, the internationally recommended “value chain” approach is adopted. The coverage of each component domain is mapped to relevant industries as classified under the Hong Kong Standard Industrial Classification (HSIC) Version 2.0 for delineating the specific economic activities involved in the processes of content creation, production and distribution of the cultural and creative goods and services concerned in the value chain.

2.5 HSIC is a statistical classification scheme for the compilation and dissemination of sectoral economic statistics. HSIC Version 2.0 is the latest version of HSIC modelled on the United Nations’ International Standard Industrial Classification of All Economic Activities Revision 4 with local adaptation.

2.6 For instance, the CCI domain of film, video and music covers a wide range of activities along the value chain including the production of motion pictures; motion picture film editing, processing, special effects and animation; reproduction and distribution of motion picture films; cinema operation; production and reproduction of video discs; wholesale and retail of video recordings; renting of video discs; etc. Thus, each component domain comprises economic activities straddling different industries under HSIC.

2.7 基本上，文化及創意產業的各個組成界別主要涵蓋私營部分的經濟活動。例如，康樂及文化事務署轄下的公共圖書館和博物館，因主要是政府提供的公共服務，故此並不包括在文化教育及圖書館、檔案保存和博物館服務的組成界別內。

### 3. 文化及創意產業的量度和資料來源

3.1 文化及創意產業的經濟貢獻可以透過有關行業所產生的增加價值、涉及的就業人數及有關的貨品和服務貿易來量度。

3.2 行業增加價值的統計數字主要是根據政府統計處進行的「經濟活動按年統計調查」所搜集的數據而編製。由 2009 統計年起，「經濟活動按年統計調查」的涵蓋範圍擴展至個人服務業，並就文化及創意產業當中若干項組成界別，包括娛樂服務；文化教育及圖書館、檔案保存和博物館服務；以及表演藝術，提供數據以編製更全面的增加價值估算數字。為方便分析較長期的發展趨勢，有關界別在 2005 年至 2008 年的增加價值的粗略估算數字，則透過其他資料來源，包括當時的「個人、社會及康樂服務按年統計調查」所搜集的數據編製而成。因此，在闡釋有關數字時應注意 2005 年至 2008 年的數字不能與 2009 年及以後的數字作嚴格比較。

3.3 文化及創意產業就業人數的統計數字是根據政府統計處進行的「僱傭及職位空缺按季統計調查」所得數據編製而成。就業人數包括全職和兼職受薪僱員、在職董事、東主、合夥人，以及有親屬關係並在機構工作而無正薪的人士。

2.7 Primarily, CCI cover mainly the private sector economic activities in the component domains. For instance, the component domain of cultural education and library, archive and museum services does not cover public libraries and museums under the management of the Leisure and Cultural Services Department which are mainly public services provided by the Government.

### 3. Measuring CCI and data sources

3.1 The economic contribution of CCI can be measured in terms of the value added generated, persons engaged and trade in relevant goods and services.

3.2 Value added statistics for industries are mainly compiled from data collected through the Annual Survey of Economic Activities (ASEA) conducted by C&SD. The coverage of ASEA has been expanded as from the reference year of 2009 to cover personal services industries, providing more comprehensive estimates of value added for CCI's component domains of amusement services; cultural education and library, archive and museum services; as well as performing arts. To facilitate analysis of the development trend over a longer time frame, crude estimates of value added for these component domains for 2005 to 2008 are compiled from other sources, including the then Annual Survey of Personal, Social and Recreational Services. Caution should thus be taken in interpreting the figures for 2005 to 2008, which may not be strictly comparable to figures for 2009 and onwards.

3.3 Employment statistics for CCI are based on data on the number of persons engaged collected through C&SD's Quarterly Survey of Employment and Vacancies. Persons engaged include full-time salaried employees, part-time employees, as well as working directors, proprietors, partners and family workers without regular pay.

3.4 選定的文化及創意貨品貿易包括古董及工藝品；視覺藝術及設計貨品；視聽及互動媒體貨品；表演藝術及節慶貨品；以及出版貨品（書籍及報刊）。文化及創意貨品的進口及出口統計數字是根據商品貿易統計所編製，涵蓋香港與其貿易夥伴間商品的進出口，包括經陸路、航空、水路運輸及郵寄商品。商品貿易統計是根據進出口報關單上的資料編製。

3.5 選定的文化及創意服務貿易包括廣告、市場研究及公眾意見調查服務；建築、工程、科學及其他技術服務；電腦服務；資訊服務；視聽及有關服務；其他個人、文化及康樂服務（視聽服務以外的相關服務）；研究及發展以及與創新活動相關的服務；和特許經營權及商標以外的知識產權使用費。文化及創意服務的輸入及輸出的統計數字主要是根據政府統計處進行的「服務輸入及輸出按年統計調查」所搜集的數據編製。

3.6 與文化及創意產業有關的國際統計指引仍在演化中，政府統計處會繼續密切留意有關此課題的國際統計方法的最新發展及其他經濟體的良好做法，並在將來就這產業的編製架構引進適當的改良和修訂。

## 4. 文化及創意產業在 2005 年至 2014 年整體的發展

4.1 表 1 載列 2005 年及 2010 年至 2014 年文化及創意產業的增加價值，及其對本地生產總值的貢獻。在 2005 年至 2014 年期間，文化及創意產業的名義增加價值的平均每年升幅為 8.6%，相對香港名義本地生產總值在同期 5.4% 的平均每年升幅明顯較快。文化及創意產業的增加價值相對於本地生產總值的百分比，亦相應地由 2005 年的 3.8% 上升至 2014 年的 5.0%。

3.4 Trade in selected cultural and creative goods covers antiques and crafts goods; visual arts and design goods; audio-visual and interactive media goods; performing arts and celebration goods; and publishing goods (books and press). Statistics on imports and exports of cultural and creative goods are compiled based on merchandise trade statistics, which cover movements of merchandise between Hong Kong and her trading partners by land, air, water and by post. Merchandise trade statistics are compiled based on information contained in import/export declarations.

3.5 Trade in selected cultural and creative services covers advertising, market research and public opinion polling services; architectural, engineering, scientific and other technical services; computer services; information services; audio-visual and related services; other personal, cultural and recreational services (relevant services other than audio-visual services); research and development, and services related to innovation activities; and charges for the use of intellectual property rights other than franchises and trademarks. Statistics on imports and exports of cultural and creative services are mainly based on data compiled from the Annual Survey of Imports and Exports of Services conducted by C&SD.

3.6 As the relevant international statistical guidelines pertaining to CCI are still evolving, C&SD will continue to keep abreast of the latest developments in international statistical methodology and good practices in other economies on this subject. Refinements and revisions will be introduced to the compilation framework of CCI in the future as appropriate.

## 4. Development of CCI as a whole for 2005 to 2014

4.1 Table 1 presents the value added of CCI and its contribution to Gross Domestic Product (GDP) for 2005 and 2010 to 2014. During 2005 to 2014, the value added of CCI in nominal terms increased at an average annual rate of 8.6%, significantly faster than the average annual growth rate of the nominal GDP of Hong Kong, at 5.4%. Accordingly, the value added of CCI as a percentage of GDP increased from 3.8% in 2005 to 5.0% in 2014.

4.2 表 2 載列 2005 年及 2010 年至 2014 年文化及創意產業的就業人數。在 2005 年至 2014 年期間，文化及創意產業就業人數由 2005 年的 171 990 人增加至 2014 年的 213 060 人，平均每年升幅為 2.4%，相比香港總就業人數在同期 1.3% 的每年升幅較快。文化及創意產業佔香港總就業人數的百分比，亦相應由 2005 年的 5.1% 上升至 2014 年的 5.7%。

4.3 表 3 載列 2005 年及 2010 年至 2014 年選定文化及創意貨品的貿易數字。在 2005 年至 2014 年期間，選定文化及創意貨品整體出口的平均每年升幅為 2.0%。有關貨品的進口的增長速度較快，平均每年為 5.5%，這反映本地對文化及創意貨品的進口需求保持強勁。

4.4 表 4 載列 2005 年及 2010 年至 2014 年選定文化及創意服務的貿易數字。在 2005 年至 2014 年期間，選定文化及創意服務的輸出及輸入保持強勁，平均每年升幅分別為 7.2% 及 5.6%。

## 5. 文化及創意產業組成界別在 2014 年的表現

5.1 在 2014 年，文化及創意產業的增加價值為 1,097 億元，較 2013 年上升 3.4%。在 2014 年，這產業對香港本地生產總值的貢獻為 5.0%。（表 1）

5.2 在 2014 年，文化及創意產業的就業人數為 213 060 人，較 2013 年增加 2.7%。在 2014 年，這產業對香港就業總人數的貢獻為 5.7%。（表 2）

4.2 Table 2 presents the employment figures in respect of CCI for 2005 and 2010 to 2014. During 2005 to 2014, the employment in CCI increased from 171 990 in 2005 to 213 060 in 2014. This represents an average annual growth rate of 2.4%, faster than the average annual rate of increase of total employment in Hong Kong, at 1.3%. Accordingly, the share of CCI in the total employment of Hong Kong increased from 5.1% in 2005 to 5.7% in 2014.

4.3 Table 3 presents figures on trade in selected cultural and creative goods for 2005 and 2010 to 2014. During 2005 to 2014, total exports of selected cultural and creative goods increased at an average annual rate of 2.0%. The imports of these goods grew at a faster pace, at 5.5% per annum, reflecting the robust import demand for cultural and creative goods locally.

4.4 Table 4 presents figures on trade in selected cultural and creative services for 2005 and 2010 to 2014. During 2005 to 2014, exports and imports of selected cultural and creative services remained strong, registering an average annual growth rate of 7.2% and 5.6% respectively.

## 5. Performance of CCI component domains in 2014

5.1 In 2014, the value added of CCI was \$109.7 billion, representing an increase of 3.4% from 2013. The contribution to GDP of Hong Kong was 5.0% in 2014. (Table 1)

5.2 In 2014, the employment in CCI was 213 060, representing an increase of 2.7% from 2013. The contribution to the total employment of Hong Kong was 5.7% in 2014. (Table 2)

## **藝術品、古董及工藝品**

5.3 藝術品、古董及工藝品界別主要涵蓋珠寶及相關物品的製造（包括寶石切割及鑲嵌、貴金屬雕刻、打金及打銀）；以及珠寶首飾及貴金屬裝飾物、古董、藝術品及工藝品的批發及零售。

5.4 香港一向以珠寶首飾的精細工藝，及具時代感和新穎設計馳名於世。在 2014 年，藝術品、古董及工藝品界別的增加價值為 122 億元，佔文化及創意產業總增加價值的 11.1%。這界別的就業人數為 19 240 人，佔文化及創意產業總就業人數的 9.0%。

（表 1 及表 2）

5.5 文化及創意產業可視為香港增長最快的經濟環節之一。藝術品、古董及工藝品界別為文化及創意產業各界別中的佼佼者。它在文化及創意產業的總增加價值中所佔的比重由 2005 年的 8.1% 增加至 2014 年的 11.1%。它的增長在過往年間一直相對穩定。

5.6 藝術品、古董及工藝品界別包括製造及銷售活動，當中藝術品、古董及工藝品的銷售佔這界別的增加價值超過 90%。這組成部分受惠於珠寶業需求暢旺，尤其是中國內地旅客對珠寶首飾的需求殷切。

## **文化教育及圖書館、檔案保存和博物館服務**

5.7 文化教育及圖書館、檔案保存和博物館服務界別包括私營的藝術、戲劇、音樂、舞蹈、繪畫、攝影等訓練；綜合美術及表演藝術學校（學術除外）；以及私營的圖書館及檔案保存、博物館及歷史遺址的經營及管理。

## **Art, antiques and crafts**

5.3 The domain of art, antiques and crafts covers the manufacture of jewellery and related articles (including cutting and setting of precious stones; engraving on precious metals; goldsmithing and silversmithing); and the wholesale and retail of jewellery and precious metal accessories, antiques, and works of art and crafts.

5.4 Hong Kong is renowned for its craftsmanship in jewellery set with precious stones, with contemporary and innovative designs. In 2014, the value added of the art, antiques and crafts domain was \$12.2 billion, accounting for 11.1% of the total value added of CCI. The employment in this domain was 19 240, accounting for 9.0% of the total employment in CCI. (Table 1 and Table 2)

5.5 CCI can be seen as one of the fastest growing sectors of the Hong Kong economy. The art, antiques and crafts domain is one of the star performers among the CCI domains. Its share in the total value added of CCI grew from 8.1% in 2005 to 11.1% in 2014. Its growth path has been relatively steady over the past years.

5.6 The art, antique and crafts domain consists of manufacturing and distribution activities, of which distribution of art, antiques and crafts accounted for more than 90% of the value added of this domain. This component benefitted much from the burgeoning demand for jewellery, particularly that of visitors from the mainland of China.

## **Cultural education and library, archive and museum services**

5.7 The domain of cultural education and library, archive and museum services includes instruction in arts, drama, music, dance, painting, photography, etc. in the private sector; general fine arts and performing arts schools (except academic); as well as the operation and management of libraries and archives, museums and historical sites in the private sector.



5.8 在 2014 年，文化教育及圖書館、檔案保存和博物館服務界別的增加價值為 15 億元，佔文化及創意產業總增加價值的 1.3%。這界別的就業人數為 10 430 人，佔文化及創意產業總就業人數的 4.9%。（表 1 及表 2）

### **表演藝術**

5.9 表演藝術界別包括創作及表演藝術活動（例如管弦樂團、芭蕾舞表演團體及音樂會表演團體、舞台設計、劇場監製等）；藝術創作人；音樂人及作家；以及私營的表演藝術場所經營（例如可作現場表演的劇院）。此外，藝人代理和模特兒代理亦包括在內。

5.10 表演藝術界別是文化及創意產業中最小的組成部分。在 2014 年，這界別的增加價值為 10 億元，佔文化及創意產業總增加價值的 0.9%。這界別的就業人數為 4 800 人，佔文化及創意產業總就業人數的 2.3%。（表 1 及表 2）

### **電影及錄像和音樂**

5.11 電影及錄像和音樂界別涵蓋各類相關活動，包括電影、錄像及電視節目製作活動；錄音及音樂出版活動；攝影活動；已儲錄資料媒體的複製；樂器的製造；以及音樂及錄像影碟的批發、零售和租賃。

5.12 在 2014 年，電影及錄像和音樂界別的增加價值為 31 億元，佔文化及創意產業總增加價值的 2.8%。這界別的就業人數為 14 960 人，佔文化及創意產業總就業人數的 7.0%。（表 1 及表 2）

### **電視及電台**

5.13 電視及電台界別包括電視及電台節目廣播。廣播可應用多種科技，例如經無線廣播、衛星、有線網絡或互聯網進行。

5.8 In 2014, the value added of the cultural education and library, archive and museum services domain was \$1.5 billion, accounting for 1.3% of the total value added of CCI. The employment in this domain was 10 430, accounting for 4.9% of the total employment in CCI. (Table 1 and Table 2)

### **Performing arts**

5.9 The performing arts domain covers creative and performing arts activities (e.g. orchestras, ballet and concert show groups, stage designers, theatrical producers, etc.); creative artists; musicians and writers; as well as performing arts venue operation (e.g. theatres for live performance) in the private sector. It also includes agents for artists and models.

5.10 The performing arts domain is the smallest component of CCI. In 2014, the value added of this domain was \$1.0 billion, accounting for 0.9% of the total value added of CCI. The employment in this domain was 4 800, accounting for 2.3% of the total employment in CCI. (Table 1 and Table 2)

### **Film, video and music**

5.11 The domain of film, video and music covers a wide range of relevant activities, including motion picture, video and television programme production activities; sound recording and music publishing activities; photographic activities; reproduction of recorded media; manufacture of musical instruments; as well as wholesale, retail and renting of music and video recordings.

5.12 In 2014, the value added of the film, video and music domain was \$3.1 billion, accounting for 2.8% of the total value added of CCI. The employment in this domain was 14 960, accounting for 7.0% of the total employment in CCI. (Table 1 and Table 2)

### **Television and radio**

5.13 The domain of television and radio covers television and radio programming and broadcasting activities. The broadcasting can be performed using different technologies, e.g. over-the-air, via satellite, via a cable network or via the Internet.

5.14 在 2014 年，電視及電台界別的增加價值為 64 億元，佔文化及創意產業總增加價值的 5.9%。這界別的就業人數為 6 740 人，佔文化及創意產業總就業人數的 3.2%。

(表 1 及表 2)

### **出版**

5.15 出版界別包括書籍、報紙及期刊的印刷、出版、批發和零售，亦包括新聞通訊社及其他資訊服務活動。

5.16 雖然出版是文化及創意產業的第二大界別（按增加價值及就業人數計算），但這界別在近年的業務表現相對溫和，部分原因是由於報紙及雜誌業務的競爭激烈，以及免費報紙和資訊網站帶來的挑戰。它在文化及創意產業的總增加價值中所佔的比重由 2005 年的 27.1% 下降至 2014 年的 12.7%。很多傳統的出版活動已經由印刷平台轉移至數碼化平台，以網絡及門戶網站託管活動代替。這類新興活動包括在軟件、電腦遊戲及互動媒體界別內。

5.17 在 2014 年，出版界別的增加價值為 139 億元，佔文化及創意產業總增加價值的 12.7%。這界別的就業人數為 42 660 人，佔文化及創意產業總就業人數的 20.0%。

(表 1 及表 2)

### **軟件、電腦遊戲及互動媒體**

5.18 軟件、電腦遊戲及互動媒體界別包括軟件和電腦遊戲的出版和分銷；資訊科技服務活動（例如電腦遊戲、軟件、網站和網絡系統的設計及開發）；互聯網及其他電訊活動；以及入門網站、資料處理、寄存及相關活動。

5.14 In 2014, the value added of the television and radio domain was \$6.4 billion, accounting for 5.9% of the total value added of CCI. The employment in this domain was 6 740, accounting for 3.2% of the total employment in CCI. (Table 1 and Table 2)

### **Publishing**

5.15 The publishing domain covers printing, publishing, and wholesale and retail of books, newspapers and periodicals. It also covers news agency and other information service activities.

5.16 While publishing is the second largest component of CCI (in terms of both value added and employment), the business performance of this domain has been rather moderate in recent years, partly due to keen competition, especially in the business of newspapers and magazines, and challenges arising from free newspapers and information portals. Its share in the total value added of the entire CCI declined from 27.1% in 2005 to 12.7% in 2014. Many traditional publishing activities have migrated from printed platforms to digital platforms, contributing to web and portal hosting activities. The latter activities are covered under the software, computer games and interactive media domain.

5.17 In 2014, the value added of the publishing domain was \$13.9 billion, accounting for 12.7% of the total value added of CCI. The employment in this domain was 42 660, accounting for 20.0% of the total employment in CCI. (Table 1 and Table 2)

### **Software, computer games and interactive media**

5.18 The domain of software, computer games and interactive media covers publishing and distributive trades of software and computer games; information technology service activities (e.g. designing and development of computer games, software, websites and network systems); Internet and other telecommunications activities; as well as web portals, data processing, hosting and related activities.

5.19 作為文化及創意產業的最大組成部分（按增加價值及就業人數計算），軟件、電腦遊戲及互動媒體界別在香港的知識型經濟中亦擔當重要的角色。在 2014 年，軟件、電腦遊戲及互動媒體界別的增加價值為 444 億元，佔文化及創意產業總增加價值的 40.5%。這界別的就業人數為 55 520 人，佔文化及創意產業總就業人數的 26.1%。

（表 1 及表 2）

5.20 軟件、電腦遊戲及互動媒體界別在文化及創意產業中一直佔着重要的地位。它在文化及創意產業的總增加價值中所佔的比重由 2005 年的 31.6% 增加至 2014 年的 40.5%。這界別的主要組別為互聯網服務及軟件和電腦遊戲開發，此兩組別合共佔這界別在 2014 年約 90% 的增加價值。

### 設計

5.21 設計界別涵蓋各類專門設計活動，包括室內設計和傢具設計；多媒體、視覺及平面设计；時裝及配飾設計（包括珠寶設計）；以及工業設計。

5.22 香港正發展成為區內的設計中心，而設計在作為創新元素的源頭和驅動產品的經濟價值及商業競爭力方面，扮演相當重要的角色。在 2014 年，設計界別的增加價值為 41 億元，佔文化及創意產業總增加價值的 3.7%。這界別的就業人數為 15 820 人，佔文化及創意產業總就業人數的 7.4%。

（表 1 及表 2）

### 建築

5.23 建築界別包括建築設計服務；城市規劃及設計活動；以及綜合及其他建築、測量及工程服務（當中包括景觀園藝設計）。

5.24 近年來，隨着多個基建和文化項目的開展，香港對建築服務的需求保持殷切。香港

5.19 As the biggest component of CCI (in terms of both value added and employment), the software, computer games and interactive media domain also plays an important role in the knowledge-based economy of Hong Kong. In 2014, the value added of the software, computer games and interactive media domain was \$44.4 billion, accounting for 40.5% of the total value added of CCI. The employment in this domain was 55 520, accounting for 26.1% of the total employment in CCI.

(Table 1 and Table 2)

5.20 The software, computer games and interactive media domain has all along been a dominant component among all CCI domains. It accounted for 31.6% of the total value added of CCI in 2005, growing to 40.5% in 2014. Key members of this domain are Internet services and development of software and computer games, which together accounted for some 90% of the value added of this domain in 2014.

### Design

5.21 The design domain covers a wide range of specialised design activities including interior and furniture design; multi-media, visual and graphic design; fashion and accessories design (including jewellery design); as well as industrial design.

5.22 Hong Kong is developing into a regional design centre. Design is playing an important role as a source of innovative content and a key driver of enhancing economic value of products and business competitiveness. In 2014, the value added of the design domain was \$4.1 billion, accounting for 3.7% of the total value added of CCI. The employment in this domain was 15 820, accounting for 7.4% of the total employment in CCI. (Table 1 and Table 2)

### Architecture

5.23 The architecture domain covers architectural design services; town planning and urban design activities; as well as combined and other architectural, surveying and engineering services (including landscape gardening design).

5.24 Local demand for architectural services remains buoyant in recent years, along with the launch of a number of infrastructure and cultural

的建築顧問公司亦積極參與區內（尤其是中國內地）的各項住宅及商業發展項目，以及大型城市發展和基建項目。

5.25 在 2014 年，建築界別的增加價值為 111 億元，佔文化及創意產業總增加價值的 10.1%。這界別的就業人數為 15 640 人，佔文化及創意產業總就業人數的 7.3%。  
（表 1 及表 2）

### 廣告

5.26 廣告界別包括廣告及市場研究；會議及商展服務；以及商業廣告牌的製造。

5.27 在 2014 年，廣告界別的增加價值為 93 億元，佔文化及創意產業總增加價值的 8.4%。這界別的就業人數為 18 650 人，佔文化及創意產業總就業人數的 8.8%。

### 娛樂服務

5.28 娛樂服務界別包括遊樂園和主題樂園，及遊戲機中心，為文化及創意產業當中一個較小的組成部分。在 2014 年，娛樂服務界別的增加價值為 29 億元，佔文化及創意產業總增加價值的 2.6%。這界別的就業人數為 8 600 人，佔文化及創意產業總就業人數的 4.0%。（表 1 及表 2）

## 6. 2014 年選定文化及創意貨品和服務貿易

6.1 在 2014 年，選定文化及創意貨品的整體出口（包括港產品出口和轉口貨品）達 5,051 億元，較 2013 年減少 0.4%。有關貨品的整體出口佔香港貨品整體出口總額的 13.8%。視聽及互動媒體貨品為最大的組成部分，佔 2014 年選定文化及創意貨品整體出口總額的 72.0%。其次為視覺藝術及設計貨品（14.0%）；表演藝術及節慶貨品（9.3%）；

projects. Architectural firms in Hong Kong are also actively engaged in various residential and commercial development projects as well as large-scale urban development and infrastructure projects in the region, particularly in the mainland of China.

5.25 In 2014, the value added of the architecture domain was \$11.1 billion, accounting for 10.1% of the total value added of CCI. The employment in this domain was 15 640, accounting for 7.3% of the total employment in CCI. (Table 1 and Table 2)

### Advertising

5.26 The advertising domain includes advertising and market research; convention and trade show organising services; as well as manufacture of advertising displays.

5.27 In 2014, the value added of the advertising domain was \$9.3 billion, accounting for 8.4% of the total value added of CCI. The employment in this domain was 18 650, accounting for 8.8% of the total employment in CCI.

### Amusement services

5.28 The amusement services domain, which covers mainly activities of amusement parks and theme parks as well as amusement game centres, is a small component of CCI. In 2014, the value added of the amusement services domain was \$2.9 billion, accounting for 2.6% of the total value added of CCI. The employment in this domain was 8 600, accounting for 4.0% of the total employment in CCI. (Table 1 and Table 2)

## 6. Trade in selected cultural and creative goods and services in 2014

6.1 In 2014, total exports (comprising domestic exports and re-exports) of selected cultural and creative goods amounted to \$505.1 billion, representing a decrease of 0.4% compared with 2013. They accounted for 13.8% of Hong Kong's total exports of goods. The largest component was audio-visual and interactive media goods, accounting for 72.0% of overall value of total exports of selected cultural and creative goods in 2014. This was followed by visual arts and design goods (14.0%);

古董及工藝品（2.4%）；和出版貨品（2.3%）。（表3）

6.2 在2014年，選定文化及創意貨品的進口達5,775億元，較2013年減少3.1%。有關貨品進口佔香港貨品進口總額的13.7%。視聽及互動媒體貨品為最大的組成部分，佔2014年選定文化及創意貨品進口總額的63.9%。其次為視覺藝術及設計貨品（22.1%）；表演藝術及節慶貨品（10.2%）；古董及工藝品（2.4%）；和出版貨品（1.4%）。（表3）

6.3 在2014年，選定文化及創意服務的輸出達255億元，較2013年增加1.8%。有關的服務輸出佔香港服務輸出總額的3.1%。主要服務的組成部分包括電腦服務（佔選定文化及創意服務輸出總額的28.9%）；廣告、市場研究及公眾意見調查服務（23.4%）；特許經營權及商標以外的知識產權使用費（16.2%）；以及建築、工程、科學及其他技術服務（16.1%）。（表4）

6.4 在2014年，選定文化及創意服務的輸入達254億元，較2013年增加0.9%。有關的服務輸入佔香港服務輸入總額的4.4%。特許經營權及商標以外的知識產權使用費為最大的組成部分，佔選定文化及創意服務輸入總額的40.8%。其次為電腦服務（20.0%）；廣告、市場研究及公眾意見調查服務（16.0%）；以及建築、工程、科學及其他技術服務（11.2%）。（表4）

performing arts and celebration goods (9.3%); antiques and crafts goods (2.4%); and publishing goods (2.3%). (Table 3)

6.2 In 2014, imports of selected cultural and creative goods amounted to \$577.5 billion, representing a decrease of 3.1% compared with 2013. They accounted for 13.7% of Hong Kong's total imports of goods. The largest component was audio-visual and interactive media goods, accounting for 63.9% of total imports of selected cultural and creative goods in 2014. This was followed by visual arts and design goods (22.1%); performing arts and celebration goods (10.2%); antiques and crafts goods (2.4%); and publishing goods (1.4%). (Table 3)

6.3 In 2014, exports of selected cultural and creative services amounted to \$25.5 billion, representing an increase of 1.8% compared with 2013. They accounted for 3.1% of Hong Kong's total exports of services. Major service components included computer services (accounting for 28.9% of total exports of selected cultural and creative services); advertising, market research and public opinion polling services (23.4%); charges for the use of intellectual property rights other than franchises and trademarks (16.2%); and architectural, engineering, scientific and other technical services (16.1%). (Table 4)

6.4 In 2014, imports of selected cultural and creative services amounted to \$25.4 billion, representing an increase of 0.9% compared with 2013. They accounted for 4.4% of Hong Kong's total imports of services. The biggest component was charges for the use of intellectual property rights other than franchises and trademarks, accounting for 40.8% of total imports of selected cultural and creative services. This was followed by computer services (20.0%); advertising, market research and public opinion polling services (16.0%); and architectural, engineering, scientific and other technical services (11.2%). (Table 4)

**表 1 文化及創意產業的增加價值**  
**Table 1 Value added of the cultural and creative industries**

	百萬元 \$ million					
	2005	2010	2011	2012	2013	2014
藝術品、古董及工藝品 Art, antiques and crafts	4,223	7,121	10,142	11,446	13,633	12,199
文化教育及圖書館、檔案保存和博物館服務 <sup>(1)</sup> Cultural education and library, archive and museum services <sup>(1)</sup>	-	1,065	1,137	1,161	1,246	1,465
表演藝術 Performing arts	661	862	872	932	876	954
電影及錄像和音樂 Film, video and music	2,243	2,982	3,239	3,643	3,524	3,106
電視及電台 Television and radio	5,543	5,677	7,322	7,043	7,986	6,431
出版 Publishing	14,145	13,655	13,329	14,066	14,112	13,894
軟件、電腦遊戲及互動媒體 Software, computer games and interactive media	16,508	27,263	32,663	37,755	40,265	44,387
設計 Design	1,001	2,932	3,615	3,310	3,711	4,080
建築 Architecture	3,161	7,968	8,537	9,261	9,762	11,058
廣告 Advertising	3,869	6,805	7,128	7,322	8,682	9,254
娛樂服務 Amusement services	904	1,244	1,566	1,899	2,253	2,852
<b>文化及創意產業<sup>(2)</sup></b> <b>Cultural and creative industries<sup>(2)</sup></b>	<b>52,258</b>	<b>77,573</b>	<b>89,551</b>	<b>97,837</b>	<b>106,050</b>	<b>109,680</b>
佔以基本價格計算的本地生產總值的百分比 <sup>(3)</sup> % of Gross Domestic Product (GDP) at basic prices <sup>(3)</sup>	3.8%	4.5%	4.7%	4.9%	5.1%	5.0%

註釋：由 2009 年起，增加價值數字的編製採用「香港標準行業分類 2.0 版」作行業分類。2005 年的後向估計數字是受到一定的局限，並須謹慎闡釋。

由於四捨五入關係，個別數字加起來可能與總數不符。

(1) 文化教育及圖書館、檔案保存和博物館服務在 2008 年以前並沒有統計調查的數據。因此，2005 年以“-”來顯示。

(2) 文化及創意產業在 2008 年及以後的總體數字不能與較早年份的數字作嚴格比較，這是由於較早年份的總體數字沒有涵蓋文化教育及圖書館、檔案保存和博物館服務的相關數字。

(3) 百分比是根據 2016 年 5 月 13 日公布的本地生產總值的數字計算。

資料來源：政府統計處進行的「經濟活動按年統計調查」（2009 年以前為「按年經濟統計調查」）

Notes: Since 2009, the value added figures have been compiled based on HSIC Version 2.0 for classification of industries. The backcasted data for 2005 are subject to certain limitations and should be interpreted with care.

Figures may not add up to total due to rounding.

(1) Survey data for cultural education and library, archive and museum services are not available prior to 2008. Thus, “-” is shown for 2005.

(2) Aggregate figures for 2008 and onwards are not strictly comparable with those of earlier years where data for cultural education and library, archive and museum services are not covered.

(3) Calculation is based on GDP statistics released on 13 May 2016.

Source: Annual Survey of Economic Activities (formerly the Programme of Annual Economic Surveys prior to 2009) conducted by the Census and Statistics Department

**表 2 文化及創意產業的就業人數**  
**Table 2 Number of persons engaged in the cultural and creative industries**

	人數（進位至最接近的十位數） Number (rounded to the nearest ten)					
	2005	2010	2011	2012	2013	2014
藝術品、古董及工藝品 Art, antiques and crafts	18 020	16 600	17 160	17 730	18 430	19 240
文化教育及圖書館、檔案保存和博物館服務 <sup>(1)</sup> Cultural education and library, archive and museum services <sup>(1)</sup>	-	8 410	8 810	9 100	9 420	10 430
表演藝術 Performing arts	2 610	3 010	3 370	3 810	4 200	4 800
電影及錄像和音樂 Film, video and music	14 010	14 270	14 180	14 700	14 990	14 960
電視及電台 Television and radio	7 350	5 440	5 460	5 730	6 420	6 740
出版 Publishing	47 010	45 680	44 550	44 220	43 900	42 660
軟件、電腦遊戲及互動媒體 Software, computer games and interactive media	39 930	44 700	46 600	49 700	52 600	55 520
設計 Design	9 610	12 080	13 150	14 140	15 120	15 820
建築 Architecture	10 560	13 310	14 030	14 670	15 310	15 640
廣告 Advertising	16 000	17 820	17 600	18 320	18 510	18 650
娛樂服務 Amusement services	6 890	8 110	8 000	8 230	8 590	8 600
<b>文化及創意產業<sup>(2)</sup></b> <b>Cultural and creative industries<sup>(2)</sup></b>	<b>171 990</b>	<b>189 430</b>	<b>192 930</b>	<b>200 370</b>	<b>207 490</b>	<b>213 060</b>
佔總就業人數的百分比 <sup>(3)</sup> % of total employment <sup>(3)</sup>	5.1%	5.4%	5.4%	5.5%	5.6%	5.7%

註釋：由 2009 年起，就業數字的編製採用「香港標準行業分類 2.0 版」作行業分類。2005 年的後向估計數字是受到一定的局限，並須謹慎闡釋。

由於四捨五入關係，個別數字加起來可能與總數不符。

(1) 為了配合表 1，表內沒有載列 2005 年文化教育及圖書館、檔案保存和博物館服務的數字。因此，2005 年以“-”來顯示。

(2) 文化及創意產業在 2008 年及以後的總體數字不能與較早年份的數字作嚴格比較，這是由於較早年份的總體數字沒有涵蓋文化教育及圖書館、檔案保存和博物館服務的相關數字。

(3) 總就業人數是以《香港統計月刊》2015 年 9 月號刊載的就業綜合估計數字為依據。

資料來源：政府統計處進行的「僱傭及職位空缺按季統計調查」

Notes: Since 2009, the employment figures have been compiled based on HSIC Version 2.0 for classification of industries. The backcasted data for 2005 are subject to certain limitations and should be interpreted with care.

Figures may not add up to total due to rounding.

(1) In order to align with Table 1, the figure of persons engaged in the cultural education and library, archive and museum services is not presented for the 2005 reference year. Thus, “-” is shown for 2005.

(2) Aggregate figures for 2008 and onwards are not strictly comparable with those of earlier years where data for cultural education and library, archive and museum services are not covered.

(3) Total employment is based on the Composite Employment Estimates released in the September 2015 issue of the *Hong Kong Monthly Digest of Statistics*.

Source: Quarterly Survey of Employment and Vacancies conducted by the Census and Statistics Department

表 3 選定的文化及創意貨品的整體出口及進口  
Table 3 Total exports and imports of selected cultural and creative goods

百萬元  
\$ million

	2005	2010	2011	2012	2013	2014
<b>選定文化及創意貨品的整體出口<sup>(1)</sup></b> <b>Total exports<sup>(1)</sup> of selected cultural and creative goods</b>						
古董及工藝品 Antiques and crafts goods	9,860	9,849	11,194	10,696	11,505	11,956
視覺藝術及設計貨品 Visual arts and design goods	44,926	44,990	56,400	63,450	66,430	70,876
視聽及互動媒體貨品 Audio-visual and interactive media goods	316,487	334,621	362,876	393,864	364,993	363,525
表演藝術及節慶貨品 Performing arts and celebration goods	40,125	47,294	52,010	57,469	52,204	47,004
出版貨品（書籍及報刊） Publishing goods (books and press)	10,967	13,049	13,346	12,395	11,973	11,706
<b>選定文化及創意貨品的整體出口總額<sup>(1)</sup></b> <b>Overall value of total exports<sup>(1)</sup> of selected cultural and creative goods</b>	<b>422,365</b>	<b>449,803</b>	<b>495,826</b>	<b>537,874</b>	<b>507,105</b>	<b>505,067</b>
佔貨品整體出口總額的百分比 % of total exports of goods	18.8%	14.8%	14.9%	15.7%	14.2%	13.8%
<b>選定文化及創意貨品的進口</b> <b>Imports of selected cultural and creative goods</b>						
古董及工藝品 Antiques and crafts goods	8,703	10,946	15,287	13,394	14,005	13,718
視覺藝術及設計貨品 Visual arts and design goods	35,187	58,888	91,783	106,054	110,480	127,796
視聽及互動媒體貨品 Audio-visual and interactive media goods	276,249	347,103	370,599	415,080	399,201	368,887
表演藝術及節慶貨品 Performing arts and celebration goods	30,807	51,944	59,015	66,266	64,222	58,880
出版貨品（書籍及報刊） Publishing goods (books and press)	6,466	8,817	9,244	8,828	8,322	8,206
<b>選定文化及創意貨品的進口總額</b> <b>Total imports of selected cultural and creative goods</b>	<b>357,412</b>	<b>477,698</b>	<b>545,928</b>	<b>609,622</b>	<b>596,230</b>	<b>577,487</b>
佔貨品進口總額的百分比 % of total imports of goods	15.3%	14.2%	14.5%	15.6%	14.7%	13.7%

註釋： (1) 貨品整體出口包括港產品出口和轉口貨品。

資料來源：政府統計處商品貿易統計

Note: (1) Total exports of goods comprise domestic exports and re-exports.

Source: Merchandise trade statistics, Census and Statistics Department



**表 4 選定的文化及創意服務的輸出及輸入**  
**Table 4 Exports and imports of selected cultural and creative services**

百萬元  
\$ million

	2005	2010	2011	2012	2013	2014
<b>選定文化及創意服務的輸出</b>						
<b>Exports of selected cultural and creative services</b>						
廣告、市場研究及公眾意見調查服務 Advertising, market research and public opinion polling services	4,117	5,063	5,701	6,090	6,451	5,961
建築、工程、科學及其他技術服務 Architectural, engineering, scientific and other technical services	2,281	3,745	3,731	3,946	3,815	4,107
電腦服務 Computer services	1,608	6,307	6,621	7,027	7,293	7,380
資訊服務 Information services	451	570	742	766	760	726
視聽及有關服務 Audio-visual and related services	1,907	869	858	869	732	675
其他個人、文化及康樂服務 Other personal, cultural and recreational services	1,023	2,441	2,820	2,807	1,087	1,328
研究及發展以及與創新活動相關的服務 Research and development, and services related to innovation activities	412	395	535	606	903	1,209
特許經營權及商標以外的知識產權使用費 Charges for the use of intellectual property rights other than franchises and trademarks	1,833	2,795	3,268	3,660	4,024	4,129
<b>選定文化及創意服務的輸出總額</b>	<b>13,632</b>	<b>22,185</b>	<b>24,276</b>	<b>25,771</b>	<b>25,065</b>	<b>25,515</b>
<b>Total exports of selected cultural and creative services</b>						
佔服務輸出總額的百分比 % of total exports of services	3.7%	3.5%	3.4%	3.4%	3.1%	3.1%
<b>選定文化及創意服務的輸入</b>						
<b>Imports of selected cultural and creative services</b>						
廣告、市場研究及公眾意見調查服務 Advertising, market research and public opinion polling services	2,557	3,725	3,984	4,498	4,386	4,069
建築、工程、科學及其他技術服務 Architectural, engineering, scientific and other technical services	712	1,971	2,483	2,544	2,593	2,837
電腦服務 Computer services	2,884	3,788	3,481	3,706	4,260	5,087
資訊服務 Information services	435	596	730	774	1,127	1,022
視聽及有關服務 Audio-visual and related services	278	307	495	544	464	389
其他個人、文化及康樂服務 Other personal, cultural and recreational services	125	341	233	320	289	387
研究及發展以及與創新活動相關的服務 Research and development, and services related to innovation activities	1,174	908	917	1,047	1,069	1,250
特許經營權及商標以外的知識產權使用費 Charges for the use of intellectual property rights other than franchises and trademarks	7,430	11,908	11,993	11,907	11,001	10,375
<b>選定文化及創意服務的輸入總額</b>	<b>15,595</b>	<b>23,544</b>	<b>24,316</b>	<b>25,340</b>	<b>25,189</b>	<b>25,416</b>
<b>Total imports of selected cultural and creative services</b>						
佔服務輸入總額的百分比 % of total imports of services	3.6%	4.3%	4.2%	4.3%	4.3%	4.4%

資料來源：政府統計處進行的「服務輸入及輸出按年統計調查」

Source: Annual Survey of Imports and Exports of Services conducted by the Census and Statistics Department