New Video Landscape in Hong Kong – Powered by Nielsen

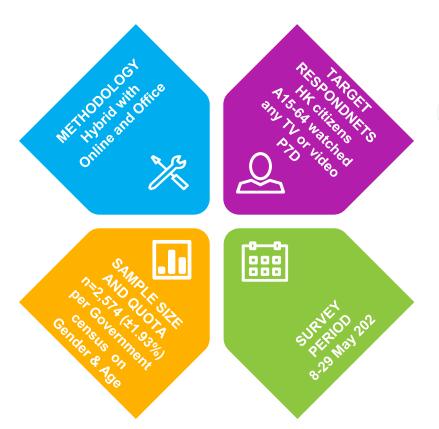
Review on the change of HK Video Landscape after the impact of social unrest and Covid-19



2020 HK Video Landscape



Survey Design



TV (Offline and Online)



















Digital Video Platforms





































Video Consumption Behavior

Target Incidence: 99% Mass population viewed Video Content in the Past 7 Days

97% of them are Daily Viewers (+12pts)

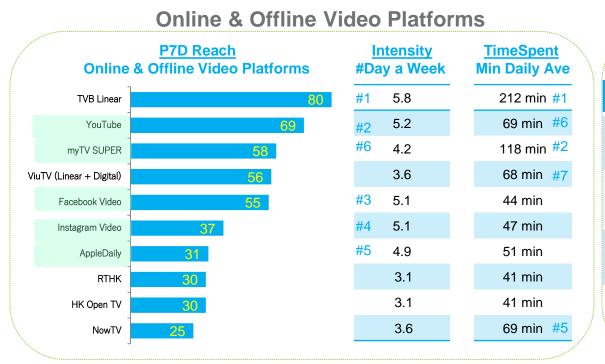


- 330 minutes daily average (+25%) they spent on video contents, from both offline and online
- Long form and News contents with significant higher usage
- 85% use the Second Screen while watching video content from the Big Screen TV Set and Smartphone (87%) is the most common device used.





Top 10 Video Platforms



Past 7 Days Audience Reach Intensity **Time Spent** You Tube You Tube **NETFLIX** You Tube

Online Video Platforms

Source: 2020 Video Consumption Landscape Survey (n=2,574 Aged 15-64 General Video User for HK local population in the past 7 days)

Fieldwork period: May 8-29, 2020

AUDIENCE ARE...

Gender



47% vs 53%

Age



10% A15-24(-3pts) 15% A25-34(-4pts) 19% A35-44(-3pts) 24% A45-54(+2pts)

31% A55-64(+7pts)

University



50% (46%) (46%)

Working



79% (79%) (84%)

PMEB



41% (40%) (40%)

Married



69% Married (62%) (60%)

9 out of 10 have Kids (9) (8)

Grocery Shoppers



82% (81%) (79%)

Head of Household



76% (72%) (72%)

Household **Monthly Income**



HK\$66,738 2019 (HK\$65,378)

2018 (HK\$60,809)

Personal **Monthly Income**



HK\$32,196

2019 (HK\$31,378) 2018 (HK\$29,013)



(69%) AUDIENCE ARE...

Gender



49% vs 51%

Age



22% A25-34 22% A35-44(+1pts) 22% A45-54(-1pts)

16% A55-64(-1pts)

University



60% (50%)

Working



81% (80%)

PMEB



39% (38%)

Married



54% Married (52%)

Grocery **Shoppers**



80% (78%)

Head of Household



69% (67%)

Household **Monthly Income**



+4.0%



Personal

Monthly Income

+9.4%

HK\$63,246

(HK\$60,796)

HK\$30,970

(HK\$28,318)



(55%) AUDIENCE ARE...

Gender



47% vs 53%

Age



13% A15-24(-3pts) 25% A25-34(+1pts) 25% A35-44(+2pts)

22% A45-54

15% A55-64

University



60% (52%)

Working



84% (81%)

PMEB



41% (40%)

Married



55% Married (52%)

Grocery **Shoppers**



83% (79%)

Head of Household



71% (67%)

Household **Monthly Income**



+4.5%



Personal

Monthly Income

+10.2%

HK\$64,968

(HK\$62,192)

HK\$31,795

(HK\$28,862)



(37%) AUDIENCE ARE...

Gender



46% vs 54%

Age



26% A15-24 (-) 32% A25-34(+1pts) 22% A35-44(+2pts) 15% A45-54(-1pts) A55-64 (-1pts)

University



65% (56%)

Working



81% (77%)

PMEB



38% (38%)

Married



44% Married (42%)

Grocery **Shoppers**



78% (76%)

Head of Household



64% (62%)

Household **Monthly Income**



HK\$65,330

(HK\$62,326)

Personal **Monthly Income**



+11.9%

HK\$30,052

(HK\$26,846)



(25%) AUDIENCE ARE...

Gender



47% vs 53%

Age



21% A15-24(-1pts) 30% A25-34(-6pts)

22% A35-44(+3pts)

18% A45-54(+2pts)

9% A55-64(+2pts)

University



71% (63%)

Working



84% (82%)

PMEB



47% (46%)

Married



55% Married (51%)

Grocery Shoppers



81% (81%)

Head of Household



69% (68%)

Household Monthly Income



HK\$70,657

(HK\$70,932)

Personal Monthly Income



+8.7%

HK\$34,194

(HK\$31,453)



(17%) AUDIENCE ARE...

Gender



47% vs 53%

Age



16% A15-24(+2pts) 32% A25-34(+1pts) 24% A35-44(-1pts) 21% A45-54(+2pts)

8% A55-64 (-3pts)

University



67% (55%)

Working



88% (85%)

PMEB



50% (46%)

Married



54% Married (54%)

Grocery **Shoppers**



86% (87%)

Head of Household



75% (74%)

Household **Monthly Income**



+4.9%

Personal

Monthly Income

+12.3%

HK\$71,037

(HK\$67,704)

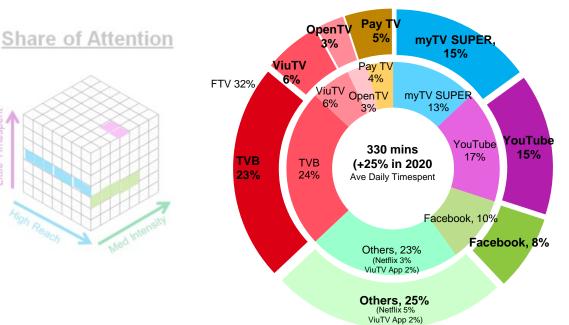
HK\$34,662

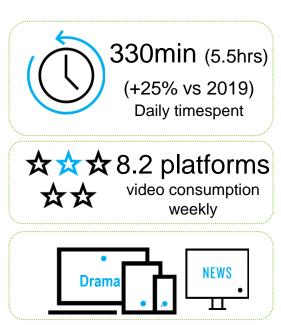
(HK\$30,876)

Stay-at-home Drives The Spike In Time Spent

Re-distributed slightly on the share with more gain on Big Screen Players from the Social on Video Consumption

Share of Attention 2020 (outer circle)

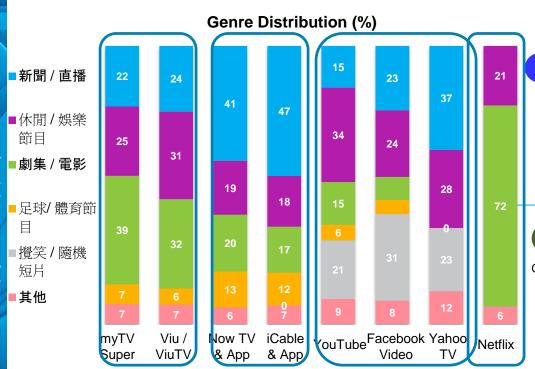




Definition: myTV SUPER (OTT Box, App, Web), Free TV (TVB Jade, TVB Pearl, ViuTV Ch99, HK Open TV), Pay TV (iCable TV, nowTV, now E Box), Others (Instagram video, Netflix, HBG Go, Yahoo TV, ViuApp, ViuTV App, Now App, Now E App, Appledaily, On.cc, ATV digital, iQiyi, Qianxun, Tencent video, YouKu, Xiaomi, Android box)
Source: 2020 Video Consumption Landscape Survey (n=2,574 Aged 15-64 General Video User for HK local population in the past 7 days)
Fieldwork period: May 8-29, 2020

13

Drama/Movies are leading among key OTT & FTV players while News/Live content are the primary choice by PTV viewers. For social, diversified content with mainly for fun & entertaining



myTV SUPER

Majority time goes to follow drama/movies series and nearly equal split on leisure and live news consumption

OTT players

Time spent on Netflix is almost on the premium abundance choice of drama/movies as well as the leisure program

Social media

Genre viewership on YouTube and Facebook are more diversified with content and mainly serve a leisure and funny enjoyment purpose

Pay TV

Informative live news are the leading genre among pay TV viewers and also the share of sports content is highest among the competitors

Q:平均每月來說,你在以下媒體收看影片時間既分佈是如何?請以時間百分比表示

 $Source: 2020\ Video\ Consumption\ Landscape\ Survey\ (n=2,574\ Aged\ 15-64\ General\ Video\ User\ for\ HK\ local\ population\ in\ the\ past\ 7\ days)$

Fieldwork period: May 8-29, 2020

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Consumers, more then ever, need a board content mix

- Top 6 combinations occupied 50% audience and 62% attention time



Pla	ntforms Consumption in P7D	% of Audience	% on Attention	Minutes Spent
1.	myTV SUPER, FTV, YT, FB, Others (no PTV)	13.0%	16.5%	387 min
2.	myTV SUPER, FTV, PTV, YT, FB, Other	10.5%	18.7%	543 min
3.	FTV, YT, FB, Other (no myTV SUPER, PTV)	9.9%	10.3%	316 min
4.	myTV SUPER, FTV (no PTV, YT, FB, Other)	8.1%	6.1%	231 min
5.	FTV, PTV, YT, FB, Other (no myTV SUPER)	6.5%	8.4%	397 min
6.	FTV only	4.2%	1.7%	122 min
7.	myTV SUPER, FTV, Other (no PTV, YT, FB)	3.9%	3.8%	296 min
8.	myTV SUPER, FTV, YT, Other (no PTV, FB)	3.6%	4.3%	359 min
9.	FTV, YT, Other (no myTV SUPER, PTV, FB)	3.3%	2.9%	273 min
10.	myTV SUPER only	2.6%	1.9%	221 min
	50 ' " " "			

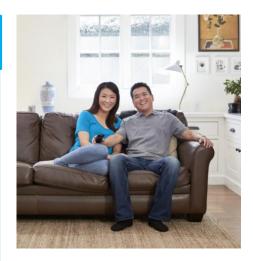
..... 59 various audience consumption compositions

13.0% Video Viewer (P7D), 16.5% Share of Attention myTV SUPER+FTV+YT+FB+Others Only (no PTV)

(387min average time spent on Video content)

Demographic & Household Status

- Female (51%), Male (49%)
- A25-34 (22%), A35-44 (27%), A45-54 (26%)
- Living with families (HH3+ 77%)
- Married (57%) with Kids (76%)
- Working (87%), PMEB (39%)
- MPI \$31,900 & MHI \$63,000





89% Outbound travelers 7 of 10 more than 2x trips a year



Interest on Finance & Banking Products
81% Insurance owner
76% Stock or bonds
49% Premium banking



Attention on health Spent on self images



Worth paying more for quality goods Interest on luxury products



Interest on latest digital electronics Enjoy shopping

Source: 2020 Video Consumption Landscape Survey (n=2,574 Aged 15-64 General Video User for HK local population in the past 7 days)

Fieldwork period: May 8-29, 2020

10.5% Video Viewer (P7D), 18.7% Share of Attention myTV SUPER+FTV+PTV+YT+FB+Others Only

(543min average time spent on Video content)

Demographic & Household Status

- Female (50%), Male (50%)
- A25-34 (31%), A44-54 (25%), A45-54 (23%)
- Big families (HH3+ 83%)
- Married (67%) with Kids (88%), Kids under 18 over 79%
- Working (92%), PMEB (58%)
- MPI \$40,000 & MHI \$79,200





94% Outbound travelers 4 of 5 more than 2x trips a year Higher spending power



84% Insurance owner75% Stock or bonds62% Funds / Retirement plan56% Premium banking



Pet lovers Attention on kids education & growth Higher chance studying abroad



Strong attention on Health Willing to invest on themselves



Higher interest on luxury items
Worth paying for quality
46% Car Owner

Source : 2020 Video Consumption Landscape Survey (n=2,574 Aged 15-64 General Video User for HK local population in the past 7 days)

Fieldwork period: May 8-29, 2020

9.9% Video Viewer (P7D), 10.3% Share of Attention FTV+YT+FB+Others Only (no MT, PTV)

(316min average time spent on Video content)

Demographic & Household Status

- Female (52%), Male (48%)
- A15-24 (18%), A25-44 (50%), A45-64 (32%)
- Living with families (HH3+ 70%)
- Single (52%)
- Students (11%), Working (83%), PMEB (36%)
- MPI \$27,800 & MHI \$55,900





78% Outbound travelers
Most likely 1x-2x trips a year



Interest to understand Finance products 72% Insurance owner 69% Stock or bonds



Interest on latest digital electronics
Digital Guru



Grocery shoppers Enjoy shopping

Source: 2020 Video Consumption Landscape Survey (n=2,574 Aged 15-64 General Video User for HK local population in the past 7 days)

Fieldwork period: May 8-29, 2020

8.1% Video Viewer (P7D), 6.1% Share of Attention myTV SUPER+FTV Only

(231min average time spent on Video content)

Demographic & Household Status

- Female (53%), Male (47%)
- A55-64 (71%), A35-54 (23%)
- Living with families (HH3+ 82%)
- Married (88%) with Kids (88%), Grown up kids (A18+) over 75%
- Working (65%), Housewives (23%), Retired (7%)
- MPI \$25,200 & MHI \$57,700





68% Outbound travelers
Most likely 1x-2x trips a year
Budget travelling



70% Stocks / Bonds 60% Insurance owner



Enjoy cooking at home Grocery shoppers



Attention on health Worth paying for quality



Unlikely to spent on self images or luxury items

Not keen on chasing latest digital electronic products

Source : 2020 Video Consumption Landscape Survey (n=2,574 Aged 15-64 General Video User for HK local population in the past 7 days)

Fieldwork period: May 8-29, 2020

6.5% Video Viewer (P7D), 8.4% Share of Attention FTV+PTV+YT+FB+Others Only (no MT)

(397min average time spent on Video content)

Demographic & Household Status

- Female (48%), Male (52%)
- A25-44 (60%), A45-64 (26%), A15-24 (14%)
- Living with families (HH3+ 75%)
- Married (49%) with Kids (67%),
 Divorced (4%)
- Working (88%), PMEB (41%), Students (8%)
- MPI \$33,500 & MHI \$68,300





89% Outbound travelers
7 of 10 more than 2x trips a year
Higher spending power



43% Premium Banking 75% Insurance 72% Stocks / Bonds



Attention on kids education & growth Higher chance studying abroad



Enjoy shopping Grocery shoppers High interest in latest digital electronics



Worth paying on quality
Willing to spend on self images

Source: 2020 Video Consumption Landscape Survey (n=2,574 Aged 15-64 General Video User for HK local population in the past 7 days)

Fieldwork period: May 8-29, 2020

4.2% Video Viewer (P7D), 1.7% Share of Attention FTV Only

(122min average time spent on Video content)

Demographic & Household Status

- Female (54%), Male (46%)
- A45-64 (60%), A35-44 (23%)
- HH Size 1-2 (39%); HH3+ 61%
- Married (57%) with Kids (68%)
- Working (91%) PMEB (39%)
- MPI \$31,000 & MHI \$56,600





72% Outbound travelers 4 of 5 travel 1x-2x a year Budget travelling



65% Insurance owner 59% Stock or bonds 40%+ hold Funds/Retirement Plans or Foreign Currency



Grocery shoppers
Worth paying for quality



Unlikely to spent on self images or luxury items

Not keen on chasing latest digital electronic products

Source: 2020 Video Consumption Landscape Survey (n=2,574 Aged 15-64 General Video User for HK local population in the past 7 days)

Fieldwork period: May 8-29, 2020



11

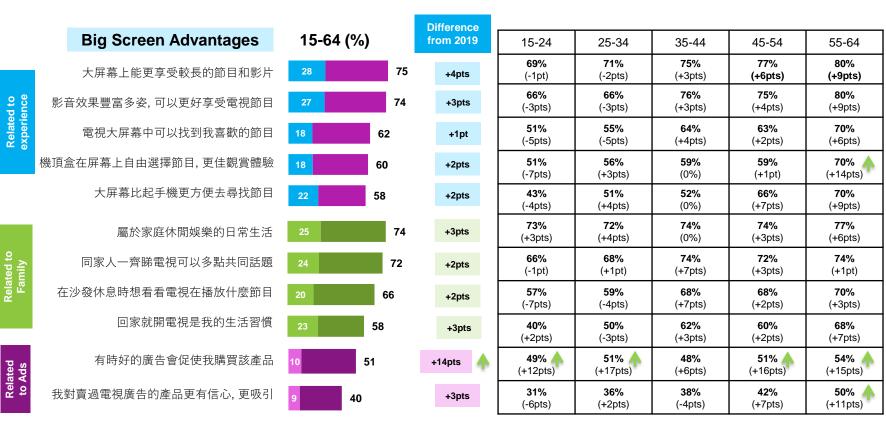
Big Screen



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Positive Commentary on the Big Screen Enjoyment

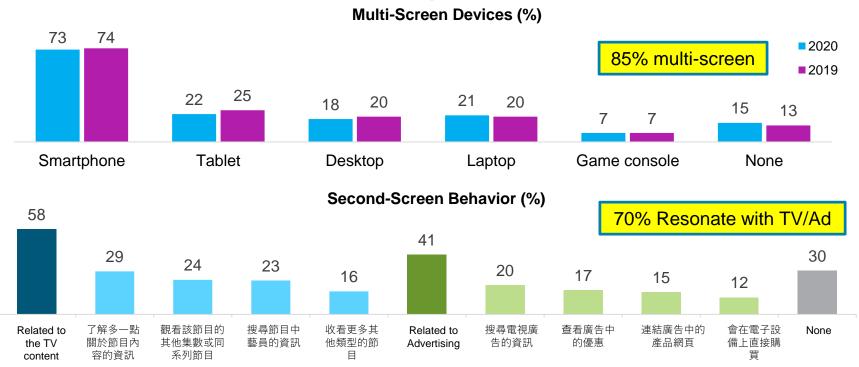
Especially on the growth of Triggering on purchase from the Attractive ad



Q14. 當通過電視大屏觀看節目或影片時,你有幾同意以下句子 (Strongly agree / Top 2 boxes) Base: All TV viewers

Second Screen get the most Audience Devices and Time

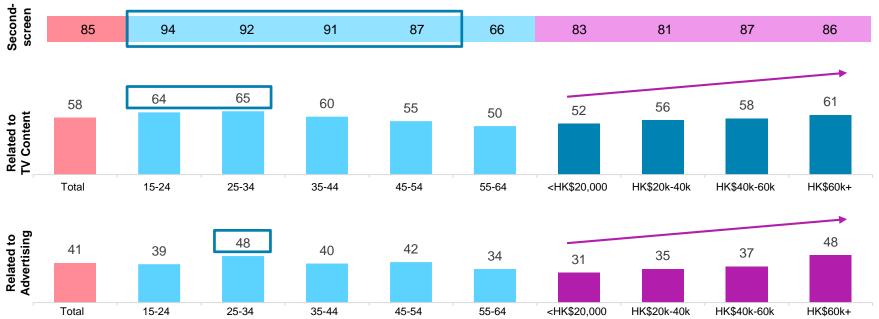
Resonate a Direct Reaction for Advertising Products and Turns to Conversion



Second Screen is Common for A15-54

Younger with higher Tendency on Content Related Searching; while the higher MHI are keen on the Information Related to the Ads in TV





Q55. 在睇電視的同時使用其他電子設備的好處係? (Behavior)

Base: Multiscreen Viewers

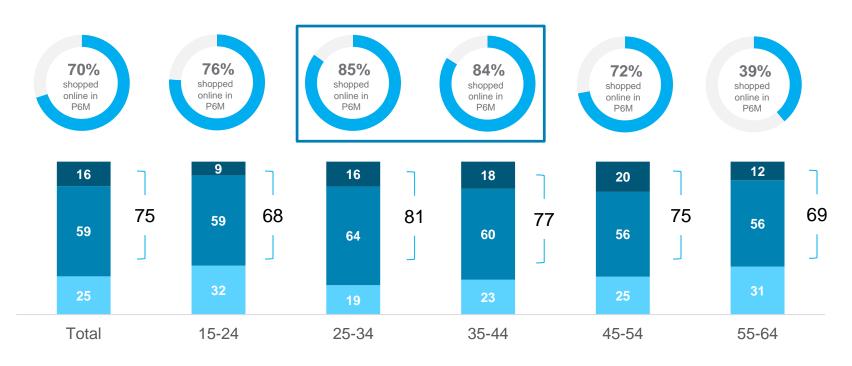


Online Shopping



Shopping Online Is Popular For The Mass Audience

Online Shopping Penetration and Frequency (%)

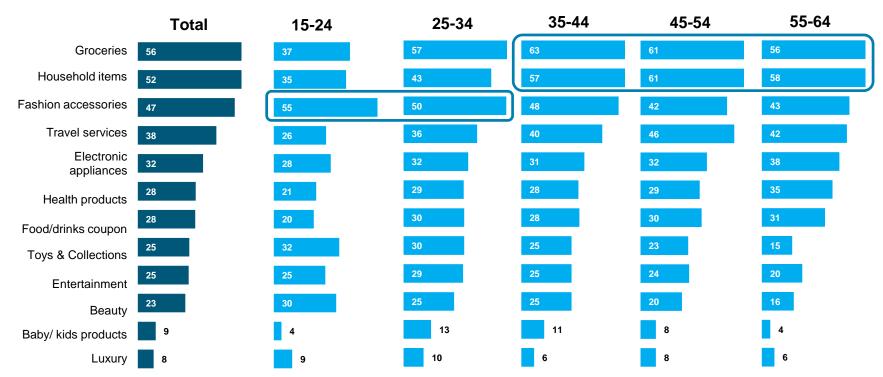


Total (n=2,574); 15-24 (n=351); 25-34 (n=479); 35-44 (n=532); 45-54 (n=589); 55-64 (n=623)

Groceries & Household Items - Most Common For A35+

While Fashion Accessories Is Also a Hot Item For A15-34

Online Shopping Product Category (%)

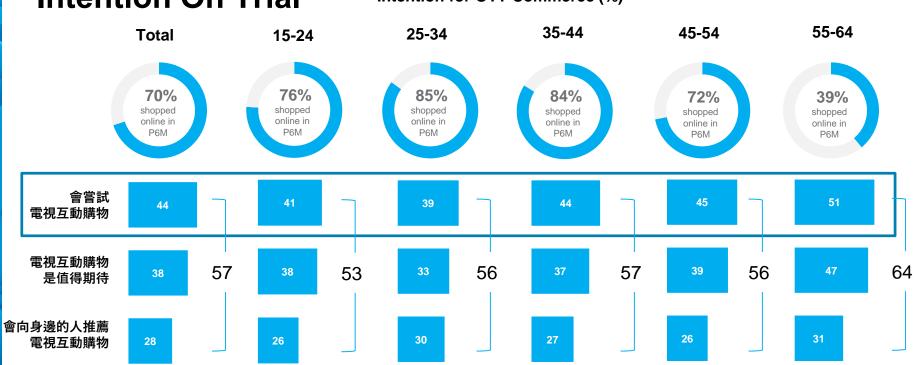


11

OTT Commerce



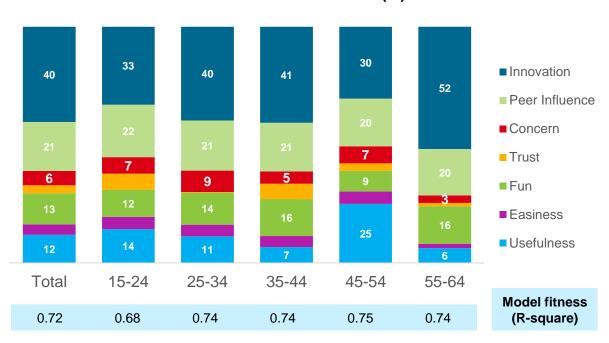
Higher Potential For A Trial Of Shopping Via Big Screen Among A35+ where The Elder The Audience The More Intention On Trial Intention for OTT Commerce (%)



Relative Importance On Shopping In Big Screen By Linear Regression Model

Dimension	Attributes			
Intention (Y)	Likelihood, Recommendation and Expectation			
Innovation	Trendy, Future, New experience			
Peer influence	Friends/Relative, media, celebrity			
Concern	Payment, Quality, Hinder viewing, Expensive			
Trust	Product Reliability and Credibility			
Fun	Enjoyment of OTT commerce			
Easiness	2nd screen multi-usage, QR Code			
Usefulness	Convenience, Save time, Relevancy			

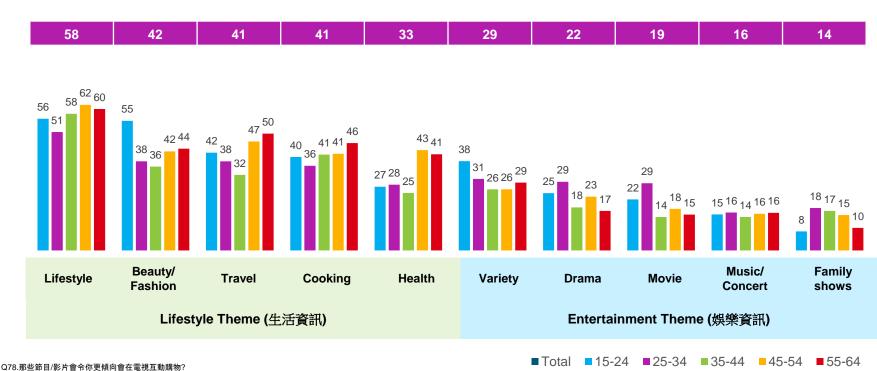
Influence Factor for OTT Commerce (%)



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Audience Prefer Lifestyle To Entertainment Theme

Top 10 Genre Fit for OTT Commerce (%)



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Summary

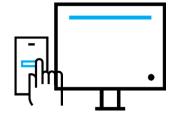












51% trigger to purchase via Big Screen Enjoyment 85% Second Phone



OTT Commerce Intention trigger by Innovation (40%) & Peer Influence (21%) Lifestyle Theme content more appropriated for OTT commerce

Impact of the Covid-19 Widespread that to Sharp Business and Consumer Behavior

- While the humanitarian & safety-related aspects of this outbreak are top of mind, it's unquestionable that social distancing, lockdown policy & staying home will have a significant effect on media consumption
- Implication are straightforward: More TV & Video Consumption Time, Attentions on News content, both Linear TV and Digital benefit
- Audience become hungry for entertainment & home centric contents...Consumers, more than ever, need a broad content mix adjust to indoor living style
- Audience considered adding new paid subscription since the outbreak, essential to have the audience engagement strategy to maintain higher level engagement (Reach, Intensity & Timespent)
- → Need to adapt & seek business opportunities, understand what is the trending and knowing the sales driven factors



Next Sections

OTT Commerce is ready to take off in 2021

Oct 23, 2020 (2:30pm - 3:00pm)

Programmatic comes of age with connected TV and OTT

Oct 23, 2020 (4:00pm - 4:30pm)

