# Public Opinion Survey on Victoria Harbour

prepared for Harbour Business Forum



#### **PRESENTATION OF**

## LITERATURE REVIEW AND **FOCUS GROUPS**

prepared for



H055134 Paul Yao/Paul Tang/Maria Ho

February 2006







## Flow of Presentation





#### Flow Of Presentation

# Introduction Research Background & Objectives Research Design **Literature Review Of The Harbour Usage & Attitude Towards The Harbour Current Public Perceptions Of The Harbour Future Of The Harbour Executive Summary**







## Introduction





#### **Research Background**

- ➤ The Harbour Business Forum (HBF) is an informal group of over 100 leading Hong Kong corporations and business groups. The purpose of HBF is to promote better planning and coordination of projects related to the well-being and future prospect of the Harbour.
- ➤ In order to gain a better understanding of the Hong Kong public's perception and usage of and their attitude towards the Harbour, a research program was developed, employing both qualitative and quantitative methodologies with the following objectives
  - Squage current knowledge and usage
  - **♦** Obtain opinions about the current state of the Harbour
  - **♦ Seek views on its future**
  - Determine differences in usage and opinion by various demographic measures,
     e. g. age, gender, income, place of residence and place of work/study
- ➤ A literature review and focus group discussions were used in the qualitative study and this document summarizes the key findings





#### **Research Objectives - Qualitative**

- > The Literature Review had several objectives
  - **♦** Identify key themes related to the Harbour
  - **♦** Identify key descriptions and perceptions of the Harbour
  - **♦ Identify key directions for the future development of the Harbour**
  - Provide key directions for areas of investigation in the subsequent focus group discussions and quantitative survey
- > The Focus Group Discussions had several objectives
  - Explore the general usage behaviour of the Harbour, i.e. when, where, how; direct vs indirect usage; intentional vs casual
  - **♦ Look into the awareness of the Harbour (issues & concerns, development plans)**
  - **♦** Investigate current perceptions of and attitudes towards the Harbour
  - **♥** Explore the notion of the Ideal Future Harbour
  - Seek information and opinions about schemes and ideas currently proposed for the Harbour





## **Research Design – Focus Group Discussion**

> Six focus groups, each with eight participants, were conducted in November 2005 at the ACNielsen office

	Group 1	Group 2	Group 3	Group 4	Group 5	Group 6
Age	15 - 18	19 - 24	25 - 44		45 - 64	
Occupation	Teens	University Students	White Collars	Blue Collars	White Collars / Retirees	Blue Collars / Retirees
Usage of The Harbour	All must have some connection to the Harbour:  > Living in close proximity > Using the Harbour to commute or for leisure > Having a clear view of the Harbour from home at a distance					





# Literature Review of The Harbour





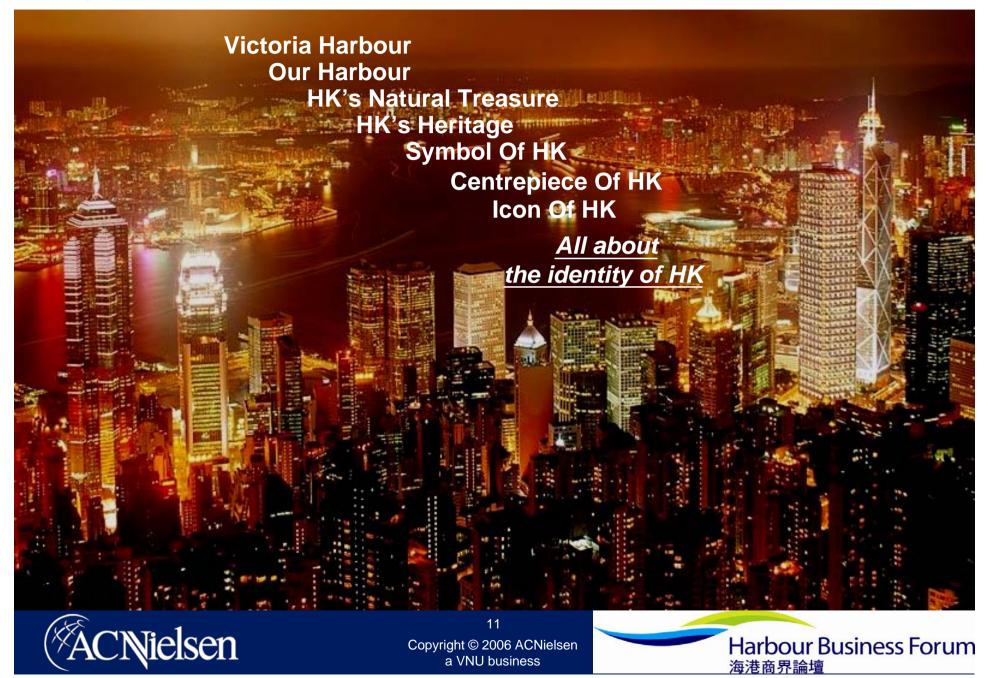
#### Ad Hoc Literature Review Of The Harbour



## **Key Themes Emerge...**



## **Key Descriptions Of The Harbour**



### Joys, Hopes, Grievances and Fears





## **Focus Groups**











#### **Usage and Attitude Towards The Harbour**

- > To establish our baseline understanding of what consumers think of the Harbour and how consumers use the Harbour we prepared a series of questions to guide the focus group discussions
  - ♦ What comes to mind when you hear 'Victoria Harbour'? What else do you think of?
    - → Probe any issues that came of out the Literature Review, e. g. prosperity, lifestyle, entertainment, heritage, environment, pollution, transportation, ecosystem and urban planning
    - → If the consumers mention any changes or trends in developments, ask about specific changes, the reasons, how such changes impact on the respondents and their families, what they see the future impact of such developments on them and the community
  - ♦ How do you see / view the Harbour? What issues, concerns, expectations and reservations you may have regarding the Harbour?
    - → Gauge how positive or negative the consumers may be and why.
  - **♦ What role does the Harbour play in your life? In the community?**
  - **♦ How would you describe the significance of the Harbour? What is it similar/dissimilar to?**
  - ♦ When do you use or come into contact with the Harbour and its surrounding amenities/facilities. How often and on what occasions?





## **Significance of The Harbour**



#### **Touch Points of The Harbour**

- > Anytime
  - **♦** Commuting by ferry
  - **♦** Fishing
- > Daytime
  - ♦ Jogging & exercising
  - **♦** Studying (teens)
- Night-time
  - ♥ Strolling
  - **♦** Chatting with friends

#### **Intimate**

- > The big events
  - **♦** Firework
  - **♦ A Symphony of Lights**
  - **♥ CNY parade / CNY lights**
  - **Christmas lights**
- > Travel spots
  - ♦ Avenue of Stars / Bruce Lee statue / Golden Bauhinia Square (with overseas visitors)

#### Regular

- Distant view from home / office
- Commuting by vehicle
  - ♥ Popular routes: Eastern Island Corridor, the three Cross Harbour Tunnels, etc.

**Special** 

- Distant view from a restaurant
  - **♥** Usually for a celebration
  - **♥** Popular locations, e.g. The Peak, Tsimshatsui, Causeway Bay, Central. etc.

**Distant** 

These touch points allow us to better understand the Harbour in terms of definitions of the Harbour and mindsets while using the Harbour





#### **Definitions and Mindsets of The Harbour**



- Personal space
- Free and peaceful
- No pressure





- For intimacy / impact
- Big crowd enhancing atmosphere / mood





- Relaxing & calming
- Symbol of success / pride



**Distant** 

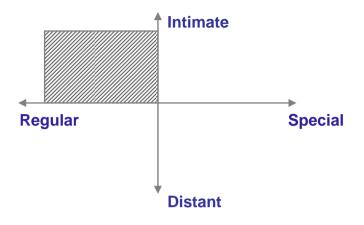
#### Special

- > Enjoy from afar
- Avoid the crowds
- Special angle / scenery for special occasion





## **Associations with the Harbour (I)**



- > Anytime
  - **♦** Commuting by ferry
  - **♦** Fishing
- > Daytime
  - **⇔** Jogging & exercising
  - ♦ Studying (teens)
- Nighttime
  - **⇔** Strolling
  - ♦ Chatting with buddies



#### Likes

 Difficult to access The Harbour (teens and university students) – want to have privacy

#### **Dislikes**

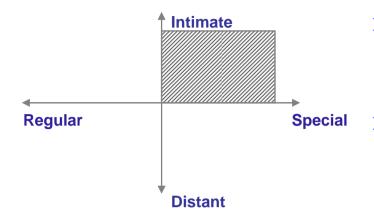
- **⊗** Bad water quality
- **⊗** Bad air quality bad smell
- ☼ Inadequate public areas / greening along harbour side
- **⊗** Width of the Harbour is getting narrower the ferry trip is less enjoyable

- ➤ Harbour performance is sub-par on this aspect
- >Areas to be improved more natural environment and facilities





### **Associations with the Harbour (II)**



- > The big events:
  - **♦** Firework
  - **♦ A Symphony of Lights**
  - **♦ CNY parade / CNY lights**
  - **♦** Christmas lights
- Travel spots:
  - Avenue of Stars / Bruce Lee statue / Golden Bauhinia Square (with overseas visitors)



#### Likes

- ☺ Iconic developments are around "I have been there"
- New initiative like A Symphony of Lights is to increase the appeal

#### **Dislikes**

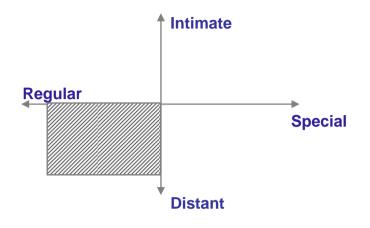
- Special traffic arrangements ineffective during big event takes longer time to travel to the prime districts
- **⊗** Public areas cannot cope with large crowds
- Difficult to access the harbour-side in a district like Causeway Bay (all except the teens)

- > Harbour performance is on-par on this aspect
- > Area to be improved better arrangements for big events





## **Associations with the Harbour (III)**



- Distant view from home / office
- > Commuting by vehicle
  - **♥** Popular routes: Eastern Island Corridor, The three Cross Harbour Tunnels, etc.



#### Likes

**○** New road system to ease the traffic condition

#### **Dislikes**

- ⊗ Bad air quality smog and haze
- **⊗** Traffic jams still inevitable
- **⊗** The harbour view is not guaranteed tall or big buildings in front block the view
- **③ Tall or big buildings on opposite harbour** side block the Kowloon hills

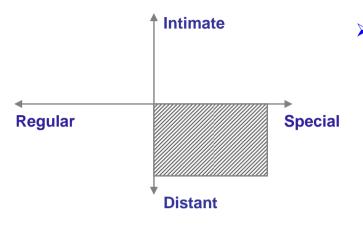
- > Harbour performance is sub-par on this aspect
- > Areas to be improved better urban planning on roads and skyscrapers





a VNU business

## **Associations with the Harbour (IV)**



#### Distant view from restaurant

- **♥** Usually for celebration
- Popular locations, e.g. The Peak, Tsimshatsui, Causeway Bay, Central, etc.



#### Likes

⊙ Nil

#### **Dislikes**

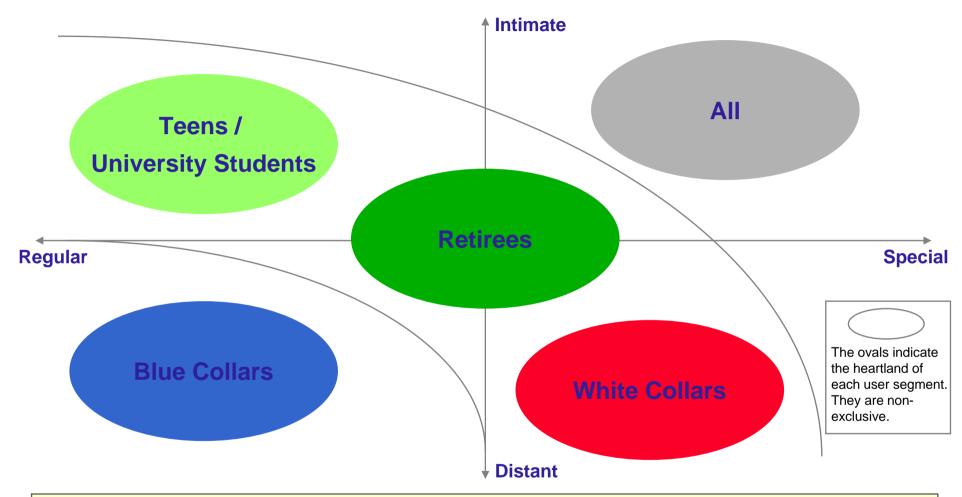
- **⊗** Width of The Harbour is getting narrower the view is ruined
- **⊗** Construction and reclamation sites ruin the view

- ➤ Harbour performance is sub-par on this aspect➤ Areas to be improved better urban planning on reclamation and construction





### **Usage And Attitude Toward The Harbour**



- > Teens, University Students and Retirees tend to be more involved with the Harbour
- ➤ Their requirements are relatively simple: natural environment and basic facilities like jogging trail and playground.





# **Current Public Perceptions**of The Harbour





#### **Current Public Perception Of The Harbour**

- To better comprehend the publics' perception of the harbour, a projective technique, The Image Gallery, was used
  - \$\times\$ The respondents, representing different segments of the public, were asked to select images from a pool of nearly 100 images to reflect how they feel about The Harbour.
- Consistently across all segments, three key themes emerge







a VNU business

## **Identity - Heritage**







- Fragrant harbour as our heritage
- History of fishing & seafaring
- Deep sea port and home to international liners and warships
- Used to host cultural events e.g. cross harbour swim, dragon boat



"We were taught in primary school that Hong Kong was a fishing harbour. That's our history. The Harbour was our livelihood. It's our duty to remember."

Younger White Collar

"The Harbour reflects the progress and development of Hong Kong. Look at the buildings and skyline around the Harbour. They are here because of the Harbour and the hard work we have all put in."

Younger Blue Collar



"I want my kids to witness and experience the changes of Hong Kong via the Harbour not just from text book." Older White Collar





## **Identity - Modernity**



- Bright lights / Big City
- Our World City
- > City which never sleeps
- World class fireworks and laser shows
- > State-of-the-art skyscrapers



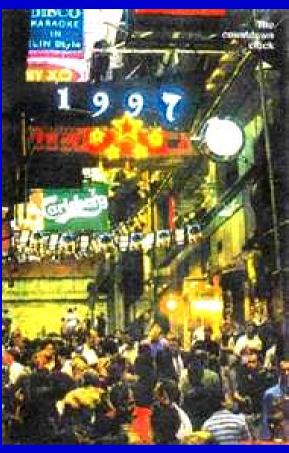
"From fireworks to laser shows, Hong Kong has the best." Older Blue Collar

"The shining pearl of the Orient, where else can you find a night scenery so vibrant and full of life?"

**Younger White Collar** 

"Hong Kong has come a long way and we have moved on. Our Harbour reflects what we have achieved... and what we believe in... Progress."

Retiree











### **Identity - Prosperity**



- Extravagant fireworks and laser shows
- Christmas and CNY night lights
- Busy traffic, land and sea
- Taller and taller skyscrapers
- Hub of Asia, if not the world
- Compact concentration of wealth around the Harbour



"We have the wealth to flaunt. The night sky is lit up with fireworks for the world to see. We are vibrant and we are proud."

Younger Blue Collar

"When I see the busy harbour with ferries & ships. It reminds me of the energy & vitality of Hong Kong... and how much we have achieved."

**Older White Collar** 

"Look at our Harbour. That's our pride. It shows what we have accomplished over the years."

Retiree













### **Sanctuary - Guardian**

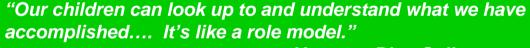




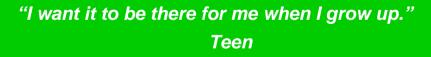
- Witness to my success, my growth, my family
- Watches over me
- Encourages me to go on
- > Reminds me of my goals
- > Be there for me

"It is not just a backdrop.... It reminds me of the hard work we have to put in to be successful. It's like a beacon."

**Older White Collar** 



Younger Blue Collar



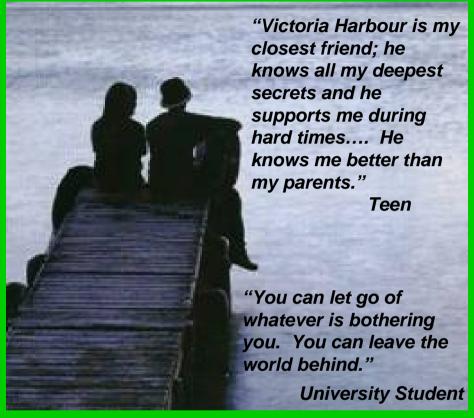
"It guards what I believe in – Hong Kong."
Retiree







## **Sanctuary - Companion**



- A place where singles, best friends, lovers, couples hang out
- > A place where you get to be yourself
- > Totally free
- No strings attached
- Part of growing up



"A place where I can be myself, relax and be with my friends.... You have the time and space all to yourselves. No pressure."

Teen

"It's an old friend from childhood. It's calm and reassuring simply being there."

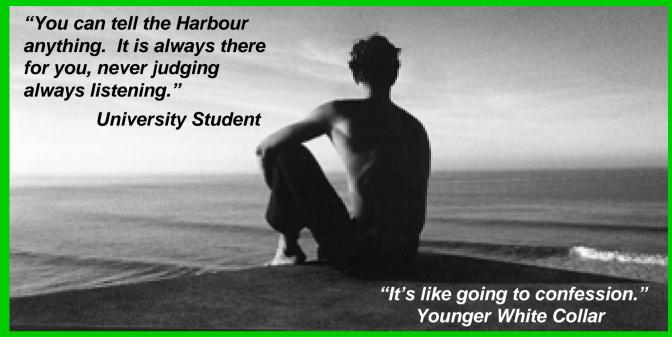


Retiree





## **Sanctuary - Confidant**





"The Harbour knows. You don't even have to talk. It accepts you the way you are."

Retiree



"You can't tell your parents everything.
Sometimes not even your best friends.... The Harbour is old and wise.... I like to just sit there and talk to the Harbour."

- > For personal space
- > Like a pod, a cocoon
- Total peace and tranquility
- > My confidant
- Guardian of my secrets
- > A good listener
- Someone I trust, I can count on



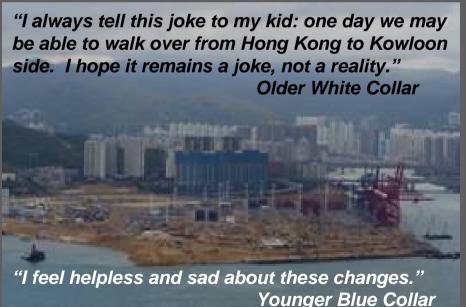


#### **Victim - Abused**





- > Never-ending constructions & reclamations
- > Too commercial, money-minded
- More about the city, the skyscrapers than the Harbour
- Concrete over nature
- Stripped off its natural elements
- Polluting the environment ~ Harbour, air, noise, and surrounding areas
- Haze, smog over the Harbour
- Choking the Harbour, the city to death
- Harbour becoming lacklustre
- Becoming sterile







#### **Victim - Silenced**

- Government ignoring public opinion
- Groups argue amongst themselves
- Treat the Harbour as disposable
- No proper channel to speak out for the Harbour

"It's like there is an invisible wall to hinder me from getting close to the Harbour."

Older White Collar









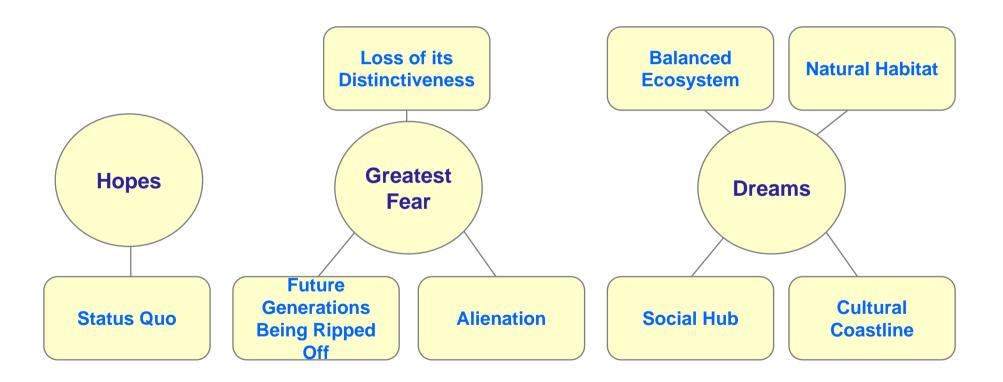
## **Future of The Harbour**





#### **Public Perception Of The Future Harbour**

- The Image Gallery was also used to capture the public's 'Ideal Harbour in the future'
- Consistently across almost all segments, three key themes emerge with teens, university students, white collar and retirees







## Hopes - Status Quo (All Segments, esp. Blue Collar)



- No more reclamation
- Maintaining current state already acceptable for blue collar
- Strike a good balance a good mix of both recreation areas and commercial buildings

"Lock it up in a safe so that it won't change, so that I will always have this friend."

University student

"Protect the Harbour as if a parent would protect a kid."

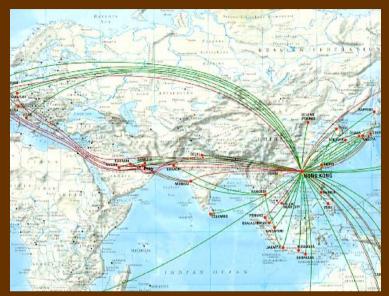
**Older Blue Collar** 







### **Greatest Fear - Loss Of Hong Kong's Distinctiveness** (All Segments)



"I want to be proud of being a Hong Konger – having a unique Harbour that cannot be found anywhere in the world."





The Harbour may no longer....

- Represent the identity of Hong Kong
- Live up to its world acclaimed Pearl of the Orient
- Be a 'must see' attraction in Asia
- Act as the hub for Asia

"It's the landmark for Hong Kong – historical architectural structure for Europe and Victoria Harbour for HK. The peak is meaningless without the Harbour." "When you see the Clock Tower, you know you are in TST, when you see the Victoria Harbour, you know you're in Hong Kong."

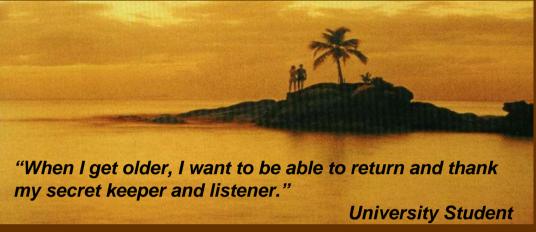
Younger White Collar

Older Blue Collar



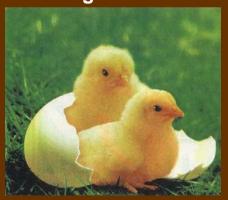
## **Greatest Fear - Loss Of My Distinctiveness** (All Segments)





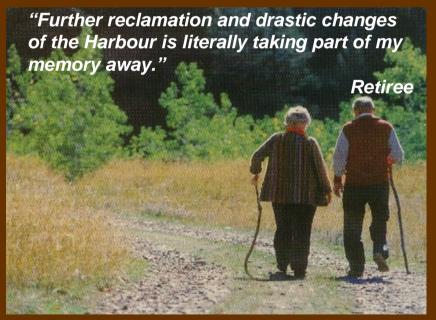
Changes to Victoria Harbour mean...

- Loosing the witness of life
- Loosing a growing partner
- Loosing pride and glory to be a Hong Konger



"Some resemblance of its older look reminds me of my past – the happy times, the hard times; and what life is all about."

Older Blue Collar







### **Greatest Fear - Ripping Off Our Future Generations** (All Segments)



"It acts as a reminder of our roots – fishing port."

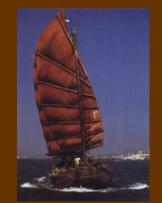
Younger Blue Collar

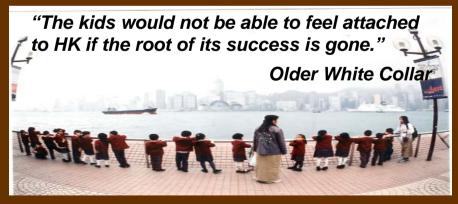
With a very different Harbour, the next generation...

- Cannot see the roots of HK
- Cannot experience the special nature of the Harbour
- Cannot see and learn about how Hong Kong has changed

"Seeing is believing. What's better than show and tell for our kids on how Hong Kong got to where it is now!" Older White Collar

"I want my kid, the next generation, to be able to see the same Harbour." Younger White Collar









# **Greatest Fear - Alienation** (All Segments)

#### Fear of the Harbour...

- No longer a place that is cherished and respected by people
- Infiltrated by tourists, esp. mainlanders, with diminishing ownership by HK public





"Getting more distant from it, less relaxing and leisure like, with too many tourists." Older White Collar

"Becoming a forgotten place."

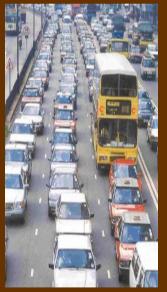
Younger White Collar

"The Harbour is for us, not tourists."

**University Student** 

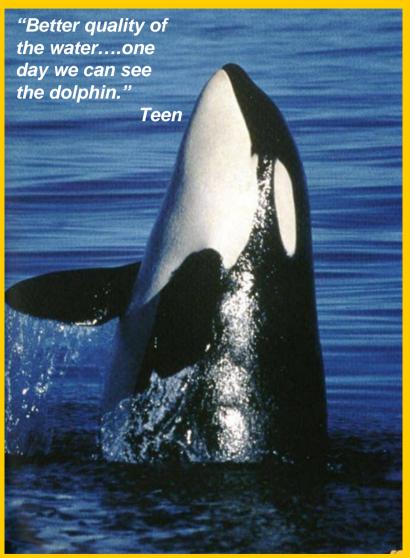
"Too many mainlanders may make the place too crowded and noisy."

Younger Blue Collar





## **Dreams - Balanced Ecosystem**(All Segments)



- Pollution free get closer to the Harbour
- Restore the ecosystem to its original state
- Enjoy and get in touch with the nature clean water, no bad smell

"One day, with better water conditions, it will be fit for swimming again!"

Younger White Collar



"...can still fish along the Victoria Harbour when I get old." Younger Blue Collar









## **Dreams - Natural Habitat** (All Segments)



- Greening to enhance the look & feel of the Harbour and for better air
- Becoming a leisure hotspot good for individual or groups
- Pollution-free open environment to allow some light exercise – yoga, taichi, jogging

"Bring out the natural nature of the Harbour. Lying on the grass, picnicking would be such a treat."

Older White Collar



"A place of applause – not only for the manmade scenes, but also the natural environment." Older Blue Collar

"More open space would make me happier. I can't wait to do yoga on the grass with natural breezes!"

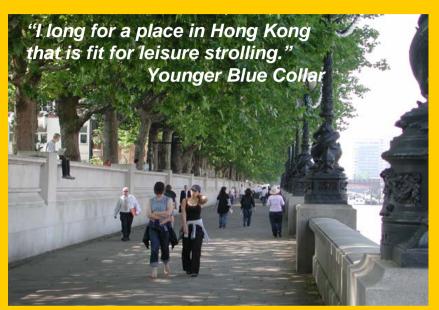
Younger White Collar







## **Dreams - Social Hub**(Primarily Teens, University Students And Retirees)





"Immerse with
Hong Kong
people's
lifestyle, so that
we can be
around the
Victoria
Harbour all the
time."

Teen

"Morning exercise at the Harbour would be the perfect location."

Minimal facilities e.g. promenade/ walkways, small snacks/ coffee shops, small playground

Inviting, welcoming and people centric – spacious and comfortable

 Spacious, quiet and peaceful for chatting and self reflection (teens & university students want more private space)

"Some basic facility like playground is good enough, not necessary another culture center. It will be too noisy." University Student







## **Dreams - Cultural Coastline** (Primarily White Collars)

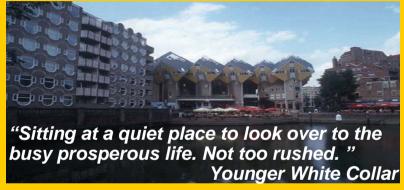


"Venice-like type of place – so that you could have a relaxing afternoon tea."

**Younger White Collar** 

- A place for gathering to enjoy the good scenic view - alfresco café for a leisure afternoon tea
- A place for true relaxation and celebrations
- ➤ A designated area for tourist attraction Avenue of Stars / mini-Fisherman's Wharflike types of market for culture arts and souvenirs





"Some small shops/ stalls for the tourist are good – more people-centric, better economy."

Older White Collar







### **Executive Summary**





### **Executive Summary (I)**

#### **Literature Review**

- Literature review of articles related to The Harbour, published by six leading publications between December 2003 and November 2005, indicate four major themes:
  - Environment (28%), e.g. urban planning, pollution, ecosystem
  - Prosperity (26%), e.g. lifestyle, economy
  - **♦ Heritage (14%), e.g. natural treasure, Hong Kong Identity**
  - Public Opinion (32%), e.g. views and opinions of the public regarding the three aforementioned themes
- The key insights gathered from the public using focus groups echo these themes
- The groups also enriched our understanding of how the public feel about The Harbour on a deeper emotional level

<sup>\*</sup> South China Morning Post, Oriental Daily news, Sing Tao Daily, Apple Daily, Ming Pao and Next Magazine





### **Executive Summary (II)**

#### **Significance of The Harbour**

- ➤ The Harbour plays a significant role in the eyes of the public as vast majority of them agree that the Harbour is something shared by all HK people, is valuable to them and symbolizes the prosperity and success of HK
- > The Harbour reflects
  - **♦ The identity and physical well-being of Hong Kong** 
    - → Heritage, prosperity, and modernity
  - ♦ The sense of belonging and emotional welfare of the public
    - → A sanctuary and source of pride





### **Executive Summary (III)**

#### **Current Perception of The Harbour**

- > The public holds some strong sentiments and passions about the current perception of the Harbour, due in part to the changes the public has observed
  - **♦ The Harbour being abused and silenced**
  - ♦ The Harbour being more commercialized and less people-oriented than in the past
- While the beautiful and distinctive scenery is still strongly associated with the Harbour, the public sees reclamation and pollution as threats to the future of The Harbour.
- Consequently, the public's vision for the future of The Harbour tends to be a reactionary need to simply curb the changes and maintain status quo.





### **Executive Summary (IV)**

#### **Perception of The Harbour in the Future**

- When encouraged to think of the ideal vision of The Harbour, the public can readily express more positive and pro-active views
  - ♦ The Harbour as more people-oriented and more integrated with people's daily lives
  - The Harbour as more culturally driven to preserve and enrich the identity and pride of Hong Kong
- Consistently all segments of the public see more greening areas/ plantings as the direction for the ideal future of the Harbour
- There are also significant mentions of more promenades / walkways along and more ground level pedestrian access to the harbourfront
  - ☼ Possibly with more good old memories, those aged 55+ express stronger urge to enhance the Harbour, e.g. by having more pedestrian access to Harbour at the ground level
  - On the other hand, the younger generation simply look for a spacious, quiet and peaceful place where they can truly relax and enjoy their leisure time
  - In addition, reducing water and air pollution, the amount of litter in the harbour and cutting down the level of reclamation are other key areas suggested that need to be improved
  - As such, commercial and residential buildings are less favoured to be included in future enhancement of the harbour





#### **Disclaimer**

All the photos and collages in this report have been put together based on direct input from the public.

We acknowledge the photos and collages have been sourced from SMWM and various magazines publications, books and Internet downloads

- **♦** Asian Spa
- **♦ Asian Travel**
- **♦ Car & Driver**
- **♦ Cathay Magazine (in-flight)**
- **♦** East Magazine
- **♦ The Economist**
- **♦ Next Magazine**
- **♦ Hong Kong Our World In Color**
- **♦ Hong Kong Past & Present**
- **⇔** HK Tatler





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