

**Survey on Viability of
Two Public Markets and
Six Cooked Food Hawker Bazaars
- Executive Summary -**

Prepared for



By

Consumer Search Hong Kong Ltd.



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Executive Summary

Background and Objective

1. In the market survey conducted in 2009, Shau Kei Wan Market (SKWM) and Tang Lung Chau Market (TLCM) were two of the identified markets with very low daily patronage during peak business hours and specifically for the former market, it also denoted a high percentage of inactive and non-trading stalls.
2. The cooked food hawker bazaars (CFHBs) were built by the two former Municipal Councils to facilitate the removal of the on-street cooked food stalls (CFSs) to off-street sites for environmental and food hygiene purposes. With relocation or surrender of licences by licensees over the years, Hong Kong has 11 CFHBs comprising 77 CFSs at present. It is anticipated that, because of natural attrition, more and more licences are expected to be surrendered. Among the existing 11 CFHBs, six of them have more than 65% stalls vacant.
3. In order to assess the business viability of the two public markets and six CFHBs, namely, Shau Kei Wan Market (SKWM), Tang Lung Chau Market (TLCM), Reclamation Street Cooked Food Hawker Bazaar (RS CFHB), Yu Chau West Street Cooked Food Hawker Bazaar (YCWS CFHB), Ma Kok Street Cooked Food Hawker Bazaar (MKS CFHB), Luen Yan Street Cooked Food Hawker Bazaar (LYS CFHB), Kwai Wing Road Cooked Food Hawker Bazaar (KWR CFHB), and Tai Lin Pai Road Cooked Food Hawker Bazaar (TLPR CFHB), the Food and Environmental Hygiene Department (FEHD) commissioned Consumer Search Hong Kong Limited to conduct a survey (the Survey) of the stalls concerned.
4. The Survey aimed to collect the following information to gauge the usage of selected markets and CFHBs:
 - (a) Number of patrons departing from the designated markets and CFHBs;
 - (b) Usage of the designated markets and CFHBs; and
 - (c) Information of the competitors in the vicinity of the designated markets and CFHBs.
5. Corresponding information from two control samples, namely, one representing the markets (i.e. Causeway Bay Market (CBM)) and the other representing the CFHBs (i.e. Haiphong Road Temporary Cooked Food Hawker Bazaar (HRT CFHB)) would also be made reference to for benchmarking purpose. CBM and HRT CFHB were considered average performers in terms of occupancy rate and level of activity in FEHD markets and CFHBs respectively.

Survey Methodology

HEADCOUNT

6. Headcounts for the control samples (one for market and the other for CFHB), the designated two markets and six CFHBs were conducted at different operating hours of the day for respective markets and CFHBs. The Survey covered the main operating hours of respective markets and CFHBs and the details were summarized as follows:
 - (a) For the two markets and six CFHBs, time sessions were selected randomly over a fieldwork period of three weeks (i.e. 25 November 2011 - 15 December 2011)¹. The Survey was conducted on different days, with the total length of time sessions selected equivalent to two weekdays (i.e. Monday to Thursday) and two non-weekdays/ special days on Friday, Saturday, Sunday or public holiday.
 - (b) For the two control samples, two weekdays and two non-weekdays/ special days on Friday, Saturday, Sunday or public holiday were selected randomly over a fieldwork period of one week (i.e. 5 March 2012 - 11 March 2012)¹.
7. The number of patrons² leaving via all exits (ranged from two to four) of the designated markets and CFHBs was counted by the enumerators at 30-minute intervals for the entire session.

BUSINESS STATUS

8. Inspection of the business status of the stalls (i.e. have customer, no customer, storage, or non-operating) at an hourly interval (i.e. 06:00, 07:00 etc.) for the entire session was also carried out during the enumeration. For those stalls having customers during inspection, the number of customers³ was also recorded.

COMPETITORS

9. Information about the competitors, i.e. other similar retail outlets⁴ in the vicinity of the two markets and restaurants in the vicinity of six CFHBs, was also collected.
10. In the map of scale 1:1 000 as published by the Lands Department, the “vicinity” of a market or CFHB is defined as the area falling within nine grids (the grid in which the market or CFHB is located plus the surrounding eight grids) covering an area of 90 000 m² (300 m x 300 m), with reasonable modification in accordance to the completeness and accessibility of the street blocks.

¹ No public holidays fell within the selected fieldwork periods, to ensure the representativeness and to reduce the effect of special days on the estimates.

² “Patron” refers to a person who left the market / CFHB concerned via any one of its exits. Staff of FEHD / FEHD contractors / stalls inside the market / CFHB was excluded.

³ “Customer” refers to a person identified during a snapshot who:

(a) was selecting / buying goods or receiving service (e.g. viewing the menu / eating) in the business area of a stall during the snapshot;

(b) was waiting to be served in the business area of a stall.

⁴ “Similar retail outlets” of a specified market / CFHB were defined as shops / restaurants which provided the same type of products / foods. These outlets only included those with clear signs indicating their existence, and excluded mobile hawkers as they had no fixed trading area in nature.

11. For each competitor with clear signs indicating its existence identified during the patrolling, the name, address, time visited, operating status during visit (i.e. “Opened” or “Closed”) and general classification were collected.

Summary of Findings - Markets

HEADCOUNT

12. The control sample, CBM has 51 stalls, with 47 (92%) of them being occupied⁵. The main operating hours are 06:00 - 20:00 hours. On average, CBM had weekly patronage of 29 520. The peak-hour⁶ patronage accounted for 70% of total patronage. For every half-hour, the average patronage was 151. The maximum patronage was observed at 10:01 - 10:30 with 281 customers.
13. SKWM have 82 stalls (vs. 51 for CBM), with 56 (68%, vs. 92% for CBM) of them being occupied. For TLCM, there are 34 stalls (vs. 51 for CBM), with 33 (97%, vs. 92% for CBM) of them being occupied. The main operating hours of these markets are 06:00 - 20:00 hours.
14. On average, SKWM and TLCM had weekly patronages of 5 646 and 8 699 respectively (vs. 29 520 for CBM). The peak-hour patronage accounted for 54% of total patronage for SKWM and that for TLCM, 56% (vs. 70% for CBM).
15. For every half-hour, the average patronage was 29 for SKWM and 44 for TLCM (vs. 151 for CBM). The maximum patronage was observed at 13:01 - 13:30 hour (40) for SKWM and at 16:01 - 16:30 hour (87) for TLCM (vs. 280 at 10:01 - 10:30 for CBM).

Table 1. SUMMARY OF THE PATRONAGE FOR THE MARKETS

Markets	Average patronage per week	Average patronage per day	Average patronage per occupied stall per day⁷	Percentage of patronage during peak hours	Average patronage per half-hour	Maximum patronage per half-hour
<i>Causeway Bay Market (1 800m²) (control)</i>	<i>29 520</i>	<i>4 217</i>	<i>90</i>	<i>70%</i>	<i>151</i>	<i>281 at 10:01 - 10:30</i>
<i>Tang Lung Chau Market (656m²)</i>	<i>8 669</i>	<i>1 238</i>	<i>38</i>	<i>56%</i>	<i>44</i>	<i>87 at 16:01 - 16:30</i>
<i>Shau Kei Wan Market (2 226m²)</i>	<i>5 646</i>	<i>807</i>	<i>14</i>	<i>54%</i>	<i>29</i>	<i>40 at 13:01 - 13:30</i>

BUSINESS STATUS

16. Among those occupied stalls in CBM, 45 of them (96%) were operating and 11 (23%) of them were active.

⁵ A stall is considered as “occupied” if the stall concerned was leased to a tenant across the period of conducting the observations according to FEHD records.

⁶ For markets, the” peak hours” are defined as: (a) 08:00 - 11:00 and (b) 15:00 - 19:00.

⁷ Readers should be reminded that on the one hand, a patron may be a sole passer-by in a market environment. On the other hand, a patron may also be a customer of several stalls for each market visit.

17. Among those occupied stalls in SKWM, 23 of them (41% vs. 96% for CBM) were operating but none of them was active. In TLCM, 25 stalls (76% vs. 96% for CBM) were operating but only one (3% vs. 23% for CBM) of them was active.

Table 2. SUMMARY OF THE BUSINESS STATUSES FOR THE MARKETS

Markets	No. of Stalls								Similar Stalls in vicinity ⁸
	Total	Vacant	Occupied ⁹						
			Sub-total	Operating			Non-operating		
				Sub-total	Active	Inactive		Storage	
Causeway Bay Market (1 800m ²) (control)	51	4	47 (100%)	45 (96%)	11 (23%)	26 (55%)	8 (17%)	2 (4%)	Not available
Shau Kei Wan Market (2 226m ²)	82	26	56 (100%)	23 (41%)	0 (0%)	22 (39%)	1 (2%)	33 (59%)	Available
Tang Lung Chau Market (656m ²)	34	1	33 (100%)	25 (76%)	1 (3%)	20 (61%)	4 (12%)	8 (24%)	Not available

18. The hourly customer snapshots indicated an average of 16 for CBM. The maximum number of customers in hourly snapshot was observed at 10:00 - 10:59 hour with 32 customers.
19. Overall speaking, the hourly customer snapshots indicated an average of 1 for SKWM and 3 for TLCM (vs. 16 for CBM). The maximum number of customers in hourly snapshot was observed at 15:00 - 15:59 hour (5) for SKWM and 16:00 - 16:59 hour (8) for TLCM (vs. 32 at 10:00 - 10:59 hour for CBM).

⁸ “Available” means that all types of stalls inside the market were covered by stalls in vicinity while “Not available” means that some types of stalls inside the market were not covered by stalls in vicinity.

⁹ An “occupied” stall is considered as “operating” if one or more readings were recorded as “have customer”, “no customer” or “storage” across the period of conducting the observations.
 An “occupied” stall is considered as “active” if not less than one-third readings were recorded as “have customer” across the period of conducting the observations.
 An “occupied” stall is considered as “storage” if less than one-third readings were recorded as “have customer” but not less than one-third readings were recorded as “storage” across the period of conducting the observations.
 An “occupied” stall is considered as “inactive” if less than one-third readings were recorded as “have customer” and less than one-third readings were recorded as “storage” across the period of conducting the observations.
 An “occupied” stall is considered as “non- operating” if no reading were recorded as “have customer”, “no customer” or “storage” across the period of conducting the observations. Specifically, the stall was either “Physically Closed” or “Left Empty” across the period of conducting the observations.

Table 3. SUMMARY OF THE CUSTOMER SNAPSHOTS FOR THE MARKETS

Markets	Average number of customers in hourly snapshot	Maximum number of customers in hourly snapshot
<i>Causeway Bay Market (1 800m²) (control)</i>	16	32 at 10:00 - 10:59
Tang Lung Chau Market (656m ²)	3	8 at 16:00 – 16:59
Shau Kei Wan Market (2 226m ²)	1	5 at 15:00 – 15:59

COMPETITORS

20. 92 similar stalls were identified in the vicinity of CBM covering the seven types of stalls (such as stall other wet goods and other dry goods) inside the market. It was noted that there were two poultry stalls in the market but no similar stall was found in the vicinity.
21. 130 similar stalls were identified in the vicinity of Shau Kei Wan Market (vs. 92 for CBM), covering all the seven types of stalls (such as stall selling meat/ frozen meat and dry food) inside the market. A total of 48 similar stalls were identified in the vicinity of Tang Lung Chau Market (vs. 92 for CBM), but covering only four types of stalls (e.g. stall selling meat / frozen meat and other wet goods) inside the market. It was noted that there were 10 fish stalls and one poultry stall in the market but no similar stall was found in the vicinity.

Summary of Findings - Cooked Food Hawker Bazaars**HEADCOUNT**

22. The control sample, HRT CFHB, has 20 stalls, with 11 of them being occupied. The main operating hours are 06:00 - 22:30 hours. On average, HRT CFHB had weekly patronage of 23 738. The peak-hour¹⁰ patronage accounted for 45% of total patronage. For every half-hour, the average patronage was 103. The maximum patronage was observed at 12:31 - 13:00 hour with 297 customers.
23. MKS CFHB (36 total, 12 occupied vs. 20 total, 11 occupied for HRT CFHB) and LYS CFHB (36 total, 7 occupied) have the most number of stalls, followed by YCWS CFHB (26 total, 4 occupied), TLPR CFHB (22 total, 4 occupied) and KWR CFHB (20 total, 5 occupied), while RS CFHB have the fewest stalls (12 total, 4 occupied). The main operating hours of these CFHBs ranged from the shortest of 06:30 - 18:00 hours to the longest of 05:30 - 21:00 hours (vs. 06:00 - 22:30 for HRT CFHB)¹¹.

¹⁰ For bazaars, the "peak hours" are defined as: (a) 07:00 - 09:00, (b) 12:00 - 14:00 and (c) After 18:00.

¹¹ It was observed that one out of the seven stalls in LYS CFHB opened until 01:00 hour. As the Survey only covered the main operating hours (06:30 - 21:00 for Luen Yan Street CFHB), some of the operating hours of this stall were not covered. Nevertheless, the implications on the statistical analysis for the CFHBs were minimal.

24. On average, YCWS CFHB had the highest weekly patronage of 13 033 (vs. 23 738 for HRT CFHB), followed by MKS CFHB of 12 152 and RS CFHB of 7 519. KWR CFHB (4 111) and TLPR CFHB (3 154) indicated lower weekly patronages, with LYS CFHB having the lowest patronage at 1 468. The peak-hour patronage of TLPR CFHB accounted for 76% of total patronage, which was the highest among all CFHBs. The lowest percentage was 54% for RS CFHB (vs. 45% for HRT CFHB), while other CFHBs fell in the range of 60% to 64%.
25. For every half-hour, the average patronages ranged from 78 for YCWS CFHB to 7 for LYS CFHB (vs. 103 for HRT CFHB). The maximum patronage for each CFHB was observed as:
- YCWS CFHB: 300 (at 13:31-14:00 hour)
 - MKS CFHB: 273 (at 13:31-14:00 hour)
 - RS CFHB: 93 (at 13:31-14:00 hour)
 - TLPR CFHB: 79 (at 12:31-13:00 hour)
 - KWR CFHB: 77 (at 08:31-09:00 hour)
 - LYS CFHB: 25 (at 13:01-13:30 hour)
 - HRT CFHB (for benchmarking purpose): 297 (at 12:31-13:00 hour)

Table 4. SUMMARY OF THE PATRONAGE FOR THE CFHBs

Bazaars	Average patronage per week	Average patronage per day	Average patronage per occupied stall per day ¹²	Percentage of patronage during peak hours	Average patronage per half-hour	Maximum patronage per half-hour
<i>Haiphong Road Temp. CFHB (367m²) (control)</i>	23 738	3 391	308	45%	103	297 at 12:31-13:00
Yu Chau West Street CFHB (790m ²)	13 033	1 862	466	60%	78	300 at 13:31-14:00
Ma Kok Street CFHB (2 383m ²)	12 152	1 736	145	64%	76	273 at 13:31-14:00
Reclamation Street CFHB (111m ²)	7 519	1 074	269	54%	35	93 at 13:31-14:00
Kwai Wing Road CFHB (515m ²)	4 111	587	118	61%	25	77 at 08:31-09:00
Tai Lin Pai Road CFHB (810m ²)	3 154	451	113	76%	15	79 at 12:31-13:00
Luen Yan Street CFHB (1 662m ²)	1 468	210	30	62%	7	25 at 13:01-13:30

¹² Readers should note that a patron may be just a passer-by in a CFHB environment. On the other hand, a patron may also be a take-away customer of several stalls per CFHB visit. Nevertheless, such impacts were less significant comparing with the markets.

BUSINESS STATUS

26. All the occupied stalls in HRT CFHB were operating, with 10 stalls (91%) were active.
27. In general, all the occupied stalls in six CFHBs were operating, except MKS CFHB which had an operating rate of 92% (11 stalls). All occupied stalls in RS CFHB (4) and YCWS CFHB (4) were active (vs. 10 stalls, 91% for HRT CFHB), while KWR CFHB (4 stalls, 80%) and MKS CFHB (9 stalls, 75%) had high active rates. Relatively speaking, TLPR CFHB (1 stall, 25%) and LYS CFHB (1 stall, 14%) had much lower active rates.

Table 5. SUMMARY OF THE BUSINESS STATUSES FOR THE CFHBs

Bazaars	No. of Stalls								Similar Stalls in vicinity ¹³
	Total	Vacant	Occupied					Non-operating	
			Sub-total	Operating					
			Sub-total	Active	Inactive	Storage			
Haiphong Road Temp. CFHB (367m ²) (control)	20	9	11 (100%)	11 (100%)	10 (91%)	1 (9%)	0 (0%)	0 (0%)	Available
Ma Kok Street CFHB (2 383m ²)	36	24	12 (100%)	11 (92%)	9 (75%)	2 (17%)	0 (0%)	1 (8%)	Available
Luen Yan Street CFHB (1 662m ²)	36	29	7 (100%)	7 (100%)	1 (14%)	6 (86%)	0 (0%)	0 (0%)	Available
Yu Chau West Street CFHB (790m ²)	26	22	4 (100%)	4 (100%)	4 (100%)	0 (0%)	0 (0%)	0 (0%)	Available
Tai Lin Pai Road CFHB (810m ²)	22	18	4 (100%)	4 (100%)	1 (25%)	3 (75%)	0 (0%)	0 (0%)	Available
Kwai Wing Road CFHB (515m ²)	20	15	5 (100%)	5 (100%)	4 (80%)	1 (20%)	0 (0%)	0 (0%)	Available
Reclamation Street CFHB (111m ²)	12	8	4 (100%)	4 (100%)	4 (100%)	0 (0%)	0 (0%)	0 (0%)	Available

¹³ “Available” means that all types of stalls inside the bazaar were covered by stalls in vicinity while “Not available” means that some types of stalls inside the bazaar were not covered by stalls in vicinity.

28. HRT CFHB had an average number of 58 customers in hourly snapshot. The maximum number of customers in hourly snapshot was observed in 13:00 - 13:59 hour with 173 customers.
29. Similar to the average patronage, YCWS CFHB had the highest average number of customers in hourly snapshot (67 vs. 58 for HRT CFHB) and LYS CFHB, the lowest (10). For other CFHBs, MKS CFHB had a higher average of 57 while RS CFHB (30), TLPR CFHB (13) and KWR CFHB (12) showed lower averages. The maximum number of customers in hourly snapshot were observed in the following sessions:
 - (a) YCWS CFHB: 305 at 13:00 – 13:59 hour
 - (b) MKS CFHB: 240 at 13:00 – 13:59 hour
 - (c) TLPR CFHB: 68 at 12:00 – 12:59 hour
 - (d) RS CFHB: 60 at 13:00 – 13:59 hour
 - (e) KWR CFHB: 32 at 13:00 – 13:59 hour
 - (f) LYS CFHB: 31 at 20:00 – 20:59 hour
 - (g) HRT CFHB (for benchmarking purpose): 173 at 13:00 - 13:59 hour

Table 6. SUMMARY OF THE CUSTOMER SNAPSHOTS FOR THE CFHBs

Bazaars	Average number of customers in hourly snapshot	Maximum number of customers in hourly snapshot
<i>Haiphong Road Temp. CFHB (367m²) (control)</i>	58	173 at 13:00 - 13:59
Yu Chau West Street CFHB (790m ²)	67	305 at 13:00 – 13:59
Ma Kok Street CFHB (2 383m ²)	57	240 at 13:00 – 13:59
Reclamation Street CFHB (111m ²)	30	60 at 13:00 – 13:59
Kwai Wing Road CFHB (515m ²)	12	32 at 13:00 – 13:59
Tai Lin Pai Road CFHB (810m ²)	13	68 at 12:00 – 12:59
Luen Yan Street CFHB (1 662m ²)	10	31 at 20:00 – 20:59

COMPETITORS

30. 183 similar stalls were identified in the vicinity of HRT CFHB, covering all the three types of stalls (Chinese restaurant, tea cafe, and congee and noodles stall) inside the bazaar.
31. Three types of stalls (Chinese restaurant, congee and noodles stall, and tea cafe) were identified inside the six CFHBs, which were all covered by competitive stalls in the vicinity. In particular, RS CFHB had the highest (137 vs. 183 for HRT CFHB) number of similar stalls identified, followed by KWR CFHB (67), LYS CFHB (59) and YCWS CFHB (57). TLPR CFHB and MKS CFHB had the lowest of 8 stalls and 13 stalls respectively.

Conclusions

MARKETS

32. The average daily patronage of Shau Kei Wan Market and Tang Lung Chau Market was 807 and 1 238 respectively. Comparing with the control sample, Causeway Bay Market (4 217), they were only 19% and 29% of the average daily patronage of Causeway Bay Market respectively. In addition, the average daily patronage per occupied stall of Shau Kei Wan Market (14) and Tang Lung Chau Market (38) were 16% and 42% respectively of that of Causeway Bay Market (90).
33. While 23 stalls (41% of the occupied stalls) in Shau Kei Wan Market and 25 stalls (76% of the occupied stalls) in Tang Lung Chau Market were operating (comparing with 45 stalls in Causeway Bay Market, 96%), no stall (0% of the occupied stalls) in Shau Kei Wan Market and only one stall (3% of the occupied stalls) in Tang Lung Chau Market was active (comparing with 11 stalls in Causeway Bay Market, 23%) during the enumeration period.
34. Only 5 and 8 customers were observed in the customer snapshot exercise at Shau Kei Wan Market and Tang Lung Chau Market respectively during the busiest hour, which were 14% and 23% of that for Causeway Bay Market (32 customers).
35. The two markets concerned were under-performed as compared with the control sample, Causeway Bay Market, in terms of their lower average daily patrons, lower maximum number of customers in hourly snapshot, lower percentage of active stalls and operating stalls. This might imply that the business viability of the two markets might be considered to be unsatisfactory.

CFHBs

36. The average daily patronage of Luen Yan Street CFHB, Kwai Wing Road CFHB and Tai Lin Pai Road CFHB ranged from 210 to 587, which was 6% to 17% of that of the control sample, Haiphong Road Temp. CFHB (3 391). In addition, the average daily patronage per occupied stall ranged from 10% (30) to 38% (118) of that of Haiphong Road Temp. CFHB (308). On the other hand, the average daily patronage of Yu Chau West Street CFHB (1 862) and Ma Kok Street CFHB (1 736) was around half (55% and 51% respectively) of that of Haiphong Road Temp. CFHB. The average daily patronage per occupied stall of Yu Chau West Street CFHB (466) was even greater than that of Haiphong Road Temp. CFHB (151%).
37. All stalls in the six CFHBs and the control sample were operating, with the exception of one stall (8% of the occupied stalls) in Ma Kok Street CFHB. In terms of whether stalls were active during the enumeration, only one stall each in Luen Yan Street CFHB (14% of the occupied stalls) and Tai Lin Pai Road CFHB (25% of the occupied stalls) was active, which was much lower than other CFHBs (ranged from 75% to 100%) and Haiphong Road Temp. CFHB (91%).

38. Reclamation Street CFHB, Luen Yan Street CFHB, Kwai Wing Road CFHB and Tai Lin Pai Road CFHB had around 31-68 customers being observed in the customer snapshot exercise during the busiest hour. They were only 18%- 39% of that of Haiphong Road Temp. CFHB (173 customers). On the other hand, Yu Chau West Street CFHB and Ma Kok Street CFHB had much higher number of customers being observed in the customer snapshot exercise during the busiest hour at 13:00 to 13:59 (305 and 240 respectively), which were 177% and 139% of that of Haiphong Road Temp. CFHB.
39. The six CFHBs were under-performed as compared with the control sample, Haiphong Road Temporary CFHB, in terms of their lower average daily patrons. However, Yu Chau West Street CFHB out-performed Haiphong Road Temporary CFHB in terms of higher average patronage per occupied stall per day as well as average and maximum number of customers in hourly snapshot. For Ma Kok Street CFHB, the average number of customers in hourly snapshot was quite close with the corresponding figure of Haiphong Road Temporary CFHB while the maximum number of customers in snapshot was even higher. It could be considered that these three CFHBs have their own operating characteristics.
40. Of the six CFHBs concerned, the viability of Luen Yan Street CFHB, Kwai Wing Road CFHB and Tai Lin Pai Road CFHB might be considered to be less satisfactory, in consideration of their level of patronage and customer snapshot.

**Survey on Viability of
Choi Hung Road Market
- Executive Summary -**

Executive Summary

Background and Objective

41. In order to assess the business viability of Choi Hung Road Market (CHRM), the Food and Environmental Hygiene Department (FEHD) commissioned Consumer Search Hong Kong Limited to conduct a survey (the Survey) of the stalls concerned.
42. The market consisted of two floors, the general market area on the ground floor and the cooked food centre on the first floor, operating quite independently. Up to 25 May, the general market area had 97 stalls with 3 of them vacant, and the cooked food centre had 19 stalls with 2 of them vacant. As there are separate exits on the ground floor and the first floor, patrons can depart from the general market area or the cooked food centre without passing through each other. In addition, there is an escalator (going upstairs only) and a staircase in the middle for the floor area linking between the general market area and the cooked food centre.
43. The Survey aimed to collect the following information to gauge the usage the general market area and the cooked food centre of CHRM:
 - (h) Number of patrons departing from the general market area and the cooked food centre;
 - (i) Usage of the general market area and the cooked food centre; and
 - (j) Information of the competitors in the vicinity of the CHRM.

Survey Methodology

HEADCOUNT

44. Headcounts for the general market area and the cooked food centre were conducted at different operating hours of the day. The Survey covered the main operating hours of the general market area and the cooked food centre. The time sessions were selected randomly over a fieldwork period of one week (i.e. 4 June 2012 - 10 June 2012)¹. The Survey was conducted on different days, with the total length of time sessions selected equivalent to two weekdays (i.e. Monday to Thursday) and two non-weekdays/ special days on Friday, Saturday, Sunday or public holiday.
45. The number of patrons² leaving via all exits (seven and five exits respectively) was counted by the enumerators at 30-minute intervals for the entire session.

¹ No public holidays fell within the selected fieldwork periods, to ensure the representativeness and to reduce the effect of special days on the estimates.

² “Patron” refers to a person who left the area concerned via any one of its exits. Staff of FEHD / FEHD contractors / stalls inside the area was excluded.

BUSINESS STATUS

46. Inspection of the business status of the stalls (i.e. have customer, no customer, storage, or non-operating) at an hourly interval (i.e. 06:00, 07:00 etc.) for the entire session was also carried out during the enumeration. For those stalls having customers during inspection, the number of customers³ was also recorded.

COMPETITORS

47. Information about the competitors, i.e. other similar retail outlets⁴ in the vicinity of CHRM, was also collected.
48. In the map of scale 1:1 000 as published by the Lands Department, the “vicinity” is defined as the area falling within nine grids (the grid in which the market is located plus the surrounding eight grids) covering an area of 90 000 m² (300 m x 300 m), with reasonable modification in accordance to the completeness and accessibility of the street blocks.
49. For each competitor with clear signs indicating its existence identified during the patrolling, the name, address, time visited, operating status during visit (i.e. “Opened” or “Closed”) and general classification were collected. For comparison purpose, the general classifications of the stalls within the CHRM were also collected according to the same classification groups.

Notes to Executive Summary

50. The percentages might not necessarily be added up to 100% due to rounding.
51. The figures in the Executive Summary are rounded to nearest integer for ease of perusal. It is not recommended to compile new figures from the figures in the Executive Summary and use the new figures to compare with other figures directly.

³ “Customer” refers to a person identified during a snapshot who:

- (a) was selecting / buying goods or receiving service (e.g. viewing the menu / eating) in the business area of a stall during the snapshot;
- (b) was waiting to be served in the business area of a stall.

⁴ “Similar retail outlets” of a specified market (including both general market area and cooked food centre) were defined as shops / restaurants which provided the same type of products / foods. These outlets only included those with clear signs indicating their existence, and excluded mobile hawkers as they had no fixed trading area in nature.

Summary of Findings

HEADCOUNT

52. The general market area has 97 stalls, with 94 (97%) of them being occupied⁵. The main operating hours are 06:00 - 20:00 hours. On average, the weekly patronage was 37 139. The peak-hour⁶ patronage accounted for 57% of total patronage. For every half-hour, the average patronage was 189. The maximum patronage was observed at 09:01 - 09:30 hour with 278 customers.
53. The cooked food centre has 19 stalls, with 17 (89%) of them being occupied. The main operating hours are 06:00 - 22:00 hours⁷. On average, the weekly patronage was 3 899. The peak-hour⁸ patronage accounted for 59% of total patronage. For every half-hour, the average patronage was 17. The maximum patronage was observed at 12:01 - 12:30 hour with 76 customers.

Table 7. SUMMARY OF THE PATRONAGE

Choi Hung Road Market	Average patronage per week	Average patronage per day	Average patronage per occupied stall per day	Percentage of patronage during peak hours	Average patronage per half-hour	Maximum patronage per half-hour
General market area	37 139	5 306	56 ⁹	57%	189	278 at 09:01 - 09:30
Cooked food centre	3 899	557	33 ¹⁰	59%	17	76 at 12:01 - 12:30

⁵ A stall is considered as “occupied” if the stall concerned was leased to a tenant across the period of conducting the observations according to FEHD records.

⁶ For the general market area, the “peak hours” are defined as: (a) 08:00 - 11:00 and (b) 15:00 - 19:00.

⁷ The official opening hours of the cooked food centre are 06:00 - 02:00 the next day. However, according to pre-fieldwork observation and the frontline staff of the market, the whole market closes already after 22:00.

⁸ For the cooked food centre, the “peak hours” are defined as: (a) 07:00 - 09:00, (b) 12:00 - 14:00 and (c) After 18:00.

⁹ Readers should be reminded that on the one hand, a patron may be a sole passer-by in a market environment. On the other hand, a patron may also be a customer of several stalls for each market visit.

¹⁰ Readers should note that a patron may be just a passer-by in a CFC environment. On the other hand, a patron may also be a take-away customer of several stalls per CFC visit. Nevertheless, such impacts were less significant comparing with the market areas.

BUSINESS STATUS

54. Among those occupied stalls in the general market area, 87 of them (93%) were operating and 6 (6%) of them were active.
55. Among those occupied stalls in the cooked food centre, 16 of them (94%) were operating and 2 (12%) of them were active.

Table 8. SUMMARY OF THE BUSINESS STATUSES

Choi Hung Road Market	No. of Stalls								Similar Stalls in vicinity ¹¹	
	Total	Vacant	Occupied ¹²							Non-operating
			Sub-total	Operating			Storage			
				Sub-total	Active	Inactive				
General market area	97	3	94 (100%)	87 (93%)	6 (6%)	73 (78%)	8 (9%)	7 (7%)	Not available	
Cooked food centre	19	2	17 (100%)	16 (94%)	2 (12%)	7 (41%)	7 (41%)	1 (6%)	Available	

56. The hourly customer snapshots indicated an average of 19 for the general market area. The maximum number of customers in hourly snapshot was observed at 17:00 - 17:59 hour with 40 customers. It was worth noting that, one stall selling light refreshment and one stall selling food-related dry goods accounted for 54% (10 out of 19 customers) of the customers observed in a customer snapshot exercise on average. If the above two dominating stalls are excluded, the average number of customers observed per snapshot decreased from 19 to 9.

¹¹ “Available” means that all types of stalls inside CHRM were covered by stalls in vicinity while “Not available” means that some types of stalls inside CHRM were not covered by stalls in vicinity.

¹² An “occupied” stall is considered as “operating” if one or more readings were recorded as “have customer”, “no customer” or “storage” across the period of conducting the observations.
 An “occupied” stall is considered as “active” if not less than one-third readings were recorded as “have customer” across the period of conducting the observations.
 An “occupied” stall is considered as “storage” if less than one-third readings were recorded as “have customer” but not less than one-third readings were recorded as “storage” across the period of conducting the observations.
 An “occupied” stall is considered as “inactive” if less than one-third readings were recorded as “have customer” and less than one-third readings were recorded as “storage” across the period of conducting the observations.
 An “occupied” stall is considered as “non- operating” if no reading were recorded as “have customer”, “no customer” or “storage” across the period of conducting the observations. Specifically, the stall was either “Physically Closed” or “Left Empty” across the period of conducting the observations.

57. The hourly customer snapshots indicated an average of 21 for the cooked food centre. The maximum number of customers in hourly snapshot was observed at 12:00 - 12:59 hour with 52 customers. During the enumeration, it was observed that an Indonesian restaurant (occupying two stalls) dominated the cooked food centre by accounting for 80% (29 out of 36 customers) of the customers observed in a customer snapshot exercise on non-weekdays. On average, this restaurant accounted for 61% (13 out of 21 customers) of the customers observed in a customer snapshot exercise. If this restaurant was excluded, the average number of customers observed per snapshot decreased from 21 to 8.

Table 9. SUMMARY OF THE CUSTOMER SNAPSHOTS

Choi Hung Road Market	Average number of customers in hourly snapshot	Maximum number of customers in hourly snapshot
General market area	19	40 at 17:00 - 17:59
Cooked food centre	21	52 at 12:00 - 12:59

COMPETITORS

58. 302 similar stalls were identified in the vicinity, covering the twelve types of stalls (such as other wet goods and other dry goods) inside the general market area. It was noted that there were four aquarium equipments stalls in the general market area but no similar stall was found in the vicinity. These four aquarium equipment stalls were all inactive stalls. On average, less than 1 customer was observed in a customer snapshot exercise.

59. 139 similar stalls were identified in the vicinity, covering all the five types of stalls (such as Chinese restaurant and meat / frozen meat (including frozen food) stall) inside the cooked food centre. There were three stalls identified providing meat / frozen meat. For information, none of the stalls were active stalls. For the 36 meat / frozen meat stalls identified in the vicinity, 34 of them were retail stalls in Tai Shing Street Market.

OTHER OBSERVATIONS

60. A number of passers-by were observed travelling between the exits, as a passage to other premises which has implication on the patronage figures.

61. According to the definitions, a “patron” refers to a person who left the area concerned via any one of its exits. As the general market area and the CFC are connected, the following have implications on the patronage figures of the general market area and the CFC:

(a) persons might have been simply passing through and leaving the general market area via the escalator and the staircase as a passage to the CFC (such patron flow was 2 744 (7%) out of 37 139 patronage of the general market area on average per week);

- (b) persons leaving the cooked food centre via the staircase might have been simply passing through and leaving the general market area via other exits leaving CHRM (such patron flow was 695 (2%) out of 37 139 patronage of the general market area on average per week); and
 - (c) possible overlapping and thus double counting of the above two groups of people.
62. The Indonesian restaurant (occupying two stalls) in the cooked food centre was observed serving as a gathering place of the Indonesians during the afternoons and evenings of the non-weekdays. This caused domination of this restaurant in the number of customers observed customer snapshot exercises during non-weekdays.

Conclusions

63. The average daily patronage for the general market area and the cooked food centre were 5 306 and 557 respectively. Comparing both areas, the cooked food centre had only 10% of the average daily patronage for the general market area. However, the average daily patronage per occupied stall for the cooked food centre (33) was 60% of that for the general market area (56). During the busiest hour, more customers were observed in the customer snapshot exercise at the cooked food centre (52) than that at the general market area (40).
64. While both the general market area (87 stalls, 93% of the occupied stalls) and the cooked food centre (16 stalls, 94% of the occupied stalls) had high operating rates, only 6 stalls (6% of the occupied stalls) in the general market area and 2 stalls (12% of the occupied stalls) in the cooked food centre were active during the enumeration period.
65. The business activities of the general market area were dominated by a stall selling light refreshment and a stall selling food-related dry goods. On average, they accounted for 54% (10 out of 19 customers) of the customers observed in a customer snapshot exercise. While for the cooked food centre, an Indonesian restaurant (occupying two stalls) dominated the cooked food centre on the non-weekdays by accounting for 80% (29 out of 36 customers) of the customers observed in a customer snapshot exercise, on average.