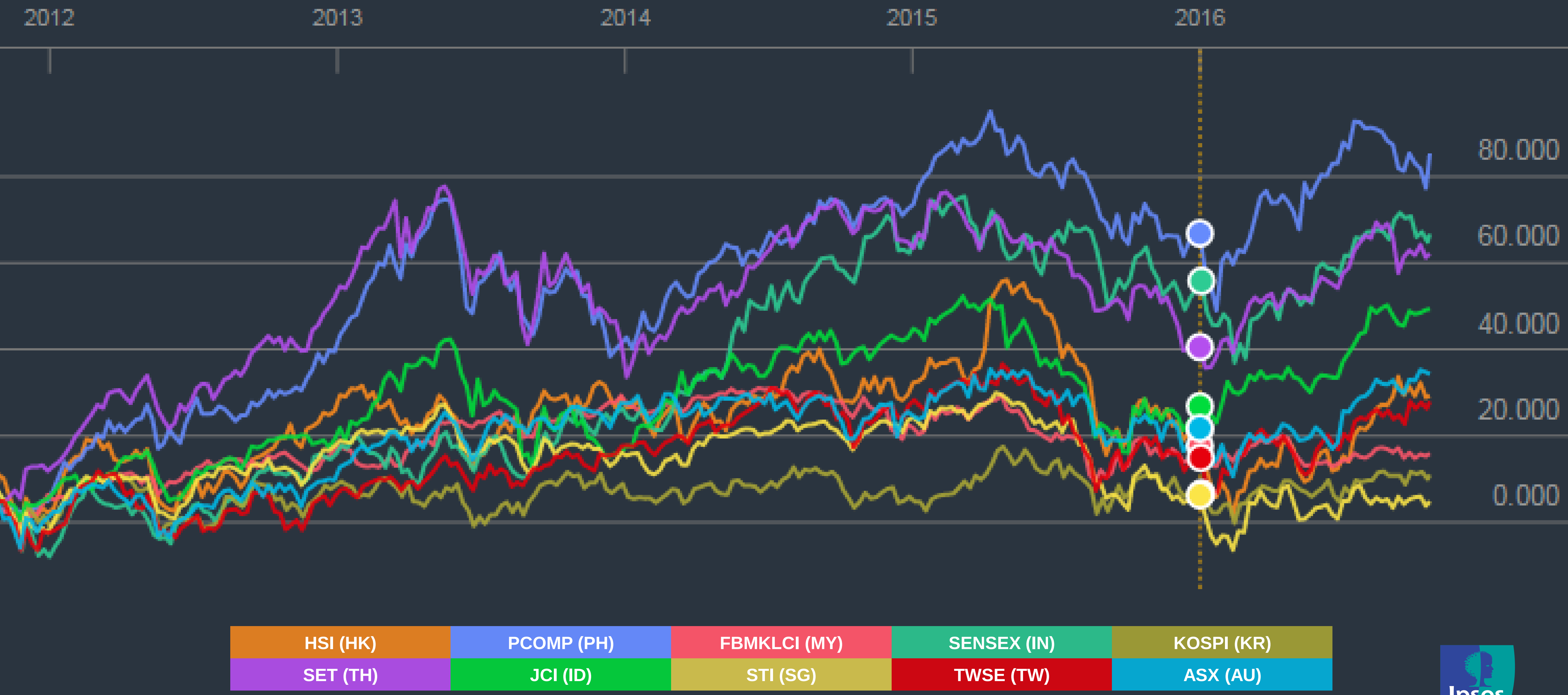
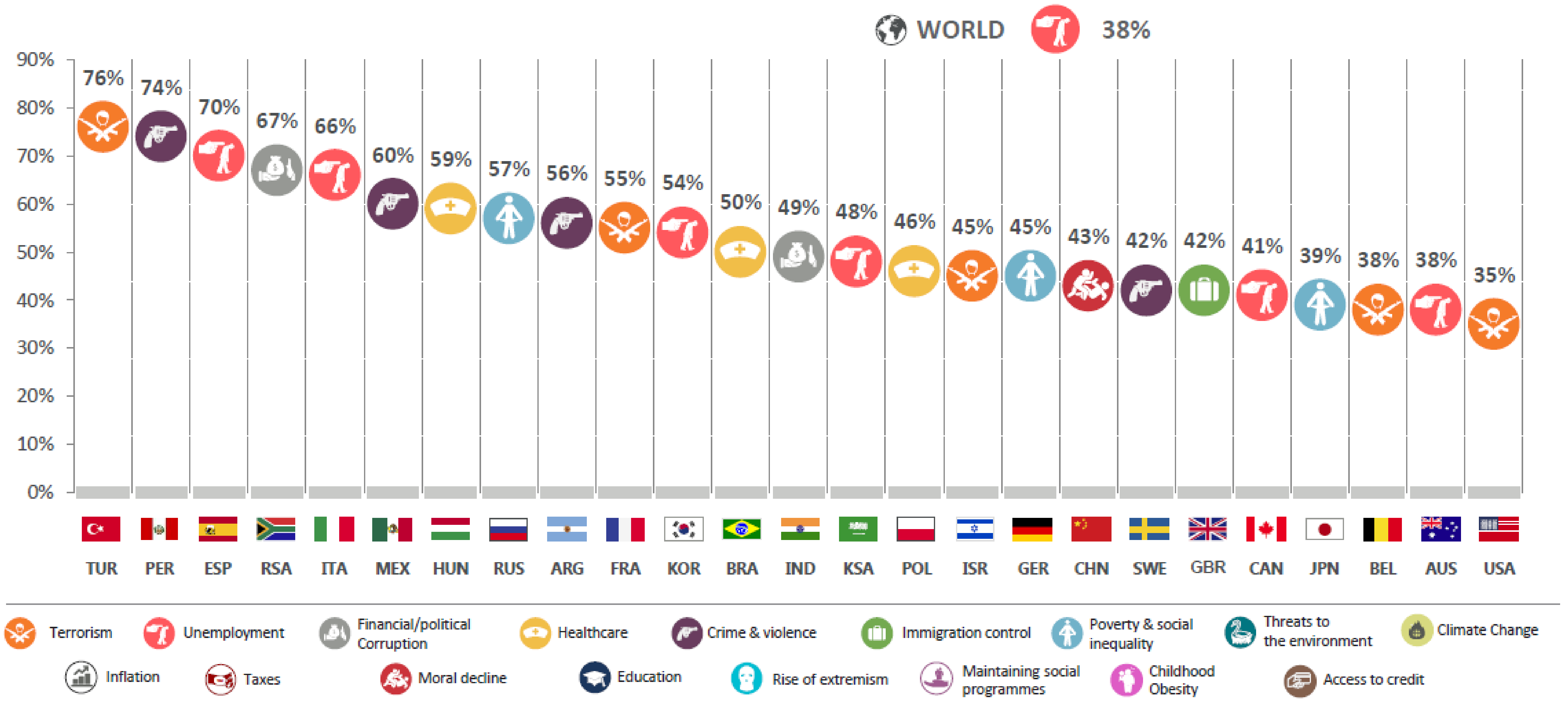
Affluent Asia Launch 2016

Singapore – Nov 1, 2016 | Hong Kong – Nov 3, 2016

Some signs of picking up … still a challenging year overall

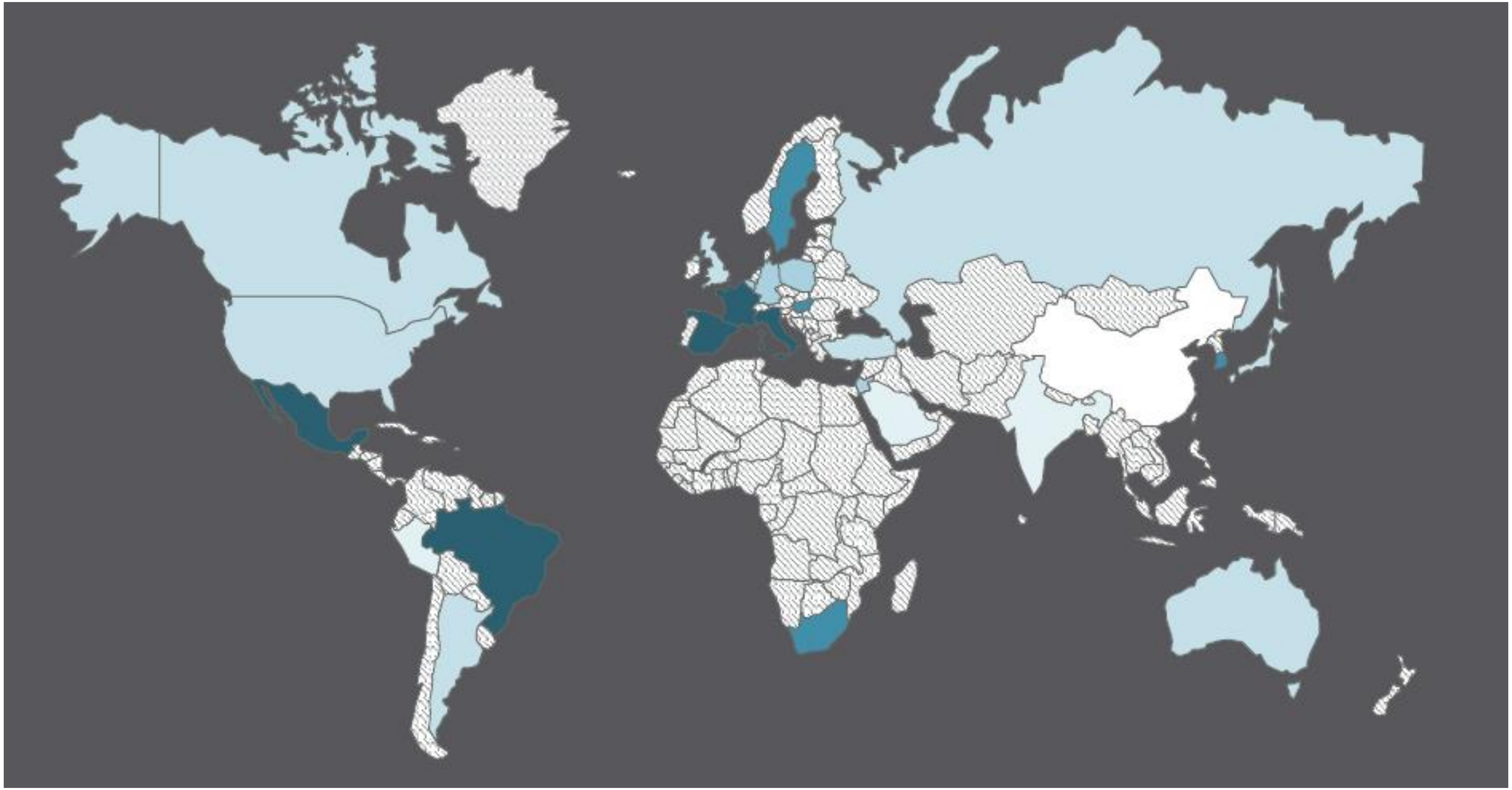


Most worrying ...



Source: Global Advisor, World Worries, September 2016
Question: Which three of the following topics do you find the most worrying in your country?
Base: Representative sample of 18,014 adults aged 16-64 in 25 participating countries, August 26th - September 9th 2016

Right direction? Or wrong track …



% RIGHT DIRECTION

90-100%

55-89%

36-54%

29-35%

19-28%

7-18%

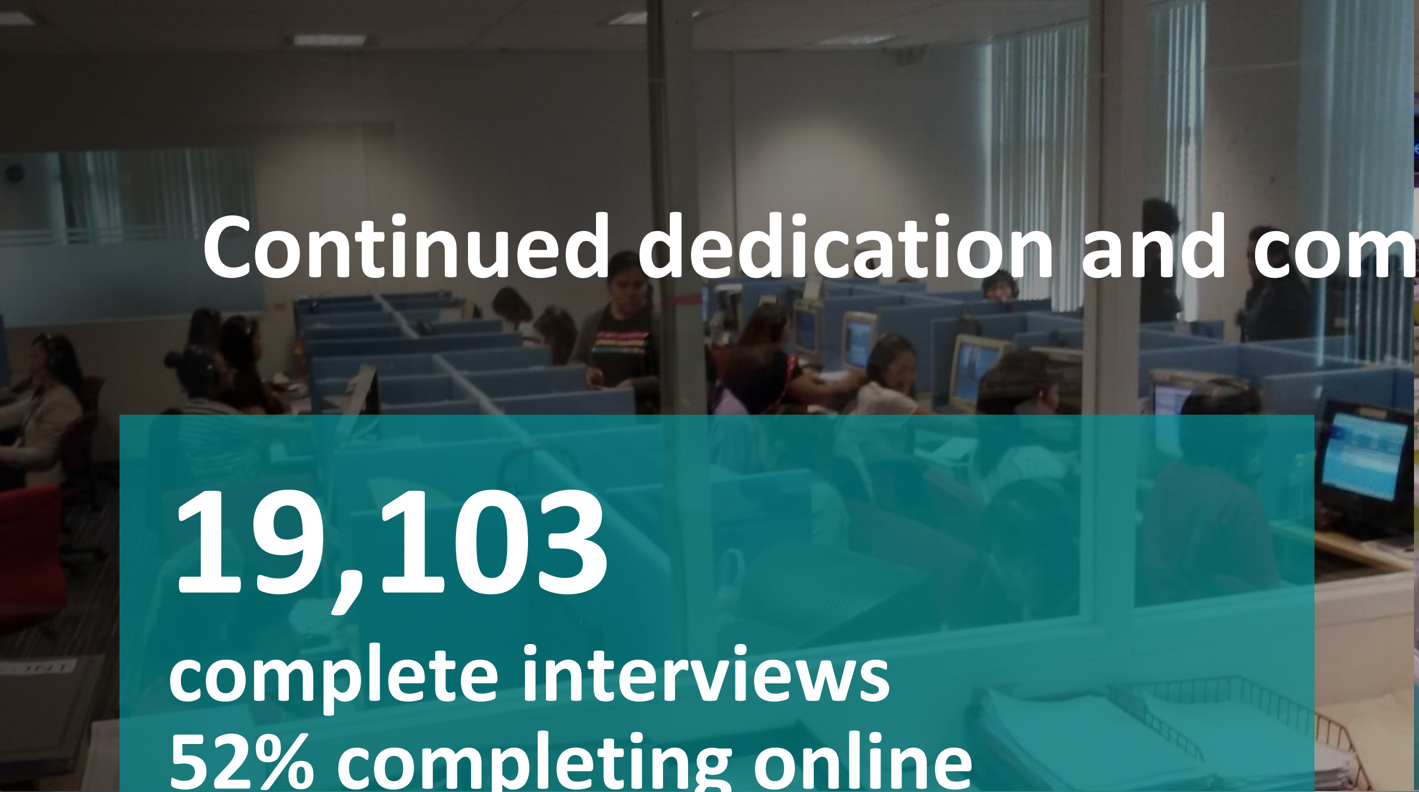
Countries not included

Source: Global Advisor, World Worries, September 2016
Question: Generally speaking, would you say things in this country are heading in the right direction, or are they off on the wrong track?
Base: Representative sample of 18,014 adults aged 16-64 in 25 participating countries, August 26th - September 9th 2016

Affluent Asia

20 years of surveying the region's top income earners as well as the influential

Continued dedication and commitment



19,103

complete interviews
52% completing online

29 mins

average length of interview

Source: Ipsos Affluent Survey Asia Pacific. Q3 2015 to Q2 2016. 10 markets total.

All marketers need an affluent strategy


Luxury Jewelry and Watches


HDTV


High End Automobile


Fine Wine


EMBA Programs

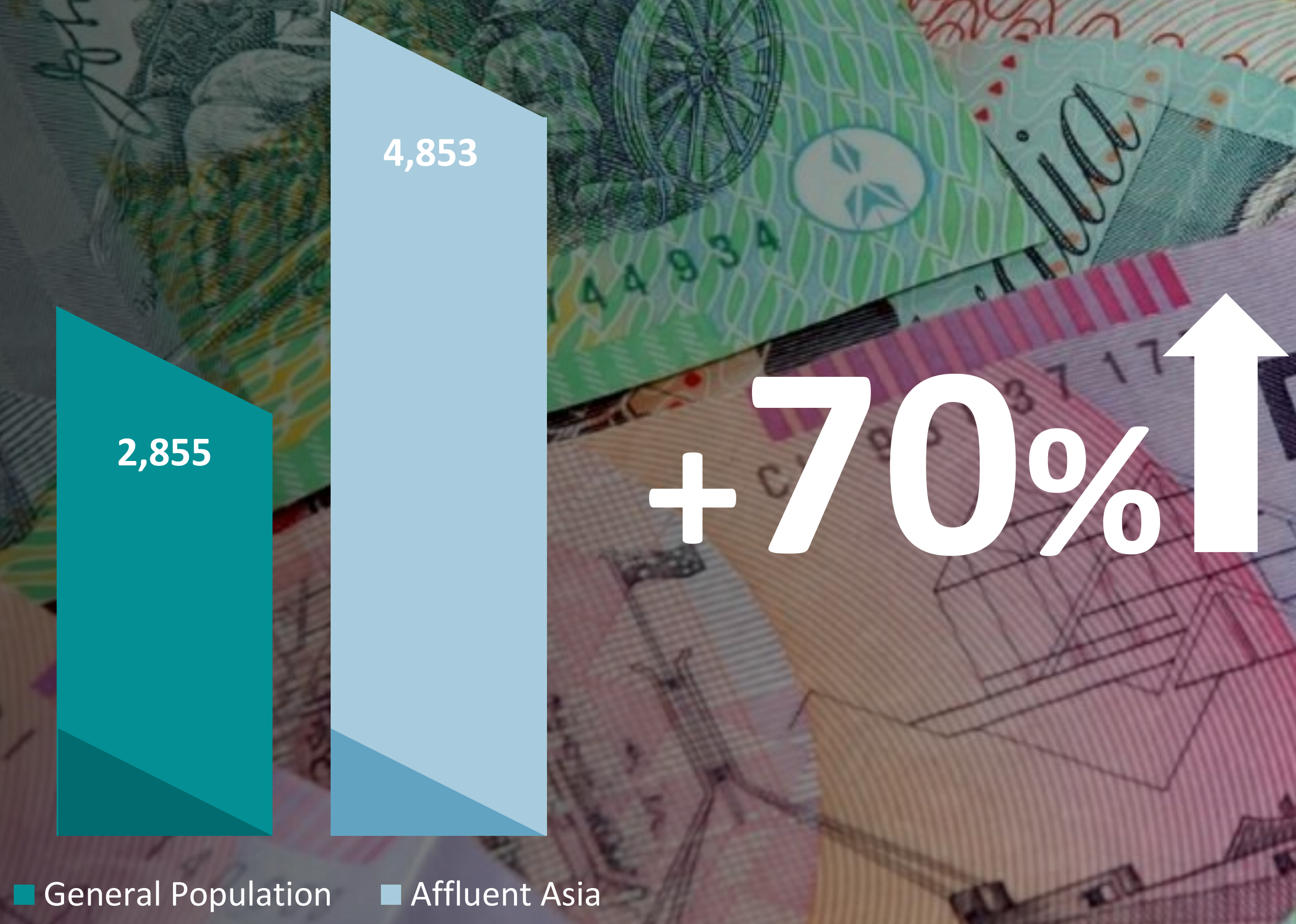

Snow Sports


Medical Tourism


Investment

THE SIGNIFICANCE OF THE AFFLUENT

Much higher earning power



Source: Ipsos Affluent Survey Asia Pacific. Q3 2015 to Q2 2016. Among all respondents in Hong Kong.
Ipsos Media Atlas Hong Kong. Q3 2015 to Q2 2016. Among all respondents aged 25 to 64 in Hong Kong.
Figures shown in the chart are average monthly personal income in USD.

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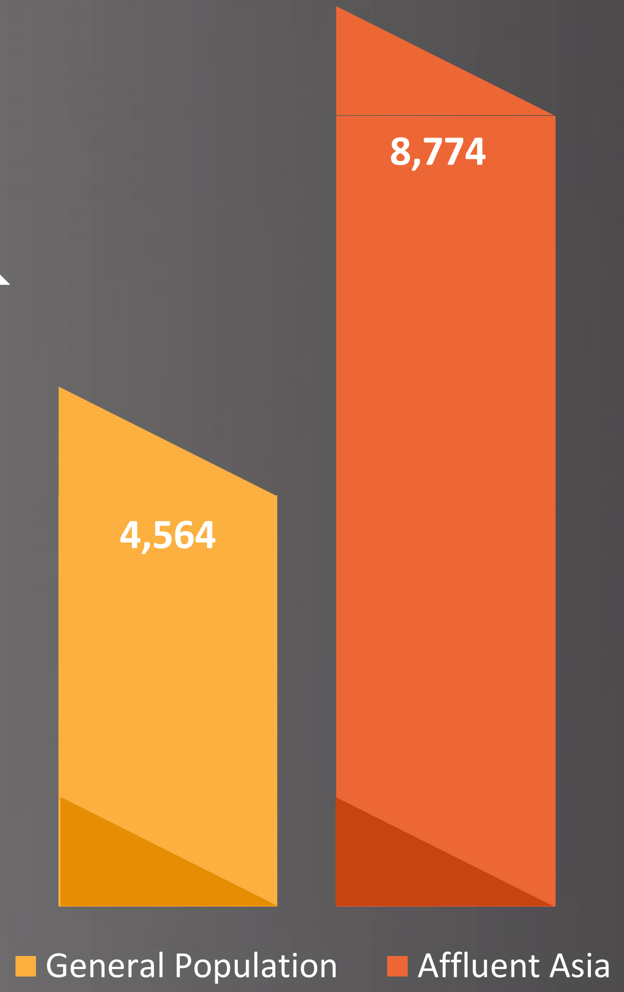
More affluent possibilities

+92%



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Ipsos Media Atlas Hong Kong. Q3 2015 to Q2 2016. Among all respondents aged 25 to 64 in Hong Kong.
Figures shown in the chart are average monthly household income in USD.

Sizeable wealth contributor

67%

of total personal income earned is contributed by the Affluent

Source: Ipsos Affluent Survey Asia Pacific. Q3 2015 to Q2 2016. Among all respondents in Hong Kong.
Ipsos Media Atlas Hong Kong. Q3 2015 to Q2 2016. Among all respondents aged 25 to 64 in Hong Kong.
Figure shown is the proportion of total monthly personal income from Affluent Asia vs. Media Atlas Hong Kong.

47% own property

13% have other properties as investment

32%

Do not seem to save enough for property down payment

Source: Ipsos Affluent Survey Asia Pacific. Q3 2015 to Q2 2016. Among all respondents in Hong Kong.
Ipsos Media Atlas Hong Kong. Q3 2015 to Q2 2016. Among all respondents aged 25 to 64 in Hong Kong.

Proportion of frequent business travelers three times higher within the affluent cut than the general population.

Source: Ipsos Affluent Survey Asia Pacific. Q3 2015 to Q2 2016. Among all respondents in Hong Kong.
Ipsos Media Atlas Hong Kong. Q3 2015 to Q2 2016. Among all respondents aged 25 to 64 in Hong Kong.
Comparison is based on those who have taken 3 or more business trips in the past 12 months.

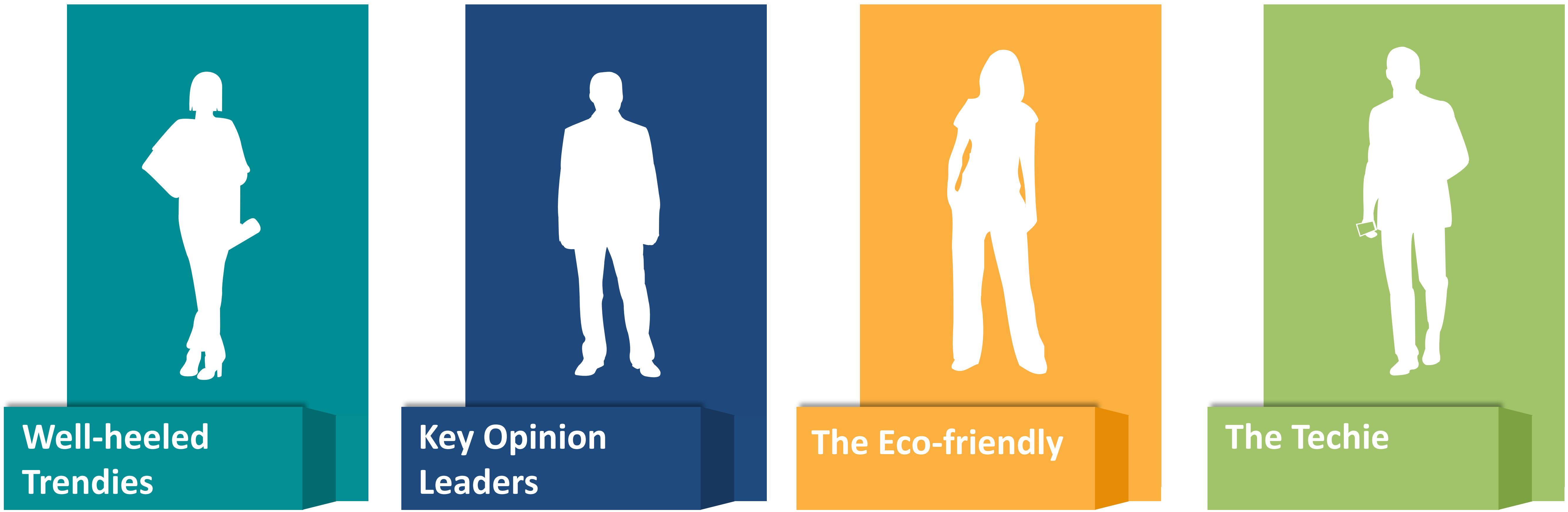
49%

total annual spending on wear and accessories is contributed by the Affluent.

Source: Ipsos Affluent Survey Asia Pacific. Q3 2015 to Q2 2016. Among all respondents in Hong Kong.
Ipsos Media Atlas Hong Kong. Q3 2015 to Q2 2016. Among all respondents aged 25 to 64 in Hong Kong.

AFFLUENT ASIA KEY SEGMENTS

Four key segments identified



Source: Ipsos Affluent Survey Asia Pacific. Q3 2015 to Q2 2016. Among all respondents in Asia Pacific.

Well-heeled Trendies

- Female skewed
- Youngest of all segments, average age: 40 years old
- Work in real estate, retail

- Very interested in fashion trends
- Deem themselves to have expensive taste
- Constantly in search of products to enhance their looks

- Enjoy taking time off
- Most first class travelers amongst all segments
- Big fans of cruise holidays
- Support medical tourism
- Shopping fanatics – smart TV, massage chair, home theater sound systems, jewelry, etc.

Source: Ipsos Affluent Survey Asia Pacific. Q3 2015 to Q2 2016.

Key Opinion Leaders

- Equal gender split
- Married with children
- Work in banking/finance, import/export/trading

- Prefer to be leaders than followers
- Purchase advisors for others out there

- Usual suspects for frequent business travel
- Segment with highest business class travel
- Like sports, especially winter sports
- Appreciate wine and whisky
- Have properties for investment purposes
- Big fans of luxury designer clothes and leather goods, etc.

Source: Ipsos Affluent Survey Asia Pacific. Q3 2015 to Q2 2016.

The Eco-friendly

- Slightly female skewed
- Average age: 42 years old

- Willing to pay more for products that are eco-friendly
- Prefer premium over standard goods/services
- Exercise to stay fit

- Advocates of a paperless environment so majority use e-readers and digital print
- Enjoy jogging, cycling and hiking
- They shop too e.g. watches, designer accessories
- Subjects related to the environment, culture and history can entice them the most

Source: Ipsos Affluent Survey Asia Pacific. Q3 2015 to Q2 2016.

The Techie

- Highest income of all segments
- Average age: 41 years old
- Work in education, government and business services

- Mobile technology central to their lives
- Interested in pursuing further education

- Beer lovers
- Car owners
- Most digital activities of all segments
- Highest proportion of owners for nearly all screens
- Enjoy sun/beach holidays as well as city breaks
- Interested in a wide variety of subjects—from gourmet cooking to photography.

Source: Ipsos Affluent Survey Asia Pacific. Q3 2015 to Q2 2016.

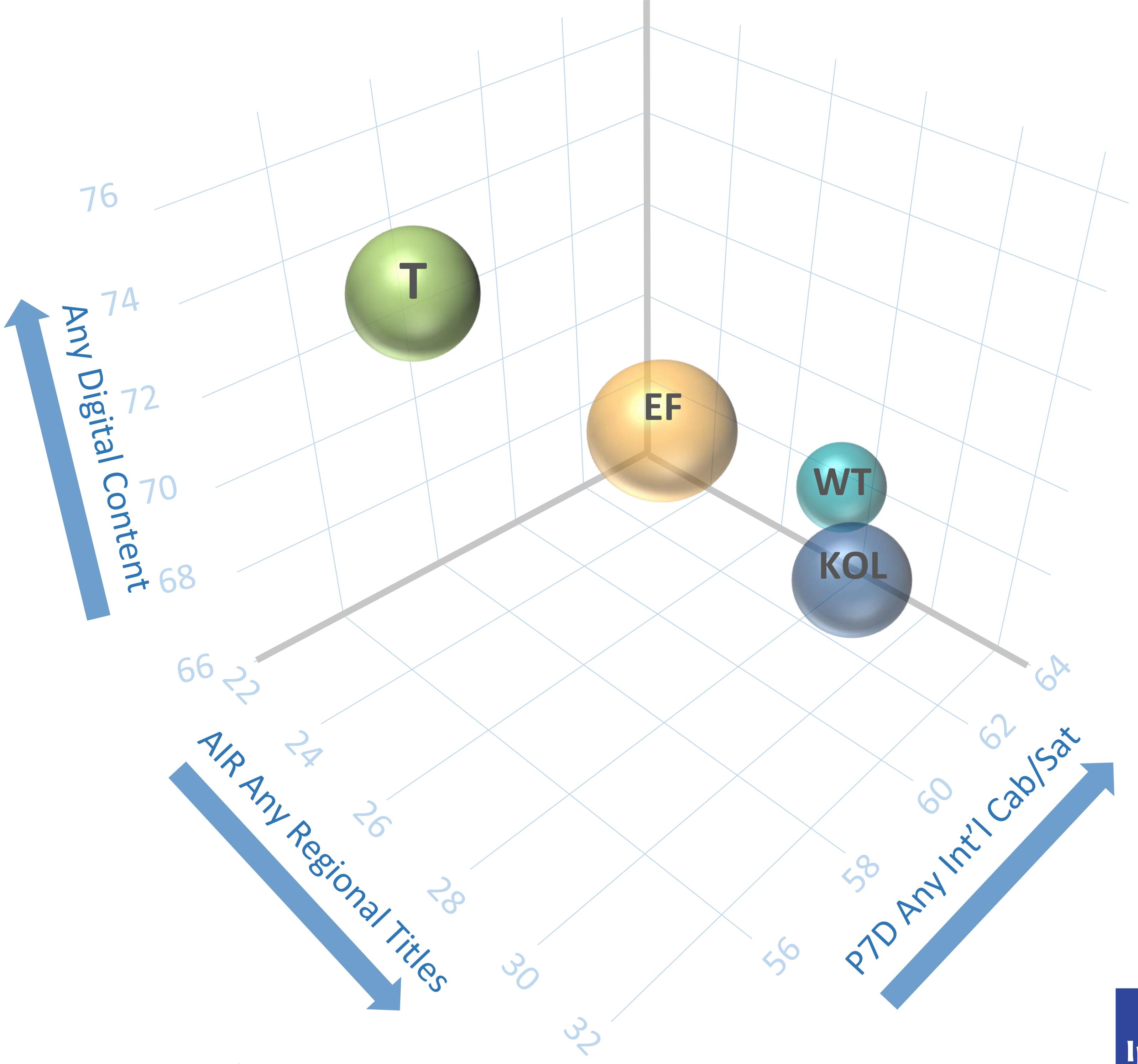
Media consumption

WT - Well-heeled Trendies

KOL - Key Opinion Leaders

EF - The Eco-friendly

T - The Techie



Source: Ipsos Affluent Survey Asia Pacific. Q3 2015 to Q2 2016. Among all respondents in Asia Pacific.
Any Digital Content refers to any online access of news/ business/ financial news, electronic newspaper/ magazine and live TV

MEDIA CONSUMPTION

More content is increasingly being consumed

A variety of interest topics

Wine Tasting

13% ↑

Outdoor Lifestyle

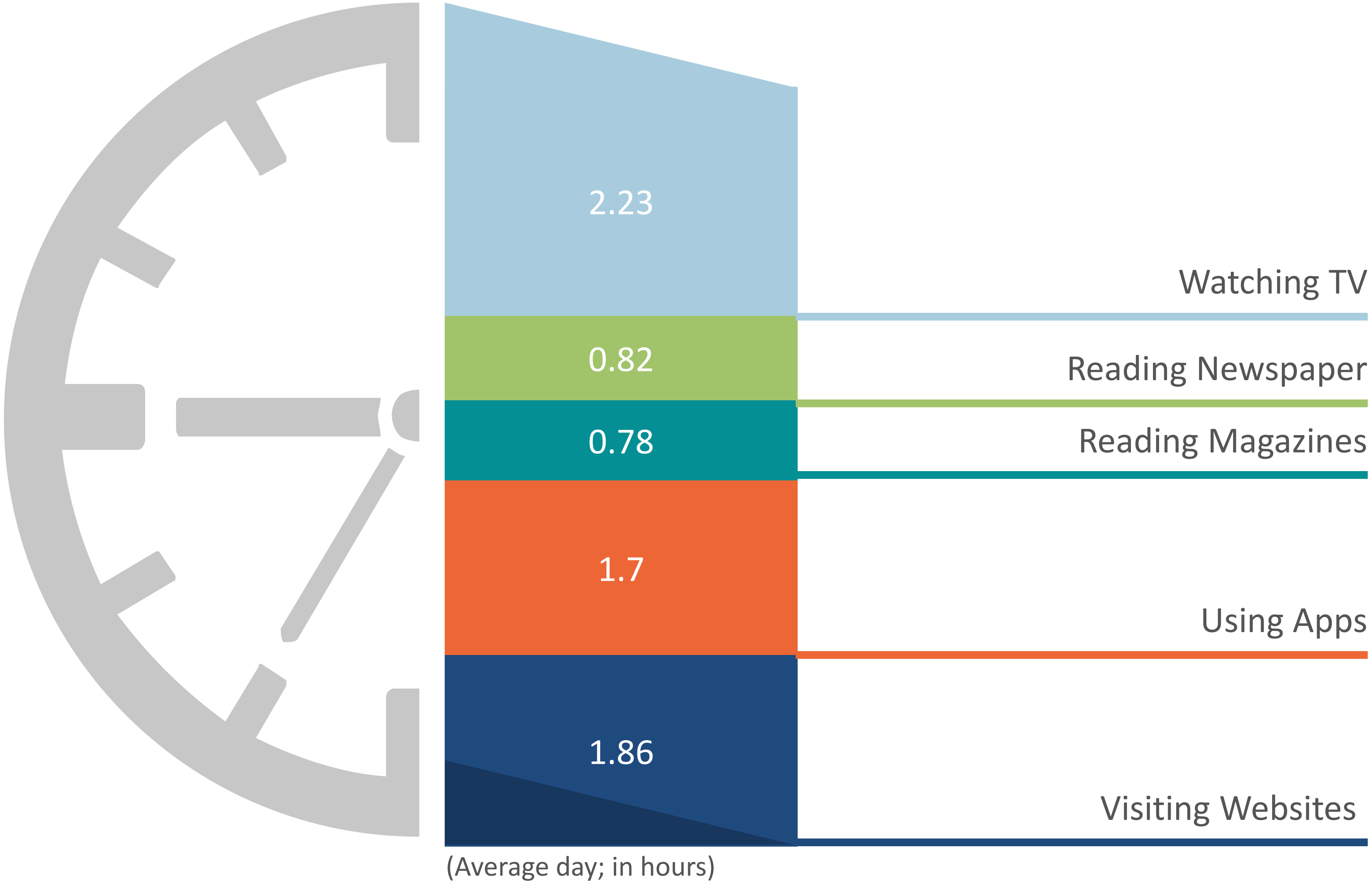
51% ↑

Photography

10% ↑

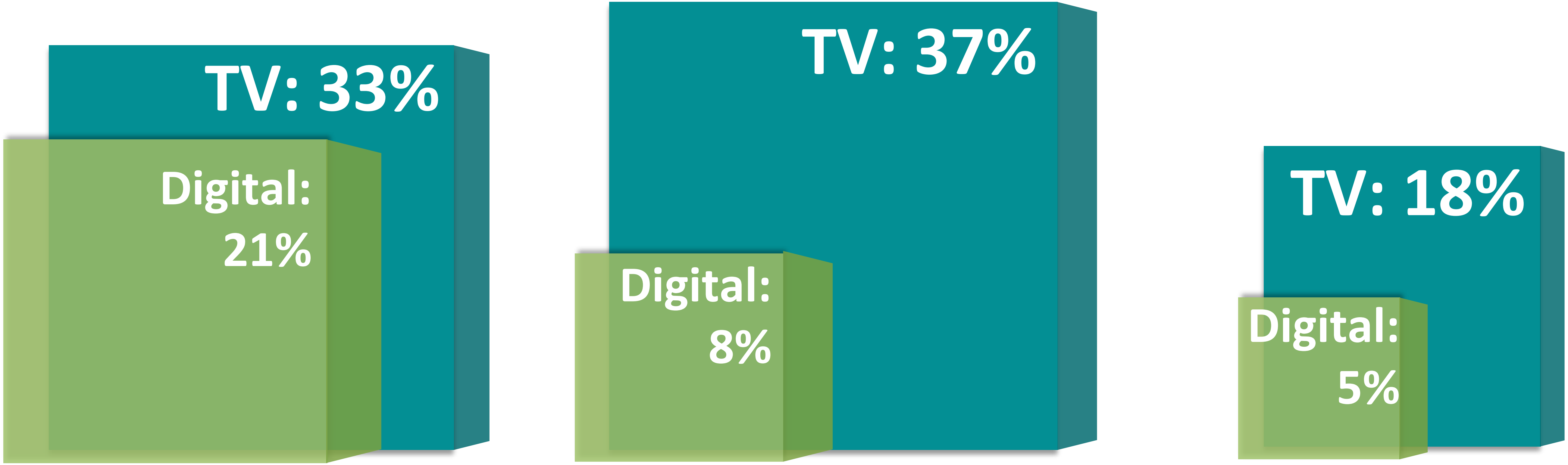
Figures shown refer to % change of Q3 2015 to Q2 2016 vs. Q3 2014 to Q2 2015
Source: Ipsos Affluent Survey Asia Pacific. Q3 2015 to Q2 2016 and Q3 2014 to Q2 2015. Among all respondents in Asia Pacific.

Traditional media still plays an important role



Source: Ipsos Affluent Survey Asia Pacific. Q3 2015 to Q2 2016. Among all respondents in Asia Pacific.

Total TV reach enhanced by digital



Int’l News Channels Combined Reach:

39%

Int’l Documentary Channels Combined Reach:

39%

Int’l Entertainment Channels Combined Reach:

20%

Source: Ipsos Affluent Survey Asia Pacific. Q3 2015 to Q2 2016. Among all respondents in Asia Pacific.
Combined reach refers to nett of past 7 days viewership and past 30 days digital reach.

Ipsos

Similar for print as well

Digital: 12%

Int’l Dailies
Combined Reach:

13%

Digital: 13%

Int’l Weeklies
Combined Reach:

17%

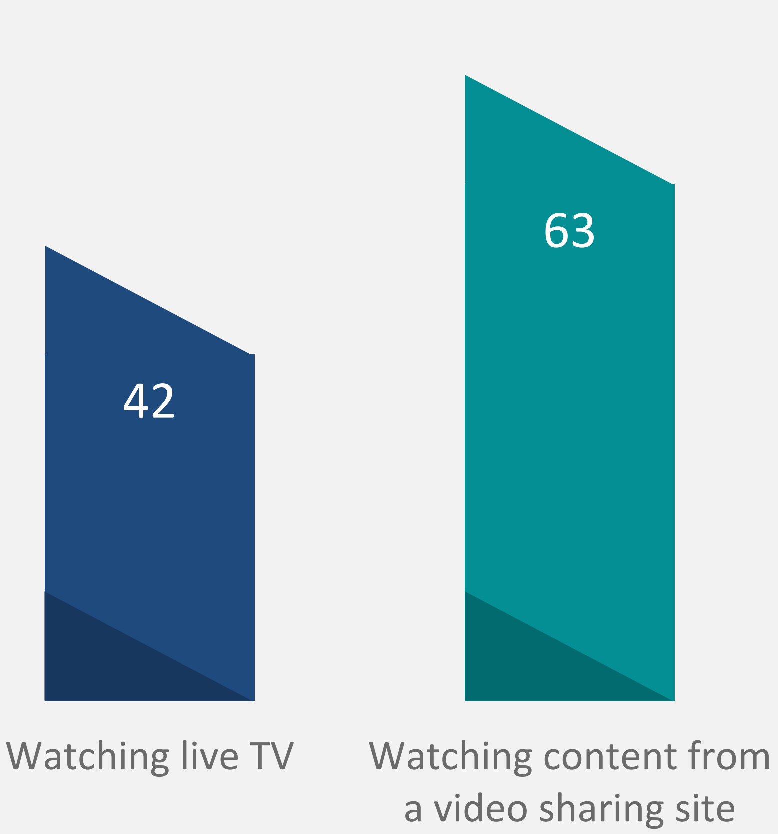
AIR: 17%

Int’l Monthlies
Combined Reach:

22%

Source: Ipsos Affluent Survey Asia Pacific. Q3 2015 to Q2 2016. Among all respondents in Asia Pacific.
Combined reach refers to nett of average issue readership and past 30 days digital reach.

Reach enhancement via the use of videos



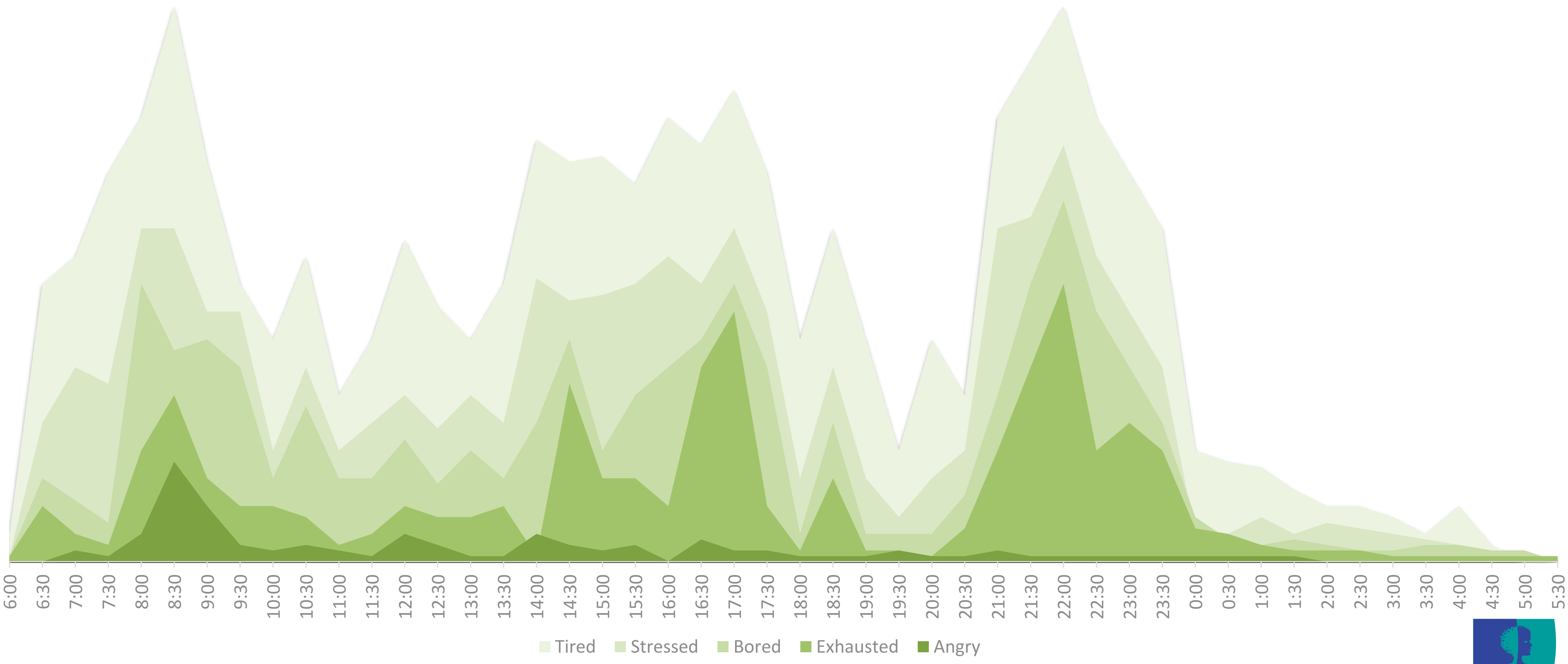
Source: Ipsos Affluent Survey Asia Pacific. Q3 2015 to Q2 2016. Among all respondents in Asia Pacific.
Figures shown refer to regular activities on digital devices (%).

AFFLUENT ASIA ENHANCEMENTS

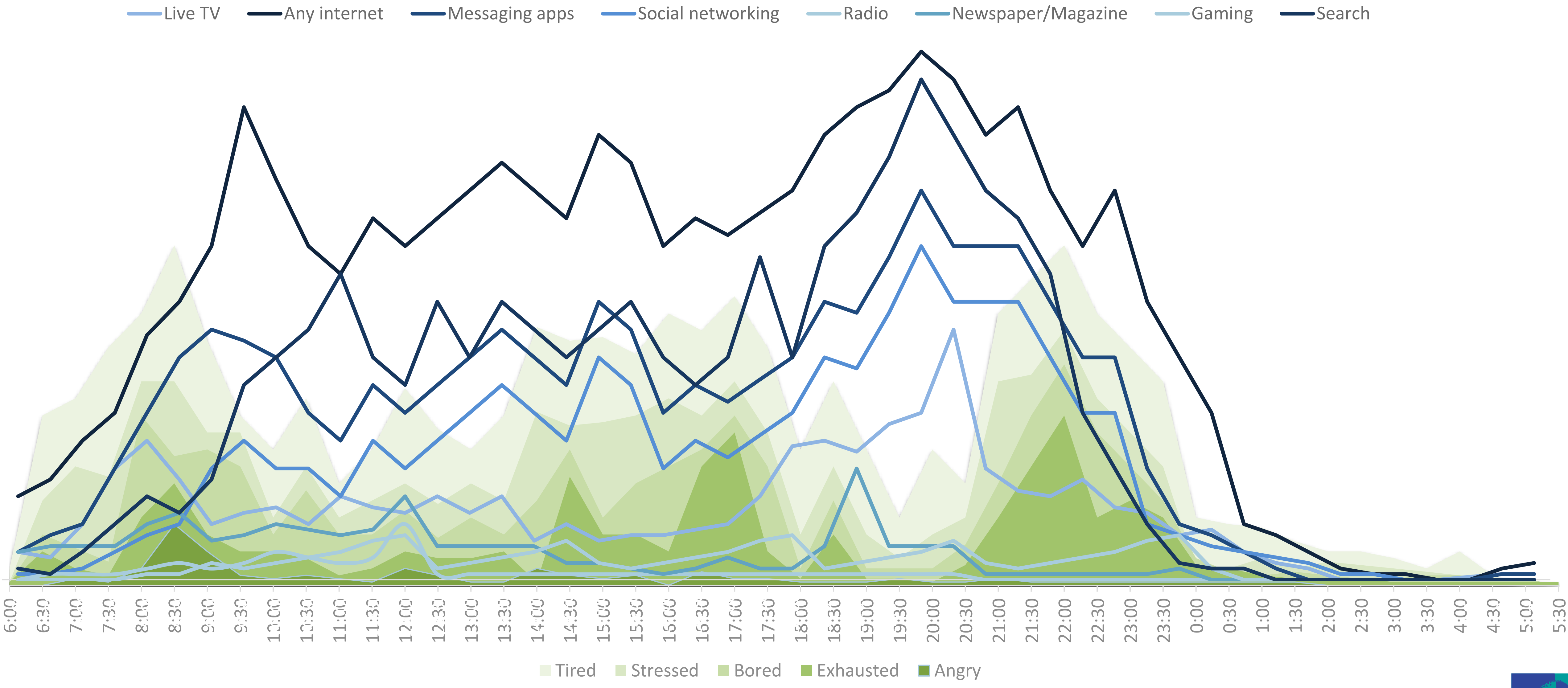
Summary of enhancements

- Methodology
- Coverage
- Sample Size
- Device Agnostic
- Digital R&F

Understanding changes in mood



Identifying occasions for brand insertions



Ipsos

AFFLUENT ASIA
CHINA PILOT RESULTS

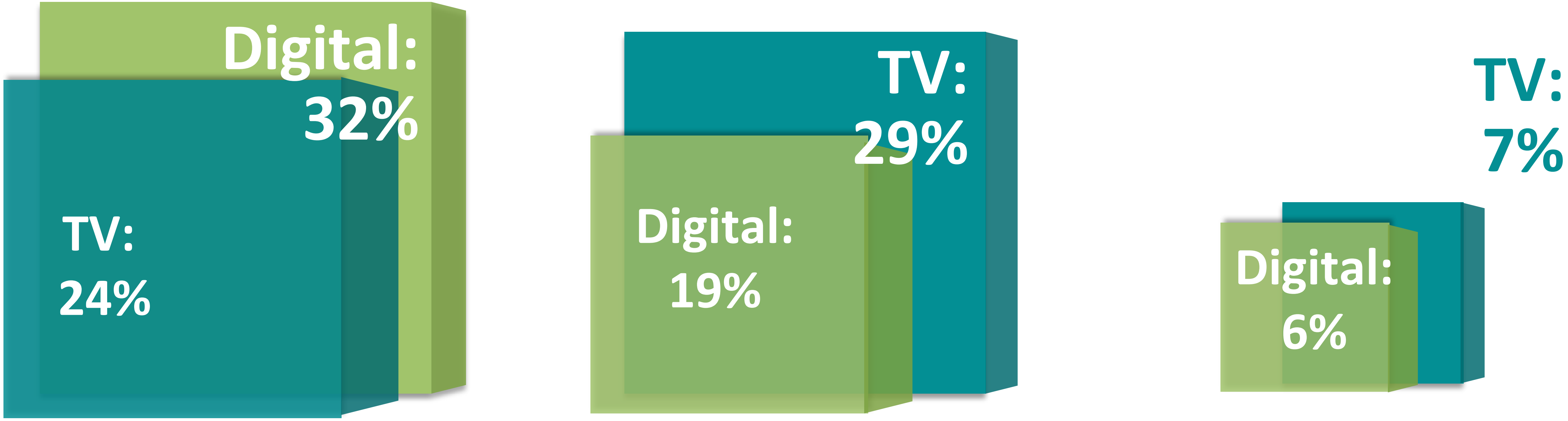
China pilot

Beijing, Shanghai, Guangzhou

n=540 in total

Source: Ipsos Affluent Survey Asia Pacific. China Pilot 2016.

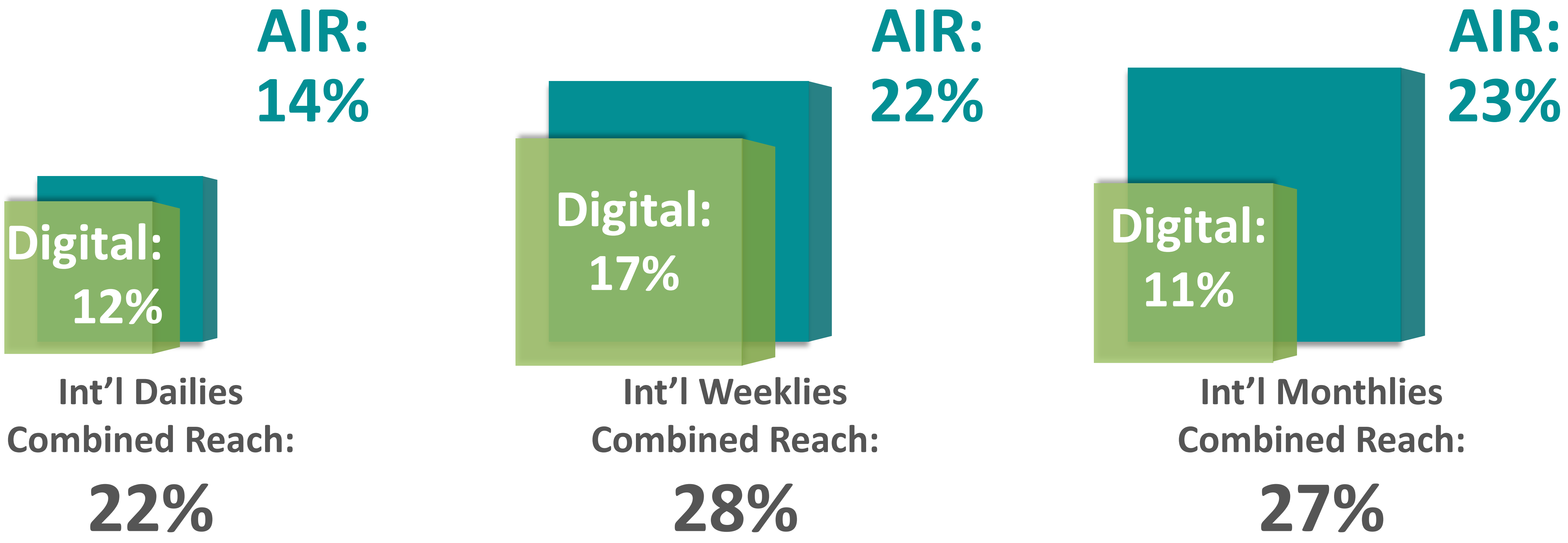
China pilot results – TV and digital



Int’l News Channels Combined Reach:	Int’l Documentary Channels Combined Reach:	Int’l Entertainment Channels Combined Reach:
45%	**38%**	**11%**

Source: Ipsos Affluent Survey Asia Pacific. China Pilot 2016.
Combined reach refers to nett of past 7 days viewership and past 30 days digital reach.

China pilot results – Print and digital



Source: Ipsos Affluent Survey Asia Pacific. China Pilot 2016.
Combined reach refers to nett of average issue readership and past 30 days digital reach.

Thank you for your continued support!