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Legislative Council Panel on Housing

Sub-committee to Study the Letting and Rent Policies of Non-Domestic Premises of the Housing Authority and the Housing Society

Operation of Housing Authority's Markets

Purpose

At the meeting on 14 March, Members requested additional information on the operation of Housing Authority's markets. The following provides the requisite information.

Vacancy Rates

2. The latest vacancy rate for markets managed by Housing Department and by Single-Operators* is 11.3% and 6.4% respectively.

Popularity of Single-Operator Markets

3. A summary of an opinion survey conducted in 1998 showing the popularity of markets managed by Single-Operators is at Annex. The survey indicated that market stall operators, estate residents and shoppers were generally satisfied with markets managed by Single-Operators (with 74% to 97% of respondents giving a rating of acceptable/satisfactory), in comparison with the satisfaction levels for markets managed by Housing Department at 55% to 92%, in terms of management services, physical design and sufficiency of trade types. An informal survey carried out by Housing Department in 2001 showed similar results.

* Single-Operators are companies engaged by Housing Department to oversee the overall management of Housing Authority markets. The operators are responsible for licensing out of individual market stalls and the daily management of the market.

Comparison of Unit Rent for Market Stalls and Supermarkets

4. Members have requested supporting figures on the relative unit rents for supermarkets and market stalls within an estate. On average, the unit rent for supermarkets is about 50% higher than that of market stalls in the same estate.

Overall Review of Rents, Facilities and Management

5. With regard to Members' suggestion for an overall review of rents, facilities and management of Housing Authority's commercial premises to ensure competitiveness of the small operators, Housing Authority reviews its policies as and when required. On rent, Housing Authority conducted two rent re-assessment exercises in 1998 and 2001 to assist tenants in the face of the economic downturn. Average rental reductions of 21% and 18% were made respectively. On facilities, the Housing Authority implements a five-year rolling programme to upgrade the facilities in older shopping centres. Improvement works scheduled for 2001-02 to 2005-06 cost $1.6 billion. On management, Housing Authority reviews its management policies and practices from time to time to ensure flexibility and responsiveness to market conditions.

Housing Department
April 2002

<u>Annex</u>

OPINION SURVEY OF
USERS' VIEWS ON
SHOPPING CENTRES AND MAREKTS
UNDER THE MANAGEMENT OF
HOUSING DEPARTMENT,
PROPERTY MANAGEMENT AGENTS
AND SINGLE OPERATORS

- EXECUTIVE SUMMARY -

Prepared for
Hong Kong Housing Authority

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OPINION SURVEY OF USERS' VIEWS ON SHOPPING CENTRES AND MARKETS UNDER THE MANAGEMENT OF HOUSING DEPARTMENT, PROPERTY MANAGEMENT AGENTS AND SINGLE OPERATORS

PURPOSE

1. This report presents the key findings of a survey to assess users' views on the management services, general design and retail provision in the Housing Authority (HA) shopping centres and markets under different types of management.

BACKGROUND

2. In recent years, HA has utilized private sector's resource and expertise into the management of HA shopping centres and markets through the implementation of various schemes namely Agency Management of Shopping Centres, Single Operator for Shopping Centres (SOSC) and Single Operator for Markets (SOM). The property management agents (PMA) under the Agency Management Scheme are mainly responsible for the management of shopping centres whereas the operators under the Single Operator Scheme are responsible for both the management and licensing out of the leased areas.

3. In order to assess the customers' satisfaction with and to compare the management services provided in HA shopping centres/markets under different types of management, International Research Associates (HK) Limited was commissioned to conduct a survey to collect users' views on the HA shopping centres and markets. The findings will serve as useful reference for evaluating the standard of management performance provided in the HA shopping centres/markets and identifying areas for improvement.

4. The opportunity is taken to obtain from the survey the users' views on the general design of these shopping centres/markets and sufficiency of retail provision which may be useful for planning of future development in shopping centres/markets.

SURVEY COVERAGE

5. This study covered 33 shopping centres or markets under the four management types (Annex 1). They are considered typical and representative in terms of the types of management under which the shopping centres/markets are operated.

6. Three types of respondents were interviewed. These include commercial tenants/licencees in the shopping centres/ markets covered in this survey, residents living in nearby public housing estates (PRH) and Home Ownership Scheme (HOS) courts and shoppers who are not living in the nearby PRH and HOS courts.

7. A sample of 1,390 commercial tenants/licencees and 2,740 residents were drawn, using disproportionate stratified random sampling method. A total of 3,404 people, including 1,196 commercial tenants/licencees and 2,208 residents living in nearby PRH/HOS courts were successfully interviewed. This represents response rates of 86% for commercial tenants/licencees and 81% for residents.

8. Views were also collected as reference from 412 shoppers who were not living in the nearby PRH and HOS courts. They were selected using quota sampling method with age shopping centres/markets of type C or above because those of type D are designed mainly to service the residents in the nearby PRH or HOS courts.

SURVEY PERIOD

9. Fieldwork was carried out between September 7 and October 30, 1998.

MAJOR SURVEY FINDINGS

SHOPPING CENTRES

Satisfaction with Overall Management Services

10. Generally, users' views on the overall management services provided in shopping centres were favourable Most users (79% to 88%) including commercial tenants/ licencees, residents and shoppers rated the overall management services provided under HD direct management, PMA and SOSC as average or very/ quite satisfactory (simply termed as acceptable/ satisfactory in subsequent paragraphs)

	Satisfaction with Overall Management Services(Note 1)							
	HD Direct Management			Property Management Agents			Single Operator Shopping Centre	
	T	R	S	T	R	S	T	R
	%	%	%	%	%	%	%	%
Very/quite satisfied	29	40	38	35	30	32	31	35
Average	50	45	49	48	58	53	53	51
Very/quite dissatisfied	18	10	9	16	7	4	15	7
Mean score (Note 2)	3.1	3.3	3.3	3.2	3.2	3.3	3.2	3.3

11. Some (4% to 18%) were dissatisfied with the overall management services. They mainly considered that cleaning, maintenance, security and performance of management staff would require further improvement.

12. Slightly more users (83% to 88%) considered the overall management services provided under the PMA as acceptable/satisfactory than those under HD direct management (79% to 87%). The acceptable/satisfactory scores on overall management services provided under SOSC scheme (84% for tenants and 86% for residents) were at levels in between that of HD direct management and PMA. However, this slight difference may or may not indicate a genuine difference in satisfaction levels due to sampling errors (Note 3)

T denotes commercial tenants/ licencees in the shopping centres/markets covered
R denotes residents in nearby public housing estates and Home Ownership Scheme courts
S denotes shoppers from elsewhere

Note 1: The percentages do not add up to 100% as those indicated no comments/don't know are not shown in the above table.

Note 2: The satisfaction rating is based on a 5-point scale, where 5=very satisfied, 4=quite satisfied, 3=average, 2=quite dissatisfied and 1=very dissatisfied.

Note 3: The sampling errors of the estimates can be up to ±8% points for commercial tenants and ±7% for residents.

MAJOR SURVEY FINDINGS

SHOPPING CENTRES

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Satisfaction with Major Aspects of Management Services

13. Users also expressed favourable views on most of the major aspects of management services provided under the three management types. However, relatively lower scores (i.e. about 60%) were recorded on two aspects, namely management of loading bay and provision of promotional activities.

14. Detailed survey findings on users' satisfaction with these aspects are shown in the table below.

% of Respondents who Rated the Aspect as Acceptable/ Satisfactory by Management Types

Aspect	HD			PMA			SOSC		Remarks
	T %	R %	S %	T %	R %	S %	T %	R %	
Performance of management staff	85	60	69	82	56	60	82	56	• HD direct management fared better • Users were mainly dissatisfied with staff's responsiveness to complaint/ enquiry • Large proportions of residents (35% to 41%) and shoppers (21% to 36%) had no comment possibly because they had less contact with the staff
Cleaning	81	89	91	81	90	90	83	95	• Lower scores were recorded on cleanliness of toilets in the shopping centres under HD management (with satisfaction scores ranging from 26% to 38%) and PMA (33% to 43%)
Control of shop front obstruction	77	92	82	72	82	94	85	88	• Relatively more residents considered the service provided by HD as better
Maintenance	74	83	73	78	74	65	71	80	• Commercial tenants were mainly dissatisfied with the maintenance of flush water supply, minor repair in toilet and air-conditioning/ ventilation, particularly for those under HD direct management • Commercial tenants mainly considered these items breakdown frequently and the maintenance service was inefficient
Security	73	79	71	72	70	72	76	76	• Provision of security guards were considered as inadequate under PMA (23% to 26% considered insufficient)

% of Respondents who Rated the Aspect as Acceptable/ Satisfactory by Management Types

Aspect	HD T %	HD R %	HD S %	PMA T %	PMA R %	PMA S %	SOSC T %	SOSC R %	Remarks
Management of loading bay	61	NA	NA	54	NA	NA	56	NA	• 25% to 39% of commercial tenants had no comment
Provision of promotional activities	60	77	72	58	61	85	60	61	• Relatively more residents considered the provision under HD direct management as better • More users gave higher ratings to type A/B centres (83% to 92%) than to type C (59% to 76%) and D (54% for commercial tenants and 58% for residents) centres • Those who were dissatisfied with the provision mainly considered it as inadequate and unattractive

NA denotes not applicable

Satisfaction with General Design

15. Most users (70% to 95%) rated the general design of shopping centres under HD/PMA management and SOSC scheme as acceptable/satisfactory.

Satisfaction with the General Design of Shopping Centres

	HD Direct Management/ Property Management Agents #			Single Operator Shopping Centre	
	T	R	S	T	R
	%	%	%	%	%
Very/quite satisfied	34	46	52	26	39
Average	36	44	38	49	56
Very/quite dissatisfied	26	7	9	23	4
Mean score	3.0	3.4	3.5	3.0	3.3

16. Some (4% to 26%) were dissatisfied with the general design of the shopping centres. They mainly considered that illumination, provision of signage, air-conditioning/ventilation and size of the shopping centres would require further improvement.

Satisfaction with Major Aspects of General Design

17. Users gave higher scores on three aspects of general design namely, spaciousness of passageway (75% to 94%), overall illumination (82% to 98%) and ventilation (82% to 87%). Lower scores were recorded in conspicuousness of signage (46% to 62%), provision of loading bay (32% in SOSC and 44% in HD/PMA) and provision of signage (39% to 66%).

18. Comparison of different management types indicated that relatively more users considered that the shopping centres under HD direct management/PMA were better than those under SOSC scheme in regard to the spaciousness of passageway (91% to 94% for HD/PMA vs 75% for residents and 79% for tenants under SOSC scheme), provision of signage (50% to 66% for HD/PMA vs 39% for tenants and 58% for residents under SOSC scheme) and the provision of loading bay (44% for HD/PMA vs 32% for SOSC scheme). Detailed findings on the eight major aspects of general design are shown in the table below.

\# Design and retail provision of the shopping centres/markets under HD direct management or PMA are all provided by Housing Department and they are taken as a single group for analysis.

Sufficiency of Retail Services

19. Most respondents (72% to 92%) considered the retail provision in the shopping centres under HD/PMA and SOSC scheme as acceptable/sufficient.

Sufficiency of the Overall Provision of Retail Services

	HD Direct Management/ Property Management Agents			Single Operator Shopping Centre	
	T	R	S	T	R
	%	%	%	%	%
Very/quite sufficient	49	27	41	21	15
Average	33	54	51	53	57
Very/quite insufficient	15	17	6	25	27
Mean score	3.4	3.1	3.4	2.9	2.8

20. Regarding the provision of individual trade types, more users considered it as insufficient in shopping centres under SOSC scheme when compared with those provided under HD/PMA management.

21. Analysis in terms of scale of shopping centres showed that more users considered the provision of most trade types as insufficient in type D centres. More residents (44%) considered the provision of trade type on electronic products as insufficient in type C shopping centres.

% of Respondents who Rated the Provision of Trade Type as Insufficient by Management Types

Trade Type	HD/PMA			SOSC	
	T	R	S	T	R
	%	%	%	%	%
Electronic products	43	36	53	63	28
Service shops (Note 4)	28	39	28	50	69
Catering	26	40	22	42	52
Clothing & footwear	23	32	23	54	45
Durable goods	19	26	24	45	43
Miscellaneous (Note 5)	7	11	3	8	11
Foodstuff	5	12	7	18	26

Note 4: Service shops refer to beauty salon, hairdressers, bank, clinic, etc.
Note 5: Miscellaneous refers to shops selling stationery, medicine, newspapers and magazines, etc.

% of Rcspondents who Rated the Aspect as Acceptable/ Satisfactory by Management Types

Aspect	HD/PMA			SOSC		Remarks
	T %	R %	S %	T %	R %	
Spaciousness of passageway	94	91	94	79	75	• HD/PMA fared better
Overall illumination	83	95	91	82	98	• Most users were satisfied with this aspect, particularly the residents
Ventilation	82	87	85	NA	NA	• Most users were satisfied with this aspect
Ease of understanding the signage	69	73	85	78	71	
Sufficiency of air-conditioning	64	92	80	64	88	• Tenants were relatively less satisfied
Provision of signage	50	62	66	39	58	• HD/PMA fared better • Tenants were relatively less satisfied • About 20% of residents had no comment
Provision of loading bay	44	NA	NA	32	NA	• HD/PMA fared better • About 37% of tenants had no comment
Conspicuousness of signage	48	58	62	46	55	• Tenants were relatively less satisfied • About 20% of residents had no comment

NAdenotes not applicable

MARKETS

Satisfaction with Overall Management Services

22. Generally, users' views on the overall management services provided in markets under HD direct management, PMA and Single Operator Scheme were favourable. 73% to 97% of users considered the services as acceptable/satisfactory.

23. Some (1% to 23%) were dissatisfied with the overall management services of the markets. They mainly considered that cleaning, performance of management staff and control of shop front obstruction would require further improvement.

Satisfaction with Overall Management Services

	HD Direct Management			Property Management Agents			Single Operator Shopping Centre		Single Operator Market		
	T %	R %	S %	T %	R %	S %	T %	R %	T %	R %	S %
Very/ quite satisfied	23	18	17	31	32	20	26	29	29	33	54
Average	54	55	61	51	48	64	59	58	57	55	43
Very/ quite dissatisfied	23	21	12	17	12	9	15	5	13	7	1
Mean score	2.9	3.0	3.1	3.1	3.2	3.1	3.0	3.3	3.1	3.3	3.5

24. The markets under SOSC and SOM schemes fared better than the ones under HD direct management. The scores for the overall management services provided under PMA were at levels (80% to 84%) in between that of HD direct management (73% to 78%) and Single Operator Scheme (85% to 97%).

Satisfaction with Major Aspects of Management Services

25. Relatively lower scores were recorded in the provision of promotional activities (43% to 79%) and management of loading bay (55% to 75%). Detailed findings on the six major aspects are shown in the table below.

% of Respondents who Rated the Aspect as Acceptable/ Satisfactory by Management Types

Aspect	HD T %	HD R %	HD S %	PMA T %	PMA R %	PMA S %	SOSC T %	SOSC R %	SOM T %	SOM R %	SOM S %	Remarks
Performance of management staff	80	46	65	85	49	53	74	54	78	45	67	• Slightly more commercial tenants gave acceptable/satisfactory rating to this item provided by PMA (85%) • Commercial licensees were less satisfied with the staff's responsiveness to complaint/enquiry • Large proportions of residents (45% to 50%) and shoppers (24% to 38%) had no comment, possibly because they had less contact with the staff
Cleaning	73	74	70	88	81	82	78	92	88	87	97	• Cleaning in markets under HD direct management fared relatively lower scores • Lower scores were recorded in cleanliness of toilets in the markets under HD direct management (with scores ranging from 23% to 41%)
Control of shop front obstruction	73	73	73	63	83	98	61	82	76	74	85	• Relatively more residents considered the item provided under SOSC and PMA as better
Maintenance	70	66	59	75	61	38	68	69	72	73	56	• More commercial tenants gave dissatisfaction ratings to minor repair in toilets (57%) and maintenance of flush water supply (57%) under HD direct management • Users mainly considered these items breakdown frequently and the maintenance service was inefficient • Many residents (20% to 28%) and shoppers (17% to 58%) had no comment

% of Respondents who Rated the Aspect as Acceptable/ Satisfactory by Management Types

Aspect	HD T %	HD R %	HD S %	PMA T %	PMA R %	PMA S %	SOSC T %	SOSC R %	SOM T %	SOM R %	SOM S %	Remarks
Management of loading bay	61	NA	NA	58	NA	NA	75	NA	55	NA	NA	• SOSC scheme fared better • 14% to 33% of commercial tenants had no comment
Provision of promotional activities	50	45	70	43	44	67	53	51	52	70	79	• Relatively more residents considered the service item provided by SOM as better • More users gave satisfactory scores to markets attached to type A/B shopping centres (66% to 86%) than those attached to type C (51% to 73%) and D (39% to 47%) shopping centres • Those who were dissatisfied with the provision mainly considered it as inadequate and unattractive

Satisfaction with General Design

26. Users had more favourable views on the general design of markets under SOM scheme (74% to 90% considered acceptable/satisfactory) as compared to the ones under HD direct management/PMA (55% to 77%) and SOSC scheme (53% for tenants and 89% for residents).

Satisfaction with the General Design of Markets

	HD Direct Management/ Property Management Agents			Single Operator Shopping Centre		Single Operator Market		
	T %	R %	S %	T %	R %	T %	R %	S %
Very/ quite satisfied	22	28	22	16	36	35	44	62
Average	33	48	55	37	53	39	46	27
Very/ quite dissatisfied	44	21	22	47	9	25	7	12
Mean score	2.7	3.1	3.0	2.5	3.3	3.0	3.4	3.5

27. Some (7% to 47%) were dissatisfied with the general design of the markets. They mainly considered that ventilation, illumination and the spaciousness of passageway would require further improvement.

Satisfaction with Major Aspects of General Design

28. Users were relatively more satisfied with overall illumination (72% to 99% considered acceptable/satisfactory) and spaciousness of passageway (54% to 90%) in markets as compared with other aspects of general design.

29. Lower scores were recorded in conspicuousness of signage (39% to 60%), provision of signage (42% to 65%) and provision of loading bay (37% to 47%).

% of Respondents who Rated the Aspect as Acceptable/ Satisfactory by Management Types

Aspect	HD/PMA			SOSC		SOM			Remarks
	T %	R %	S %	T %	R %	T %	R %	S %	
Overall illumination	85	92	87	72	97	93	99	98	• SOM markets fared better
Spaciousness of passageway	79	59	66	75	54	90	68	83	• SOM markets fared better
Ease of understanding the signage	67	51	80	57	52	63	70	81	• Lower scores were recorded in SOSC markets • More than 20% of residents had no comment
Sufficiency of air-conditioning	58	82	93	51	78	56	84	87	• Lower scores were recorded in SOSC markets
Ventilation	46	63	67	NA	NA	62	74	83	• SOM fared better
Provision of loading bay	45	NA	NA	47	NA	37	NA	NA	• Relatively more commercial tenants considered the provision under HD/PMA and SOSC as sufficient • 19% to 34% of commercial tenants had no comment
Provision of signage	42	47	65	42	49	46	61	57	• Relatively more commercial tenants and residents considered this item under SOM as better • 21% to 39% of residents had no comment
Conspicuousness of signage	40	39	60	42	41	45	58	57	• Users had similar views as that shown in the remarks above

NA denotes not applicable

Sufficiency of Retail Services

30. Generally speaking, relatively more users considered the provision of retail services in markets under HD direct management/PMA (72% to 92%) and SOM scheme (79% to 91%) as average/sufficient than those provided under SOSC scheme (51% for residents and 85% for tenants).

Sufficiency of the Overall Provision of Retail Services

	HD Direct Management/Property Management Agents			Single Operator Shopping Centre		Single Operator Market		
	T %	R %	S %	T %	R %	T %	R %	S %
Very/ quite sufficient	61	26	37	39	14	47	30	58
Average	25	46	55	46	37	32	49	33
Very/ quite insufficient	12	25	8	15	49	18	20	9
Mean score	3.6	3.0	3.3	3.2	2.6	3.3	3.1	3.5

31. More users considered individual trade types provided in markets under SOSC scheme as insufficient when compared with the other two management types.

32. Analysis in terms of scale of markets showed that the provision of most trade types except vegetable were considered as insufficient in the markets attached to type D shopping centres. In addition, more residents considered the provision of fish and fresh sea food in markets attached to type C shopping centres as insufficient. These are summarised in the table below.

% of Respondents who Rated the Provision of Trade Type as Insufficient by Management Types

Trade Type	HD/PMA			SOSC		SOM		
	T %	R %	S %	T %	R %	T %	R %	S %
Fish and fresh sea food	22	37	16	26	55	17	27	21
Poultry	13	31	3	21	55	17	39	28
Frozen meat	11	31	7	27	46	10	20	11
Fresh meat	8	22	5	17	48	12	16	11
Miscellaneous (Note 6)	9	30	10	38	43	17	37	27
Vegetable	6	18	1	21	33	17	16	9
Fruit	4	13	1	21	43	11	16	5

Note 6: Miscellaneous refers to market stalls selling newspapers, magazines and miscellaneous dry goods, etc.

SUMMARY OF KEY FINDINGS

Management Services

33. Overall speaking, most users were satisfied with the overall management services in HA shopping centres (79% to 88% considered acceptable/satisfactory) and markets (73% to 97%). 4% to 18% of users were dissatisfied with the overall management services provided in provided in shopping centres whereas 1% to 23% of users were dissatisfied with the management services provided in markets.

34. The overall management services provided in shopping centres under PMA fared slightly better than the ones under other management types. As regards the overall management services provided in markets, relatively higher acceptable/satisfactory scores were recorded for those provided under SOSC or SOM schemes.

35. As regards individual major aspects, management of shop front obstruction, performance of management staff and cleaning in both shopping centres and markets were rated as better.

36. Lower acceptable/satisfactory scores were recorded in the management of loading bay and provision of promotional activities.

37. Even though performance of management staff and cleaning were rated as better, those who were dissatisfied with the overall management services provided ill shopping centres and markets also commented that these two areas would require further improvement. In addition, they considered that maintenance and security service in shopping centres and control of obstruction in markets may need further improvement.

General Design

38. The majority (70% to 95%) of users considered the general design of shopping centres as acceptable/satisfactory and 4% to 26% considered it as dissatisfactory. With regard to the general design of markets, S3% to 90% considered it acceptable/satisfactory whereas 7% to 47% were dissatisfied.

39. More users were satisfied with the general design of markets under SOM scheme than the ones under HD direct management/PMA.

40. As regards individual design aspects, users were more satisfied with the overall illumination and spaciousness of passageway.

41. Those design aspects in both shopping centres and markets which recorded relatively lower acceptable/satisfactory scores were (i) conspicuousness of signage, (ii) provision of signage, and (iii) provision of loading bay.

42. Even though illumination was rated as better, those who were dissatisfied with the general design also considered that this area in both shopping centres and markets would require further improvement. They also considered that air-conditioning/ventilation in both shopping centres and markets can be improved further. The other suggested improvement areas for shopping centres were provision of signage and the size of the shopping centres and the one for markets was the width of passageway.

Retail Provision

43. Relatively more users considered the provision of retail services in shopping centres (25% for tenants and 27% for residents) and markets (I5% for tenants and 49% for residents) under SOSC scheme as insufficient.

44. In general, more users considered individual trade types provided in type D shopping centres/markets as insufficient.

45. The types of trade considered as insufficient in shopping centres were (i) electronic products, (ii) service shops such as beauty salon, hairdressers and bank, etc., (iii) catering, (iv) clothing & footwear and (v) durable goods.

46. The types of trade considered as insufficient in markets were (i) fish and fresh sea food, (ii) poultry, (iii) frozen meat, (iv) fresh meat and (v) miscellaneous items such as newspapers and magazines.

ANNEX 1 - LiST OF SI1OPPING CENTRES / MARKETS COVERED

	HD Direct Management	Property Management Agents	Single Operator Shopping Centre	Single Operator Market
Type A		Tsz Wan Shan *		
Type B	Hau Tak *			
Type C	Chuk Yuen South Fung Tak Oi Man Wo Che	Mei Lam Shun Lee		Chung On Tin Shui
Type D	Hing Tin Sun Chui	Cheung Ching Cheung Wah Hing Man Kin Sang Lek Yuen Pok Hong San Shing Shun On Sun Tin Wai Tsui Lam Wah Ming Fu Heng * Wah Kwai * Yiu On *	Hiu Lai Court Ping Tin Wah Sum	Ka Fuk Kwong Tin Tin Ma Court

Note: The markets attached to those shopping centers marked with * are managed under the SOM scheme. For Tze Wan Shan Shopping Centre, both the conventional market managed by the PMA and the one managed under the SOM scheme are covered in the survey.