



## Press Release

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### ***Ipsos Media Atlas (formerly Synovate Media Atlas) presents new insights - revealing the attitudes and behaviour of Hong Kong's poorest 20%***

Over the past 7 years, Media Atlas has looked at many groups and sectors of the Hong Kong population. This year, we focus on the poorest 20% of the Hong Kong population. These 20% only get 6% of the income share (while the top 20% have 43%). They tend to be older and only 40% of them work full time (over 70% for the richest quintile). Over half (56%) haven't gone above Form 3 at school. In a fast paced, mercantile city where rents are soaring, poverty in Hong Kong has become an even bigger factor of exclusion. What does it mean to be part of Hong Kong, to those who are poorer, often older and unemployed?

Ipsos, one of the top 3 global market research companies, today releases the latest findings from its Media Atlas Hong Kong study, revealing the media consumption, attitudes and lifestyles of consumers. The 2012 Ipsos Media Atlas Hong Kong study surveyed all people aged 12-64 in Hong Kong. The survey is conducted year-round, and Ipsos spoke with 6,100 people to obtain the latest data, which covers January to December 2012.

### **The digital divide**

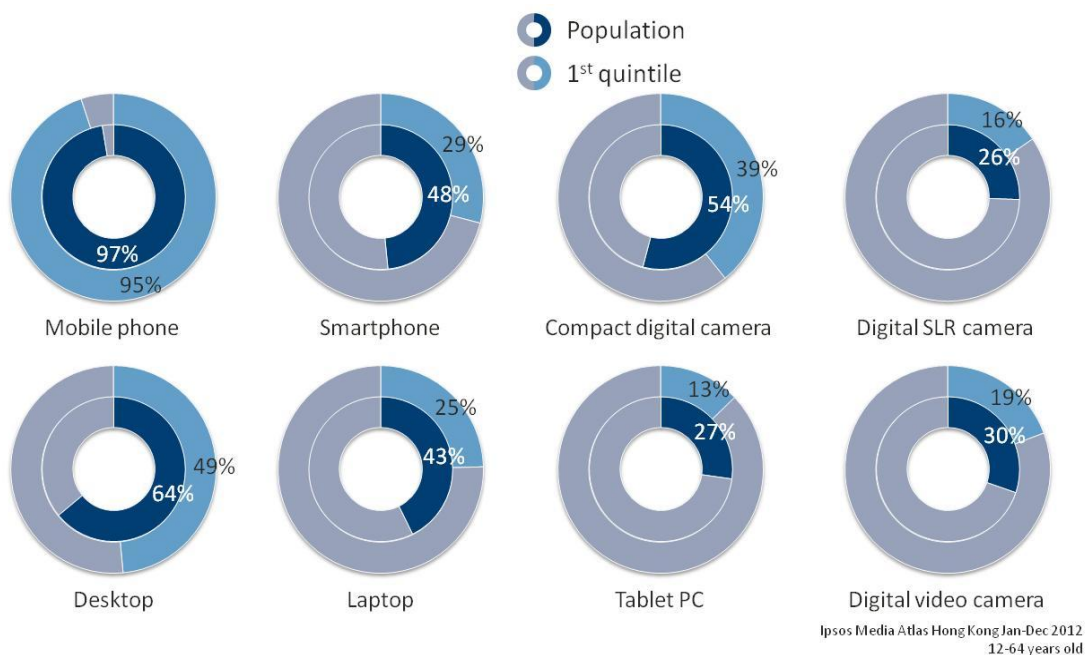
While technology has become omnipresent in developed societies, most still do not see it as a critical factor of success. In fact, only a quarter (28%) of the Hong Kong people agree that keeping up with modern technology is a key to their success - a roughly homogenous number among all income groups.

However, technology, and its impact on everyday communication, remains a critical factor of integration. The poorest 20% of Hong Kong clearly lag behind in the adoption curve. While ownership of a mobile phone in the traditional sense reaches nearly 100%, there are clear differences when it comes to more advanced devices. Please see Figure 1 for details.

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**Figure 1 – Personal Ownership of Gadgets**



Whether it is smartphones, digital cameras, desktop or laptop PCs, tablets or video cameras, the poorest 20% of Hong Kong are on average at only two-thirds of the adoption levels of the overall population. Susanna Lam, Director, Ipsos MediaCT Hong Kong commented: “This means they are not able to experience the conveniences that come with technology, not being able to take and share pictures and videos with friends, accessing emails and social media – being part of the group.”

## Mental Exclusion

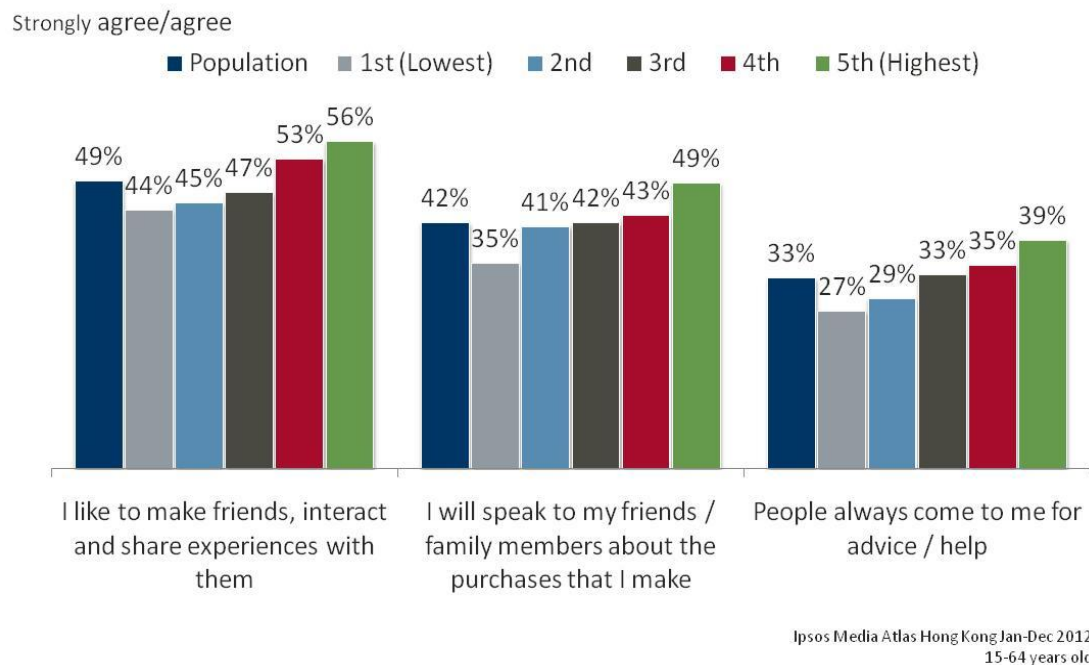
“Being poor in Hong Kong is not just about money. Exclusion can also be felt in one’s attitude to life and the actual *feeling* of exclusion” Lam said. As such, only 39% of the poorest quintile believe that they can reach their goals (46% average, 54% for richest quintile) and are the most likely to believe that “good luck is more important than hard work”. (38%, against 32% average and 29% for richest quintile).

It is easy not to value money when you have some. For those who do not, money becomes the symbol of their failure to succeed: 32% therefore agree that money is the most important measure of success in life (28% average, 25% for the richest). Less money also means less willingness to take risks in general (12% against 20% average, 27% for richest quintile).

This feeling of exclusion leads to an increased feeling of loneliness. The less money they have, the less people in Hong Kong are willing to “make friends, interact and share experiences with them” – in line with the smaller ownership of smartphone and communication devices described above – and that “less people will come to you for help”. Misery isn’t easily shared.

Please see Figure 2 for attitudes of people from different income quintiles

**Figure 2 – Consumer Attitudes**



Because of their limited spending power, the poorest 20% are also more likely to stay at home rather than going out (52% for the poorest quintile against 42% for richest quintile), hence the number of people going to the cinema, to the pub or to karaoke being much smaller than the average.

## It’s not all doom and gloom

So what makes people belonging to Hong Kong? Despite their differences, Hong Kong inhabitants do share values and pleasures: One of them is .... Shopping; a third (33%) of Hong Kong people, rich or



poor, agree that they “enjoy the fun of shopping”. More than half (53% for the poorest quintile against 58% average) go shopping every week.

However only 14% of Hong Kongers visit museum /art gallery and only about 7% watch opera/drama in the theatre, once every 2-3 months, both figures being pretty similar across all income groups.

Everyone seems to agree that Hong Kong is not famous for its love of the arts!

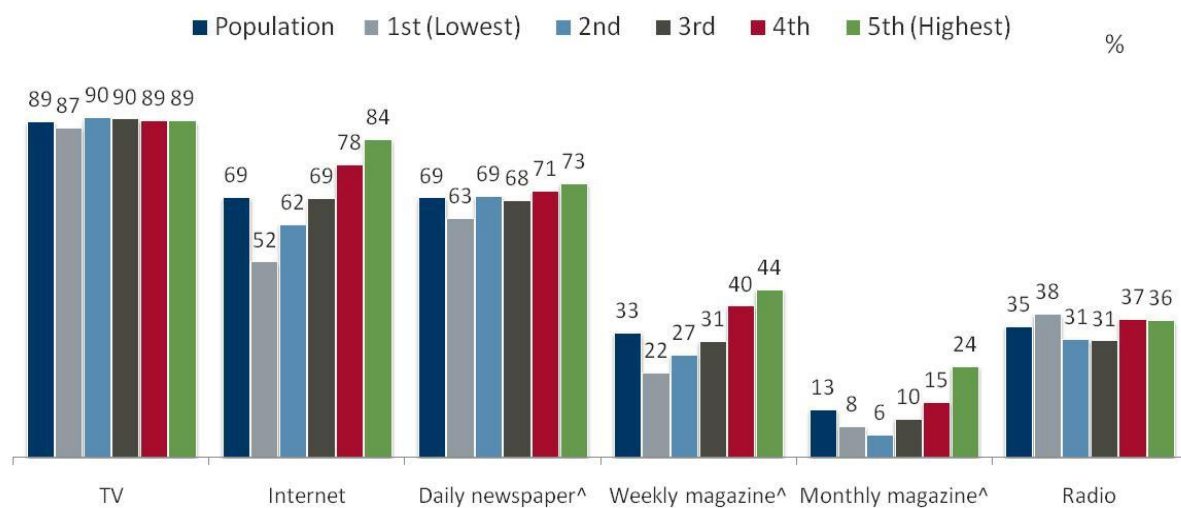
Another common Asian trait is shared by all parts of HK society - gambling. Every month, a quarter (24%) makes a bet on horse racing, 32% play mahjong and over half (54%) make a bet on Mark-Six. So while the poorest parts of Hong Kong are more risk averse in everyday life, it clearly does not apply to gambling - where participation levels are similar across all income groups. One can guess though, that the amounts being bet probably differ.

## **Media Consumption**

There are clear differences in media consumption for the poorest population. Internet, as with the rest of the digital world, remains the biggest barrier. But those among the poorest 20%, who do have internet access, end up using it just as much as the others (130 minutes per day per user, against 139 on average). They are also much less likely to consume weekly or monthly magazines.

Television is still king; with daily usage across all groups close to 90%, no other media even comes close to this level of consumption. Daily newspaper consumption is also relatively homogenous albeit at a lower level. Consumption of paid dailies is quite high too for the poorest, at 42% (against 48% for average). Radio is most popular with the poorest segment, mainly due to the high proportion of older people among them. Please see Figure 3 for further details

**Figure 3 – Media Consumption Habits**



TV, daily newspaper, internet and radio: Yesterday

Weekly magazine: Past week

Monthly magazine: Past month

<sup>^</sup>Print edition

Ipsos Media Atlas Hong Kong Jan-Dec 2012  
12-64 years old

**END**



### **About Ipsos Media Atlas**

This seventh annual Ipsos Media Atlas Hong Kong study captures a complete cross section of society, revealing the media consumption, attitudes and lifestyles of Hong Kong consumers. It covers 6,100 Hong Kong respondents aged 12 to 64 in January to December 2012.

The Ipsos Media Atlas Hong Kong study tracks:

1. Media consumption, product ownership, attitudes and values using computer assisted telephone interviews (CATI).
2. Brand, spending pattern and lifestyle insights using online and offline data collection.

Ipsos runs Media Atlas in Mainland China, Hong Kong and the Philippines, and works closely with major media specialists, media owners and advertisers in each country to develop surveys relevant to local conditions.

### **About Ipsos**

Founded in France in 1975, Ipsos is the only independent market research company that is controlled and managed by research professionals. In October 2011 Ipsos completed the acquisition of Synovate. The combination forms the world's third largest market research company.

With offices in 84 countries, Ipsos has the resources to conduct research wherever in the world our clients do business.

Working both on a global scale and in local markets, our expert teams give our clients the benefit of high value-added business solutions including qualitative, forecasting, modeling, market knowledge and consumer insights.

Ipsos professionals deliver insightful expertise across six research specialisations: advertising, customer loyalty, marketing, media, public affairs research, and survey management.

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