

Opinion Research Analysis Brand Hong Kong Review

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Introduction

In 2001, Brand Hong Kong (BrandHK) was launched to promote Hong Kong as Asia's world city. The core values and attributes of the Brand were determined after conducting extensive research in Hong Kong and abroad. Seven years after its launch, The Hong Kong Special Administrative Region Government (the Government) reviewed the BrandHK programme. In 2008, the Government commissioned Fleishman-Hillard, a leading global public relations firm, working in conjunction with Taylor Nelson Sofres (TNS), one of the world's largest custom market research specialists, to conduct opinion research to determine whether the BrandHK programme has to be updated to represent the prevailing values and attributes of Hong Kong and to align with the aspirations of the people of Hong Kong.

Research was carried out from May 2008 to February 2009 to gauge public views on the Brand and their vision of an ideal Hong Kong in 2020. The research was undertaken using three methods - qualitative and quantitative research, Webledge analysis to assess international perceptions of Hong Kong on the Internet, and a newly created online platform, www.myhk2020.com to engage the public in the Brand Hong Kong review process. This three-pronged approach ensured a balanced representation of the views of Hong Kong from people of different sectors.

This report outlines the background and analysis of research findings and provides professional input into the Government's initiatives to revitalise the city's brand and update its communications strategy.

1 Executive Summary

1.1 Overview

Since the launch of Brand Hong Kong (BrandHK) in 2001, there have been changes in the macro-environment affecting Hong Kong. With globalisation as well as rapid development in the region, Hong Kong faces increasing competitive challenges from other cities within the region. Hong Kong has to adjust and develop internally to adapt to these changes and to maintain its competitiveness as a world city in Asia.

Unlike in 2000-01, when the brand development research primarily targeted overseas audiences, the research undertaken in 2008-09 for the BrandHK Review focused on stakeholders within Hong Kong - the business community, tourists, opinion leaders (academics, politicians, NGOs, media), students and the general public. External perception of Hong Kong was researched on the Internet and through various global indices.

The research covered three broad objectives:

- To explore the need to update the core values, attributes and positioning of BrandHK
- To understand the strength and weaknesses of today's Hong Kong
- To understand Hong Kong people's vision of the ideal Hong Kong in 2020

A better understanding of these three areas would help the Government assess Hong Kong's current brand status, develop a brand strategy that will maintain Hong Kong's position as Asia's world city, and align the brand vision with people's aspirations.

1.2 Overview of Research Design

Three types of research were undertaken during 2008 and 2009:

- **Opinion Research**, which was undertaken among stakeholders within Hong Kong in three phases. It included Qualitative Research (Phase 1 – May to June 2008), Quantitative research to prioritise findings (Phase 2 – July to October 2008) and Qualitative research to obtain an in-depth understanding (Phase 3 – November 2008 to February 2009).
- **Webledge Research**, which assessed international perceptions of Hong Kong on the Internet through keywords search and filters. This information was then analysed to assess public views of Hong Kong compared with four other key cities – Singapore, Shanghai, New York and London.
- **myhk2020.com** was an online platform specially designed and created to engage the local community, particularly youths, and proactively solicit their views. Members of the public were encouraged to share their opinions and aspirations for Hong Kong in 2020.

1.3 Overview of Opinion Research Findings

The opinion research aimed to identify what people value most in a city. It looked at the important aspects that make a city desirable to live, work, study in or travel to, and personal values that are vital to people's overall satisfaction and enjoyment in life. Attributes or the most prominent characteristics describing Hong Kong today and people's ideal Hong Kong in 2020 were also explored in the research.

“Safe City”, “Stable City”, “Social Harmony”, “Strong and High Quality Education Services”, “Quality Environment”, and “Free, Tolerant and Open” were identified as the most important aspects of a city that attract people to live, work, study and travel.

In general, people were satisfied with Hong Kong as a “Safe City”, a “Stable City” and a “Free, Tolerant and Open” society. However, satisfaction levels were relatively lower for “Quality Environment”, “Social Harmony” and “Strong and High Quality Education Services”.

As far as personal values are concerned, “**Security**”, “**Justice**”, “**Freedom**”, “**Learning and Knowledge**” and “**Harmony**” were what people valued most to achieve overall satisfaction and enjoyment in life.

The following attributes were deemed most applicable to Hong Kong today:

- Well-connected
- Cosmopolitan
- Fair and Just Legal System
- Materialistic
- People Work Hard
- Stable and Secure
- People Enjoy Freedom/Free Society
- Efficient
- Full of Energy/Dynamic

Ideal Hong Kong in 2020

When asked what Hong Kong should ideally look like in 2020, respondents identified four key elements that they wanted the city to possess:

- Creativity and Diversity - People value a society that encourages creativity and the nurturing of diverse talent, lifestyles, and beliefs.
- Better Quality of Life - Specifically, they seek a better living environment with sufficient greenery, good air quality and a more balanced lifestyle.
- Freedom and Enjoyment - People would like to be free of stress and worry about economic and political issues, and they enjoy the freedom now found in Hong Kong.
- Striving for Excellence - Participants believe the city as a whole is making continuous progress, gaining a wider perspective and achieving higher levels than previous.

1.4 Overview of Webledge Research Findings

The Webledge study revealed that Hong Kong is less mentioned on the Internet compared with Western cities such as New York and London, although it is commented on more than other Asian cities, with Singapore close behind. The information captured by Webledge was categorised into topics for the purpose of analysis. Topics included “Trade”, “Culture/Heritage”, “Economy”, “Quality City”, “Physical Assets” and “Investment”. Most of the online comments were on the topics of “Trade” and “Culture/Heritage”, and most information was found in news pages and blogs. The topics of “Economy” and “Quality City” received less exposure than the other topics. There were relatively more blogs about Hong Kong’s and New York’s “Physical Assets”, but there were more positive mentions about New York’s and London’s “Culture/Heritage” than Asian cities.

Hong Kong’s Victoria Harbour and its skyline are perceived as unique assets that provide the city with a distinctive icon. Hong Kong is seen as a place where East meets West, but it is weak on “Culture/Heritage”, an area where London and New York is outstanding. Hong Kong is perceived as the gateway to China and a financial hub in Asia. It was mentioned as a world city as often as New York, although London was the city most often mentioned as a world city. Hong Kong’s infrastructure is well regarded with positive comments on the airport and other transportation.

In the sentiment analysis, the study found limited negative comments overall. All cities received similar positive comments on “Investment” except Shanghai, which was comparatively lower than the others.

Singapore was seen as Hong Kong’s closest competitor. It received more positive feedback than other comparison cities on “People”, “Governance”, and “Quality City”.

1.5 Overview of myhk2020.com Findings

The website myhk2020.com, together with two open competitions, generated positive feedback by inspiring people to envision their ideal Hong Kong in 2020. The exercise gathered views from Hong Kong residents through various channels.

Through the myhk2020.com platform, people expressed their views in the areas that they viewed as important for the future of Hong Kong. The key areas of interest were protecting the environment, treasuring heritage and enhancing international presence.

From the submissions, a common theme emerged – Hong Kong in 2020 will need to balance development and preservation. Sustainable economic development needs to take into consideration preserving the environment, and the next generation needs to develop a greater appreciation of heritage and culture.

Overall, Hong Kong people hope that Hong Kong in 2020 will have an enhanced international presence with strengthened measures in environmental protection and an appreciation of Hong Kong’s tradition and heritage.

1.6 *Brand Implications of BrandHK Review*

Taken in totality, the research confirms that Hong Kong people still aspire for the city to be regarded as a world city. They are proud of its status as an international finance centre and that it is, in general, a free, safe, stable and progressive society that is industrious and results-oriented.

However, for Hong Kong to maintain its competitiveness and world city status, it should encourage more innovation and creativity. The education system should be more tolerant and open to diversity. Society has to work to achieve harmony and work/life balance in order to provide a better environment for bringing up families. Hong Kong has to develop greater appreciation of its rich culture and heritage.

From a branding perspective, the research supports Hong Kong's positioning as **Asia's world city**, but the core values and attributes could be adjusted to better reflect the aspirations of Hong Kong people. The core values and attributes of the revitalised BrandHK could be refined as follows:

<u>Core Values</u>	<u>Key Attributes</u>
Freedom	Connected
Stability	Cosmopolitan
Progress	Enterprising
Quality	Innovative
Sustainability	Diverse

2 Opinion Research on BrandHK

2.1 Methodology

<i>Segment</i>	<i>Phase 1 – May to June 2008 Qual</i>	<i>Phase 2 – July to Oct 2008 Quant</i>	<i>Phase 3 – Nov 2008 to Feb 2009 Qual</i>
(a) Business community			
- Multi-national corporation (MNCs) & expatriates	1 focus group (n=7)	n=50	5 in-depth interviews
- Small and medium enterprises (SMEs)	1 focus group (n=8)	n=51	5 in-depth interviews
(b) Tourists in HK			
- Mainland	13 in-depth interviews	n=36	13 in-depth interviews
- Other markets		n=69	2 ethnographies
(c) Opinion formers			
- Politicians	8 in-depth interviews	-	10 in-depth interviews
- Academics and think tanks			
- Non-governmental organisations (NGOs)			
- Media (local and international)			
(d) Students			
- Senior secondary	1 focus group (n=8)	n=40	4 in-depth interviews 2 ethnographies
- Tertiary (local, mainland and overseas students)	2 mini-focus group (n=8 in total)	n=60	6 in-depth interviews 3 ethnographies
(e) General public (covering lower, middle and upper income groups)	3 focus groups (n=24 in total)	n=300	10 in-depth interviews 2 ethnographies
Total	8 focus groups 21 in-depth interviews	n=606	53 in-depth interviews 9 ethnographies

2.2 Identifying What People Value Most in a City

A critical component of the BrandHK research was to determine what key stakeholders - students, business representatives, tourists and the general public – valued the most in a city. To determine this, respondents were asked to identify what makes a city desirable, and what gives them personal satisfaction in life.

Survey respondents identified six core aspects – **“Safe City”**, **“Stable City”**, **“Strong and High Quality Educational Services”**, **“Free, Tolerant and Open”**, **“Social Harmony”**, and **“Quality Environment”** – as what they considered most important to making a city desirable to live, work, study in and travel to.

With the exception of tourists, respondents were also asked which personal values were vital to their overall satisfaction and enjoyment in life. The five most vital personal values selected were **“Security”**, **“Justice”**, **“Freedom”**, **“Learning and Knowledge”** and **“Harmony”**.

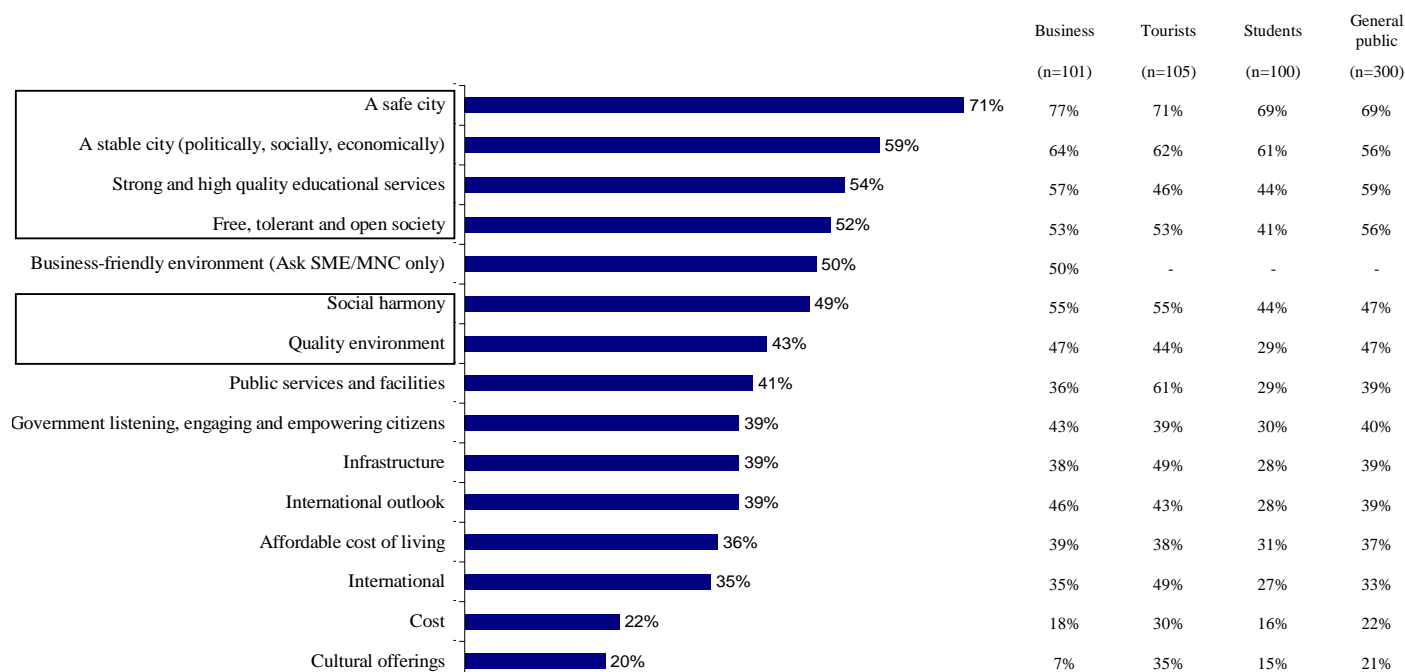
Respondents’ preference for important aspects of a city complement the personal values chosen as a desirable city would provide the environment and conditions conducive to pursuing personal satisfaction and enjoyment in life.

2.2.1 What Makes a City Desirable

Stakeholders of different age groups and background unanimously regarded **“Safe City”** as the most important aspect for Hong Kong. The four groups gave the highest rating (68% and above) to this aspect, which was justified in terms of personal safety and security of possessions. While **“Safe City”** is fundamental, having a stable political, social and economic environment is also important to the progress of a city. Hence, stakeholders agreed **“Stable City”** as the second most important aspect for Hong Kong.

It is worth noting that there is a discrepancy between the level of importance in the other four core aspects for students and the other three stakeholder groups. Students placed less emphasis on **“Strong and High Quality Educational Services”**, **“Free, Tolerant and Open Society”** and **“Quality Environment”**. Less than 50% of students rated these three aspects as important as **“Safe City”** and **“Stable City”**. Students gave a considerably lower rating to **“Quality Environment”** with only 29% considered this to be most important.

Important aspects that make a city desirable to live/work/study in or travel to



Base: All respondents (n=606)

Seventy one percent (71%) of respondents identified “**Safe City**,” as the most important aspect of a desirable city. Participants cited a city’s low crime rate, strong police force, civilised citizenry and political system, and motivation among the populace to maintain the city’s safety as critical elements of their satisfaction.

Respondents of the survey said they were satisfied with Hong Kong as a “**Stable City**,” which relates to a citizen’s sense of control over his own future and reassurance that he will not suffer from a substantial loss in terms of career, wealth and social status.

Participants credited the Chinese government for its support to Hong Kong; however, there was also some concern that over-reliance on the Chinese government would not be beneficial to Hong Kong’s long term economic sustainability.

On the political front, respondents were satisfied that Hong Kong’s government composition had not changed abruptly upon reunification. They noted that violent protests and riots were rare. In sum, people attributed Hong Kong’s status as a “**Stable City**” to its firm economic and political foundations and lack of destructive protests.

Hong Kong people believe that a “**Strong and High Quality Education System**” will drive the city forward; however, only 26% rated Hong Kong today as a good place to study in. Specifically, people noted the city’s lack of support for students with diverse talents, unstable education policy, exam-oriented philosophy, large class sizes, rigid teaching methods, narrow scope of curriculum substandard teacher qualifications that failed to keep pace with demand, and insufficient teacher support.

To provide strong and high quality educational services, people believe Hong Kong must create sound, stable, and consistent education policies that address the city's future talent needs, develop flexible and motivational educational content, tap international experiences, provide comprehensive coverage of a broad range of academic disciplines and give sufficient resources to support the development of individual students with different potential and learning styles.

Overall, respondents rated Hong Kong as satisfactory in terms of being “**Free, Tolerant and Open**”. Nevertheless, they felt that Hong Kong should be more tolerant of different cultures and show greater acceptance of new immigrants from Mainland China. They stressed the need for people to be able to pursue the lifestyle of their choice without constraints. Survey participants commented that Hong Kong remains free, tolerant and open, with guaranteed freedom of speech, the press, publication and religion, right to protest and equal treatment for all regardless of culture or race.

People regarded this particular aspect as Hong Kong's key differentiator from China and other Asian countries. For this reason, they place high importance to this aspect. Survey participants identified “**Social Harmony**” as another critical aspect. “Social Harmony” is about unity of a society and its acceptance of people from different backgrounds, cultures or beliefs. It helps to nurture a sense of belonging by strengthening the social bond between people.

While respondents noted its importance, they gave Hong Kong an unsatisfactory rating in this area due to unequal treatment of those from different sectors of society (most notably the poor), growing discontent with government policies, the media's tendency to magnify bad news, the widening rich-poor gap, weakened family ties and frequent reports of family violence.

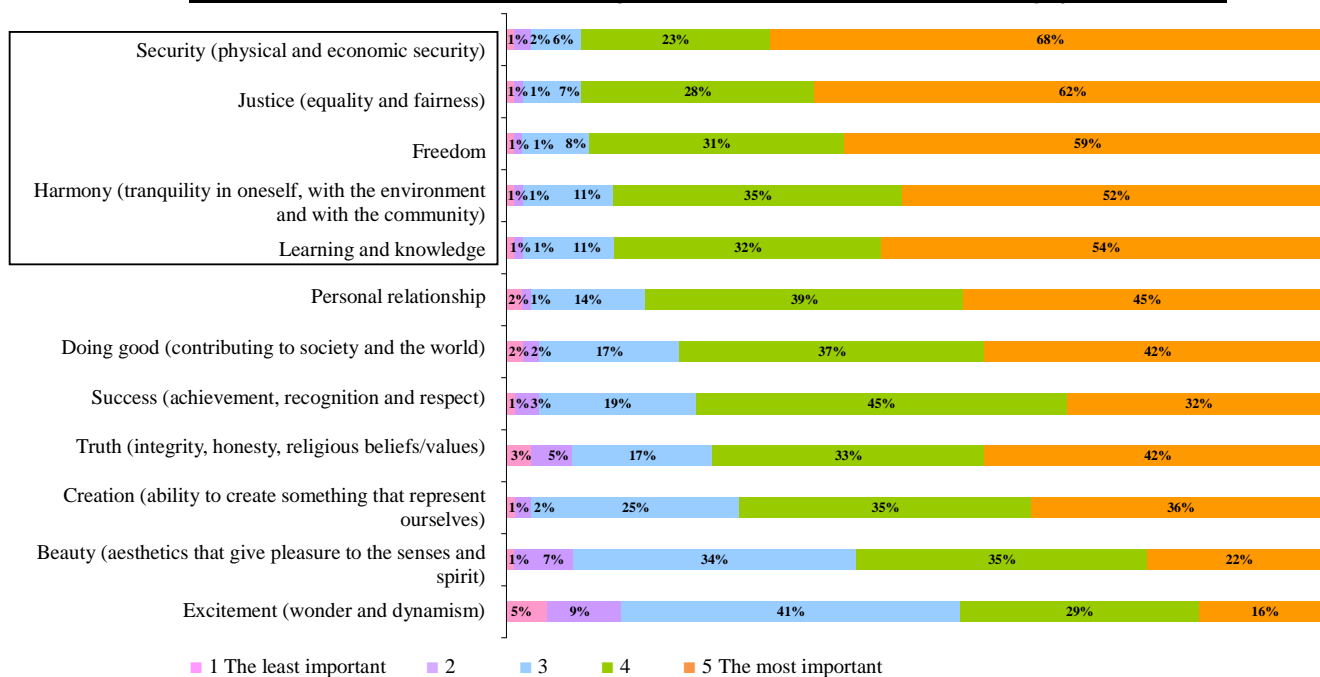
Finally, participants noted “**Quality Environment**” as another aspect of great importance. Hong Kong residents desire an environment that helps make their life more enjoyable and fulfilling, contributes to their well-being, promotes a healthy lifestyle both physically and mentally, and encourages productivity.

While respondents appreciated the large green areas in the New Territories and Hong Kong's well-developed infrastructure, public service and facilities, they emphasized the need to reverse poor air quality, high density housing, and insufficient greenery in urban areas. To warrant a satisfactory rating, the city has to improve its air quality, enhance its city landscape and properly maintain its public services, facilities and infrastructure.

2.2.2 Personal Values Vital to Overall Satisfaction and Enjoyment of Life

The research also revealed the important personal values that are key to people's overall satisfaction and enjoyment of life. Respondents (except tourists) identified five of the most important personal values – “**Security**”, “**Justice**”, “**Freedom**”, “**Learning and Knowledge**” and “**Harmony**” which complement the core aspects chosen.

Personal values that are vital to your overall satisfaction and enjoyment of life



Base: All respondents except tourists (n=501)

Sixty eight percent (68%) of respondents chose “**Security**” as the most important personal value. They wanted to live in an environment where there was both physical and economic security. It is clear that having a safe and stable city is the cornerstone of the Hong Kong lifestyle. This strongly correlates with two of the selected important aspects – “Safe City” and “Stable City”.

“**Justice**” and “**Freedom**” are the second (62%) and third (59%) most important personal values. This finding reinforced respondents’ preference for a “Free, Tolerant, and Open” society. This shows that the equality, fairness and freedom that Hong Kong people currently enjoy should be maintained in order to uphold a satisfied population.

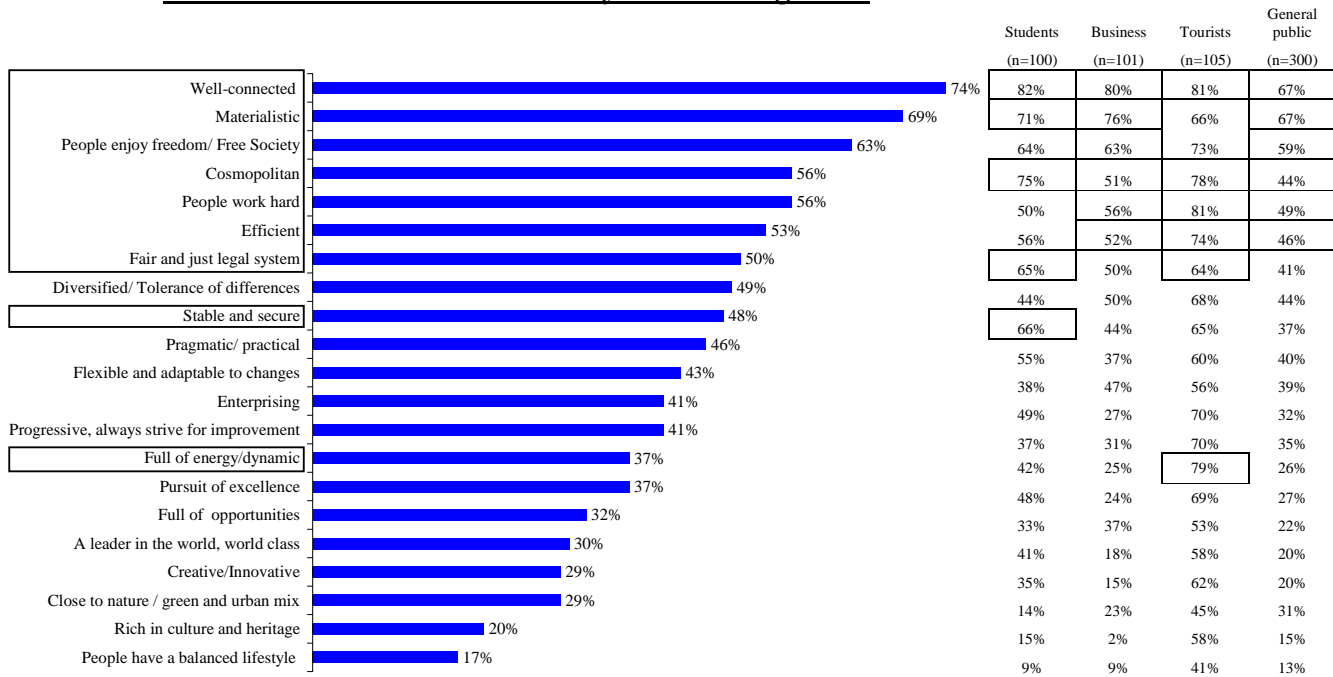
Strong and high quality educational services are essential to nurture future talent and support continued education. Living in a knowledge based society, some Hong Kong people have an intention to seek for continual education. Not surprisingly, respondents rated “**Learning and Knowledge**” as the fourth (54%) most important personal value that is critical to their satisfaction and enjoyment of life.

The finding also revealed that Hong Kong people would like to have harmony in society and as a result, “**Harmony**” was rated the fifth (52%) most important personal value. Again, this echoes with the previous finding where “Social Harmony” was considered a critical factor that attracts people to live, work, study in or travel to a city.

2.3 Understanding the Characteristics of Hong Kong

The attributes identified in this research as the most prominent characteristics describing Hong Kong today are “**Well-connected**”, “**Cosmopolitan**”, “**Fair and Just Legal System**”, “**Materialistic**”, “**People Work Hard**”, “**Stable and Secure**”, “**People Enjoy Freedom/Free Society**”, “**Efficient**” and “**Full of Energy/Dynamic**”.

Prominent attributes identified by different segments



Base: All respondents (n=606)

“**Well-connected**” was the most prominent attribute identified among all segments. Seventy four percent (74%) of respondents rated it as a very strong characteristic of Hong Kong. People felt that Hong Kong’s fast, rich and free information flow enabled them to communicate freely with the rest of the world and fostered openness and tolerance toward different cultures and lifestyles.

Key elements of “**Well-connected**” include Hong Kong’s well-established transportation system and open communication practice. Mass transit such as the Mass Transit Railway (MTR) and buses are regarded as fast and convenient, and the airport is considered by most to be well-known and world-class. Readily accessible communication channels supported by broad Internet coverage, well-developed telecommunication networks and freedom of speech allow people to communicate and access information freely and easily.

The general public, business community, and students identified “**Materialism**” as a leading attribute and a key driver in encouraging Hong Kong people to work hard, think, and act progressively. Respondents equated materialism with aspirations such as moving to a bigger house, buying more expensive clothes and accessories, and travelling more often.

Nevertheless, “Materialism” in Hong Kong is viewed as somewhat unhealthy and produced the negative impression of a city lacking diversity, long-term perspective and broad vision. Possessions, rather than contributions to society are used to judge neighbours and determine social class. As such, “Materialism” is not desirable for the sustainable development of Hong Kong.

The general public and business community identified “**Freedom**” as a value to be protected. Hong Kong people are very proud of the city’s freedom, which in the general sense acts as a key driver making Hong Kong a desirable place to live. Specifically, people cited freedom of speech, the press, publication and religion as important, and the business community appreciates the city’s policy of “positive non-interventionism.”

Seventy five percent (75%) of students and 78% of tourists view Hong Kong as “**Cosmopolitan**.” They consider it as a well-known tourist destination with a superb business environment that attracts foreign visitors and investment. The landscape, skyline, and well-established financial system contribute to the city’s cosmopolitan image.

The business community, on the other hand, believes that Hong Kong is only superficially “Cosmopolitan”. They criticised the city for being narrow-minded and remaining racially segregated. Some respondents also believe that Hong Kong people need to broaden their views of the world. To live up to its world-city status, the city should focus on developing a more open society that is able to tolerate people of different lifestyles and races.

Three of the four target audiences, including the general public, business community, and tourists, believe that “**People Work Hard**” is another prominent attribute of Hong Kong. Hong Kong people are known for working long hours. They strive for continuous improvement and enhanced competitiveness and generally live by a “can-do” and “never-give-up” attitude. This has helped the city rebound from difficult situations such as the Asian financial crisis and SARS.

While everyone agreed that people’s hard work was a key driver of Hong Kong’s success, they also acknowledged that – in excess – it could negatively impact people’s personal, social and family life. For this reason, the characteristic is viewed overall as not healthy for Hong Kong’s holistic development.

The general public, tourists and business community appreciate Hong Kong as “**Efficient**,” a very important quality that has contributed to the city’s economic success over the years. Hong Kong is considered a results-oriented city where people pride themselves on accomplishing tasks in a productive and cost-efficient way. Government and commercial services are valued as well-managed and delivered in a timely manner. The “Efficient” characteristic is an important enabler that allows Hong Kong people to assess and grasp any opportunity quickly and effectively.

Sixty four percent (64%) of tourists and 65% of students think a “**Fair and Just Legal System**” is a very valuable Hong Kong attribute. They believe that everyone gets the

same treatment under the current legal system. Moreover, Hong Kong has a low corruption rate, and the civil service is responsible and trustworthy. Overall, the people of Hong Kong place a high value on fair and just treatment under the law and insist on upholding it.

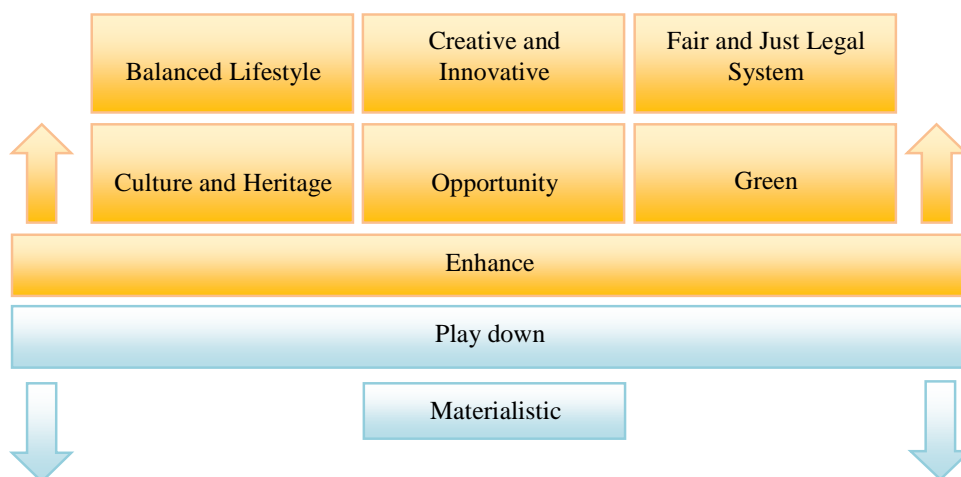
Students view Hong Kong as “**Stable and Secure,**” based on its strong government services that protect residents against crime and geographical location, which is generally free from major and destructive natural disasters. Destructive protests and riots are rare, and the people of Hong Kong express their opinions peacefully. A stable and secure environment helps retain talent over the long term and generates good will.

Finally, 79% of tourists saw Hong Kong as “**Full of Energy/Dynamic.**” The fast-paced lifestyle, efficiency, high-density living, and long shopping hours all contribute to Hong Kong’s standing as a dynamic city. Tourists viewed locals as early adopters of global and regional trends in areas such as fashion and technology. The city’s reputation as a high-energy, dynamic city makes it an attractive place for tourists and talent alike.

2.4 *Ideal Hong Kong in 2020*

When asked about what Hong Kong should ideally look like in 2020, respondents identified four key elements that they wanted to see. They stressed the need for creativity and diversity. In other words, people value a society that encourages creativity and the nurturing of diverse talent, lifestyles, and beliefs. Survey participants would also like a better quality of life. Specifically, they seek a better living environment with sufficient greenery, good air quality and a more balanced lifestyle.

Survey respondents also valued freedom, enjoyment of life and a spirit of continuously striving for excellence. People would like their lives to be free of stress and worry about economic and political issues, and they enjoy the freedom now found in Hong Kong. Participants also believe the city as a whole is making continuous progress, gaining a wider perspective and achieving at higher levels than previously.



3. *Weledge Research*

3.1 Methodology

The study used Weledge, a proprietary tool, to assess perceptions of Hong Kong on the Internet through topics using keywords and filters. Weledge is a way of tracking the number of times each topic and keyword appears. This information was then measured and organised to assess public views of Hong Kong compared with four other cities – Singapore, Shanghai, New York and London.

The data collection of English public content on the Internet, including web blogs worldwide, online news published in the United States and internationally, openly accessible forums and boards, was carried out from 1 December 2008 until 31 January 2009.

Weledge enables derived perception analysis through defined keywords which were grouped into nine topics related to the perception cities. The topics analysed were “Physical Assets”, “Culture and Heritage”, “Infrastructure”, “People”, “Trade”, “Investment”, “Governance”, “Economy” and “Quality City”. Weledge then filtered the topics by city. The information was measured by information source, the number of mentions and positive and negative sentiments.

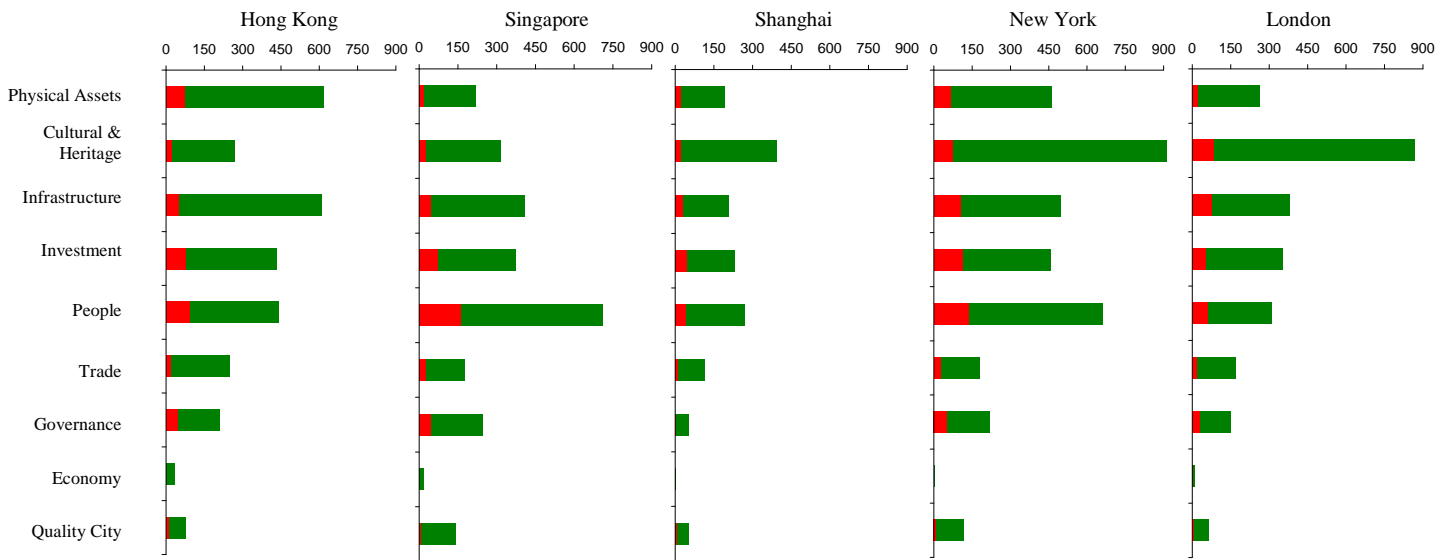
3.2 Source of Information

Most information came from news pages and blogs online, with blogs providing the most comments overall. Each of the five cities had about the same quantity of general web mentions, while other sources (news, blogs and boards) varied between cities. New York had the most exposure, with more than twice as many mentions than Hong Kong and Singapore. London was after New York in the total amount of mentions, followed by Hong Kong and Singapore. Shanghai had noticeably less exposure overall. Singapore and Hong Kong had very similar amounts of exposure through each medium.

3.3 Sentiment Analysis

The sentiment analysis rated comments as positive or negative using pre-defined sentiment keywords. These positive and negative comments were once again measured for each city and for each of the nine topics.

The positive comments for Hong Kong centred around its “Physical Assets” and “Infrastructure”. Hong Kong had relatively few negative comments, but the ones that it did have had to do primarily with “Physical Assets”, “Investment” and the “People”. While New York and London both received many comments on their “Culture and Heritage”, primarily positive, “Culture and Heritage” was also Shanghai’s strength, and it was the only area that Shanghai received more comments than Singapore and Hong Kong. New York and Singapore had the most comments on the topic “People”, but these cities had the mixed honour of receiving the most negative comments in this topic as well as the most positive ones.



Physical Assets

The positive sentiments about “Physical Assets” for each city were broken down into the subjects of regional hub, harbour, world city, environment and skyline.

While Hong Kong had the most number of positive mentions on this subject, the city’s unique asset with overwhelming positive remarks as compared to that of the other cities is its harbour. Bloggers regarded Victoria Harbour as “one of the most beautiful harbours in the world,” and “With its spectacular skyline and harbour, Hong Kong is a unique and dynamic blend of old and new, East meets West.” London was more often seen as a world city. Hong Kong was mentioned as a world city as often as New York.

Culture and Heritage

Positive details about “Culture and Heritage” were defined into subjects of East meets West, museum, theatre, concert hall, events and conservation and revitalisation.

Hong Kong had few comments about museums and theatres compared with London and New York. The positive comments that Hong Kong did have in this subject focused on the Hong Kong Museum of Art and the Hong Kong Museum of History. Shanghai was relatively well regarded for its theatre as far as Asian cities were concerned.

Hong Kong had the most comments about East meets West and conservation and revitalisation. Websites and blogs described Hong Kong’s East meets West aspect as part of a “unique culture” and one that “is reflected in its cuisine, cinema, music and traditions.” However neither the subject of East meets West nor conservation and revitalisation had very many mentions overall compared to some of the other subjects.

Museums appeared to be a determining factor of perception on a city’s “Culture and Heritage”.

Infrastructure

Infrastructure was dissembled into positive comments about connectivity, airport, facilities, telecommunications and transportation.

Infrastructure seemed to be a real point of difference for Hong Kong, which had the most comments in each of the subjects. Most of the positive remarks in this topic were about Hong Kong's airport, "the world's best for the seventh year," and about transportation facilities, particularly the Star Ferry and Peak Tram.

In positive exposure about the airport, Hong Kong was followed by Singapore, and about transportation, by New York.

People

This topic was measured by the subjects of global people, nationality/city people, distinctive character, opportunities, and attracting talent and expatriate. While Singaporeans and New Yorkers had the most positive coverage with Hong Kongers coming third in this topic, most of the positive comments for all the places except London were about the cities' nationality/city people. In regards to nationality/city people, Singaporeans as well as Hong Kong people were known for being "nice" and "friendly", especially to people of other nationalities. Bloggers described New York people as "open" and "supportive".

Singapore had the most comments on attracting talent and was mentioned as a "hub for Asia" with "talent coming in from all around the world." On Hong Kong, one writer said that the energy serves to "attract the most fascinating people," and another refers to the "support of a deep pool of talent" available in Hong Kong when starting business.

Trade

"Trade" was described by comments regarding the gateway to China, low tax/tariff, brands and free open trade in the cities. Hong Kong had the most positive exposure in the topic of trade, probably because of the city's status as the gateway to China, more so even than Shanghai. Hong Kong's free and open trade was also an important subject in this topic, and it achieved the most positive comments compared to the other cities, including the perception of Hong Kong as a "great world city for business." In addition, the low tax is a unique point of difference for Hong Kong, which one blogger commented was a reason that "entrepreneurship is on the rise" in Hong Kong.

Investment

"Investment" was defined by the keywords of international financial centre, business-friendly, foreign direct investment, investments and stock exchange market.

The topic of investment generated considerable exposure for all the cities, but Hong Kong came out slightly ahead in positive recognition even though New York had the most comments in general. Websites cited Hong Kong's position at the top of the Heritage Foundation's Index of Economic Freedom, and referred to the city as "open" in regards to "Investment".

Hong Kong's status as an international financial centre had more coverage than any of the other cities in this subject. Comments about this subject noted that Hong Kong is a hub of Asia, as well as a financial centre between the East and West. Additionally, Hong Kong and Singapore were better known than the other cities for their foreign direct investment.

Governance

The study defined "Governance" by the keyword subjects of social harmony, anti-corruption, governance, legal system, leadership and rule of law.

Singapore and Hong Kong gained a lead in positive remarks about "Governance" due to a large number of mentions about their well-governed legal system. Hong Kong's legal system was called "strong" and "well-developed."

Economy

"Economy" included the subjects of economic competitiveness, economy and world leader and open door/free economy.

Although comments about "Economy" were scarce overall, Hong Kong led the other cities by far in positive remarks on this topic with about twice as many mentions as the next city, which was Singapore. Most of Hong Kong's positive comments focused on the city's free and open economy, and in this subject Hong Kong overwhelmed the other cities. Websites referred to Hong Kong as "the most free economy in the world."

Quality City

"Quality City" was defined by the number of mentions about green living, safe city, clean city and progressive city.

Singapore had the most mentions for "Quality City" because of its cleanliness. New York and London received more comments about cleanliness than Hong Kong.

New York attracted most coverage as a safe city compared with other cities. As for Hong Kong, this is the topic that had the most positive remarks. Comments mentioned that the streets and travelling were safe in Hong Kong.

4. Analysis of Online (myhk2020.com) Submissions

4.1 About the myhk2020.com Online Platform

Launched on 28 September 2008, myhk2020.com was an online platform specially designed and created to engage the local community and proactively solicit their views. Members of the Hong Kong community were encouraged to share their opinions and aspirations for Hong Kong in 2020.

The online platform included various aspects, such as a multi-media submission option, weekly poll and two competitions. The public could express their views in multi-media

forms, such as photos, texts and videos, by responding to weekly poll questions, and through participation in a drawing competition and a lyrics/video competition. The website ran for 10 weeks and closed on 7 December 2008.

4.2 *Response to myhk2020.com*

Positive response to the website was backed up by a modest scale of promotion. The website recorded over 31,400 hits in the 10 weeks it ran. Over 1,300 multi-media submissions and responses received.

4.2.1 *Multi-media Submissions*

The following themes emerged from the multi-media submissions from the local community on their vision of an ideal Hong Kong in 2020:

A greener Hong Kong	An international city of world-class standards
A city that treasures and celebrates its past and its culture	A city where education and creativity are valued

A greener Hong Kong

Environmental protection is key to improving sustainability and living conditions for future generations in Hong Kong. Many submissions voiced the desire for a greener Hong Kong in 2020. Residents called for an end to pollution, a more concerned approach to nature conservation and a greener city.

A city that treasures its past and celebrates its future

Preserving culture and heritage is something that residents highly value in today's Hong Kong, one of the most urbanised and culturally diverse cities in the world. The strong culture and spirit of the city, which has been crucial to its success, poses a challenge to the government as it attempts to find a balance between urban development and preservation.

An international city of world-class standards

People generally want Hong Kong to have an increased presence on the international stage and a strong reputation as a world-class city. This desire was magnified by the Olympic spirit in and around China when myhk2020.com was launched. Respondents felt internationalism would certainly help boost Hong Kong's brand image.

A city where education and creativity are valued

Respondents emphasised the value of education and creativity to Hong Kong's residents, today and in the future. Submissions highlighted the importance of improving education for future generations. Respondents believed Hong Kong should be a city where the creative spirit is encouraged to thrive, and the focus on art in Hong Kong is valuable to its people.

4.2.2 *Weekly Poll Questions*

The weekly poll consisted of 15 questions that were published over a period of 10 weeks. The poll's objectives were to find out the current characteristics, attributes and core values of Hong Kong today compared to the desired characteristics, attributes and core values for Hong Kong in 2020.

Hong Kong Today

Characteristically, Hong Kong was regarded by respondents as a middle-aged person who was in his prime with considerable experience under his belt. Hong Kong would be a friend rather than spouse – a person with whom one is familiar and can share one's hopes and anxieties.

Some respondents viewed Hong Kong as a dragon, a powerful Chinese creature with a long heritage. This also symbolised Hong Kong's relationship with China. Red was regarded as the best colour to describe Hong Kong's competitive and restless spirit.

For Hong Kong people, harmony or tranquillity in oneself, was viewed as vital to overall satisfaction and enjoyment. Discovery, for example, knowledge and learning, doing good by contributing to society and the world and relationships formed by unity and connections with other people were also held in high regard.

Governance was viewed as the most important aspect of living in Hong Kong. Economic security and safety, quality of life and social harmony and cohesion were also important.

Respondents described Hong Kong and its people as globally connected, energetic, efficient, hard-working, enterprising and pragmatic.

Hong Kong was perceived to be a good place to grow up, study, and work or do business. However, poll results said that Hong Kong might not be a good place to retire.

Ideal Hong Kong 2020

Poll takers had various views on the ideal Hong Kong in the next decade. One of the top development priorities for Hong Kong is having a stronger international presence and network. Some respondents also suggested that Hong Kong's development should be broader to include environmental protection and nurturing of knowledge. Many wished for Hong Kong to be a happy place for families.

The attributes chosen as most important for an ideal Hong Kong in 2020 were creativity and innovation, but being cosmopolitan was also a commonly reported answer. The majority of poll takers believe that Hong Kong's can-do spirit will be a valuable asset to the next generation. Some also believe that Hong Kong's internationalism and free society would be important.

4.2.3 Creative Competitions

In the last quarter of 2008, two competitions were launched to encourage the public to express their ideal Hong Kong in 2020 in a creative manner. These competitions included a lyrics and video competition, jointly organised by the Information Services Department (ISD) and Radio Television Hong Kong (RTHK), and a drawing competition, jointly organised by ISD, St. James' Settlement and Arthome. myhk2020.com served as one of the platforms for the public to submit and showcase their submissions.

Lyrics and Video Competition

The lyrics created for the competition touched upon a wide range of topics such as environmental protection, justice and equality, internationalism, social harmony, innovation and universal suffrage. Their ultimate message was to highlight Hong Kong's ability to overcome any challenge, especially in the face of current economic issues, and enhance the city's position for the future. The lyrics reflected the aspirations of Hong Kong people and their hope for the city to continue to surpass expectations. Historically, Hong Kong has experienced ups and downs, but it will become even stronger with the collective contributions of its people. The entries were posted on myhk2020.com and YouTube, which recorded more than 36,000 views from the public.

Drawing Competition



Creative Category

Drawing Category

Participants in the competition ranged from age six to over 50. Environmental protection was a particularly popular topic among the younger contestants, while the preservation of Hong Kong's heritage was the major theme of the senior participants. Many of the contestants expressed their wish to preserve traditions. They believe some of the memories from the old days should be retained. The Star Ferry, trams, wet markets and old buildings frequently featured in the drawings.

5. **Brand Implications of BrandHK Review**

Taken in totality, the research confirms that Hong Kong people still aspire for Hong Kong to be regarded as world city. They are proud of its status as an international finance centre and that it is, in general, a free, safe, stable and progressive society that is industrious and results-oriented.

However, they also recognise that for Hong Kong to maintain its competitiveness and world city status, it needs to encourage innovation and creativity – which has implications for education services – be tolerant and open to diversity, and work to

achieve a more sustainable and harmonious society that values work/life balance, culture and heritage, and the environment.

From a branding perspective, the research supports Hong Kong’s positioning as **Asia’s world city**, but the core values and attributes could be adjusted to better reflect the aspirations of Hong Kong people. The core values and attributes of the revitalised BrandHK could be refined as follows:

Core Values	Key Attributes
Freedom	Connected
Stability	Cosmopolitan
Progress	Enterprising
Quality	Innovative
Sustainability	Diverse
Freedom – free and open society, freedom of the press, freedom of religion, freedom of speech, freedom of movement	Connected – infrastructure, communications, free flow of information, gateway to and from China, links with the world
Stability – safe city, security, economic and political stability, rule of law, fair and just legal system, corruption-free, social harmony	Cosmopolitan – international and local art scene, rich culture and traditions, global outlook, educated, sophisticated, popular tourist destination
Progress – continual economic, social and infrastructural advancement, continuously striving for excellence	Enterprising – can-do spirit, efficient, hard working, dynamic, resilient, seeking opportunities, aspiring, resourceful, productive
Quality – quality of life, seeking work/life balance, high quality of goods and services, leader	Innovative – creative, flexible and adaptable to changes, seeking new ways and new ideas, modern city and infrastructure, forward-looking
Sustainability – better living environment, clean and green, nature and heritage conservation, urban planning	Diverse – East meets West, old and new, multicultural, pluralistic, biodiversity, cityscape and rural landscape

6. *Future Direction*

There are several conclusions that can be drawn from the opinion research and www.myhk2020.com submissions analysis. Based on the findings, respondents felt the following are key elements to achieve an ideal Hong Kong 2020:

6.1 *Long Term Vision is Essential for Sustainable Development*

A long-term vision is essential to ensure Hong Kong's sustainable economic and social development and leading position in Asia. The vision should be based on **investment in human capital through education** and a thorough understanding of the **interests and needs of the different segments within Hong Kong society**. The vision should also take into consideration **Hong Kong's future development needs**. It is very important to ensure the consistency of policies and gain consensus on policy implementation.

6.2 *A More Engaging Policy-Making Process and Better Communication Strategies Needed*

A **more engaging and transparent policy-making process** will allow a better understanding of the needs and interests of different segments and acknowledgement of residents' opinions. In essence, **public engagement** which may be achieved through **better communication strategies**, is important. More effective channels, in addition to advisory and elected bodies such as District Councils and the Legislative Council, should be considered. These channels could include user friendly, convenient communications methods such as online channels.

6.3 *"Social Harmony with Diversity" should be Encouraged*

Social harmony is the foundation of stability and prosperity and **respect and tolerance of diversity** are a symbol of a civilised city. Social harmony with diversity is important for Hong Kong's positioning as **a world city** that allows the co-existence of different cultures, races, beliefs, opinions and lifestyles. More work should be done to promote inclusiveness, unity and respect for different viewpoints and more importantly to close the widening gap between the rich and the poor. Along with this, **encouraging diversity** helps to create a more tolerant and open society and this is built through education and long term nurturing.

6.4 *Freedom is the Most Cherished Value*

The freedom Hong Kong enjoys is perceived as **a unique characteristic that differentiates Hong Kong from other cities in China**. This is what Hong Kong people are **most proud of**, and it is perceived as a value that **should be strongly upheld by the Government**. It is apparent that having a high degree of freedom makes Hong Kong a better place to live in because residents feel comfortable about the city's long term development. It also maintains the competitiveness of Hong Kong by attracting talent to live and work. This is why maintaining the status quo, in terms of freedom, is important to the development of an ideal Hong Kong 2020.

6.5 *Creativity and Innovation are Essential in Building a More Sustainable Society*

Nurturing creativity and innovation is seen as a high priority to maintain Hong Kong's leading position in the world. Being creative and innovative enables Hong Kong to **create global trends, set benchmarks and attract attention as a role model for**

development – these are all essential elements of a world city. More resources for education, training and outreach should be devoted to developing Hong Kong’s creative and artistic talent.

6.6 *A Green Environment is Imperative to Making Hong Kong a More Livable City*

A green living environment, as well as **continuous public education** on how to live a green lifestyle, is believed to be vital for the well-being of Hong Kong’s residents and the ideal Hong Kong 2020. It is also perceived to be a critical factor in attracting talent so as to maintain Hong Kong’s competitiveness. Concerning this, among all the environmental issues, the degradation of air quality is the biggest concern. More focus should be put on tackling air pollution problems and more stringent laws to control emissions from factories and vehicles should be introduced. **Better urban planning** is also considered critical for Hong Kong to improve its living standards.

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