



July 2020

# Mercer MPF Satisfaction Index

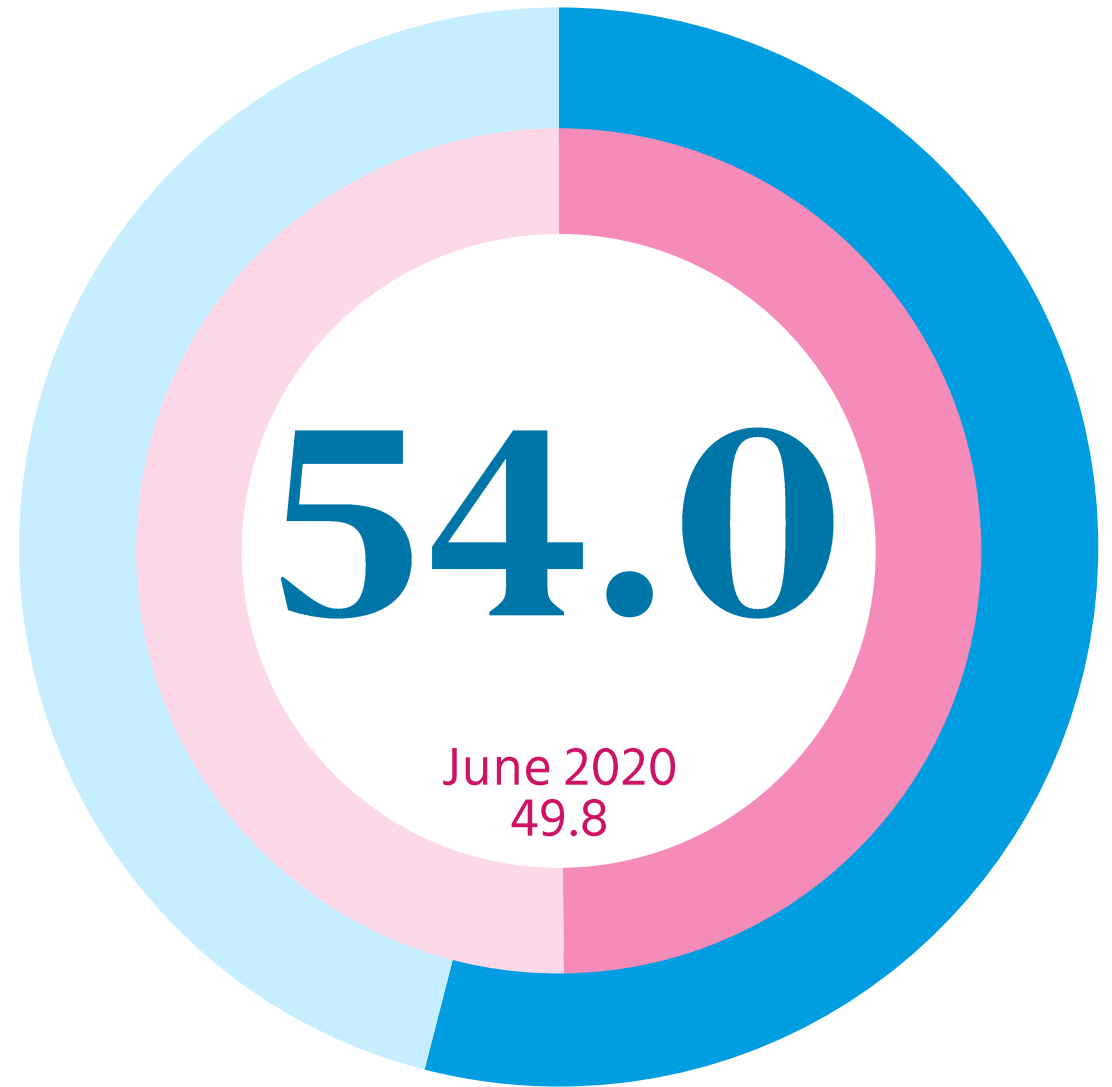
Monthly index covering over 2,400 respondents annually

Conducted by Nielsen Hong Kong

Also available online at:

<https://www.mercer.com.hk/our-thinking/wealth/mpf-satisfaction-index.html>

15 July 2020



# The More Engaged, The More Satisfied

## Time Horizon Until Retirement

Members who are closer to retirement age are more satisfied.



## Knowledge Level

Members who have better knowledge on MPF feel more satisfied.



## Advice Seeking

Members who seek advice on MPF feel more satisfied.



## Understanding of risk and return

Members who understand the risk and return of MPF investment are more satisfied.



## Top three expectations from MPF members in July 2020

Apart from good performance and low fees

1. Provide clear MPF benefit statement: 37.6%
2. Provide comprehensive fund choices: 34.7%
3. Provide loyalty discount: 31.7%



### Questions?

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## In the past 12 months, where have people sought help?

We find it is more common for members to seek advice from websites, followed by personal connections.

1. Websites — MPFA, MPF providers and other financial websites: 43.1%
2. Personal connections — family, friends and colleagues: 37.1%
3. MPF agents — individuals or financial institutions: 24.3%
4. No advice sought — 32.2%

*Note: The figures above do not add up to 100%, as individuals can seek advice from multiple sources.*

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