



# Ipsos Media Atlas Hong Kong

Revealing the lifestyle, digital and media habits of today's Hong Kong

# Research Objectives

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Provide a **cost efficient, future-proof** and **accurate media currency** to the industry

Ultimately, the media currency will...

- show you the **changes** in media audiences
- help you design and trade media ideas that can **connect** with consumers **efficiently** and **effectively**



# Specific research objectives

- To measure and trend consumers' ever-changing **media habits**
- To comprehend consumers' relationships with media and the marketing communications in it
- To grasp and define the **demographic** and **psychographic** profiles of consumers
- To gauge and track **product ownership** and **service usage**
- To understand the **lifestyle** and **consumption power** of consumers
- To gain insights into consumers' **relationship with brands**



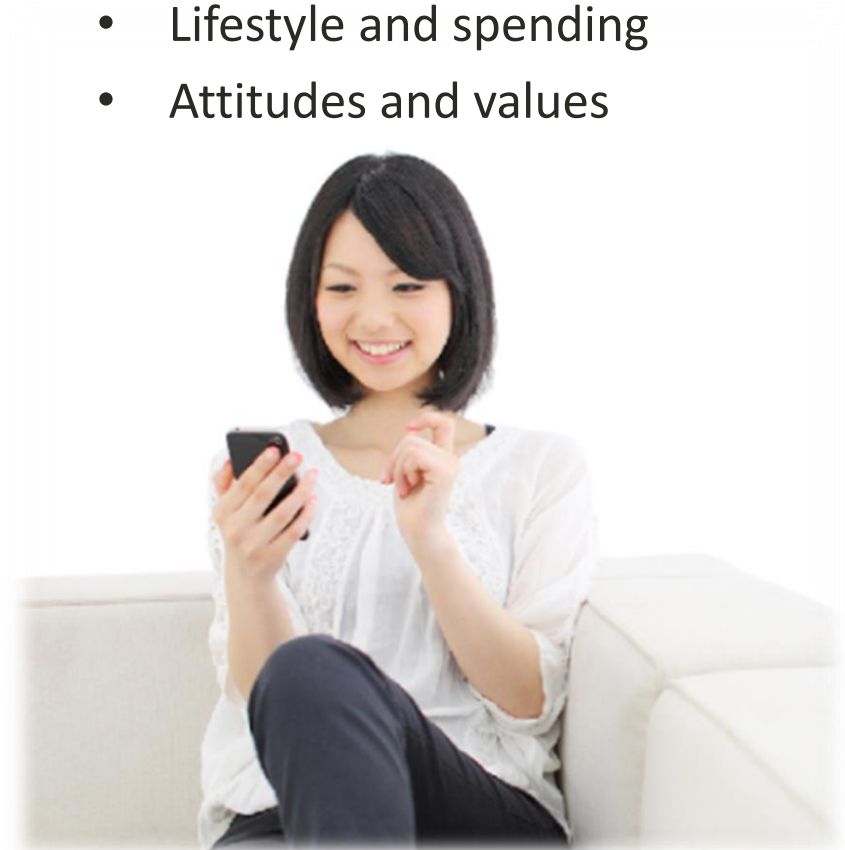
## Computer aided telephone interviews

- Media consumption
- Product ownership
- Attitudes and values



## Online and offline interviews

- Brand relationship
- Product usage
- Lifestyle and spending
- Attitudes and values





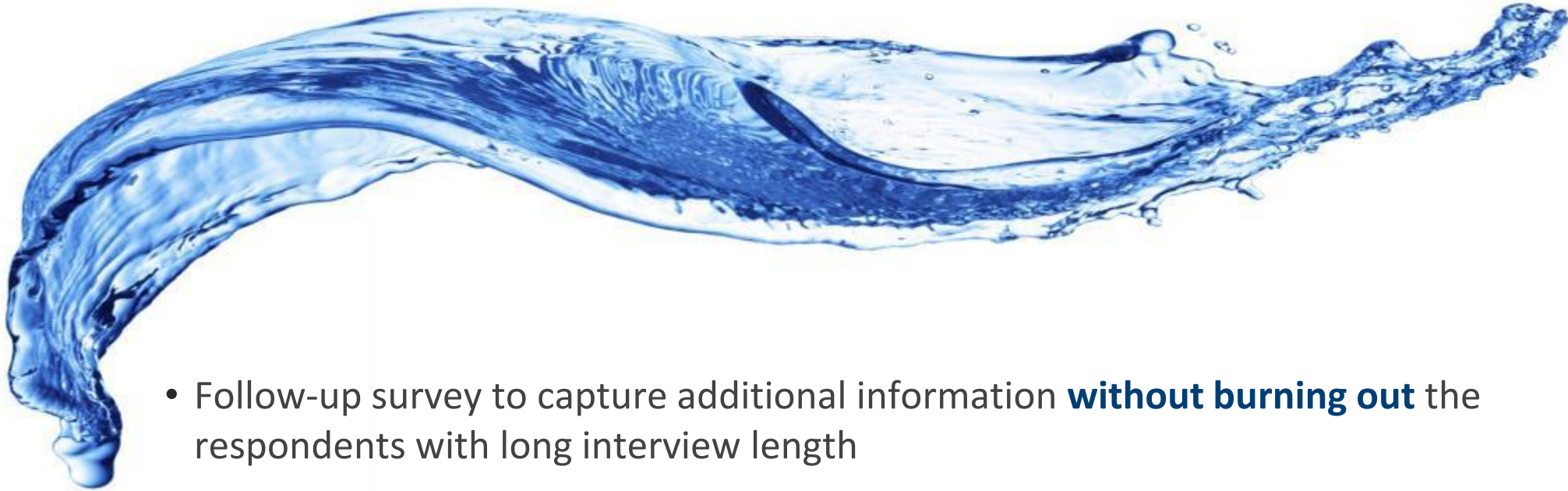
# Telephone interviews for the core currency

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- Fieldwork since January 2006
- **Computer Aided Telephone Interviewing**
- All People **aged 12-64**<sup>^</sup> in Hong Kong
- **5,000 interviews** per annum
- **Continuous** tracking throughout the year
- Annual rolling results released quarterly



<sup>^</sup> In 2006 and 2007, only those aged 15-64 were surveyed



- Follow-up survey to capture additional information **without burning out** the respondents with long interview length
- Media Atlas respondents are incentivised to fill out another study after the main survey
- Making use of both **online** and **offline** data collection methods, depending on the choice of respondents
- In case not all respondents are willing to participate in the follow up study, **data ascription** will be done to fill in the gaps and complete the full database

# Questionnaire and Deliverables





## **Main CATI Section**



## TV

- Home access to pay TV services (by service provider)
- Type of access (bundled, TV only or free of charge)
- Past 30/7/yesterday viewership of TV services (by service provider)
- Past 30/7/yesterday viewership by channel (terrestrial TV channels, DTT channels and selected local pay TV channels)



## Print (offline version only)

- Readership by title in past 12 months
- Readership by title in last issue period
- Average no. of issue read by title

## Apps

- Usage within the past year/ past 30 days/ past 7 days/ yesterday (for key newspapers/ magazines/ websites/ videos)
- Frequency of access over the past 30 days (by key newspapers/ magazines/ websites/ videos)

## Radio

- Past 30/7/yesterday listenership (by station)



## Internet

- Frequency of using the internet – via i) desktops/ laptops and ii) smartphones/ tablets
- Place of access
- Past 12 months/ past 30 days/ past 7 days/ yesterday visit by website (via any device)
- Frequency of accessing content by website

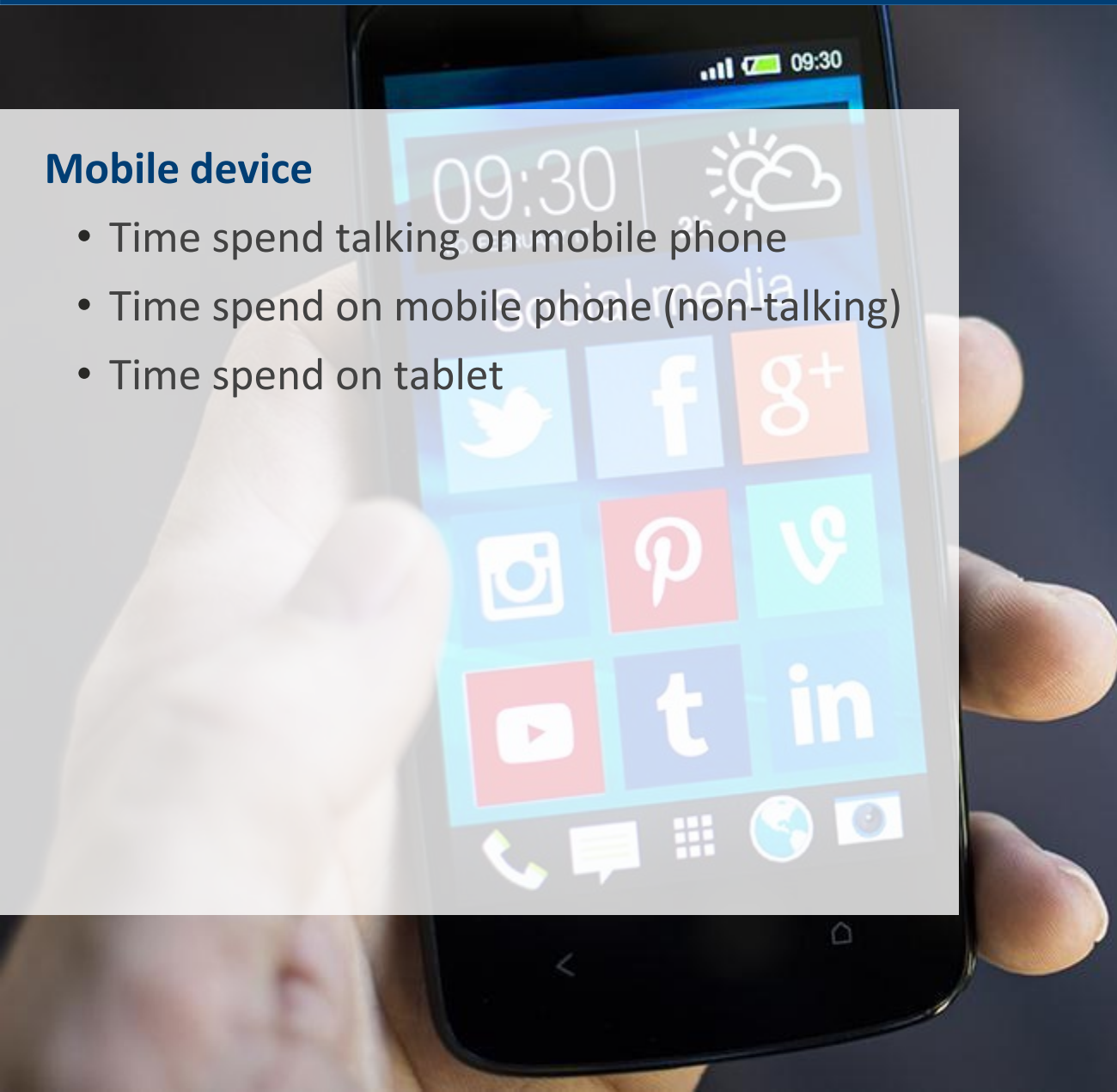


## Internet

- Purposes of using the internet
  - General browsing
  - Using search engines for information
  - Using email
  - Downloading files/ software
  - Instant messenger
  - Accessing chatroom
  - Browsing and participating online forum
  - Listening to live radio
  - Listening to live music
  - Online auctions
  - Online banking/ investment
- Types of information browsed and searched online
  - Online games
  - Online purchase
  - Online booking of travel services
  - Blogging
  - Reading news
  - Watching video
  - Watching news video
  - Watching live TV
  - Visiting social networking sites
  - Online shopping at group-buy websites

## Mobile device

- Time spend talking on mobile phone
- Time spend on mobile phone (non-talking)
- Time spend on tablet



## Mobile device

- Features used in past month
  - Access Internet sites for general browsing
  - Use instant messenger
  - Download/ upload music or ringtone
  - Send/ receive text messages (SMS)
  - Send/ receive multimedia message (MMS)
  - Send/ receive email
  - Play games
  - 3G video call
  - Take photo
  - Film video
  - Listen to radio/music
  - Visiting social networking sites
  - Watching Live TV
  - Watching video
  - Watching news video
  - Reading news online
  - Check-in at location based social networking sites
  - Download free mobile apps
  - Pay to download mobile apps



## Outdoor/Commuting

- Recency of travelling on public transportation (Past 30/14/7 days/ yesterday)
  - Bus
  - East Rail Line
  - Light Rail
  - MTR\*
  - West Rail Line
  - Mini Bus
  - Tram
  - Ma On Shan Line
  - Ferry
  - Taxi
- Recency of travelling by type of bus
- MTR stations travelled from and to (inclusive of interchange stations) within the past week

\*MTR - Kwun Tong, Tsuen Wan, Island, South Island, Tseung Kwan O, Tung Chung, Disneyland Resort Lines only



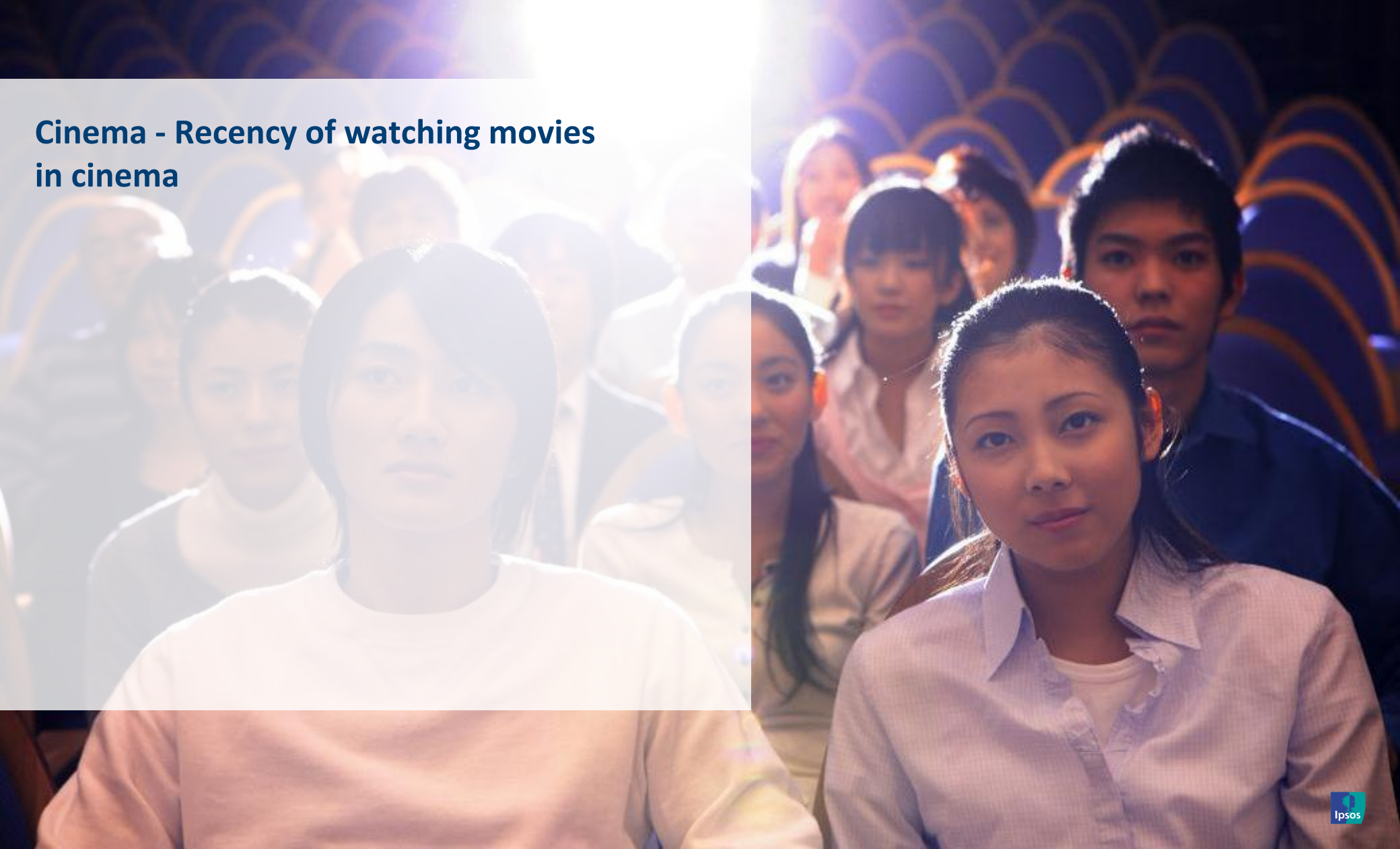
## Types of outdoor advertising seen in past 30/7 days

- MTR\* train body/in train
- MTR\* platform/concourse
- MTR (East/West/MOS/KT/S.Island Line) in-train TV
- Other MTR (East/West/Ma On Shan Line) advertisement
- LRT
- Taxi
- Minibus
- Ferry pier
- In-bus TV
- Bus shelter
- Bus body
- Tram shelter
- Tram body
- Billboard
- TV in lift lobby of commercial building
- Outdoor TV

\*MTR - Kwun Tong, Tsuen Wan, Island, South Island, Tseung Kwan O, Tung Chung, Disneyland Resort Lines only



## Cinema - Recency of watching movies in cinema





## Time spent on media in an average week

- TV, newspaper, magazine, internet, radio
- Change in time spent on various media in past 12 months (if any)

## Change in time spend vs. 12 months ago by media type



## Consumers' relationship with media and advertising

- Statement association with different communication channels
  - I couldn't live without
  - I plan to use more often
  - Keeps me up to date
  - Gives me useful information
  - Best entertainment source/ leisure pastime
  - Help you decide what to buy





## Banking/Finance (aged 15-64 only)

- Medical insurance
- Life insurance
- Personal loan
- Integrated account
- Integrated account with personal account manager
- Investment
- Retirement plan
- Credit card  
(classic, gold, platinum or above)





## Luxury items (aged 15-64 only)

- Luxury watch (HK\$4,000+ per item)
- Jewellery (HK\$4,000+ per item)
- Quality/Designer clothes & leather goods (HK\$1,500+ per item)
- Quality/designer accessories & footwear (HK\$1,500+ per item)

## Household ownership

- Private car
- Private property



## Technology goods – Personal ownership

- Laptop / notebook computer
- Desktop computer
- MP3 player
- Digital video camera
- Sports camera
- Camera drones (flying camera)
- Digital SLR camera
- Other digital camera
- Portable electric game
- Mobile phone
- Smartphone
- Tablet
- Wearable devices (e.g. smartwatches, fitness trackers)
- Electronic beauty devices



## Technology goods – Household ownership

- DVD player/recorder
- LCD / Plasma TV
- TV gaming console
- Smart TV
- Massage chair



# Health/ beauty product usage\*

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- Health supplement / vitamin
- Skin care product
- Diet/slimming product
- Slimming/keep fit programmes
- Cosmetics



\* past 12 months



## Shopping Frequency

- Personal stores
- Department stores
- Supermarkets/hypermarkets
- Convenience stores
- Traditional drug stores
- Fast food restaurants
- Drink vending machine

## Air travel frequency

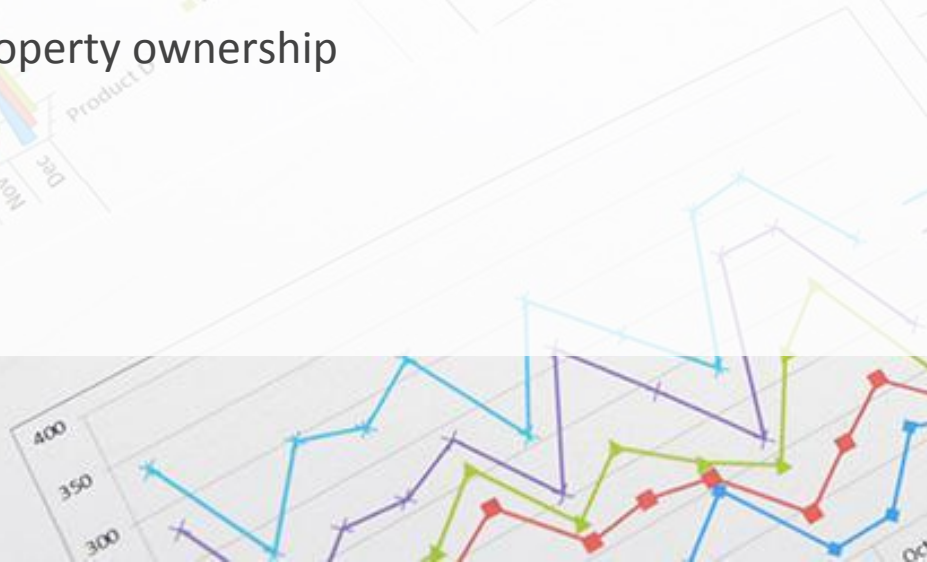
- Business
- Leisure

## Amount spent for last purchase in supermarket



## Psychographic statements (aged 15-64 only)

- Shopping
- Advertising
- Environment
- Health
- Outlook on life
- Risk taking
- Property ownership





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- Age
  - Gender
  - Marital status
  - Age of children
  - Education level
  - Language used at home
  - Ability to read English or Chinese
  - Employment status
  - Company size
  - Job title
  - Job duty
  - Personal income
  - Household income
  - Business decision maker
  - Grocery decision maker
  - Living district
  - Housing type
  - Household size
  - With domestic helper
  - Total value of liquid assets
  - Household income per capita

A hand is shown holding a white, fluffy cloud. Inside the cloud, there are several colorful data visualizations: a line graph with multiple colored lines (red, blue, green) and data points, a pie chart with a yellow segment labeled '84%', another pie chart with a blue segment labeled '78%', and a bar chart with blue bars. There are also small circular icons with plus and minus signs scattered around the cloud. The background is a dark blue gradient with bokeh light effects.

# Follow Up Study



## Key media roadmap information through the day via media and activities diary

- 7 locations e.g. work, on transportation, home etc.
- 7 media activities e.g. watching TV, reading newspaper etc.
- 16 lifestyle activities e.g. working, grocery shopping, travelling, play sports etc.



## Websites accessed in past month and most often

- Social networking sites
- E-mail services
- Instant messengers

## Time spent on online activities

- E-mails
- Online community activities
- Instant messaging

## Items downloaded via internet in past month

### Sponsored search

- Awareness
- Usage

### Usage of QR code

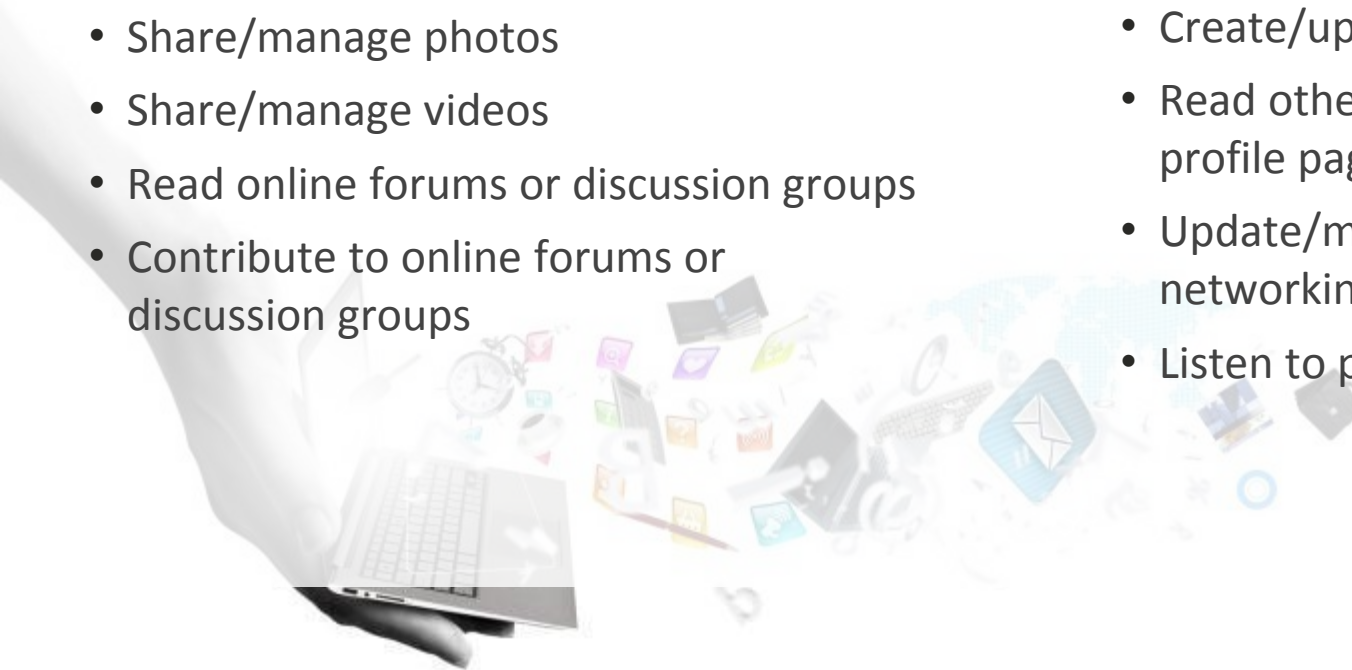
- Get information
- Download coupon





## Participation in online social activities in past month

- Read a blog without making comments
- Read a blog and commented
- Create/update a blog
- Share/manage photos
- Share/manage videos
- Read online forums or discussion groups
- Contribute to online forums or discussion groups
- Upload video I created to a public website
- Upload audio or music I created to a public website
- Create/update personal page
- Read other people's social network profile page
- Update/maintain a profile on social networking site
- Listen to podcasts



## Participation in online social activities in past month

- Visit virtual world sites
- Contribute to or edit articles in a wiki
- Making phone calls via Internet/VoIP
- Watching live TV
- Watching videos
- Creating/updating micro-blog
- Followed people on micro-blog without comments
- Put a comment on micro-blog
- Read customer ratings or reviews of products/services
- Posted ratings or reviews of products/services
- Added tags to online images






## Frequency of watching live TV & video via

- Laptop/desktop
- Mobile phone
- Tablet PC

## Platform of smartphone currently own



## Frequency of participating in different activities

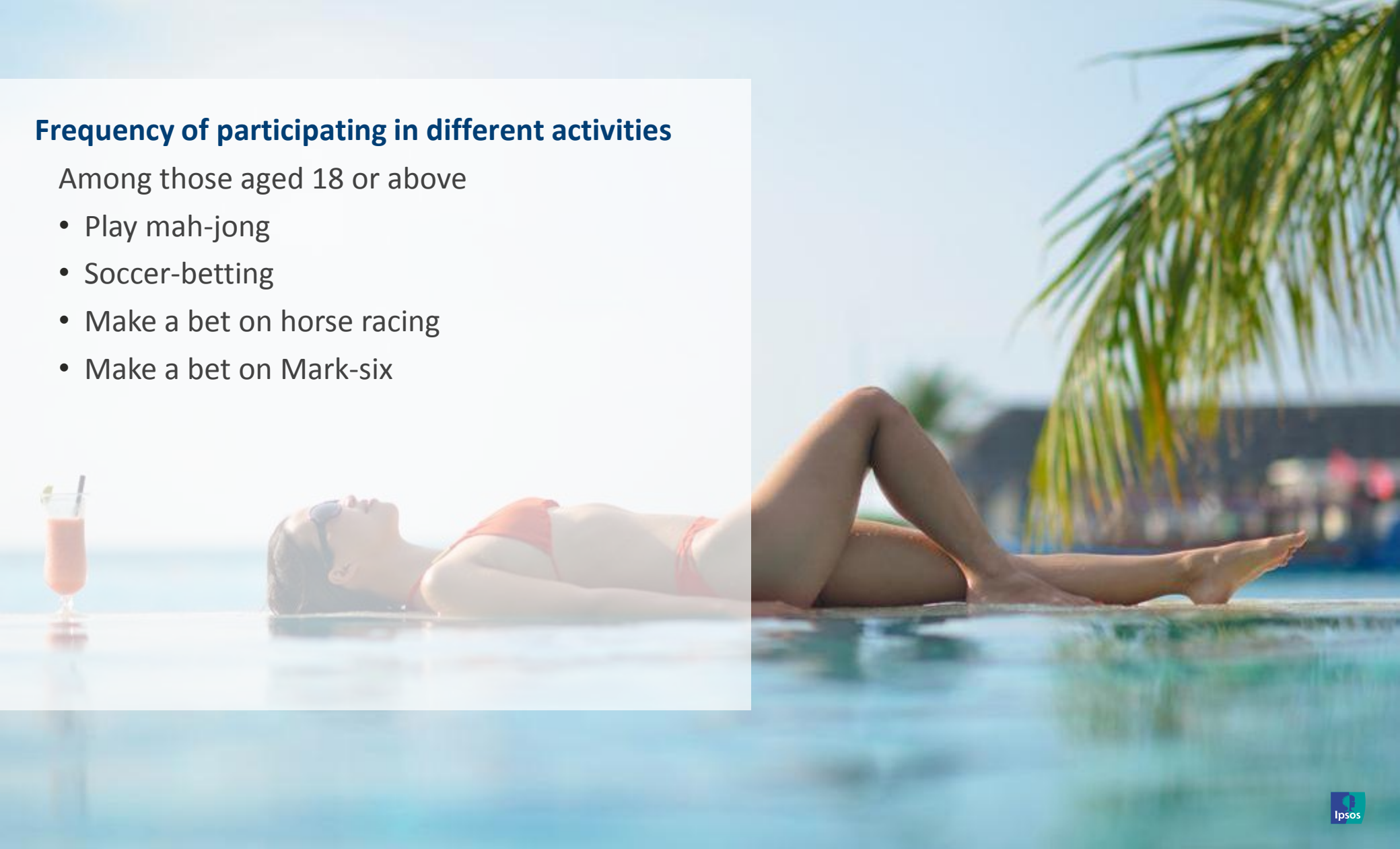
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- A woman in a red bikini is lying on her stomach on a white beach towel, relaxing by the water. The background is a blurred beach scene with palm trees and a clear sky.
- Watch recorded programmes/ video tapes/ VCD/ DVD
  - Read comic books
  - Read books/novels
  - Play offline video/electronic games
  - Listen to music
  - Go shopping
  - Dine out for dinner
  - Work out/exercise in gym
  - Watch opera/drama in theatre
  - Doing yoga
  - Participating in other sports
  - Visit museum/art gallery
  - Watch live pop concert
  - Go to Bar/pub
  - Go to karaoke box
  - Go to beauty/slimming centre
  - Go to hairdresser
  - Go to Macau for leisure



## Frequency of participating in different activities

Among those aged 18 or above

- Play mah-jong
- Soccer-betting
- Make a bet on horse racing
- Make a bet on Mark-six



## Monthly spending on:

- Wear and accessories
- Dining out
- Skincare
- Cosmetics
- Perfume / cologne
- Entertainment

## Annual spending on (aged 15-64 only):

- Overseas travel
- Investment
- Insurance
- Watch
- Jewellery
- Consumer electronics/gadgets





## Monthly spending on each child (for those with children aged 15 or below)

- Education
- Extra curriculum
- Medication
- Clothing
- Pocket money
- Living/Catering



## Frequency of consuming

- Alcoholic drinks (aged 18-64 only)
  - Beer
  - Brandy
  - Champagne/sparkling wine
  - Chinese alcoholic drink (rice wine)
  - Red wine
  - Sake
  - Whisky
  - White wine
- Non-alcoholic drinks
  - Carbonated soft drink
  - Distilled water/mineral water
  - Energy drink
  - Milk
  - RTD Coffee
  - RTD Juice
  - RTD Tea





# Frequency of buying OTC medication

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- Allergies
- Backache/muscle pain
- Colds/flu
- Cough/sore throat
- Diarrhoea
- Fever
- Headache
- Mouth/dental problems
- Sleeping problems
- Stomach ache
- Vomits



## Usage of hair care products in past 6 months

- Shampoo
- Hair conditioner
- 2-in-1 shampoo and conditioner
- Treatment/hot oil
- Leave-on treatment/moisturizer
- Colourants
- Styling clay
- Styling gel
- Styling mousse
- Styling spray
- Styling wax
- Other hair styling product

## Usage of feminine care products in past 6 months (Female only)





## Luxury items

- Quality/designer clothes & leather goods (\$1,500+ per item)
- Quality/designer accessories & footwear (\$1,500+ per item)
- Jewellery (\$4,000+ per item)
- Luxury watch (\$4,000+ per item)

## Financial items

- Life insurance
- Medical insurance
- Any investment (excludes MPF or insurance)
- Integrated account
- Retirement plan (excludes MPF)
- Personal loan
- Credit card application

<sup>^</sup> purchase intention is for the upcoming 12 months.



## Technology items

- Laptop/notebook computer
- Desktop computer
- MP3 player
- Digital video camera
- Sports camera
- Camera drones (flying camera)
- Digital SLR camera
- Other digital camera
- Portable game console
- Mobile phone
- Smartphone
- Tablet
- Wearable devices (e.g. smartwatches, fitness trackers)
- Electronic beauty devices

## Household items

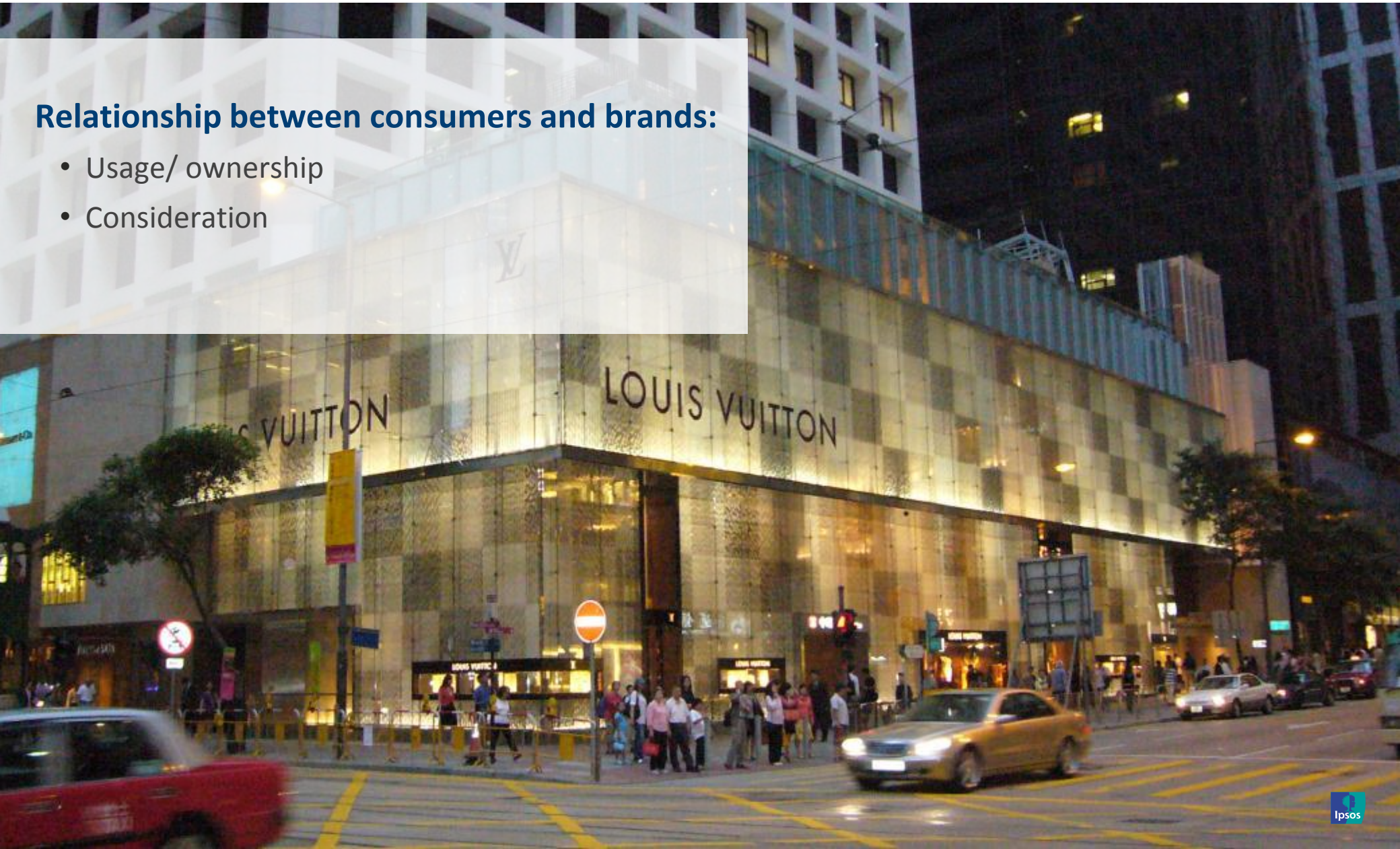
- Private car
- Private property
- DVD player/recorder
- LCD TV/Plasma TV
- TV gaming console
- Smart TV
- Massage chair

<sup>^</sup> purchase intention is for the upcoming 12 months.



## Relationship between consumers and brands:

- Usage/ ownership
- Consideration





# Relationship with brands

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## Categories covered

- Banking/finance (aged 15-64 only)
  - Credit card/ Integrated account/ Investment/ Insurance
- Skin care
- Handbags and accessories
- Watches
- Sports shoes
- Kids' clothing
- Cars
- Mobile network provider
- Digital AV
  - Plasma/ LCD TV/ HDTV/ SmartTV, digital camera, mobile phone





## Relationship between consumers and brands:

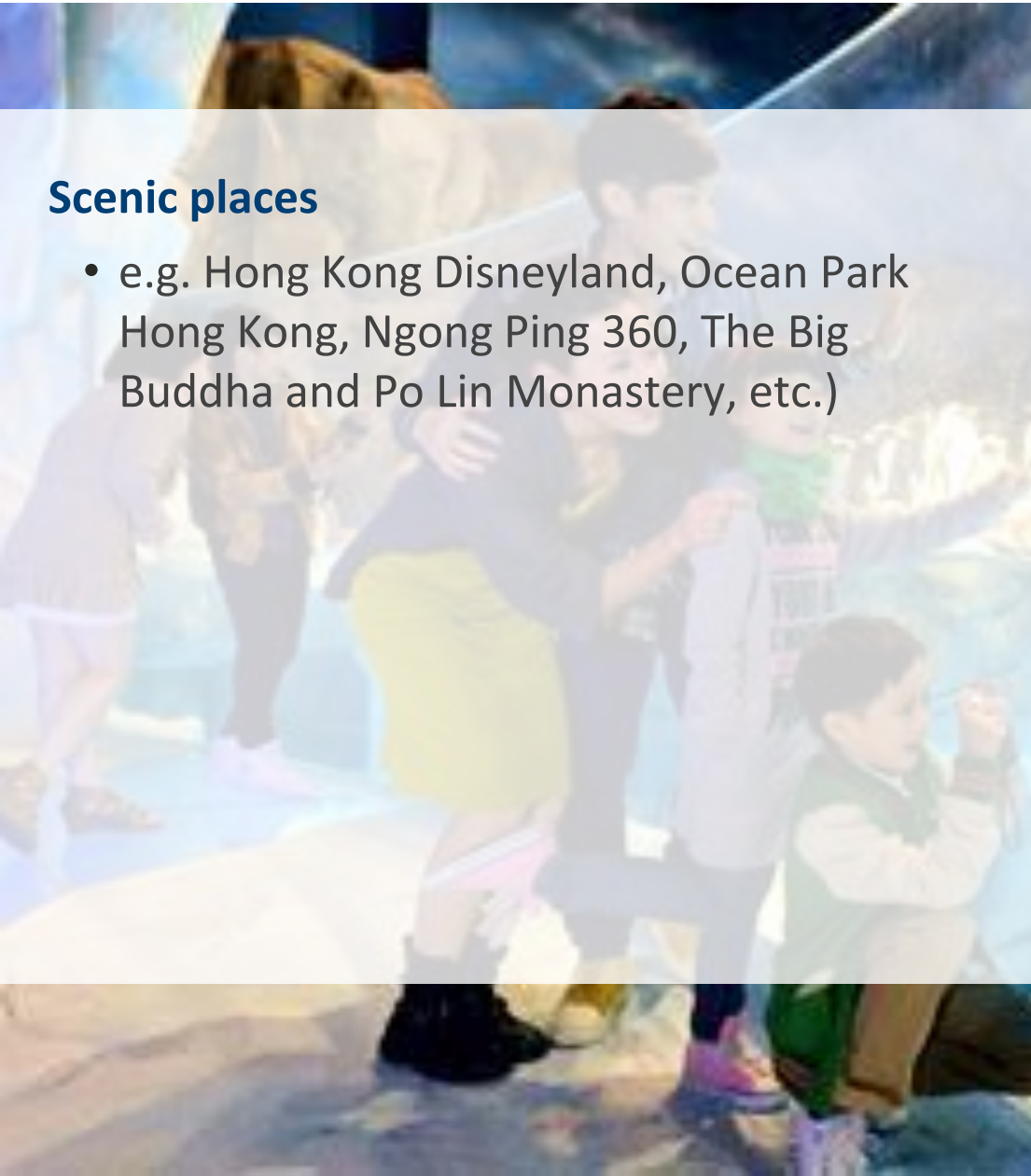
- Visited in past 12 months
- Preference

## Shopping outlets covered

- Shopping malls
- Retail store
  - Personal Store
  - Convenience store
  - Supermarket
- Fast food restaurant

## Scenic places

- e.g. Hong Kong Disneyland, Ocean Park Hong Kong, Ngong Ping 360, The Big Buddha and Po Lin Monastery, etc.)





## Psychographic statements (aged 15-64 only)

- Money and finance
- Word of mouth
- Work
- Social status
- Personality





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