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Press Release on January 5, 2021

POP releases results of Policy Address follow-up survey and results of corporate social responsibility survey

Special Announcement

The predecessor of Hong Kong Public Opinion Program (HKPOP) was The Public Opinion Programme at The University of Hong Kong (HKUPOP). “POP” in this release can refer to HKPOP or its predecessor HKUPOP.

Abstract

POP successfully interviewed 1,005 and 1,014 Hong Kong residents by random telephone surveys conducted by real interviewers in early November and mid-December respectively. The follow-up survey conducted a month after the Policy Address was delivered shows that people’s appraisal toward the Policy Address have not changed much since the instant poll. The net satisfaction rate is negative 41 percentage points while the satisfaction rating is 29.9 marks. Meanwhile, the net satisfaction rate of CE’s policy direction bounced back to negative 42 percentage points from last year’s 70 percentage points. As for the survey on corporate social responsibility (CSR), the latest results are: KMB is the best local public transportation, while the rating of MTR again fell to an all-time record low since 2008; Smartone is the best local telecommunication corporation; Hang Seng Bank is the best local bank and financial services company, but the ratings of Hang Seng Bank, HSBC and Bank of China are at all-time record low since 2008, among which the drop in the rating of HSBC is especially huge; Cheung Kong Property is the best local real estate and property development company, while the rating of Sun Hung Kai Properties again fell to an all-time record low since 2008; ParknShop is the best local retail company, its rating rose to an all-time record high since 2008; Fairwood is the best local fast food restaurant chain. The effective response rates of the surveys are 63.9% and 68.7% respectively. The maximum sampling error of percentages is +/-4%, that of net values is +/-6% and that of ratings is +/-2.7 at 95% confidence level.

Contact Information

Policy Address Follow-up Survey

Date of survey	: 18-22/12/2020
Survey method	: Random telephone survey conducted by real interviewers
Target population	: Cantonese-speaking Hong Kong residents aged 18 or above
Sample size ^[1]	: 1,014 (including 503 landline and 511 mobile samples)
Effective response rate ^[2]	: 68.7%
Sampling error ^[3]	: Sampling error of percentages not more than +/-4%, that of net values not more than +/-6% and that of ratings not more than +/-2.4 at 95% conf. level

Weighting method : Rim-weighted according to figures provided by the Census and Statistics Department. The gender-age distribution of the Hong Kong population came from “Mid-year population for 2019”, while the educational attainment (highest level attended) distribution and economic activity status distribution came from “Women and Men in Hong Kong - Key Statistics (2019 Edition)”.

Corporate Social Responsibility (Rating Survey)

Date of survey : 9-13/11/2020

Survey method : Random telephone survey conducted by real interviewers

Target population : Cantonese-speaking Hong Kong residents aged 18 or above

Sample size^[1] : 1,005 (including 512 landline and 493 mobile samples)

Effective response rate^[2] : 63.9%

Sampling error^[3] : Sampling error of ratings not more than +/-2.7 at 95% conf. level

Weighting method : Rim-weighted according to figures provided by the Census and Statistics Department. The gender-age distribution of the Hong Kong population came from “Mid-year population for 2019”, while the educational attainment (highest level attended) distribution and economic activity status distribution came from “Women and Men in Hong Kong - Key Statistics (2019 Edition)”.

- [1] This figure is the total sample size of the survey. Some questions may only involve a subsample, the size of which can be found in the tables below.
- [2] In July 2018, POP revised the calculation of effective response rate. Thus, the response rates before and after the change cannot be directly compared.
- [3] All error figures in this release are calculated at 95% confidence level. “95% confidence level” means that if we were to repeat a certain survey 100 times with different random samples, we would expect 95 times having the population parameter within the respective error margins calculated. Because of sampling errors, when quoting percentages, journalists should refrain from reporting decimal places, whereas one decimal place can be used when quoting rating figures.

Policy Address Follow-up Survey

Results of the Policy Address follow-up surveys of 2018 to 2020 together with their corresponding instant polls are tabulated below:

	Instant poll ^[4]	First follow-up survey	Follow-up / Second follow-up survey	Change
2020^[5]				
Date of survey	<u>25/11/20</u>	--	<u>18-22/12/20</u>	--
Sample size	512	--	640	--
Response rate	77.7%	--	68.7%	--
Policy Address: Satisfaction rate ^[6]	19%	--	13+/-3%	-6%^[7]
Policy Address: Dissatisfaction rate ^[6]	64%	--	54+/-4%	-10%^[7]
Net satisfaction rate	-46%	--	-41+/-6%	+4%
Mean value ^[6]	2.0	--	2.1+/-0.1	+0.1
Satisfaction rating of Policy Address	27.2	--	29.9+/-2.4	+2.8

	Instant poll ^[4]	First follow-up survey	Follow-up / Second follow-up survey	Change
Policy direction: Satisfaction rate ^[6]	--	--	16+/-3%	--
Policy direction: Dissatisfaction rate ^[6]	--	--	57+/-4%	--
Net satisfaction rate	--	--	-42+/-6%	--
Mean value ^[6]	--	--	2.1+/-0.1	--
2019				
Date of survey	<u>16/10/19</u>	<u>17-18/10/19</u>	<u>11-14/11/19</u>	--
Sample size	679	512	519	--
Response rate	80.0%	63.7%	70.4%	--
Policy Address: Satisfaction rate ^[6]	17%	11% ^[7]	9+/-3%	-2%
Policy Address: Dissatisfaction rate ^[6]	65%	73% ^[7]	75+/-4%	+2%
Net satisfaction rate	-47%	-62% ^[7]	-66+/-6%	-4%
Mean value ^[6]	2.0	1.8 ^[7]	1.7+/-0.1	-0.1
Satisfaction rating of Policy Address	29.7	23.3 ^[7]	23.2+/-2.4	-0.1
Policy direction: Satisfaction rate ^[6]	--	11%	9+/-3%	-2%
Policy direction: Dissatisfaction rate ^[6]	--	78%	79+/-4%	+1%
Net satisfaction rate	--	-67%	-70+/-5%	-3%
Mean value ^[6]	--	1.7	1.7+/-0.1	--
2018				
Date of survey	<u>10/10/18</u>	<u>11-12/10/18</u>	<u>22-24/10/18</u>	--
Sample size	534	503	1,006	--
Response rate	65.9%	65.3%	63.4%	--
Policy Address: Satisfaction rate ^[6]	33%	32%	30%	-2%
Policy Address: Dissatisfaction rate ^[6]	34%	33%	39%	+6% ^[7]
Net satisfaction rate	-1%	-1%	-9%	-8%
Mean value ^[6]	2.9	2.8	2.8	-0.1
Satisfaction rating of Policy Address	48.5	50.5	49.7	-0.8
Policy direction: Satisfaction rate ^[6]	--	42%	39%	-3%
Policy direction: Dissatisfaction rate ^[6]	--	35%	36%	+1%
Net satisfaction rate	--	7%	2%	-5%
Mean value ^[6]	--	3.0	2.9	--

[4] Questions in instant surveys would exclude respondents who had not heard of / did not have any knowledge of the Policy Address. Figures in the table are subsample sizes.

[5] No follow-up survey was conducted one to two days after the Policy Address was delivered in 2020.

[6] Collapsed from a 5-point scale. The mean value is calculated by quantifying all individual responses into 1, 2, 3, 4, 5 marks according to their degree of positive level, where 1 is the lowest and 5 the highest, and then calculate the sample mean.

[7] The difference between the figure and the result from the previous survey has gone beyond the sampling error at 95% confidence level, meaning that the change is statistically significant prima facie. However, whether the difference is statistically significant is not the same as whether they are practically useful or meaningful, and different weighting methods could have been applied in different surveys.

The follow-up survey conducted a month after the Policy Address was delivered shows that 13% were satisfied with the Policy Address and 54% were dissatisfied, thus a net satisfaction rate of negative 41 percentage points. The mean value was 2.1, meaning close to “somewhat dissatisfied” in

general. The satisfaction rating was 29.9 marks. Both the net satisfaction rate and the rating have registered slight increase since the instant poll. The survey also shows that 16% were satisfied with Carrie Lam's policy direction, while 57% expressed dissatisfaction, thus the net satisfaction rate bounced back to negative 42 percentage points from last year's negative 70 percentage points. The mean value was 2.1, meaning close to "somewhat dissatisfied" in general.

Survey on Corporate Social Responsibility

The survey series on Corporate Social Responsibility (CSR) aims to gauge the public image of different commercial organizations in order to encourage them to become ethical companies and select the best corporations. There are a total of six modules under this survey series, namely, 1) Public Transportation, 2) Telecommunication, 3) Banks and Financial Services, 4) Real Estate and Property Development, 5) Retail, and 6) Fast Food Restaurant.

The surveys were conducted in two stages. In the first stage naming survey, respondents were requested to nominate, unprompted, at most five relevant corporations that they were most familiar with. The three most frequently cited names would enter the next stage. During the second stage rating survey, respondents would be asked to rate the CSR performance for each of the shortlisted corporations using a 0-100 scale, in which 0 indicates extremely poor performance, 100 indicates extremely good performance, and 50 means half-half.

Public Transportation

In the naming survey, the public transportations mentioned most frequently were KMB, MTR and Citybus. The latest ratings of these corporations are summarized as follows:

Date of survey	<u>19-20/7/17</u>	<u>4/1/18</u>	<u>20-23/7/18</u>	<u>5-6/8/19</u>	<u>9-13/11/20</u>	<u>Latest change</u>
Sample size	503 ^[8]	500	500	509	528	--
Response rate	55.2%	58.5%	50.8%	66.6%	63.9%	--
Latest findings	Finding	Finding	Finding	Finding	Finding & error	--
KMB	63.1	63.8	59.7 ^[9]	64.3 ^[9]	61.6+/-1.8	-2.7^[9]
Citybus	62.2 ^[9]	60.0 ^[9]	59.5	62.9 ^[9]	57.8+/-2.1	-5.1^[9]
MTR	62.2 ^[9]	60.1 ^[9]	56.2 ^[9]	47.3 ^[9]	46.5+/-2.6	-0.8

[8] The mobile sample was not included when survey results were released. The figures in the table above have been updated to reflect the results based on the combined landline and mobile sample. However, whether changes have gone beyond sampling errors is still determined based on the figures in the first release.

[9] The difference between the figure and the result from the previous survey has gone beyond the sampling error at 95% confidence level, meaning that the change is statistically significant prima facie. However, whether the difference is statistically significant is not the same as whether they are practically useful or meaningful, and different weighting methods could have been applied in different surveys.

Our latest survey showed that KMB was considered as having the best CSR reputation among local public transportations, scored 61.6 marks, while Citybus and MTR scored 57.8 and 46.5 marks respectively. The rating of MTR again fell to an all-time record low since 2008.

Telecommunication Corporations

In the naming survey, the telecommunication corporations mentioned most frequently were “3” Mobile, China Mobile and Smartone. The latest ratings of these corporations are summarized as follows:

Date of survey	<u>16-17/8/17</u>	<u>5-6/2/18</u>	<u>5-6/9/18 / 18-20/9/18</u>	<u>5-6/8/19</u>	<u>9-13/11/20</u>	<u>Latest change</u>
Sample size	611 ^[10]	505	511 / 1,002	509	543	--
Response rate	57.6%	61.2%	51.3% / 55.6%	66.6%	63.9%	--
Latest findings	Finding	Finding	Finding	Finding	Finding & error	--
Smartone	--	51.1	54.2 ^[11]	56.1	53.3+/-2.1	-2.8^[11]
“3” Mobile	50.7 ^[11]	45.6 ^[11]	--	52.3	50.4+/-2.2	-1.9
China Mobile	--	--	47.6	48.0	44.4+/-2.7	-3.6
PCCW	54.1 ^[11]	51.7 ^[11]	54.5 ^{[11][12]}	--	--	--
HKBN	58.6	--	--	--	--	--

[10] The mobile sample was not included when survey results were released. The figures in the table above have been updated to reflect the results based on the combined landline and mobile sample. However, whether changes have gone beyond sampling errors is still determined based on the figures in the first release.

[11] The difference between the figure and the result from the previous survey has gone beyond the sampling error at 95% confidence level, meaning that the change is statistically significant prima facie. However, whether the difference is statistically significant is not the same as whether they are practically useful or meaningful, and different weighting methods could have been applied in different surveys.

[12] The difference between the figure and the result from the previous survey has gone beyond the sampling error at 95% confidence level because of a change in the weighting method. If the previous weighting method was used, the difference would not have gone beyond the sampling error.

Our latest survey showed that Smartone was considered as having the best CSR reputation among local telecommunication corporations, scored 53.3 marks, while “3” Mobile and China Mobile scored 50.4 and 44.4 marks respectively.

Banks and Financial Services Companies

In the naming survey, the banks and financial services companies mentioned most frequently were HSBC, Bank of China and Hang Seng Bank. The latest ratings of these corporations are summarized as follows:

Date of survey	<u>12-13/9/17</u>	<u>5-6/3/18</u>	<u>15-19/11/18</u>	<u>19-20/8/19</u>	<u>9-13/11/20</u>	<u>Latest change</u>
Sample size	621 ^[13]	501	545	513	581	--
Response rate	68.8%	57.7%	67.9%	69.8%	63.9%	--
Latest findings	Finding	Finding	Finding	Finding	Finding & error	--
Hang Seng Bank	63.0 ^[14]	62.8	64.5	63.1	56.5+/-2.0	-6.6^[14]
HSBC	61.2 ^[14]	60.6	62.9	58.9 ^[14]	46.3+/-2.0	-12.6^[14]
Bank of China	56.1 ^[14]	57.4	59.3	48.1 ^[14]	45.4+/-2.4	-2.7

[13] The mobile sample was not included when survey results were released. The figures in the table above have been updated to reflect the results based on the combined landline and mobile sample. However, whether changes have gone beyond sampling errors is still determined based on the figures in the first release.

[14] The difference between the figure and the result from the previous survey has gone beyond the sampling error at 95% confidence level, meaning that the change is statistically significant prima facie. However, whether the difference is statistically significant is not the same as whether they are practically useful or meaningful, and different weighting methods could have been applied in different surveys.

Our latest survey showed that Hang Seng Bank was considered as having the best CSR reputation among local banks and financial services companies, scored 56.5 marks, while HSBC and Bank of China scored 46.3 and 45.4 marks respectively. The drop in the rating of HSBC is especially huge. The ratings of all three banks are at all-time record low since 2008.

Real Estate and Property Development Companies

In the naming survey, the real estate and property development companies mentioned most frequently were Sun Hung Kai Properties, Cheung Kong Property and Henderson Land Development. The latest ratings of these corporations are summarized as follows:

Date of survey	<u>16-18/10/17</u>	<u>18-19/4/18</u>	<u>21-24/1/19</u>	<u>19-20/8/19</u>	<u>9-13/11/20</u>	<u><i>Latest change</i></u>
Sample size	546	503	519	513	564	--
Response rate	63.0%	56.7%	59.0%	69.8%	63.9%	--
Latest findings	Finding	Finding	Finding	Finding	<i>Finding & error</i>	--
Cheung Kong Property	49.8 ^[15]	50.3	47.9	51.2 ^[15]	53.5+/-2.2	+2.3
Henderson Land Development	52.0 ^[15]	50.7	48.8	49.2	48.1+/-2.2	-1.0
Sun Hung Kai Properties	52.1 ^[15]	48.4 ^[15]	49.6	47.6	45.1+/-2.3	-2.5

[15] The difference between the figure and the result from the previous survey has gone beyond the sampling error at 95% confidence level, meaning that the change is statistically significant prima facie. However, whether the difference is statistically significant is not the same as whether they are practically useful or meaningful, and different weighting methods could have been applied in different surveys.

Our latest survey showed that Cheung Kong Property was considered as having the best CSR reputation among local real estate and property development companies, scored 53.5 marks, while Henderson Land Development and Sun Hung Kai Properties scored 48.1 and 45.1 marks respectively. The rating of Sun Hung Kai Properties again fell to an all-time record low since 2008.

Retail Companies

In the naming survey, the retail companies mentioned most frequently were ParknShop, Wellcome and 7-Eleven. The latest ratings of these corporations are summarized as follows:

Date of survey	<u>8-9/11/17</u>	<u>8-9/5/18</u>	<u>14-19/3/19</u>	<u>19-20/8/19</u>	<u>9-13/11/20</u>	<u><i>Latest change</i></u>
Sample size	504	511	565	513	524	--
Response rate	56.1%	60.7%	73.1%	69.8%	63.9%	--
Latest findings	Finding	Finding	Finding	Finding	<i>Finding & error</i>	--
ParknShop	55.1 ^[16]	55.8	53.8	54.7	57.1+/-2.0	+2.4
Wellcome	56.0 ^[16]	57.0	55.7	56.9	53.0+/-2.1	-3.9^[16]
7-Eleven	57.0 ^[16]	57.7	55.9	57.8	52.4+/-2.1	-5.4^[16]

[16] The difference between the figure and the result from the previous survey has gone beyond the sampling error at 95% confidence level, meaning that the change is statistically significant prima facie. However, whether the difference is statistically significant is not the same as whether they are practically useful or meaningful, and different weighting methods could have been applied in different surveys.

Our latest survey showed that ParknShop was considered as having the best CSR reputation among local retail companies, scored 57.1 marks, while Wellcome and 7-Eleven scored 53.0 and 52.4 marks respectively. The rating of ParknShop rose to an all-time record high since 2008.

Fast Food Restaurant Chains

In the naming survey, the fast food restaurant chains mentioned most frequently were Café de Coral, Fairwood and McDonald's. The latest ratings of these corporations are summarized as follows:

Date of survey	<u>6/12/17</u>	<u>6-7/6/18</u>	<u>20-23/5/19</u>	<u>19-20/8/19</u>	<u>9-13/11/20</u>	<u>Latest change</u>
Sample size	502	502	687	513	527	--
Response rate	59.9%	56.0%	61.9%	69.8%	63.9%	--
Latest findings	Finding	Finding	Finding	Finding	Finding & error	--
Fairwood	55.5	57.1	55.9	56.4	54.8+/-2.0	-1.7
McDonald's	55.7	58.2 ^[17]	56.8	56.8	52.8+/-2.2	-4.0^[17]
Café de Coral	53.2	57.3 ^[17]	55.1 ^[17]	55.6	50.8+/-2.1	-4.8^[17]

[17] The difference between the figure and the result from the previous survey has gone beyond the sampling error at 95% confidence level, meaning that the change is statistically significant prima facie. However, whether the difference is statistically significant is not the same as whether they are practically useful or meaningful, and different weighting methods could have been applied in different surveys.

Our latest survey showed that Fairwood was considered as having the best CSR reputation among local fast food restaurant chains, scored 54.8 marks, while McDonald's and Café de Coral scored 52.8 and 50.8 marks respectively.

Data Analysis

The follow-up survey conducted a month after the Policy Address was delivered shows that people's appraisal toward the Policy Address have not changed much since the instant poll. The net satisfaction rate is negative 41 percentage points while the satisfaction rating is 29.9 marks. Meanwhile, the net satisfaction rate of CE's policy direction bounced back to negative 42 percentage points from last year's 70 percentage points.

As for the survey on corporate social responsibility (CSR), the latest results are: KMB is the best local public transportation, while the rating of MTR again fell to an all-time record low since 2008; Smartone is the best local telecommunication corporation; Hang Seng Bank is the best local bank and financial services company, but the ratings of Hang Seng Bank, HSBC and Bank of China are at all-time record low since 2008, among which the drop in the rating of HSBC is especially huge; Cheung Kong Property is the best local real estate and property development company, while the rating of Sun Hung Kai Properties again fell to an all-time record low since 2008; ParknShop is the best local retail company, its rating rose to an all-time record high since 2008; Fairwood is the best local fast food restaurant chain.