

<b>Doc Type</b>	CPC
<b>Paper No</b>	57/96
<b>Title</b>	Consultancy Survey of Users' Views on Shopping Centre Design
<b>CONTENTS</b>	<p>THE HONG KONG HOUSING AUTHORITY</p> <p>Memorandum for the Commercial Properties Committee</p> <p>Consultancy Survey of Users' Views on Shopping Centre Design</p> <p><b>PURPOSE</b></p> <p>To inform Members of the key findings of a consultancy survey into users' views on the design of new ousing Authority (HA) shopping centres.</p> <p><b>BACKGROUND</b></p> <p>2. The Housing Department has prepared design guidelines for the assistance of project staff involved in shopping centre design. These guidelines are amended periodically in line with the changing needs of residents, shoppers and shop tenants and to keep pace with trends in the retail market and the building industry.</p> <p>3. A market research firm, Survey Research Hongkong Ltd. (SRH), was commissioned in mid-1995 to conduct a large- scale survey into users' views on HA shopping centre design with a view to gauging satisfaction level and identification of aspects where further refinements are required.</p> <p><b>SURVEY COVERAGE</b></p> <p>4. The survey covered six shopping centres at Tai Wo and Hau Tak Estates (Type A, district centres), Tin Shui and Tak Tin Estates (Type C, large neighbourhood centres), and On Yam and Kin Sang Estates (Type D, small neighbourhood centres). These centres were completed, between 1989 and 1994, and are typical and representative in terms of type of centre and scale of retail provision. The markets in Hau Tak and Tin Shui Shopping Centres are run by single operators.</p> <p>5. A total of 2,968 people were interviewed, including 1,961 local residents living in nearby rental and HOS estates, 303 shop and shopstall tenants and 704 shoppers from elsewhere. The overall response rate exceeded 90%. Fieldwork was carried out in July and August 1995.</p> <p><b>MAJOR SURVEY FINDINGS</b></p> <p>Shopping Centres</p> <p>Level of Satisfaction</p> <p>6. Users were generally satisfied with the design of the shopping centres -</p> <p>(a) The average scores out of 100 given by residents, shoppers and shop tenants on overall design were 74, 74 and 68 respectively. The scores relating to individual shopping centres are at Annex A; and</p>

(b) Views of respondents on major design aspects were generally favourable. Satisfaction levels on general design, building services and basic shop facilities were all over 70 and on ancillary facilities nearly 70. Details are at Annex B.

#### Areas of Concern

7. Lower levels of satisfaction were recorded with specific aspects of design. Toilets were a continued concern although the problem is often more with management than design. Signage was considered insufficiently visible and comprehensible. It was also suggested that facilities for promotion activities could be improved.

#### Markets

##### Level of Satisfaction

8. Users were generally satisfied with the overall design. The average satisfaction levels were 72, 70 and 64 out of 100 for residents, shoppers and shopstall tenants respectively. For individual markets, the scores at Single Operator Markets (SOM) were slightly higher. Scores relating to individual markets are at Annex C.

#### Areas of Concern

9. On individual design aspects, the size of market stalls (too small) and susceptibility of drainage systems to blockage attracted the lowest scores. Details are given at Annex D.

#### Introduction of New Basic Provisions in Future Markets

10. In 1995, the design guidelines for markets were reviewed and a number of new facilities were introduced as basic provision for new projects, including provision of storage cocklofts, central air-conditioning and odour elimination systems. Respondents confirmed their support for these modifications. Detailed findings are at Annex E.

#### Need for Shopping Centre Improvement

11. The majority of residents (80%), shoppers (89%) and shop tenants (73%) considered shopping centre improvement works to be necessary. The minority (3%) of respondents who considered improvement works unnecessary were satisfied with the existing design; shop tenants were concerned that their business might be adversely affected by improvement works.

#### VIEWS OF THE DEPARTMENT

12. The time frame for planning, design and development of a shopping centre is typically five to six years, during which design requirements are frequently upgraded. Notwithstanding the recent completion of the centres covered by this survey, therefore, the designs differ from current design guidelines in some aspects.

13. The Department takes a proactive approach to monitor design standards and performance of shopping centres and markets. Regular in-house surveys, research studies and monitoring of feedback is maintained to identify areas for improvement. From such activity, the areas of concern revealed in the survey findings, as stated in paragraphs 7 and 9 above, have already been detected and addressed in current design guidelines.

Modifications include improved signage, display panels, hanging devices and tasklights for promotional purposes, larger market stalls and higher capacity drainage. Full-time toilet attendants are provided where possible to maintain higher standards.

#### INFORMATION

14. This paper is issued for Members' information, but if so wished may be discussed at the next Commercial Properties Committee meeting on 12 December 1996.

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