



OUR HONG KONG  
FOUNDATION  
團結香港基金

# Greater Bay Area Opportunities: Survey and Analytical Observations





## Greater Bay Area Opportunities: Survey and Analytical Observations

I. Introduction .....	2
II. Study Highlights .....	3
<b>Study Highlights (1): Recognition of the economic benefits brought by the Greater Bay Area</b> .....	3
1.1 Most respondents recognised the business opportunities arising from the Greater Bay Area.....	3
1.2 Mutual recognition for professional qualifications .....	4
<b>Study Highlights (2): It is perceived that more Hongkongers are willing to live in the Greater Bay Area - drawn by lower living costs</b> .....	5
2.1 Increased recognition of the Greater Bay Area.....	5
2.2 More inclined to move to the Greater Bay Area with social welfare incentives .....	6
<b>Study Highlights (3): Greater Bay Area development as a key “growth engine” for a more diverse economy</b> .....	8
3.1 Diversify Hong Kong’s economy .....	8
3.2 Maximise synergies among the Greater Bay Area cities .....	9
III. Concluding Remarks.....	11
Develop a refined and precise talent recognition policy.....	11
Effective promotion alongside a clear blueprint for development.....	11



## Greater Bay Area Opportunities: Survey and Analytical Observations

### I. Introduction

The Guangdong-Hong Kong-Macao Greater Bay Area (GBA) comprises two Special Administrative Regions (SARs) – Hong Kong and Macao, and nine mainland cities in Guangdong Province on the Pearl River Delta – Guangzhou, Shenzhen, Zhuhai, Foshan, Huizhou, Dongguan, Zhongshan, Jiangmen and Zhaoqing (hereinafter referred to as the “nine mainland cities”). The development of the GBA is accorded the status of key strategic planning in China’s development blueprint, and has great significance for the nation’s ongoing development and commitment to reform and opening-up. The concept for the “9+2 combination” of the GBA originated from the Pearl River Delta economic region, which was established by Guangdong’s provincial government in 1994. (HKTDC, 2020) Backed by the mainland, Hong Kong has always been an externally oriented and open economy well positioned to capitalise on the tremendous momentum of the rapid economic growth of the GBA.

Furthermore, Hong Kong has long been criticised of its excessively uniform economy structure, with its economy relying mainly on real estate and finance sectors. As a result, there are limited career paths for Hong Kong people, especially the younger generations. The co-development with the nine mainland cities will better equip the younger generations for the rapid changes in the future. Hong Kong has to formulate afresh strategies for the development of a diversified economy and introduce relevant supporting measures to seize the opportunities in the GBA.

Recent studies show that Hong Kong residents have an increased understanding about the GBA. Moreover, the GBA is recognised as an opportunity for future business development with access to the region’s market. Studies also show that businesses view the GBA as an increasingly important market in light of the new opportunities arising in China. Some of them have already set up offices in the region or are planning to do so.

In order to better understand how Hongkongers perceive and evaluate opportunities in the GBA, Our Hong Kong Foundation (OHKF) has commissioned the Public Governance Programme at the Lingnan University to conduct a randomised telephone survey. The response rate of the survey is 30.8%. 1,012 Hong Kong permanent residents (aged 18 or above) were successfully interviewed in late April 2021. The margin of error was estimated to be  $\pm 3.1\%$  at 95% confidence interval (See **Appendix I** for details).

In addition to the survey, OHKF has also commissioned an external organisation to conduct 12 focus groups to further understand participants’ perception of the GBA’s development. A total of 82 participants aged between 18 to 40 were interviewed in May 2021 (See **Appendix II** for details).



## II. Study Highlights

### Study Highlights (1): Recognition of the economic benefits brought by the Greater Bay Area

Survey

#### 1.1 Most respondents recognised the business opportunities arising from the Greater Bay Area

Questions

The survey suggests that Hong Kong residents agreed on the economic benefits brought by the development of the GBA. Leveraging the complementary advantages of the 11 cities, the GBA’s development would provide Hong Kong the access to a larger market and more development opportunities.

Among the respondents who have expressed their views<sup>1</sup>(the same applies hereinafter), 72%<sup>2</sup> of the respondents agreed<sup>3</sup> that the GBA’s development will increase the potential market size and create more opportunities for businesses in Hong Kong, while only 23% of the respondents disagreed<sup>4</sup> with this statement.

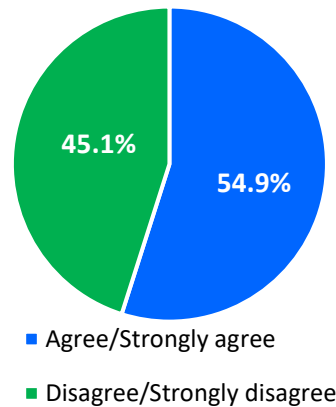
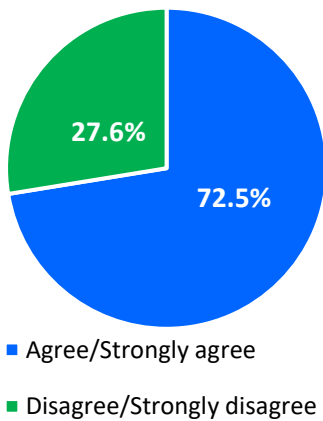
Q4

The survey also shows 55% of the respondents agreed that the development of the GBA will attract multinational corporations (MNCs) to expand its business operations in Hong Kong, creating more job opportunities in the local market, whereas 45% of the respondents disagreed with this statement (See Figure 1).

Q5

Q4: The joint development of Hong Kong and the other cities in the GBA will increase the potential market size and create more opportunities for businesses in Hong Kong.

Q5: The joint development of Hong Kong and the other cities in the GBA will attract multinational corporations to expand its business operations in Hong Kong, creating more job opportunities in the local market.



**Figure 1: Hong Kong residents’ opinions on the suggested effects brought by the joint development of Hong Kong and the other cities in the GBA**

<sup>1</sup> Unless specified or otherwise, all data presented in this document have excluded respondents who chose “no opinion” or “refuse to answer”.

<sup>2</sup> Due to rounding off error, discrepancies might occur in the percentages for the survey (All percentages are rounded off to the nearest integer in this document). See **Appendix I** for more details.

<sup>3</sup> “Agree” in this document counts the frequency of the options “strongly agree” and “agree” in the survey.

<sup>4</sup> “Disagree” in this document counts the frequency of the options “strongly disagree” and “disagree” in the survey.





Most of the participants recognised the constraints of the limited market size in Hong Kong. With a population size of 86 million and a similar level of GDP as compared with South Korea, the GBA provides more opportunities and potential for businesses growth. (Constitutional and Mainland Affairs Bureau, n.d.) With such enormous market size, opportunities in the GBA will undoubtedly contribute to the economy of HK, benefiting most stakeholders even for those who are not interested to work in the GBA.

Similar opinions were also gathered from the focus group discussions. Although not all respondents agree on the concept of the GBA, most of them have considered the potential benefits brought by the co-development of the GBA cities. This includes future career development and social upward mobility. For example, a fin-tech worker stressed on the necessity for Hong Kong's technology industry expanding into new markets in order to break the industry bottleneck. While some participants argued that with the GBA's development, businesses will be more integrated into both local and global supply chains, inducing a two-way development base for 'going global' and attracting foreign investment.

## 1.2 Mutual recognition for professional qualifications

In a knowledge driven economy, the demand for talents is on the rise incessantly. The current accreditation system of Hong Kong professional qualifications in the nine mainland cities has its limitations in effectively facilitating talent exchange between Hong Kong and the mainland GBA. Some respondents claimed that they were not familiar with policies related to preferential individual income tax, affecting their willingness to go to the GBA.

In the focus group discussions, some participants expressed their views on how the opportunities in the GBA could be a breakthrough in their careers. Below are some opinions collected from professionals of three industries, namely engineering, legal services and surveying. The study shows that the scope, requirements, and procedures of accrediting qualifications are the key factors encouraging Hong Kong professionals to develop their careers in the GBA, and in facilitating the exchange of talents.

### Surveying Industry

Currently, members of the Hong Kong Institute of Surveyors are classified into six divisions. However, according to the *Interim Guidelines for the Management of Hong Kong Engineering Construction Consultant Enterprises and Professionals Starting Business and Practising in the Guangdong-Hong Kong-Macao Greater Bay Area Cities* (the Interim Guidelines – Implemented on 1 January 2021), only three of them are mutually recognised with the mainland GBA, which are the General Practice Division, Quantity Surveying Division and Building Surveying Division, corresponding to the positions of Chinese Real Estate Appraisers, Registered Cost Engineers (Group 1) and Qualified Supervision Engineers in mainland China. (Department of Housing and Urban-Rural Development of Guangdong Province, 2020, p.7) Participants claimed that the fact that their division is not included in the Interim Guidelines is the main reason hindering their career development in the GBA.

### Engineering Industry

Some qualified engineers mentioned how local companies nowadays support graduate engineers to complete their practicum in the GBA. Internship experience in the GBA is recognised by the Hong Kong Institution of Engineers (HKIE) as part of graduate training requirement. This is a good incentive for those who are expressed interested in working in the GBA.



### Legal Services Industry

Some participants believed that as Hong Kong further integrates with the development of the GBA, there will be an increase of cross-border commercial cases. Therefore, obtaining the Chinese legal qualification will open up new client base, giving Hong Kong lawyers a competitive edge in the industry. Participants also pointed out that the current legal market has become more saturated due to increased places for law schools in Hong Kong compared to that in the past. Working in the GBA would be an alternative career pathway for new legal workers. Yet, this is not easy as it may sound. Participants expressed their worry of the time cost involved in further studies to obtain the qualifications.

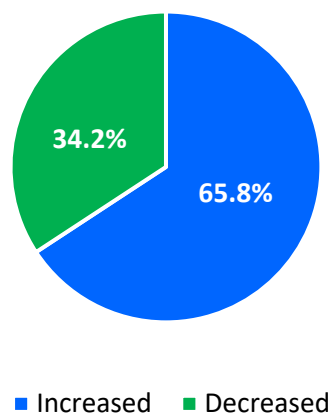
Another consideration is the benefit they would have received after obtaining the qualification. In the focus group discussions, participants give contradicting opinions when comparing the charge of legal services between Hong Kong and the mainland GBA cities. Some participants relayed that they do not understand and are not even aware of the measures. The government should do more to provide relevant information to the local industry.

### Study Highlights (2): It is perceived that more Hongkongers are willing to live in the Greater Bay Area - drawn by lower living costs

#### 2.1 Increased recognition of the Greater Bay Area

The survey shows that most respondents agreed on the trend of living in the nine mainland cities: In comparison with 5 years ago, 66% of the respondents believed that the number of people interested in living<sup>5</sup> in the GBA has increased, while 34% of them thought the opposite (See Figure 2).

Q10: In comparison with 5 years ago, what is your opinion on no. of people interested to live in the GBA?



**Figure 2: Hong Kong residents’ opinions on the trend of living in the nine mainland cities**

Among all the participants (including those who did not hold an opinion), 38% of the respondents chose Shenzhen as the city that Hong Kong residents would be most interested to work in, followed by Guangzhou (13%) and Zhuhai (7%), and 32% held no opinion. While for retirement, 16% of them selected Zhongshan. For

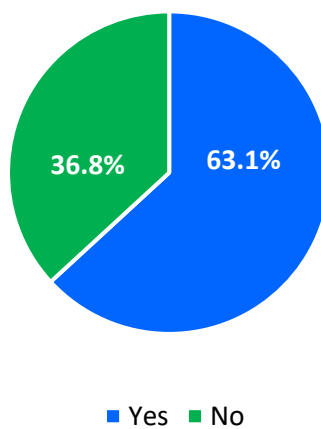
<sup>5</sup> The term “living” here includes, but not limited to working, business, studying and retiring.



the remaining eight cities, the frequency ranges from 2% to 12%, whereas 36% of the respondents held no opinion. The high percentages of ‘no opinion’ are likely related to the fact that the respondents lack thorough understanding of the mainland GBA cities. Q13

63% of the respondents said that they had been to at least one of the nine mainland cities in the past 5 years, and 37% of them said that they had not (See Figure 3). Among those who had, 58% have been to Shenzhen and 52% have been to Guangzhou. Whereas for the remaining seven cities, the frequency ranges from 13% to 32%. When asked the purpose of visiting the Mainland cities in the GBA, 62% chose “sightseeing-based tourism”, followed by “relative visiting” (23%) and “working” (11%) respectively. Q1  
Q2  
Q3

Q1: In the past 5 years, have you ever been to any city in Guangdong Province?



**Figure 3: Frequency of Hong Kong residents travelling to the nine mainland cities**

The above results show that sightseeing was the participants’ key form of interaction with the mainland GBA cities, with Shenzhen and Guangzhou being the most visited cities. However, sightseeing alone does little in helping the Hong Kong people to understand the GBA’s development and progress. Therefore, more has to be done to promote the GBA and to help Hong Kong residents to better understand business and career opportunities in the GBA.

**2.2 More inclined to move to the Greater Bay Area with social welfare incentives**

The study shows that living-cost related policies are the most attractive factors for Hong Kong people when considering whether to live in the mainland. Notably, having access to Hong Kong’s medical services and social benefits in the GBA cities is a great incentive for Hong Kong people to live in the GBA. The attempt to offer housing benefits in Mainland to Hong Kong residents would also increase their incentive in moving there.

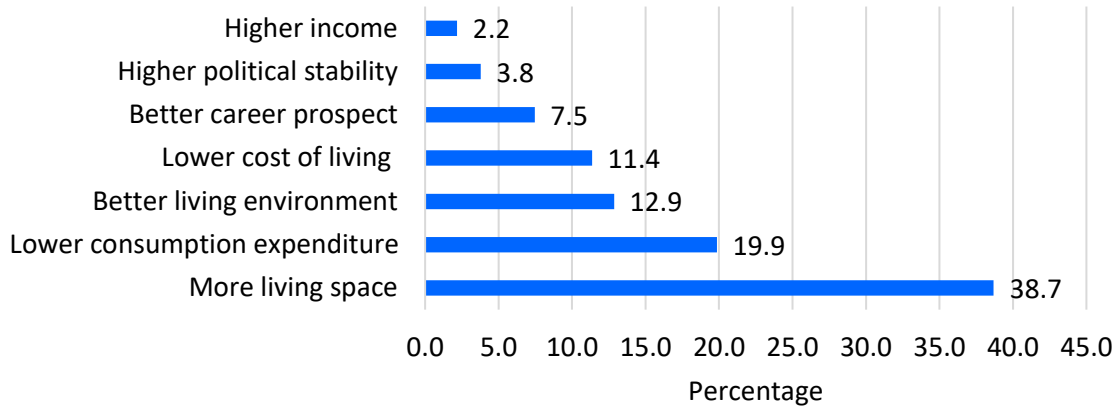
39% of the respondents selected ‘more living space’ as the most legitimate reason for moving to the GBA mainland cities, 20%, 13% and 11% of the respondents selected ‘lower living cost’, ‘better living environment’ and ‘lower cost of living’ respectively (See Figure 4). Q14

42% of the interviewees selected ‘entitlement to Hong Kong healthcare and welfare services in the GBA mainland cities’ as the most popular incentive for Hong Kong residents to live in the GBA cities, followed by Q15



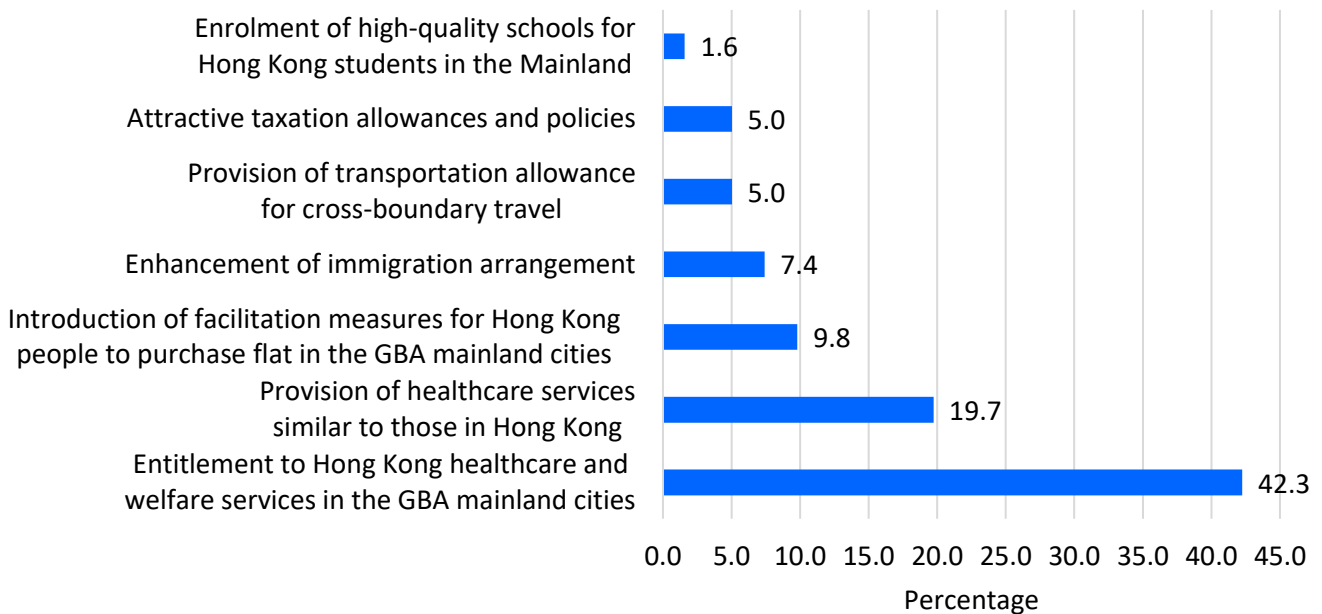
'provision of healthcare services similar to those in Hong Kong' (20%), 'introduction of facilitation measures for Hong Kong people to purchase flat in the GBA mainland cities' (10%) and 'simplification of immigration arrangement' (7%) (See Figure 5).

Q14: What do you think is the most legitimate reason for moving to the GBA mainland cities?



**Figure 4: Reasons for Hong Kong residents moving to the GBA mainland cities**

Q15: In your opinion, which of the following would increase your interest most in moving to the GBA mainland cities?



**Figure 5: Political incentives for Hong Kong residents moving to the GBA mainland cities**



Respondents also mentioned improvement in the cross-border transport and immigration arrangement were also conveyed by respondents who intend to work in the GBA. Some other respondents also mentioned cross-border transport subsidy as an incentive for highly-skilled talents.

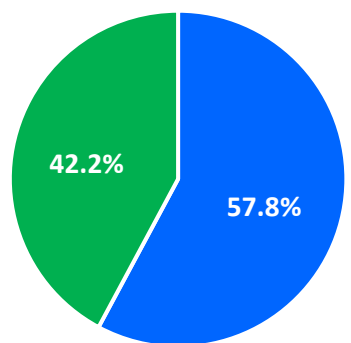
### Study Highlights (3): Greater Bay Area development as a key “growth engine” for a more diverse economy

#### 3.1 Diversify Hong Kong’s economy

According to the survey, 58% of the respondents agreed that the joint development of Hong Kong and the nine mainland cities will help to diversify Hong Kong’s economy and create more career options for Hong Kong people, while 42% of them disagreed (See Figure 6). Meanwhile, 20% of the respondents think that ‘technology and innovation’ and ‘transportation and logistics’ have the best prospect in the Greater Bay Area, followed by the ‘financial services’ (19%). The respondents recognised the fact that the local economy relies heavily on the real estate and finance, and expressed concerns about the limited career options. Hong Kong should identify new areas of growth by developing emerging industries vigorously. Through engaging in the GBA’s development, Hong Kong can nurture more talents and explore emerging industries so as to create new “growth engines”.

Q6  
Q11

Q6: The joint development of Hong Kong and the other cities in the GBA will help to diversify Hong Kong’s economy and create more career options for Hong Kong people.



- Agree/Strongly agree
- Disagree/Strongly disagree

**Figure 6: Hong Kong residents’ opinions on the suggested effect brought by the joint development of Hong Kong and the other cities in the GBA**

Many participants believed that the limited land resources and high operations cost are some of the greatest challenges to promote diversified development in Hong Kong. Some participants mentioned that the GBA is the hinterland for industrial transformation and bring continuous impetus to relaunch the economy. Some participants pointed out that all the GBA cities have different characteristics and foci of industries, Hong Kong can cooperate with them to enhance synergistic development. Otherwise, they claimed that Hong Kong would





have missed the ‘entry point’ into the mainland’s market and it will then be tough to have further development for Hong Kong.

When discussing about the need of economic transformation in Hong Kong, most participants saw ‘technology industries’ and ‘cultural and creative industries’ as potential pillar industries in Hong Kong. The following are summarised opinions from the participants:

#### **Development of Technology Industries:**

In general, participants agreed that technology industries should be one of the key industries in the government’s strategic planning. Hong Kong is renowned for its basic research as evidenced by the high positions occupied by local universities in the Quacquarelli Symonds (QS) World University Rankings in subjects related to innovation and technology. They also admitted that Shenzhen had been taking a leading role in different fields of technological developments, such as fin-tech industry development, when compared to Hong Kong. Some participants listed the advantages of the GBA cities (Shenzhen in particular) as follows: abundant land resources, precise policies to attract and retain highly-skilled talents, and the development and support from large dot-com companies. This echoes the data collected from the survey: 55% of the respondents agreed that the joint development of Hong Kong and the nine mainland cities could enhance the capacity of the innovation and technology sector in Hong Kong, and to upgrade and transform other industrial sectors, while 45% of the respondents disagreed. Q7

#### **Development of Cultural and Creative Industries:**

As suggested by the participants, the cultural industry is another possible future key industry. Among the GBA cities, Hong Kong is a city where East meets West. This unique cultural heritage in Hong Kong can strengthen the city’s position as an international cultural metropolis, and facilitates cultural exchange with the industries from the mainland cities. On the other hand, they also claimed that the government should provide support to the industry through offering the industry and local art practitioners a key role in the GBA development, especially those in the film industry. Echoing to the data collected from the survey, 66% of the respondents agreed that the joint development of Hong Kong and the nine mainland cities could provide more venue choices; and a more diverse, new audience group with the access to the mainland GBA market for Hong Kong performing groups/troupes in the arts & cultural industry. Only 34% of the respondents disagreed with the above two statements. Q8 Q9

### **3.2 Maximise synergies among the Greater Bay Area cities**

Participants agreed that under the premise of the “One Country, Two Systems”, Hong Kong has a number of unique advantages over any other GBA city, particularly in the areas of finance and business. For instance, Hong Kong’s strong legal protections for intellectual property, the free flow of capital, and a well-established legal system underscored by the Rule of Law. In short run, Hong Kong cannot be matched by any other city in China in this regard. Participants’ opinions on Hong Kong’s advantages are summarised as below.

In relation to the financial industry, Hong Kong has no restriction on capital flow in and out of the country and foreign exchange controls, which is why participants believed that Hong Kong will continue to be the dominant gateway to mainland China, as it has always been. Furthermore, the regulations and supervision of Hong Kong’s insurance industry are aligned with international standards. Together with a well-established dispute resolution and legal system, the industry has a remarkable reputation.



As a city that adopts capitalism and as the only common law jurisdiction in China, Hong Kong has a sophisticated system of law making, legal protection and legal enforcement that are in line with the western countries. These are important for international business development.

Hong Kong is one of the largest centres for equity fundraising. Its open and international capital markets, allowing free flow of capital and information. These are key factors to maintain Hong Kong's competitiveness. In addition to that, Hong Kong is currently the only Chinese Issuers' Offshore U.S. Dollar Bond Issuance Centre in China, which provides companies different financing models through issuing offshore bonds.



### III. Concluding Remarks

#### Develop a refined and precise talent recognition policy

Capitalising on the strengths of the “One Country, Two Systems” principle and its free and open economy, Hong Kong plays a crucial role in the development of the GBA. Unlike other Bay Areas in Tokyo, New York and San Francisco, Hong Kong and other mainland GBA cities are governed under different legal and economic systems. The key to creating a more integrated GBA is to overcome silos between cities, especially those between Guangdong province, Macao, and Hong Kong.

To start with, the government of the Hong Kong SAR should foster the mobility of talents by working on the mutual recognition of qualifications within the GBA cities. Participants in the study recommended government officials to set up dedicated departments to undertake mutual recognition of qualifications and re-examining relevant procedures to facilitate effective talent exchange. Meanwhile, it is also important to ensure Hong Kong talent receive social benefits equivalent to talent in the nine mainland cities, and vice versa. As such, Hong Kong can assist in the GBA ‘going out’ through mutually recognizing both international qualifications and those in the GBA.

#### Effective promotion alongside a clear blueprint for development

Among all types of occupations, the study suggests the Hong Kong SAR government to consider processing the qualification recognition of a few professions first, followed by other sectors such as civil servant positions in the GBA can be made open to Hong Kong residents for application. “*The Outline Development Plan for the Guangdong-Hong Kong-Macao Greater Bay Area*” has explicitly mentioned to expedite the development of the legal services industry, encourage and support legal services organisations in providing services for mainland enterprises going global, expand pilot areas for Guangdong, Hong Kong and Macao law firms to operate in the form of partnership associations. (Government of China, 2019, chapter 10, section 1) As suggested by some participants, this gives Hong Kong the advantage to establish a leading centre for international legal and dispute resolution service.

In conclusion, the study shows that most Hong Kong residents were able to identify the potential of the GBA, and recognised the economic benefits brought by the co-development with the other GBA cities. Therefore, when considering the approaches in promoting the GBA, the government should focus on social policies, which are of relevance and concern to local residents. In this way, Hong Kong residents will be more willing to consider living in the GBA. A regular communication mechanism can be established among the Hong Kong SAR Government, the mainland authorities and the Macao SAR Government to enhance the people’s understanding of the GBA’s opportunities and policies among Hong Kong residents.



## Reference

Constitutional and Mainland Affairs Bureau. (n.d.) *Guangdong-Hong Kong-Macao Greater Bay Area – Overview*. Retrieved July 22, 2021, from <https://www.bayarea.gov.hk/en/about/overview.html>

Department of Housing and Urban-Rural Development (DHURD) of Guangdong Province. (2020). *Interim Guidelines for the Management of Hong Kong Engineering Construction Consultant Enterprises and Professionals Starting Business and Practising in the Guangdong-Hong Kong-Macao Greater Bay Area Cities*. Page 20. Retrieved July 22, 2021, from [http://zfcxjst.gd.gov.cn/gkmlpt/content/3/3137/post\\_3137220.html#1423](http://zfcxjst.gd.gov.cn/gkmlpt/content/3/3137/post_3137220.html#1423)

Government of China. (2019). *Outline Development Plan for the Guangdong-Hong Kong-Macao Greater Bay Area*. Chapter 10. Section 1. Retrieved July 22, 2021, from [https://www.bayarea.gov.hk/filemanager/en/share/pdf/Outline\\_Development\\_Plan.pdf](https://www.bayarea.gov.hk/filemanager/en/share/pdf/Outline_Development_Plan.pdf)

Hong Kong Trade Development Council (HKTDC). (2020). *HKTDC Research*. Retrieved July 22, 2021, from <https://research.hktdc.com/en/article/NTM5MzY3MDA4>

## Appendix I: Telephone survey conducted by the Public Governance Programme at the Lingnan University, commissioned by OHKF

### 1. Methodology

<b>Date of survey :</b>	12-19 <sup>th</sup> April 2021
<b>Target population :</b>	Hong Kong permanent residents aged 18 or above
<b>Survey method :</b>	Computer-Assisted Telephone Interviewing (CATI)
<b>Sampling method :</b>	A certain number of landline telephone numbers were first randomly selected from the PGP landline telephone database. Then, the last two digits of each of these selected telephone numbers were replaced by two random numbers. One of the eligible household members was randomly selected to be the respondents when the telephone number dialled out by the computer-assisted telephone interviewing system was answered by a household resident.
<b>Valid sample size :</b>	1,012
<b>Margin of error :</b>	The margin of error was estimated to be $\pm 3.1\%$ at 95% confidence level when estimating the population size with sample size of 1012.
<b>Weighting :</b>	The data of this survey have been weighted in order to better reflect the actual situation of residency of Hong Kong people. For more details, please refer to section 3 “Weighting Method”.





**Contact Information and Response Rate:**

Call result	Number
<b>1. Total number of telephone number dialled</b>	71437
<b>2. Not eligible numbers (D)</b>	
No answer	15808
Telephone in use	3217
Non-residential number	1823
No eligible respondent	65
<b>3. Not sure if eligible (C)</b>	
Telephone recording machine (residential)	823
Household refusal	7430
Difficulty in communicating with household resident	714
<b>4. Eligible respondent selected but interviews not completed (B)</b>	
Selected respondent not at home	70
Selected respondent refused to be interviewed	200
Difficulty in communicating with the selected respondent	95
Selected respondent not in Hong Kong during the fieldwork period	13
Selected respondent not able to do interview because of old age or illness	983
Selected respondent refused to continue the interview / Partial completion	3
<b>5. Completed interview (A)</b>	1012
<b>6. Others</b>	
Non-working number	36354
Fax number	2689
Numbers required password	48
Wrong number	82
Repeated number	8
<b>Response rate</b>	<b>30.75%</b>

**Formula for the response Rate :**  $\frac{A}{A+B+C+E} * 100\%$  , where  $E = 1 - \frac{D}{A+B+D}$  (the eligibility proportion)



## 2. Weighting of the Survey Data

In order to reflect the population more accurately, the survey data was weighted based on the Census and Statistics Department-supplied Mid-2020 Hong Kong resident population aged 18 or above (excluding foreign domestic helpers). The calculation of the weighting factor is as follow:

- (i) To calculate the population proportion of the age groups as stated in the Table below by using the relevant population figures supplied by the Census and Statistics Department;
- (ii) To calculate the sample proportion of the same age groups as (i) by using the figure of completed interviews; and
- (iii) The weighting factor is the division of (i) population proportion by (ii) sample proportion.

Age Group	Mid-2020 Resident Population		Survey Sample After Weighting	
	Male	Female	Male	Female
18-19	61 500	57 400	10	9
20-24	192 600	183 700	32	30
25-29	224 500	220 300	37	36
30-34	229 500	250 500	38	41
35-39	237 200	285 700	39	47
40-44	226 100	281 600	37	46
45-49	241 100	305 200	40	50
50-54	241 000	296 300	40	49
55-59	300 900	336 500	50	56
60-64	292 300	295 500	48	49
65 or above	642 500	728 700	106	120



### 3. Demographic Survey Questions 【Unweighted】

#### Sex

	Frequency	Percent
1. Male	450	44.5
2. Female	562	55.5
Total	1012	100.0

Valid sample 1012

#### Education “What is the highest degree or level of education you have received? If currently enrolled, highest degree received.”

	Frequency	Percent
1. No schooling completed	29	2.9
2. Primary school level	111	11.0
3. Secondary school level	422	41.7
4. Sub-degree programme [Including IVE, Associate degree and Higher Diploma]	107	10.6
5. Tertiary study [Including Master’s and Doctorate degree]	301	29.7
11. Refuse to answer	42	4.2
Total	1012	100.0

Valid sample 1012

#### Age “What is your age?”

	Frequency	Percent
1. 18-19 years old	22	2.2
2. 20-24 years old	43	4.2
3. 25-29 years old	34	3.4
4. 30-34 years old	51	5.0
5. 35-39 years old	47	4.6
6. 40-44 years old	90	8.9
7. 45-49 years old	69	6.8
8. 50-54 years old	148	14.6
9. 55-59 years old	86	8.5
10. 60-64 years old	116	11.5
11. 65 years or above	306	30.2
Total	1012	100.0

Valid sample 1012



*Employment situation* “What is your current employment situation?”

	Frequency	Percent
1. Employed	487	48.1
2. Housewife	65	6.4
3. Student	52	5.1
4. Unemployed/ Between jobs	37	3.7
5. Retired	354	35.0
11. Refuse to answer	17	1.7
Total	1012	100.0

Valid sample 1012

*Birthplace* “What is your place of birth?”

	Frequency	Percent
1. Hong Kong	679	67.1
2. Mainland China	280	27.7
3. Macau	9	0.9
4. Taiwan	1	0.1
5. Other countries: _____ [Please specify]	18	1.8
11. Refuse to answer	25	2.5
Total	1012	100.0

Valid sample 1012

*Political stance* “Overall, would you classify yourself as one of the “Pro-establishment camp”, “Pro-democracy camp”, “Localist group” or “Centrist group”? Or you do not have any political stance in particular (i.e. neutral)?”

	Frequency	Percent
1. Pro-establishment camp	109	10.8
2. Pro-democracy camp	111	11.0
3. Localist group	34	3.4
4. Centrist group	102	10.1
5. Neutral	559	55.2
7. Don't know	38	3.8
11. Refuse to answer	59	5.8
Total	1012	100.0

Valid sample 1012

#### 4. Data of the Survey 【Weighted】

【Rounding up error might occur in the frequencies due to the weighting process, the frequencies might not add up to 1012, and the percentages might not add up to 100% either.】

##### Q1 “In the past 5 years, have you ever been to any city in Guangdong Province?”

	Frequency	Percent	Valid percent	Valid percent (with views) <sup>6</sup>
1. Yes [Go to Q2]	638	63.1	63.1	63.1
2. No	372	36.8	36.8	36.8
11. Refuse to answer	1	0.1	0.1	N/A
Total	1012	100.0	100.0	100.0

Valid sample 1012

##### Q2 “Which city/cities have you been to?” 【You may select more than one answer】

	Frequency	Percent
1. Guangzhou	331	52.2
2. Foshan	134	21.1
3. Zhaoqing	81	12.8
4. Jiangmen	97	15.2
5. Zhuhai	202	31.9
6. Zhongshan	191	30.0
7. Shenzhen	366	57.6
8. Dongguan	148	23.4
9. Huizhou	139	21.9
Total	1690*	266.1*

Valid sample 1012

\* Since it is possible for the interviewees to select more than one answer, the cumulative percentage and frequency of all options exceeds 100% and the sample size respectively.

<sup>6</sup> “With views” refers to the percentage excluding the options “refuse to answer” and “don’t know/no opinion”.





### Q3 “What is your main reason for visiting the city/cities in Guangdong Province?”

	Frequency	Percent	Valid percent	Valid percent (with views)
1. Sightseeing-based tourism	395	39.1	61.9	62.1
2. Relative visiting	143	14.2	22.5	22.5
3. Work	71	7.0	11.2	11.2
4. Study	11	1.1	1.7	1.7
5. Volunteer	1	0.1	0.2	0.2
6. Others: _____ [Please specify]	14	1.4	2.2	2.2
11. Refuse to answer	2	0.2	0.3	N/A
0. Not applicable	374	36.9	Missing	N/A
Total	1012	100.0	100.0	100.0

Valid sample 638

*\*\*For question 4 to 9, please state to what extent you agree with the suggested effects brought by the joint development of Hong Kong and the other cities in the Greater Bay Area by choosing either ‘strongly agree’, ‘agree’, ‘disagree’, or ‘strongly disagree’.*

### Q4 “It will increase the potential market size and create more opportunities for businesses in Hong Kong.”

	Frequency	Percent	Valid percent	Valid percent (with views)
1. Strongly agree	132	13.0	13.0	15.6
2. Agree	483	47.7	47.7	57.0
3. Disagree	186	18.4	18.4	21.9
4. Strongly disagree	48	4.7	4.7	5.7
10. Don’t know/no opinion	160	15.8	15.8	N/A
11. Refuse to answer	4	0.4	0.4	N/A
Total	1012	100.0	100.0	100.0

Valid sample 1012



**Q5 “It will attract multinational corporations (MNCs) to expand its business operations in Hong Kong, creating more job opportunities in the local market.”**

	Frequency	Percent	Valid percent	Valid percent (with views)
1. Strongly agree	82	8.1	8.1	9.7
2. Agree	382	37.7	37.7	45.2
3. Disagree	317	31.3	31.3	37.5
4. Strongly disagree	64	6.3	6.3	7.6
10. Don't know/no opinion	164	16.2	16.2	N/A
11. Refuse to answer	3	0.3	0.3	N/A
Total	1012	100.0	100.0	100.0

Valid sample 1012

**Q6 “It will help to diversify Hong Kong’s economy and create more career options for Hong Kong people.”**

	Frequency	Percent	Valid percent	Valid percent (with views)
1. Strongly agree	93	9.2	9.2	10.6
2. Agree	416	41.1	41.1	47.2
3. Disagree	304	30.0	30.0	34.5
4. Strongly disagree	67	6.7	6.7	7.6
10. Don't know/no opinion	127	12.5	12.5	N/A
11. Refuse to answer	5	0.5	0.5	N/A
Total	1012	100.0	100.0	100.0

Valid sample 1012

**Q7 “It will enhance the capacity of the innovation and technology sector in Hong Kong so as to upgrade and transform other industrial sectors.”**

	Frequency	Percent	Valid percent	Valid percent (with views)
1. Strongly agree	88	8.7	8.7	10.1
2. Agree	389	38.4	38.4	44.9
3. Disagree	309	30.5	30.5	35.6
4. Strongly disagree	81	8.0	8.0	9.3
10. Don't know/no opinion	142	14.0	14.0	N/A
11. Refuse to answer	3	0.3	0.3	N/A
Total	1012	100.0	100.0	100.0

Valid sample 1012

**Q8 “It will provide more venue choices for Hong Kong performing groups/troupes in the Arts & Cultural industry.”**

	Frequency	Percent	Valid percent	Valid percent (with views)
1. Strongly agree	79	7.8	7.8	9.4
2. Agree	480	47.4	47.4	57.0
3. Disagree	213	21.0	21.0	25.3
4. Strongly disagree	70	6.9	6.9	8.3
10. Don't know/no opinion	168	16.6	16.6	N/A
11. Refuse to answer	2	0.2	0.2	N/A
Total	1012	100.0	100.0	100.0

Valid sample 1012

**Q9 “It will provide a more diverse and new audience group for Hong Kong performing groups/troupes with the access to the mainland GBA market.”**

	Frequency	Percent	Valid percent	Valid percent (with views)
1. Strongly agree	85	8.4	8.4	9.9
2. Agree	478	47.3	47.3	55.9
3. Disagree	222	21.9	21.9	26.0
4. Strongly disagree	69	6.9	6.9	8.1
10. Don't know/no opinion	154	15.2	15.2	N/A
11. Refuse to answer	3	0.3	0.3	N/A
Total	1012	100.0	100.0	100.0

Valid sample 1012

**Q10 “In comparison with 5 years ago, what is your opinion on the number of people interested to live in the Greater Bay Area (This includes, but not limited to working, business, studying and retiring)?”**

	Frequency	Percent	Valid percent	Valid percent (with views)
1. Increased	513	50.7	50.7	65.8
2. Decreased	267	26.4	26.4	34.2
10. Don't know/no opinion	228	22.5	22.5	N/A
11. Refuse to answer	4	0.4	0.4	N/A
Total	1012	100.0	100.0	100.0

Valid sample 1012



**Q11 “In your opinion, which of the following occupations have the best prospect in the Greater Bay Area cities?”**

	Frequency	Percent	Valid percent	Valid percent (with views)
1. Arts & cultural industry	24	2.3	2.3	3.1
2. Financial services	147	14.5	14.5	19.1
3. Innovation and technology	157	15.5	15.5	20.4
4. Manufacturing industry	50	5.0	5.0	6.5
5. Service industry	63	6.2	6.2	8.2
6. Transportation and logistics	154	15.2	15.2	20.1
7. Internet and information technology	96	9.5	9.5	12.5
8. Wholesale and retail industry	50	4.9	4.9	6.5
9. Others: _____ [Please specify]	29	2.8	2.8	3.8
10. Don't know/no opinion	237	23.4	23.4	N/A
11. Refuse to answer	7	0.7	0.7	N/A
Total	1012	100.0	100.0	100.0

Valid sample 1012

**Q12 “In general, which Greater Bay Area city would you think Hong Kong residents be most interested to work at?”**

	Frequency	Percent	Valid percent	Valid percent (with views)
1. Guangzhou	134	13.3	13.3	20.0
2. Foshan	14	1.4	1.4	2.1
3. Zhaoqing	6	0.6	0.6	0.9
4. Jiangmen	2	0.2	0.2	0.3
5. Zhuhai	74	7.3	7.3	11.0
6. Zhongshan	19	1.9	1.9	2.8
7. Shenzhen	389	38.4	38.4	58.0
8. Dongguan	21	2.0	2.0	3.1
9. Huizhou	12	1.2	1.2	1.8
10. Don't know/no opinion	325	32.1	32.1	N/A
11. Refuse to answer	16	1.6	1.6	N/A
Total	1012	100.0	100.0	100.0

Valid sample 1012



**Q13 “In your opinion, which Greater Bay Area city would Hong Kong residents be most interested to live at after retirement?”**

	Frequency	Percent	Valid percent	Valid percent (with views)
1. Guangzhou	102	10.0	10.0	16.2
2. Foshan	41	4.0	4.0	6.5
3. Zhaoqing	20	2.0	2.0	3.2
4. Jiangmen	13	1.3	1.3	2.1
5. Zhuhai	122	12.0	12.0	19.4
6. Zhongshan	160	15.8	15.8	25.4
7. Shenzhen	95	9.4	9.4	15.1
8. Dongguan	28	2.8	2.8	4.4
9. Huizhou	49	4.9	4.9	7.8
10. Don't know/no opinion	367	36.3	36.3	N/A
11. Refuse to answer	16	1.5	1.5	N/A
Total	1012	100.0	100.0	100.0

Valid sample 1012

**Q14 “What do you think is the most legitimate reason for moving to the GBA mainland cities?”**

	Frequency	Percent	Valid percent	Valid percent (with views)
1. Higher income	19	1.8	1.8	2.2
2. Better career prospect	65	6.4	6.4	7.5
3. Lower consumption expenditure	173	17.0	17.0	19.9
4. Better living environment	112	11.1	11.1	12.9
5. Lower cost of living	99	9.8	9.8	11.4
6. Higher political stability	33	3.2	3.2	3.8
7. More living space	337	33.3	33.3	38.7
8. Others: _____ [Please specify]	34	3.4	3.4	3.9
10. Don't know/no opinion	122	12.0	12.0	N/A
11. Refuse to answer	19	1.9	1.9	N/A
Total	1012	100.0	100.0	2.2

Valid sample 1012





**Q15 “In your opinion, which of the following would increase your interest most in moving to the Greater Bay Area mainland cities?”**

	Frequency	Percent	Valid percent	Valid percent (with views)
1. Entitlement to Hong Kong healthcare and welfare services in the GBA mainland cities	319	31.5	31.5	42.3
2. Provision of transportation allowance for cross-boundary travel	38	3.7	3.7	5.0
3. Introduction of facilitation measures for Hong Kong people to purchase flat in the GBA mainland cities	74	7.3	7.3	9.8
4. Enrolment of high-quality schools for Hong Kong students in the Mainland	12	1.1	1.1	1.6
5. Enhancement of immigration arrangement	56	5.5	5.5	7.4
6. Provision of healthcare services similar to those in Hong Kong	149	14.7	14.7	19.7
7. Attractive taxation allowances and policies	38	3.7	3.7	5.0
8. Others: _____ [Please specify]	69	6.9	6.9	9.1
9. Don't know/no opinion	224	22.2	22.2	N/A
11. Refuse to answer	33	3.3	3.3	N/A
Total	1012	100.0	100.0	100.0

Valid sample 1012



## Appendix II: Focused group discussions conducted by an external organization, commissioned by OHKF

Category	No. of participants
Current local students of Hong Kong institutions	21
Working adult (White-collar worker)	12
Working professionals	9
Hong Kong teenagers graduated from GBA institutions	7
Hong Kong teenagers graduated from overseas institutions	7
Non-professional working adult (Non-white-collar worker)	7
Current mainland students of Hong Kong institutions	7
Working adult (Financial industry)	6
Hong Kong institution mainland graduates who hold the IANG VISA	6
<b>Total</b>	<b>82</b>

Note: If there is any inconsistency or ambiguity between the English version and the Chinese version, the Chinese version shall prevail.



**Authors:**

**Stephen Wong**

OHKF Senior Vice President and Executive  
Director of Public Policy Institute

**Renee Ho**

Lead of Community Studies  
Our Hong Kong Foundation

**[END]**