

NEWSLETTER

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Institute of Shopping Centre Management

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High Street Rents to Maintain Single-digit Growth in Q1 2024

Mr Kevin Lam, Executive Director and Head of Retail Services Agency & Management, Hong Kong of Cushman & Wakefield, offers his valuable perspective on the dynamic realm of high-street rent. Additionally, he provides a comprehensive market analysis, shedding light on the retail and F&B sectors.

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Seminar: Exploring the Future of Retail with Smart Technology, CRM, and AI

Mr Ravel Lai, the Chief Information Officer of Uni-China Group, provided an exclusive insight into the future of retail, exploring the transformative potential of Smart Technology, Customer Relationship Management, and Artificial Intelligence.

Message from the Institute

Dear ISCM members and friends,

The past year has been marked by unprecedented challenges for retail and F&B. COVID pandemic has significantly impacted consumer behaviour, causing shifts in spending patterns and preferences. We have witnessed a rapid acceleration in the adoption of e-commerce, digital experiences, and contactless technologies. These changes have necessitated a deeper understanding of the evolving needs and expectations of our customers and retailers alike.

While challenges are undeniable, we firmly believe that they also present tremendous opportunities for growth and innovation. Technology, in particular, has emerged as a powerful driver of change and transformation in our industry. The integration of artificial intelligence (AI), blockchain, and environmental, social, and governance (ESG) practices has the potential to revolutionise shopping centre management.

At the ISCM, we are committed to equipping our members with the knowledge and skills needed to thrive in this dynamic environment. Throughout the years, we have organised a series of impactful Continuous Professional Development (CPD) seminars and study tours aimed at enhancing professional knowledge and fostering valuable networking.

Moreover, we recognise the immense opportunities presented by the Greater Bay Area (GBA). To enhance our members' understanding of this vibrant region and its potential impact, we have organised study tours and seminars focusing on the latest developments within GBA and Mainland China. These events have provided valuable insights into the economic landscape, investment trends, and regulatory considerations, empowering members to seize opportunities that arise.

We are excited about the future and the prospects that lie ahead. By staying at the forefront of the industry development, fostering collaboration, and nurturing professional growth, we are confident that ISCM members will be well-positioned to navigate these challenges and leverage the exciting opportunities that come their way.

We extend our sincere appreciation to all members for your unwavering support and active participation in our activities. Thank you for being part of the ISCM community. Together, we will continue to drive excellence and shape the future of shopping centre management.

Clement Tam
Director of Training & Learning (2022-24)



AGM: Enhancing Professional Training and Embracing GBA Opportunities

We are delighted to announce the successful election of the new Board Members during the 19th Annual General Meeting, which took place on 14 December 2023. Mr Baldwin Ko has been elected as our Chairman, and the recently formed Board of Directors will commence their two-year term starting from 1 April 2024.



Mr Baldwin Ko, Chairman of ISCM (middle), in his speech at the 19th AGM concluded that professional training will be this tenure's key mission. (From the left) Ms Bluebi Poon, Director of Training & Learning, Mr Wilson Lam, Director of Study Tour & GBA Communication, Mr Clement Tam, Hon. Secretary, Mr Ken Lam (Treasurer), Mr Chris Keung, Vice Chairman (External Affairs), Ms Michelle Li, Vice Chairman (Internal Affairs), Ms Katherine Ho, Vice Chairman (General Affairs), Ms Wendy Cheng (Director of Corporate Social Responsibility), Ms Jennifer Chan (Director of Membership & Welfare), Ms Po Liu (Director of Training & Learning), Ms Helen Mak (Director of Publication & External Affairs)

ISCM Board of Directors (2024-2026)

Chairman	Mr Baldwin Ko
Vice Chairman (External Affairs)	Mr Chris Keung
Vice Chairman (Internal Affairs)	Ms Michelle Lee
Vice Chairman (General Affairs)	Ms Katherine Lo
Honorary Secretary	Mr Clement Tam
Treasurer	Mr Ken Lam
Director of Study Tour & GBA Communication	Mr Wilson Lam
Director of Training & Learning	Ms Po Liu
Director of Training & Learning	Ms Bluebi Poon
Director of Events & Marketing	Mr Joseph Leung
Director of Corporate Social Responsibility	Ms Wendy Cheng
Director of Membership & Welfare	Ms Jennifer Chan
Director of Publication & External Affairs	Ms Helen Mak

In commemoration of our 20th anniversary, our newly elected Chairman, Mr Ko, emphasised during his closing remarks at the AGM the Institute's unwavering dedication to enhancing its capabilities in professional training. As part of this commitment, two Board Members, Ms Bluebi Poon and Ms Po Liu, were elected as Directors of Training & Learning. Beginning this year, our institute will expand its training and learning capacities while simultaneously striving to grow our membership base. Recognising the immense potential in the Greater Bay Area (GBA), Director of Study Tour & GBA Communication Mr Wilson Lam will continue facilitating connections with our industry peers in the GBA, fostering the exchange of experiences and promoting knowledge sharing.

Presentation of ISCM Student Award 2022/23

Following the 19th Annual General Meeting, our Honorable members Professor Rebecca Chiu, Dr Kwong and Professor Eddie Hui, along with our Founding Chairman Ms Maureen Fung, Chairman Mr Baldwin Ko, and Director of Training & Learning (2022-24) Mr Clement Tam, presented the ISCM Student Award 2022/23 to five exceptional students from Hong Kong's leading colleges and universities (Table 1). This prestigious award serves as a testament to the awardees' outstanding academic achievements and exemplary analytical skills in relation to their insights on the current state of the shopping centre management industry in Hong Kong.

Table 1: ISCM Student Award 2022/23

Awardees	Professors	
Chan Ka Kei	Ms Yanki Law	City University of Hong Kong
Lee Cheuk Him	Ms Hebe How	Hong Kong Polytechnic
Leung Ka Man, Carmen	Professor Fok Wan Yee Wendy	The HKU School of Professional and Continuing Education)
Li Waner, Sophia	Mr Gabriel Lee	University College of Estate Management
Yang Xizhuo	Mr Ervi Liusman	The Chinese University of Hong Kong



(from left) Honorable members Dr Kwong, Professor Eddie Hui, Professor Rebecca Chiu, Founding Chairman Ms Maureen Fung, (3rd from the right) Chairman Mr Baldwin Ko, Mr Gabriel Lee, HK Ambassador of University College of Estate Management and Director of Training & Learning Mr Clement Tam together presented the ISCM Student Award to five outstanding students

Boosting Nightlife: A Winning Strategy for Hong Kong's Tourism Industry

In the vibrant heart of Hong Kong, a tale of two nightlife experiences unfolds. While the festive atmosphere at Lan Kwai Fong seems to have lost some of its former allure, with sparse crowds and struggling businesses, a different story is emerging at the newly revamped Temple Street night market in Kowloon. Here, hundreds of people eagerly gathered to savor a wide array of local delicacies, sold at over 30 stalls.

Raymond Chan Kam-wing, chairman of the Yaumatei Temple Street Association of Hawkers and Shop Operators, expressed his delight at the market's revival. He revealed that the market's transformation has not only breathed new life into the area but has also attracted a surge of visitors, both locals and tourists. Currently, about 70% of the visitors are locals, while the remaining 30% are tourists. However, Chan hoped to see this ratio shift in the future, with more non-locals, particularly those from mainland China, discovering the market through online promotions and choosing to explore it when visiting Hong Kong.

Dane Cheng, the executive director of the Hong Kong Tourism Board, shared Chan's optimism. He believed that Temple Street has the potential to become a thriving night spot, drawing in a larger number of visitors from across the globe, including mainland China. "We are very confident that the number of visitors, both local and international, would increase to Temple Street, particularly as a night spot for Hong Kong," Cheng stated. He emphasised the board's commitment to creating a captivating ambiance for visitors, especially in the evening hours.

Nestled in Yau Ma Tei, the revamped market houses around 30 food and snack stalls, offering a delightful selection of local delicacies such as fish balls, siu mai, and imitation shark's fin soup, along with a variety of Asian cuisines. This vibrant night market, spanning a six-month period, is part of the government's Night Vibes Hong Kong campaign, aimed at revitalizing the city's nightlife and giving a much-needed boost to the economy.

The market's transformation is just one facet of the government's broader efforts to invigorate the nighttime economy. Vendors can now operate their stalls at the bazaar without the burden of rent, thanks to the Night Vibes Hong Kong campaign. This move aims to encourage both established and aspiring entrepreneurs to showcase their offerings and contribute to the thriving nighttime scene.

Support for the market's long-term success comes from various quarters. Lawmaker Scott Leung Man-kwong envisioned the market evolving into a popular gathering



Photo courtesy: Hong Kong Tourism Board
Temple Street night market witnessed a bustling scene as both locals and tourists flocked to indulge in the delectable street snacks on offer

spot for ordinary citizens. He proposed incorporating local cultural elements and embracing creative youth culture to further enhance its appeal.

Anthea Cheung, director of the Lan Kwai Fong Association, revealed on a radio programme that the famous after-dark entertainment district in Central experienced fewer visitors during Christmas compared to the previous year when Covid-19 restrictions were still in place. To attract more overseas visitors, Cheung recommended organising large-scale concerts and inviting international stars to perform in Hong Kong.

Taking inspiration from Taiwan's Shilin Night Market, the new look of the Temple Street market exudes a vibrant and inviting atmosphere. Many of the food stalls are operated by restaurants situated along Temple Street, while others are run by establishments from neighboring streets.

As Hong Kong strives to revitalise its tourism industry, the focus on boosting nightlife presents an opportunity for the city to reclaim its position as a global hotspot. With the Temple Street night market leading the way, a captivating and thriving nightlife scene could become the driving force behind Hong Kong's tourism resurgence.

Louis Vuitton Makes a Stunning Debut in Hong Kong, Shining Light on the City's Resurgence as a Global Shopping Mecca

In a groundbreaking move that captured the attention of fashion enthusiasts worldwide, luxury brand Louis Vuitton recently staged its inaugural fashion show in the vibrant city of Hong Kong. This iconic event, held against the breathtaking backdrop of the harbour, not only showcased the brand's pre-fall men's collection designed by the creative genius Pharrell Williams but also symbolised the city's ongoing efforts to reclaim its status as a premier tourism and shopping hub.

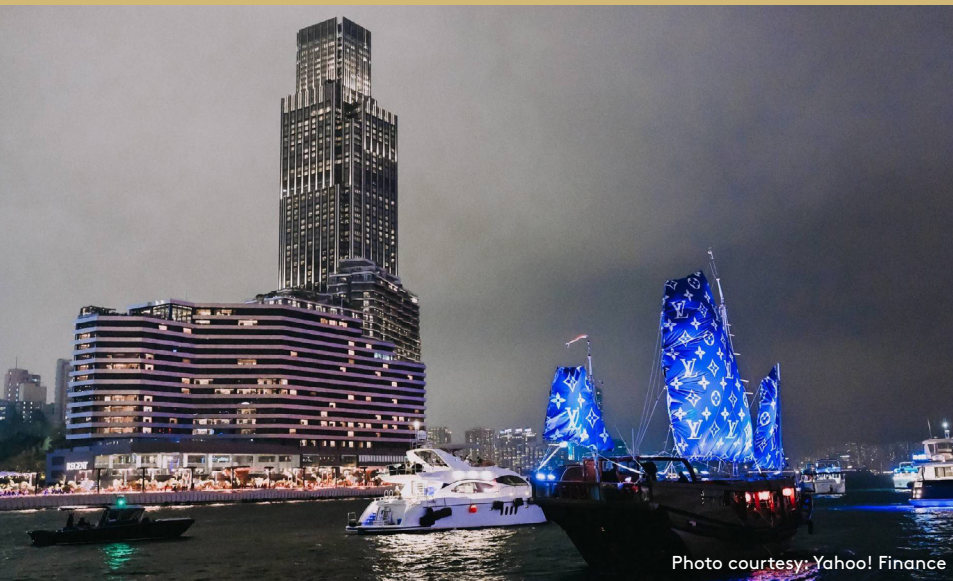


Photo courtesy: Yahoo! Finance

Louis Vuitton's first-ever Men's Pre-Fall 2024 collection was presented at Avenue of Stars in K11 Victoria Dockside



Photo courtesy: ARR

According to K11 Group, Louis Vuitton's first show in Hong Kong was set to reinvigorate the city's waterfront, while signifying the shared commitment between Louis Vuitton and the K11 Group to promote fashion, arts, culture, and beyond.

A big splash

Taking place at the K11 Victoria Dockside's renowned Avenue of Stars promenade, the show received overwhelming support from K11 MUSEA, an integral part of New World Development's ambitious harbour-front project. Against the backdrop of Hong Kong's struggles to regain its allure as a global luxury shopping destination, this high-profile event stood as a testament to Louis Vuitton's unwavering commitment to the city's potential.

Following the untimely passing of Virgil Abloh in 2021, Louis Vuitton appointed Pharrell Williams as its menswear designer, and this show marked his debut in the role. Previously, Williams had already made waves with his first show in Paris, an extravagant affair attended by an array of A-list celebrities, including Beyoncé, Kim Kardashian, Rihanna, and Formula One champion Lewis Hamilton.

Pietro Beccari, the CEO of Louis Vuitton, emphasised the significance of Hong Kong as a regional retail and business hub for the brand. In an interview with The South China Morning Post, he expressed his admiration for the city, saying, "I think Hong Kong, for everybody, is one of the

most brilliant, prolific, successful cities in Asia." Beccari further underscored the show's purpose, stating, "This show is about celebrating a city that has been and will always be in the heart of the people as one of the most beautiful and most important in Asia."

In a move that mirrors Louis Vuitton's foray into Hong Kong, Dior, another esteemed brand under the LVMH umbrella, announced its plans to hold its own men's pre-collection show in the city. Although the venue and date are yet to be confirmed, the event is set to take place in early 2024, further solidifying Hong Kong's reemergence as a fashion capital. This show will mark Dior's return to Hong Kong since its last menswear show in 2016 and is especially significant considering the brand's 11 stores scattered across the city.

Nevertheless, Hong Kong's journey to reclaim its status as Asia's premier fashion and luxury retail destination has been fraught with challenges. The city has endured the devastating impact of prolonged Covid-19 lockdowns, as well as socio-political unrest in 2019 and 2020. These obstacles have weakened its appeal to tourists, while mainland Chinese visitors, who represent a significant percentage of the city's retail landscape, have become

more cautious about their spending due to economic uncertainties at home.

Stiff competition from neighbours

Moreover, Hong Kong faces stiff competition from neighbouring shopping and entertainment havens, such as Macau, renowned for its gambling offerings, and Hainan, China's tax-free island. Despite the challenges, Hong Kong remains a top shopping destination for China's affluent elite, as affirmed by a recent survey conducted by Agility Research and Strategy. The study, which focused on 2,000 high-net-worth individuals, highlighted shopping as the primary motivation for visiting Hong Kong, closely followed by sightseeing and vacationing. However, the report emphasised that luxury experiences and entertainment also play pivotal roles in attracting these discerning tourists. To regain its status as Asia's shopping hub, Hong Kong's retailers and hospitality establishments must intensify their efforts to entice Chinese visitors with unique and memorable experiences.

Between its reopening in early 2023 and November of the same year, Hong Kong warmly welcomed a total of 30.07 million tourists, primarily from mainland China, according to the Hong Kong Tourism Board (HKTB). The ongoing revival of inbound tourism played a pivotal role in driving Hong Kong's retail sales, which continued their impressive growth streak for the 12th consecutive month in November 2023, as reported by the government. Retail sales in November amounted to HK\$34.2 billion, saw a substantial year-on-year increase of 15.9%. This surge in sales surpassed the growth rates observed in October (5.8%) and September (13%). "An expected further recovery of inbound tourism should continue to benefit the retail sector," a government spokesman said.

In a report titled "The Redefined Mainland Tourists," NielsenIQ outlined the evolving preferences of mainland Chinese tourists visiting Hong Kong. The study revealed that a majority of these tourists seek retail experiences during their repeat visits, valuing the unique product offerings available in Hong Kong. The report also emphasised the significance of tailored promotions and retail experiences, as global inflation has diminished the price advantage for tourists. Mandy Tam, Vice President of Consumer Insights at NielsenIQ, suggested that leveraging social media platforms for engaging and targeted marketing would enhance the overall visitor experience.

Regained global luxury supremacy

In fact, Hong Kong has regained its position as the market with the highest per capita expenditure on luxury goods, according to a recent report by Euromonitor. The city's post-pandemic growth in the Asia-Pacific region has been led by the luxury jewellery market. The report also predicts that Hong Kong will return to its pre-pandemic levels of luxury sales by mid-2024.

Yen Leng, Executive Director of Wharf Estates, highlighted the strong performance of Harbour City in the first three quarters of 2023. All 17 shops on Canton Road are currently leased by internationally renowned luxury brands. Sales of high-end luxury brands have surpassed pre-pandemic levels by double digits, with 5 to 6 brands on Canton Road achieving their highest sales worldwide.

Alvin Kong, Executive Director of Commercial Property at Hongkong Land, also noted the festive atmosphere in the market after three challenging years due to the epidemic. He expected sales at Landmark in Central to increase by around 20% year-on-year during the Christmas season. The group is in discussions with several major luxury brand tenants regarding their potential expansion plans.

Tailored travel experiences

As reported by Jing Daily in recent weeks, the identity of Hong Kong as a shopping and tourism hub is evolving, with an increased focus on unique and experiential offerings. An interviewee shared her perspective on Xiaohongshu, stating, "When I visit Hong Kong, I feel like I am on a different planet. Hong Kong is a vibrant and multicultural place, and when you are here, you enter a unique world." This sentiment reflects the allure of Hong Kong as a distinct and captivating destination.

Meanwhile, Hong Kong government has made efforts to revive visitation through initiatives such as distributing free plane tickets and organising night markets and other activities to boost local consumption. Local tycoons, including Henry Cheng and Adrian Cheng of New World Development, have been enlisted by the government to support these endeavours. New World Development has implemented measures such as voucher distribution, extended trading hours at its malls, and weekend night markets at the Avenue of Stars, a promenade along Victoria Harbour.

Now, with the return of A-list luxury events and the presence of major brands in the city's commercial districts, such as Chanel's high-priced two-story retail space in Causeway Bay and recent store openings by Dior, De Beers, and Bulgari, brands and retailers are contemplating whether Hong Kong will experience a renaissance in retail and tourism after all. The influx of renowned brands and high-profile events raises hopes for the city's revival as a premier shopping and tourism destination.

High Street Rents to Maintain Single-digit Growth in Q1 2024

Since Hong Kong's border reopening at the end of 2022 and the gradual return of mainland China and international travelers, the city's retail landscape has undergone an evident transformation. Major global brands have tended to concentrate their presence in premium high street districts and in the best-managed shopping malls, taking a conservative approach towards new expansion possibilities.



Photo courtesy: Hong Kong Tourism Board

Cushman & Wakefield expects Hong Kong's high street rents to maintain single-digit growth in the range of 2% to 7% in 1H 2024

The preferences of inbound tourists have also shifted, from the prior focus on "shop till you drop" shopping behavior towards a greater emphasis on enjoying personal experiences and social media-driven activities. Meanwhile, the spending habits of Hong Kong locals have seen a reverse trend of heading north to neighboring GBA cities for leisure, dining and shopping.

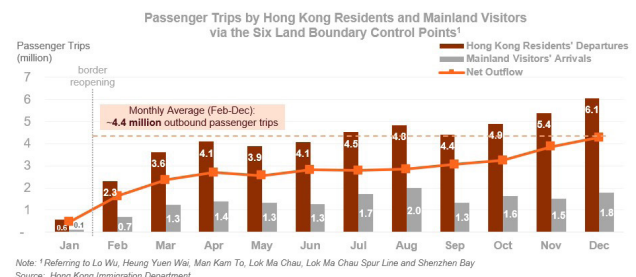
1. Overview of the Hong Kong retail landscape in 2023 following the borders reopening: figures, trends and new challenges
2. Experiential retail and new mainland China brands are starting to take the lead with consumer preferences in Hong Kong
3. Recommendations on the way ahead for the Hong Kong retail market

This changed environment has generated pressures on the recovery of overall retail sales in Hong Kong in the daily necessities sector and in F&B consumption. However, it has also opened new opportunities for mainland China F&B and entertainment operators to take advantage of the new situation and to expand their presence in the Hong Kong marketplace.

The latest Hong Kong Tourism Board data shows that total visitor arrivals into the city for the January to November 2023 period was approximately 30.1 million. This figure is only 57% of the visitor count for the same period in 2019, which was about 52.7 million visitors. In comparison,

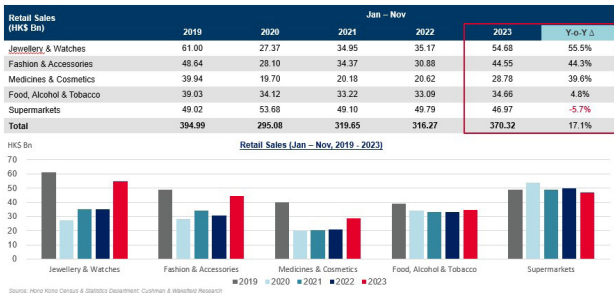
when looking at Hongkongers' traveling to Shenzhen, Immigration Department data shows that Hong Kong residents completed 4.4 million passenger trips into Shenzhen per month in the February to December 2023 period, traveling via the six land boundary control points, and contributing to an average of 2.9 million net outflows per month.

Chart 1: HK Residents Heading North for Leisure Spending



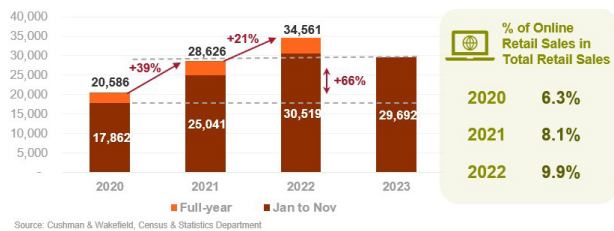
The gradual return of tourists in 2023 continued to underpin Hong Kong's overall retail market recovery, with total retail sales amounting to HK\$370.3 billion for the January to November 2023 period, an increase of 17.1% y-o-y, although coming from the low base of last year. The Jewellery & Watches retail category recorded the most significant growth at 55.5% y-o-y, while the Fashion & Accessories and Medicines & Cosmetics sectors rose by 44.3% and 39.6% y-o-y, respectively.

Chart 2: Hong Kong Retail Sales



Jewellery & Watches brands, together with Medicines & Cosmetics stores, continued to expand their presence in core retail locations in Q4, prompting the overall retail market vacancy rate to drop further from the levels seen in the prior three years. However, in the supermarket retail category, the net outflow of Hong Kong residents seen through the year continued to contribute to downwards pressure on sales, resulting in a fall of 5.7% y-o-y, and consequently dropping 12.5% from the 2020 level. Regarding the online versus offline retail environment, the pandemic period certainly boosted the popularity of online shopping, with online sales accounting for 9.9% of total retail sales in 2022, as compared to 6.3% in 2020.

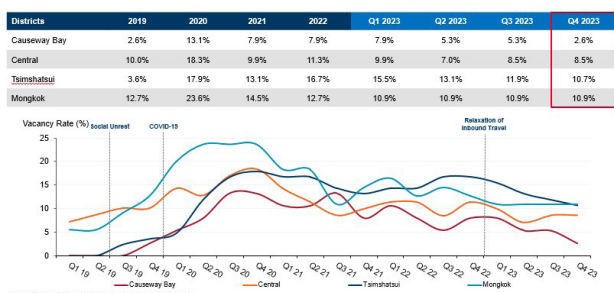
Chart 3: Hong Kong Online Sales



In the core retail area of Causeway Bay, the high street store vacancy level dropped to 2.6% in Q4, similar to its 2019 level. The vacancy rate in Tsim Sha Tsui dropped to 10.7% q-o-q, while other key retail districts such as Central and Mong Kok maintained stable vacancy rates.

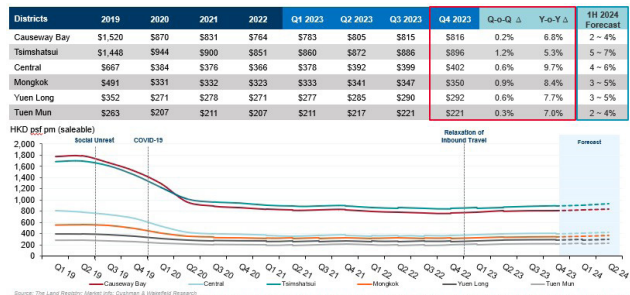
Despite the vacancy rate in Causeway Bay now falling back to the pre-pandemic 2019 level, brand mixes have largely changed and evolved during the three-year pandemic period as rents have been more attractive, with some traditional luxury brands being replaced by pharmacies and daily necessities stores. Jewelry brands have also remained cautious in their expansion strategies, although some are still opting to take up prime locations for superior footfall and to stay close to peer brands, with Tsim Sha Tsui a popular submarket.

Chart 4: Vacancy Rates Across Districts



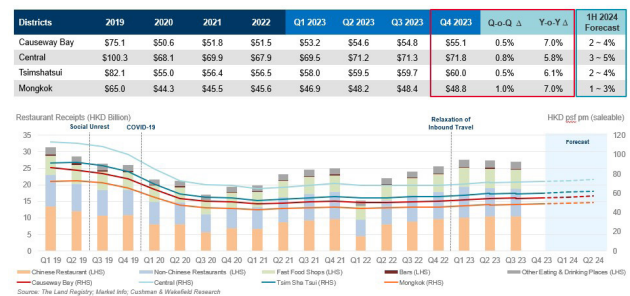
High street retail rental levels registered low single-digit growth in Q4 2023, supported by the tightened vacancy rates across districts. Year-on-year rental increases across all districts ranged from 5% to 10%, with the Central submarket recording the most notable strengthening at 9.7% y-o-y.

Chart 5: High Street Rent Across Districts



In the F&B sector, rents in all districts also recorded mild q-o-q increases, with y-o-y growth ranging from 5% to 7%.

Chart 6: F&B Rents Across Districts



Looking ahead to 2024, we expect to see further upgrading and consolidation activities across the Hong Kong retail market, while consumers are likely to place greater emphasis on seeking experiential consumption, which will further help to drive retail occupancy and support rents. We expect high street rents to maintain single-digit growth in the range of 2% to 7% in 1H 2024. However, landlords and retailers must focus on providing customers with more diverse retail experiences, by including retailtainment, sports, wellness and experiential concepts, which in turn will stimulate foot traffic and revenues, and also help strengthen community engagement and enhance corporate branding from an ESG (Environmental, social and corporate governance) perspective.



Kevin Lam

Executive Director,
Head of Retail Services Agency &
Management,
Hong Kong Cushman & Wakefield

New Members

All Board members and Honourable members Mr. Raymond Kwok, Mr. Michael Tien, Dr. Roger C.K. Chan, Professor Rebecca L.H. Chiu, Professor Eddie C.M. Hui, Professor Sin Yat Ming and Dr. T.M. Kwong welcome the following new members:

Full Member

Chek Chun Sing
Lewis Yau

Membership Application

Our Membership is open to any individual person who is a practitioner in shopping centre industry. Students who have enrolled in the course of shopping centre management at HKU School of Professional and Continuing Education (HKU Space) or other relevant courses will also be considered.

Grade of Membership

Fellow Member

Full Member

Associate Member

Student Member

Annual Fee

HK \$1650

HK \$1100

HK \$ 720

HK \$ 280

Online application can be completed at the following link:

www.iscm.org.hk



Institute News

Seminar

Exploring the Future of Retail with Smart Technology, CRM, and AI

On 29 November 2023, Mr Ravel Lai, the Chief Information Officer of Uni-China Group, presented at our seminar titled "The Future of Retail: Unleashing the Power of Smart Technology, CRM, and AI." During the seminar, Mr Lai provided an exclusive insight into the future of retail, exploring the transformative potential of Smart Technology, Customer Relationship Management (CRM), and Artificial Intelligence (AI). He discussed how these cutting-edge advancements are reshaping the retail landscape across various industries, including FMCG, fashion, luxury goods, automotive, and F&B. Attendees had the opportunity to delve into the strategic role of Smart Retailing, which enables personalised customer experiences, streamlines operations, and drives sustainable growth. Valuable insights were shared on harnessing the power of CRM and AI to enhance customer loyalty, optimise inventory management, and unlock new revenue streams.



Ravel Lai, the Chief Information Officer of Uni-China Group (3rd from the left) received a souvenir from our board members. (from the left) Ms Katherine Ho (Director of Membership & Welfare), Mr Clement Tam (Director of Training & Learning), Ms Michelle Li (Vice Chairman), Mr Chris Keung (Vice Chairman) and Mr Ken Lam (Treasurer)

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