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# Hong Kong Youngsters Survey Wave 2 2022





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Youngster Study Wave 2 2022

# Method and Approach



# Why did we continue the youngster survey?

## DELIVERING RELEVANCE

Most surveys focus on adults. Marketers with products aimed at the younger set often have less information, data, and insights.

We built on the survey to track the youngsters' behaviours with more insights to bring relevance to your marketing efforts.

## UNDERSTANDING THE EVOLUTION

Gen-Z, individuals born 1997-2012, are the next generation of adults, and they are the very first digital-born generation in human history. They're highly influenced by their experiences, especially the older youngsters who are starting to tackle their adult life in the post-Covid period.





# In Wave 1, we provided first-in-market insight into Gen Z's social and digital media behaviors

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What platforms do youngsters use in Social Media, Video Viewing, Music Listening, Gaming, and Instant Messaging?

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How much time do youngsters spend on Social Media, Video Viewing, Music Listening, and Gaming?

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Which digital device do youngsters use to consume Social Media, Video Viewing, Music Listening, and Gaming?

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What kind of videos do youngsters like to watch on video platforms?

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Scan QR code to download  
Hong Kong Youngsters Survey  
Wave 1 - 2021

# In Wave 2, we delved deeper and tried to uncover more about the behavior behind their media consumption

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How has Social Media, Video Viewing, Music Listening and Instant Messaging consumption evolved since the wave 1 study?

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What are the reasons youngsters are using the top Social Media platforms?

---

Will Youngsters consume new video subscription platforms?

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What kind of music do youngsters listen to?

---

What are youngsters' perceptions and usage of disappearing messaging functions?

---

How do Youngsters feel about privacy and security on mobile app usage?

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## How we did it

### Research Specification

- Geography: Hong Kong
- Sample Size: 306 (**All locals**)

### Interview Methodology

- A hybrid approach by respondents' age
- Street Intercept Interview for 13-17yo (achieved n=152)
- Online Survey for 18-24 (achieved n=154)

### Target Respondent Criteria

- General Hong Kong Public aged 13 – 24

### Survey Period

- 21 June to 27 June 2022 (7 days)



# MEET THE NEXT CONNECTED GENERATION – Gen Z

Before we can understand them as consumers, we need to understand them as people

## Male 13 – 17

**Marcus** here! Me and my school friends love to hang out at the movies. I love animation comics games and spend my weekends playing video games & chatting with my friends on Discord. I use YouTube to watch live video gamers & cool animations.

Classmates

## Female 13 – 17

Hi, I am **Natalie**, Marcus and I are classmates and sometimes go to the movies together. I love Korean and Chinese dramas, and Cantopop and often watch my favorite bands on YouTube. I love taking pictures with my iPhone and sharing them with my friends on IG.

Friends

Siblings



Coworkers

## Male 18 – 24

Hey! This is **Steven**, Marcus and I met playing video games online! Our favorite is Roblox. I love joking around with my friends and creating funny videos to share on Douyin. I chat to girls I like on Instagram & WhatsApp.

## Female 18 – 24

Hi, I'm **Eunis**. Steven and I are in the same graduate program. I love fashion and use IG to find out about the latest trends and products. I love listening to the latest pop music on Spotify on my way to work and binge-watching Netflix shows and going out with my friends on the weekend.



2

Youngster Study Wave 2 2022

# Media Insights and Implications



# SOCIAL MEDIA

Smartphone remains as the main device for youngsters to access social media

Over 95%  
(Past 7 Days)

We spent similar time on social media daily

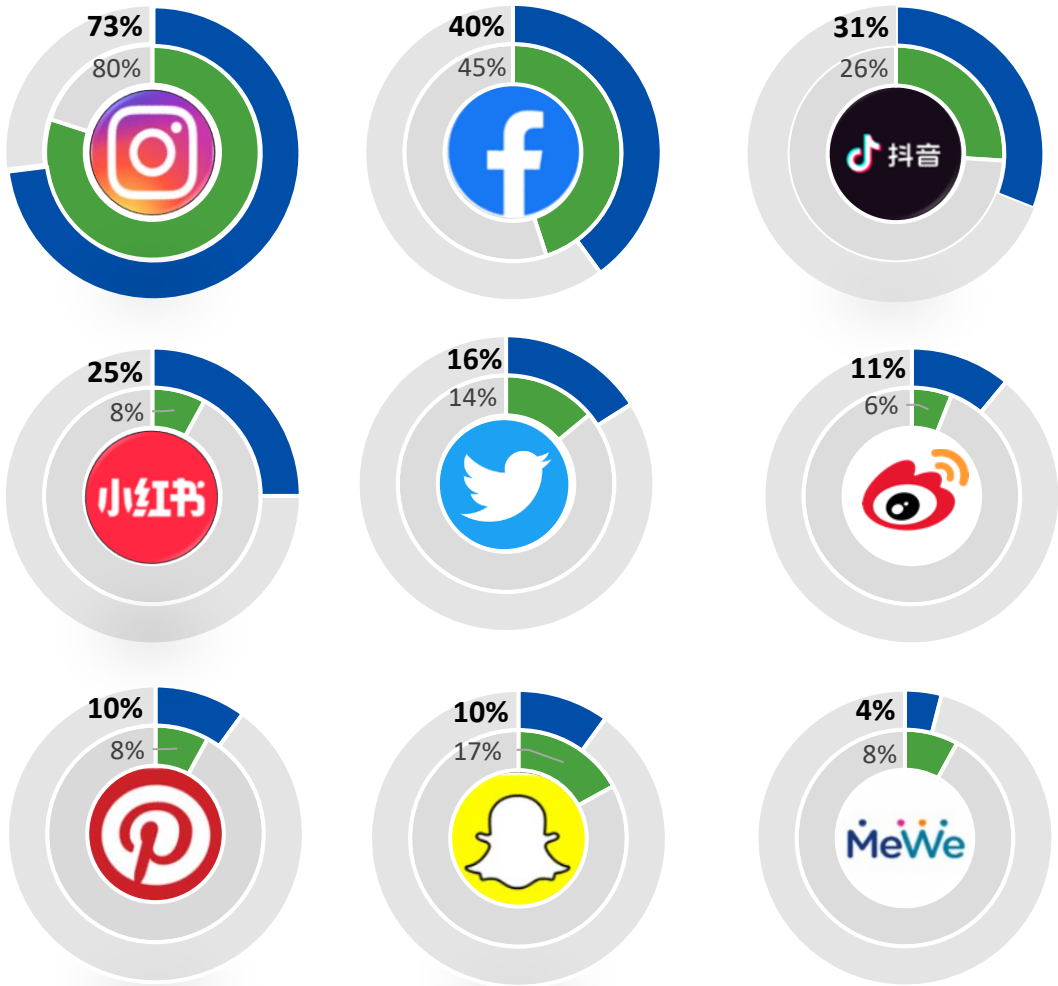


Top 3 social media platforms remain the same  
– Instagram, Facebook, Douyin but the former 2 decline vs W1

Douyin, Xiaohongshu and Sina Weibo show an obvious jump

Past 7 days of usage

Wave 1 Wave 2





# Social media mavens use different social platforms for different purposes



To follow celebrities & influencers and keep abreast of the latest trend

Top 5 reasons (n=224) %

To follow/ talk to people like me	63
To find funny posts	56
To follow celebrities/ influencers	56
To see what's trending/ to be talked about	54
To share information on topics I care about	52



For more serious purposes, to follow/talk to peers and post and share information of the topic they care

Top 5 reasons (n=121) %

To follow/ talk to people like me	50
To share information on topics I care about	46
To see what's trending/ to be talked about	37
To talk/ to find out about TV shows or movies	35
To find funny posts	34



Mainly for leisure and entertainment, like finding funny posts and see what's new to watch/listen to

Top 5 reasons (n=94) %

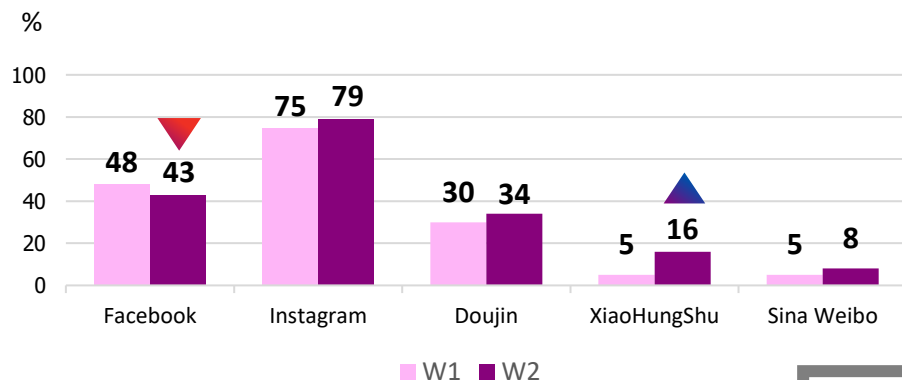
To find funny posts	84
To see what's trending/ to be talked about	48
To hear new music	43
To follow celebrities/ influencers	43
To watch live streams	43

## Marcus M13-17

"FB just seems like such a boomer social network. Rather use Instagram to stay updated with my friends, follow celebrities/influencers, also to find funny posts on Douyin to pass time."



(n=76)

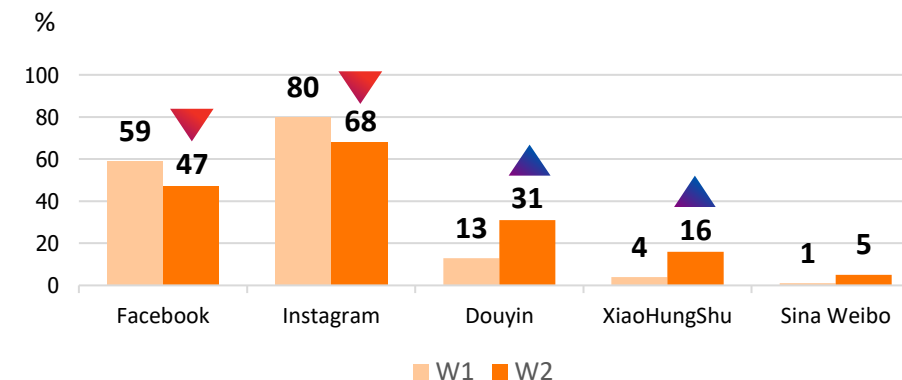


## Steven M18-24

"Using IG to see what's trending, prefer to play around with Douyin, to watch livestreams and making funny videos. Exploring Xiaohongshu as well, it seems have so many content for me to browse through."

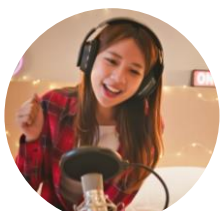


(n=77)

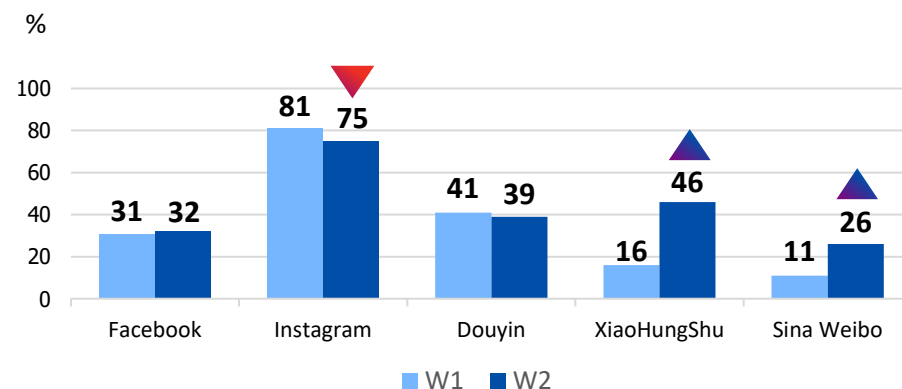


## Natalie F13-17

"I use IG more for following my friends and look for the current trending topics. Besides, Xlaohongshu is getting more addictive, there are many information to explore, like places to go, restaurants guide, travel and life hacks etc."



(n=76)

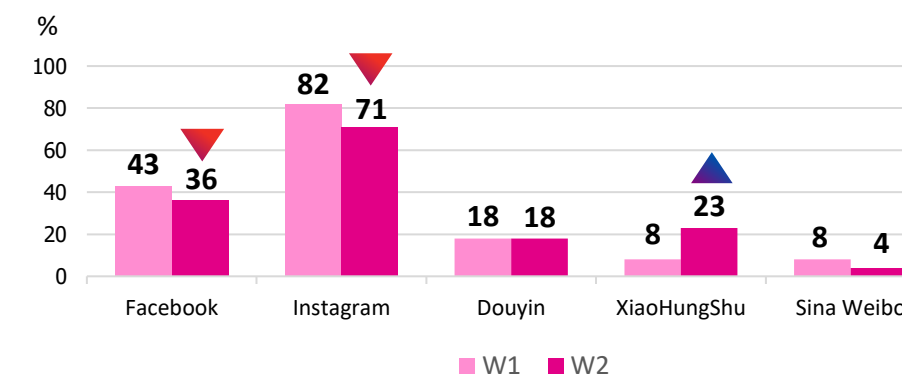


## Eunis F18-24

"I like to use FB & IG to share information on topics I care about, FB is more for finding out about TV shows or movies whereas IG to find things I want to buy. Xiaohongshu is a new trend with fresher features and functions, help me stay up to date with beauty and fashion products."



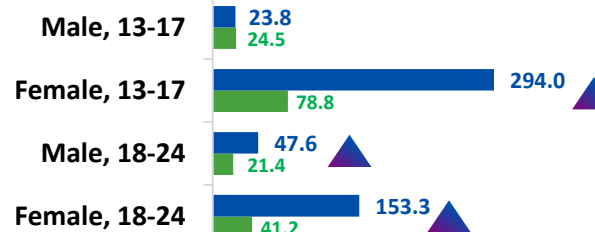
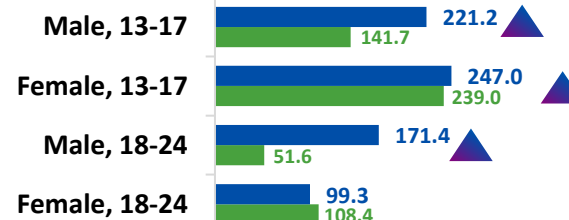
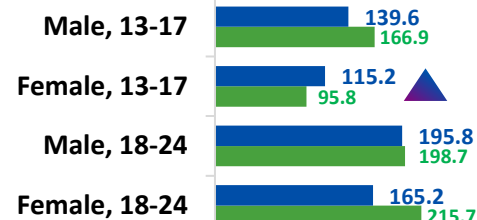
(n=77)



▲ Increase =/≥ 5pts  
▼ Decrease =/≥ 5pts



■ Wave 1 ■ Wave 2



## Implications

Youngsters rely on social media but are **purpose-led** about how they select and engage with social media platforms. Many are looking for fresh platforms that haven't become oversaturated by their older siblings and parents.

They show a heightened **preference for entertainment and hobby features**.

**Video-hosting platforms are more dominant.** Douyin continues to make rapid growth, whereas Xiaohongshu is often described as an “Instagram-meets-Pinterest-meets-Amazon” platform in which **the element of discovery** fits the taste of the young generation where anyone can share their lifestyles and stories about the products they use through pictures or short videos

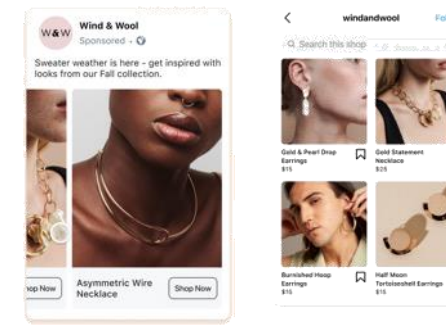
## Opportunities

### Express creatively with short video (e.g. Meta Reels)

Leverage new and diverse creative experiences to engage Gen Z. To make videos that entertain your target audiences and help introduce your content to new audiences.

### Direct link to an E-commerce site: closing the Loop

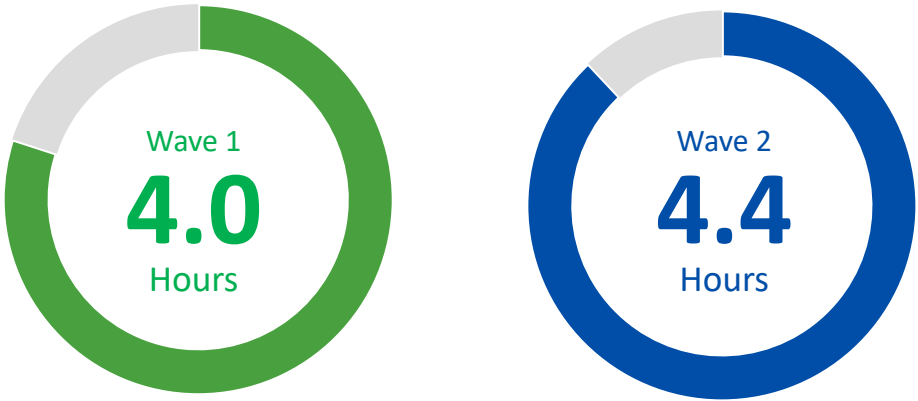
Reach the people most likely to buy with personalized ads. Allows consumers to purchase the products directly from your E-commerce site after seeing an ad. Reduces consumers' search and time cost, and further encourages the “Read-Like-Buy” cycle.



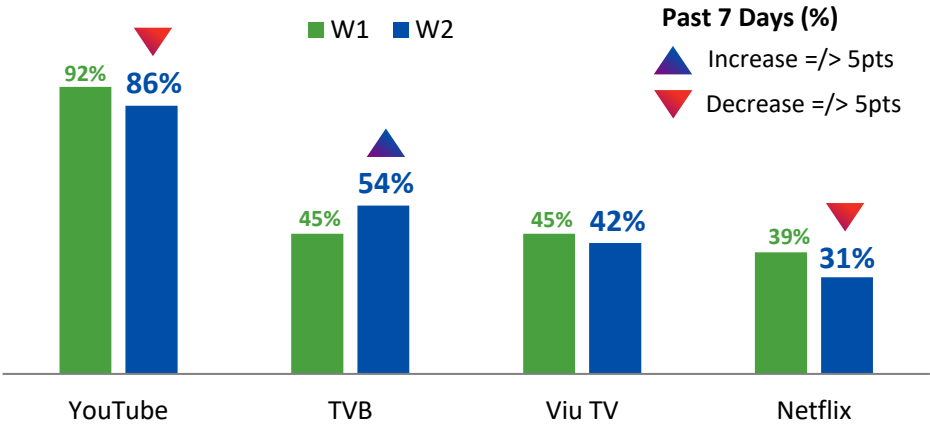


# VIDEO VIEWING

Youngsters are spending more time on video viewing on average per day



Top 4 platforms remain the same, but viewership of TVB increased



13 – 17

As a Marvel fan, I'll never refuse the free trial on Disney+, and my family and I are both sharing an account that can be used by up to seven people. Also, like to go on Twitch to watch people interact while gaming. Sometime might even join their livestream.

Marcus



I'm always looking for new dramas and reality shows to discuss with my buddies. I have subscribed to numerous platforms to make sure I can watch any popular show. For local and Korean programming, try ViuTV and Netflix; for Chinese dramas and reality programs, try Mango TV, QQ, iQiYi, and Youku.

Natalie



18-24

Recently, I've been watching a number of well-known Japanese anime on TVB and exploring more Disney and Marvel films in Disney+. I like to visit Bilibili as well for a variety of video, comic and mobile game content

Steven

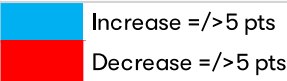


I believe that some TVB music programs and series are enjoyable to watch. And I enjoy watching some of the older drama on MyTV Super.

Eunis



Platform used in P7D Unit %	Male 13-17		Female 13-17		Male 18-24		Female 18-24	
	(W1)	(W2)	(W1)	(W2)	(W1)	(W2)	(W1)	(W2)
YouTube	90	88	92	91	96	83	92	81
TVB	53	43	49	61	41	49	38	61
Viu TV	40	33	40	43	58	47	41	45
Netflix	32	21	23	26	50	39	51	38
Bilibili	17	20	20	45	8	19	18	16
Disney+ <b>[NEW]</b>	-	17	-	26	-	29	-	26
MyTV Super	25	26	20	28	17	12	18	25
Viu App	18	12	13	16	20	16	20	5
Twitch	12	21	3	12	13	12	9	3
MangoTV	-	7	3	21	-	5	3	4
QQ	14	8	13	18	3	4	8	-
iQiYi	5	8	5	13	9	1	5	3
Youku	3	5	5	12	4	1	-	1



# The younger ones (13-17) are enthusiastic about video viewing

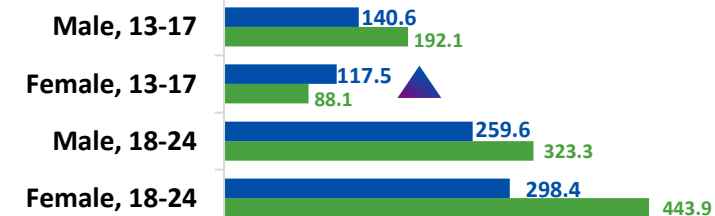
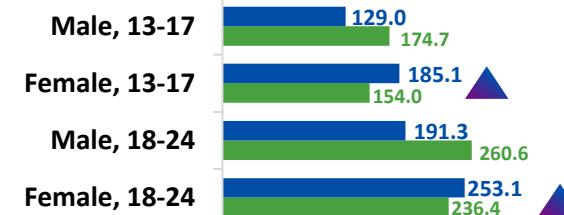
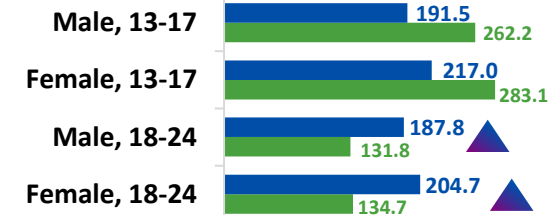
Average Time  
Spent in P7D

Wave 1

Wave 2

Average time spent P7D (minutes)

Wave 1 Wave 2

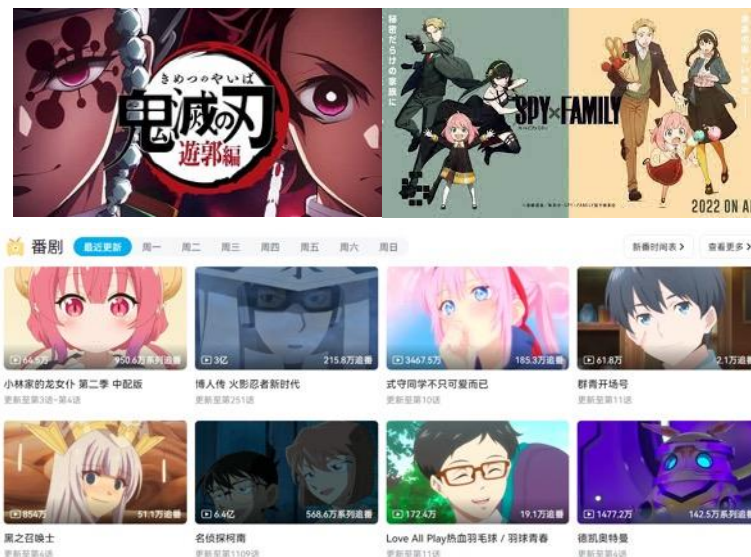




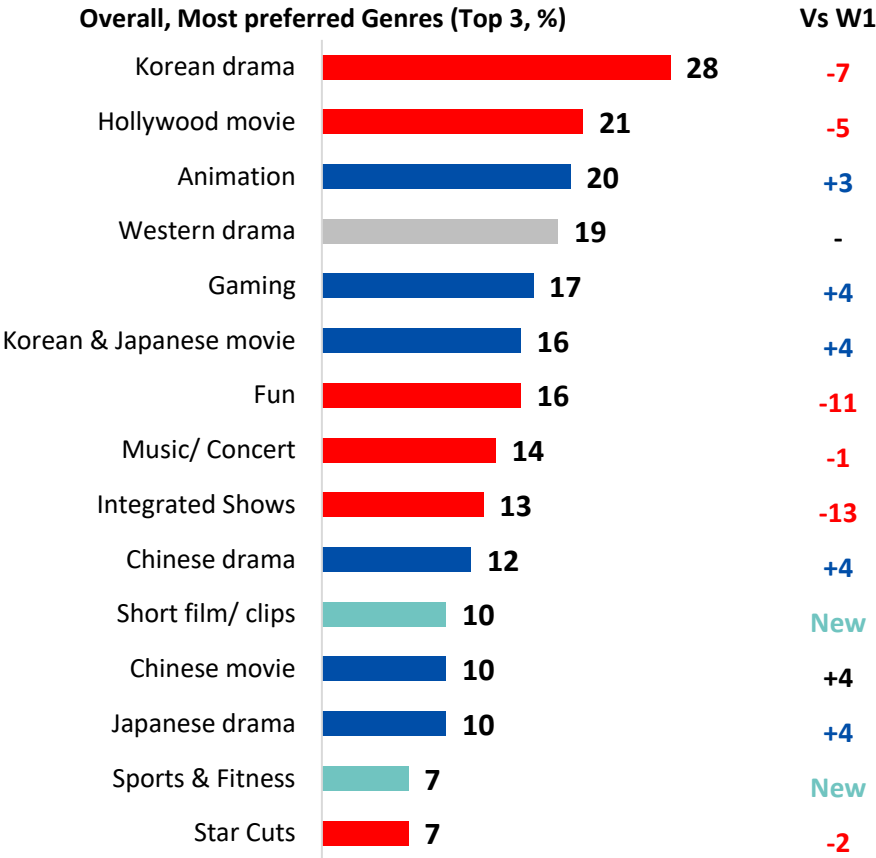


NETFLIX

“Instead of being channel driven, we are program driven. Whatever broadens our perspective of the world is what we watch. Among the most popular viewing platforms, anime is rather common for us.”



Animation and Gaming content are more chosen because of their greater visual impact and complex plots. Additionally, many Korean and Japanese films are available and pushed on streaming platforms such as Netflix and Disney+, which raises audiences’ interest.



### 13 – 17

*I spend the longest time on YouTube and watch more Twitch now, I am particularly keen on animation (32%), gaming (29%), Hollywood movies (26%)*

**Marcus**

*I watch TVB and YouTube and diversify to other China-based viewing platforms. I spend most of my time on Korean dramas (34%), animation (25%), Chinese dramas (22%), Korean/Japanese movies (22%)*

**Natalie**

### 18 – 24

*I like to spend time on gaming (30%), and watching Hollywood movies (26%), Korean dramas (25%), and Western dramas (24%) on YouTube and Netflix*

**Steven**

*I prefer YouTube, Netflix, and Viu TV over TVB, I tend to watch Korean (40%) & Western drama (21%), as well as Hollywood (23%) and Korean/ Japanese movies (23%)*

**Eunis**

“We watch any content with convenience, making sure the experience are smooth and suit my own taste”

Top 3, % (vs W1)x	Male	Female	17yo or below	18yo or above
Korean Drama	18 (-)	37 (-14 pts)	23 (-9 pts)	32 (-5 pts)
Hollywood Movie	26 (-8 pts)	15 (-4 pts)	16 (-1 pt)	25 (-11 pts)
Animation	26 (+5 pts)	15 (+3 pts)	28 (+2 pts)	12 (+5 pts)
Western Drama	19 (-3 pts)	18 (+1 pt)	14 (+3 pts)	23 (-4 pts)
Gaming	30 (+7 pts)	4 (+1 pt)	18 (+5 pts)	16 (+2 pts)



# Video Viewing

## Implications

Streaming has been king for the youngsters, they are spending more time on it and are more willing than before to pay for subscriptions, and **diverse to other streaming platforms** for the programs they want.

**Program-centric consumption** – no matter whether it is broadcast or streaming, it is their desire for faster, more convenient, and more relevant content to decide which platform they go to.

When it comes to genre taste, youngsters like a bit of escapism and tend to watch more gaming, animation, and foreign dramas/movies. **The rise of ACGN (Anime Comic Game Novel) has much driven the platform selection among youngsters.**

## Opportunities

### **New streaming ad partnership – Netflix and Disney+**

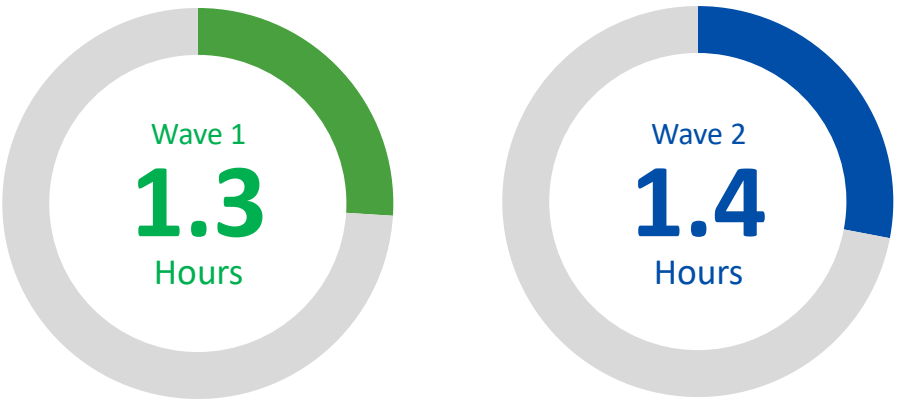
Having Microsoft and The Trade Desk as Netflix and Disney+ preferred ad partner show that streaming ad platforms are moving towards innovative and programmatic advertising techniques.

### **Micro drama product placement (China Drama Pre-production)**

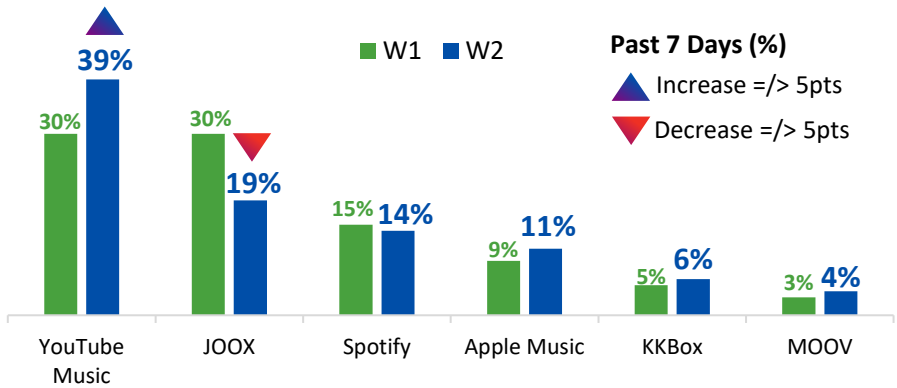
Indicate the advertising options in micro drama including customized scripts, scenes, and storylines. Create brand specific scenes to highlight brand / product features and push E-commerce sales.

# MUSIC LISTENING

Daily time spent on music listening remains stable



Youngsters show high preference for YouTube Music over other music platforms



## 13 – 17

On top of YouTube Music, my family and I are using Joox shared account, it is quite up to date with the local songs. See if there is any joint promotion from my mobile network provider, it might affect my choices of the music streaming platforms.

**Marcus**

Last time I used Joox to view online music shows and listen to the latest local music.

After the free trial, though, I much like YouTube Music since I can discover any genre of song there, plus it's free!

**Natalie**

## 18 – 24

Considering that music streaming providers now offer audio that has been up-sampled by 24 bits, my expectations have increased.

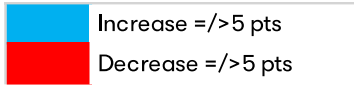
Currently, I'm trying Apple Music, depending on whether my network provider is running any deals, I might change my plan in the future.

**Steven**

Like Steven, I anticipate higher audio quality. In addition, 3 Mobile network is working with KKbox to offer a more affordable membership plan. The quality is incredible, and I can choose from a wide selection of tunes from Taiwan and locally.






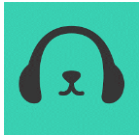
**Eunis**

Music Platforms Most Often Use (%)	Male 13-17		Female 13-17		Male 18-24		Female 18-24	
	(W1)	(W2)	(W1)	(W2)	(W1)	(W2)	(W1)	(W2)
YouTube/ YouTube Music	30	39	35	50	26	35	28	32
JOOX	23	25	35	14	25	10	38	28
Spotify	18	16	12	14	19	13	12	12
Apple Music	10	5	8	3	9	22	9	12
KKBox	7	5	3	7	10	5	-	9
MOOV	3	2	-	3	-	8	7	5
TIDAL	-	-	-	-	-	-	-	-



\*Base: All respondents (n=306)

“We listen to YouTube Music most often as it is free and allows me to search for and listen to any songs that come to mind. Yet, I don’t mind to subscribe Apple Music, KKBOX & MOOV for the 24-bits high audio quality sound. ”

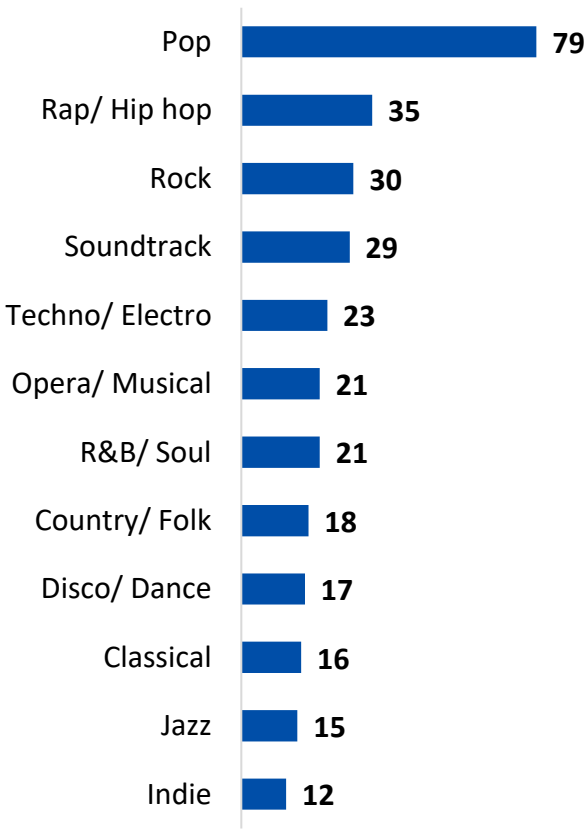
			
Platform Most Often Used (vs W1)	<b>39%</b> (+9 pts)	<b>19%</b> (-11 pts)	<b>14%</b> (-1 pt)
Average Time Spent P7D Weekdays + Weekend	<b>235</b> (204) mins	<b>124</b> (168) mins	<b>81</b> (83) mins
			
Platform Used In Past 1 month(vs W1)	<b>11%</b> (+2 pts)	<b>6%</b> (+1 pt)	<b>4%</b> (+1 pt)
Average Time Spent P7D Weekdays + Weekend	<b>72</b> (47) mins	<b>26</b> (35) mins	<b>31</b> (20) mins





“The lyrics of pop songs and hip-hop songs appeal to us. I can connect with the present reality, and sometimes it helps to unwind my mind from all the study stress.”

Most preferred Music Genres (%)



13 – 17

*I spend the longest time on YT Music and Joox to listen to Cantonpop (77%), English songs (69%), and also Mandarin (48%) and Japanese (34%) songs. I like pop, soundtrack (30%) and rock music*

**Marcus**  
Time spent:  
1.5 hours  
(W1: 1.2 hours)

*I usually listen to music on YT Music. I tend to listen to Cantonpop (78%), English (67%) and Mandarin (59%) songs. I like pop (84%) and sometimes look for the soundtracks I like*

**Natalie**  
Time spent:  
1.5 hours  
(W1: 0.9 hour)

18 – 24

*I like to listen to music on YT Music or Apple Music. I love Cantonpop & English songs (both 84%), also fond of Mandarin songs (73%). On top of the pop, I quite like rap/ hip hop (44%) and rock (33%)*

**Steven**  
Time spent:  
1.5 hours  
(Same as W1)

*Cantontop is my favorite (86%), I also like English (80%), Mandarin (65%), and Korean (62%) songs. Am keen on pop (88%) and open to various genres. I usually count on YT Music and Joox*

**Eunis**  
Time spent:  
1.0 hour  
(W1: 1.6 hours)

“We listen to more Cantonpop and Mandarin as there are many new singers joining. Because of the animation, Japanese songs are also quite addicting.”

Music Language, % (vs W1)	Male	Female	17yo or below	18yo or above
Cantontop	81 (-4 pts)	82 (+1p pt)	77 (+2 pts)	85 (+3 pts)
Mandarin	60 (+7 pts)	62 (+1 pt)	53 (+3 pts)	69 (+6 pts)
Japanese	39 (+13 pts)	43 (+24 pts)	34 (+7 pts)	47 (+29 pts)
Korean	40 (-11 pts)	58 (+3 pts)	39 (-16 pts)	58 (+7 pts)
English	77 (-)	74 (+9 pts)	68 (+4 pts)	82 (+6 pts)

\*Base: All respondents (n=306)

# Music Listening

## Implications

### Canto-pop comeback

Many local musicians, such as Keung To, Serrini, Terrance Lam, etc., represent a new breed pop culture that is more relatable and approachable for Gen Z. They have many collaborations and interact with fans across social media like using IG live and filters to talk to fans and YouTube to launch the official MV premiere.

### YouTube, the most widely used music streaming platform

Youngsters are already used to searching for songs on YouTube and watch the official MV premiere online. Brands should take advantage of livestreaming and premiere features and music-related content to draw attention and maximize reach.

**Growing needs in hi-res audio quality** for better immersive experiences. Soon, streaming services with cutting-edge features are anticipated to expand.

## Opportunities

### Audio advertising – target users listening to streaming audio

To increase your reach and brand awareness through programmatic, with the advanced targeting, you are able to find the right audience by data signal such as demographic, interests, geo, device type, playlists, and more. You are also able to implement a cross-channel retargeting strategy that will further optimize your campaign to deliver results.

### Reserve the most popular content Hong Kongers love – YouTube Prime Packs

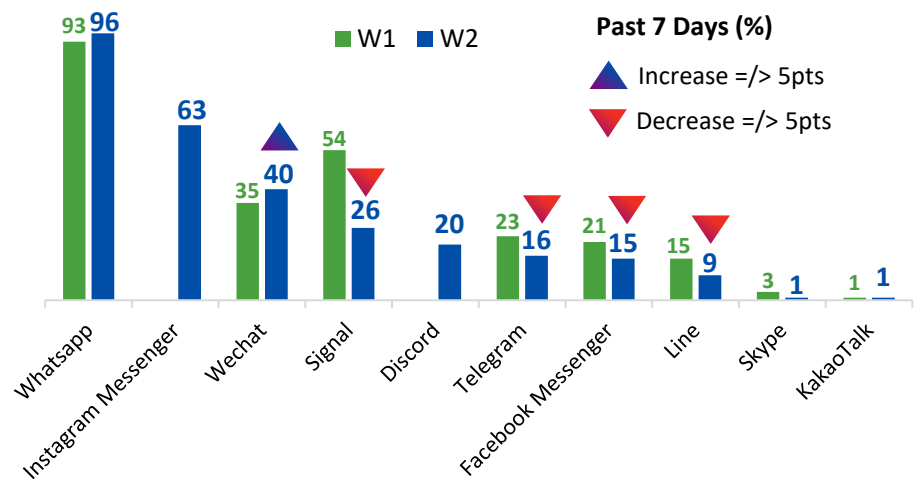
A selection of the most popular local and international channels on YouTube are packaged around content and audience. You can secure the presence of culturally relevant younger audiences.

# INSTANT MESSAGING

Youngsters are spending more time on online chat

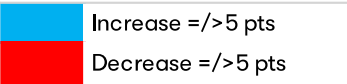


WhatsApp remains the most used instant messaging platform among youngsters



The urge for encrypted messaging services has much reduced among youngsters, especially those 13-17. P7D usage of Signal and Telegram get notable decreases from last year

Platform used in P7D Unit %	Male 13-17		Female 13-17		Male 18-24		Female 18-24	
	(W1)	(W2)	(W1)	(W2)	(W1)	(W2)	(W1)	(W2)
Whatsapp	94	95	93	97	95	95	92	97
Instagram Messenger [NEW]	-	71	-	66	-	58	-	57
Wechat	36	43	43	55	25	38	37	22
Signal	47	16	49	22	59	40	62	26
Discord [NEW]	-	45	-	13	-	21	-	1
Telegram	18	11	13	9	34	26	25	17
Facebook Messenger	16	24	12	11	34	18	24	9
Line	14	12	17	13	16	10	12	3
Skype	4	1	-	1	7	3	3	-
KakaoTalk	3	-	1	1	-	-	-	1





We still strongly rely on WhatsApp (95%-97%\*) for daily communication, especially for our family and classmates for project discussions and general chit-chat.

13 – 17

18 – 24



"I recently like to use **Discord (45%)** with my friends and classmates. Its like a portable forum, we will check on our gaming and animation-related news from there. Also, use **WeChat (43%)** with my MNC relatives to keep update of the pandemic situation."

Marcus



"As Marcus mentioned, **Discord (21%)** is pretty convenient; we have several study groups to collaborate on homework, and even professors will make announcements from there. Besides, I like to use Instagram **Messenger (58%)** with my silly friends, just send emoji to each other whenever they post IG stories"

Natalie



"Other than **WhatsApp (97%)**, I also use **WeChat (55%)** more often than before as some of the MNC relatives might find me for some pandemic travel updates. Or help my parents to check on the platform announcement for the consumption vouchers."

Steven



"I tend to use **WhatsApp (97%)** with family and friends. I'm lazy, therefore won't likely utilize any other messaging platforms. However, I have recently used **Instagram Messenger (57%)** more since I find it easier and convenient when sharing content with my friends as well as communicating with IG store owners about the interested items."

Eunis

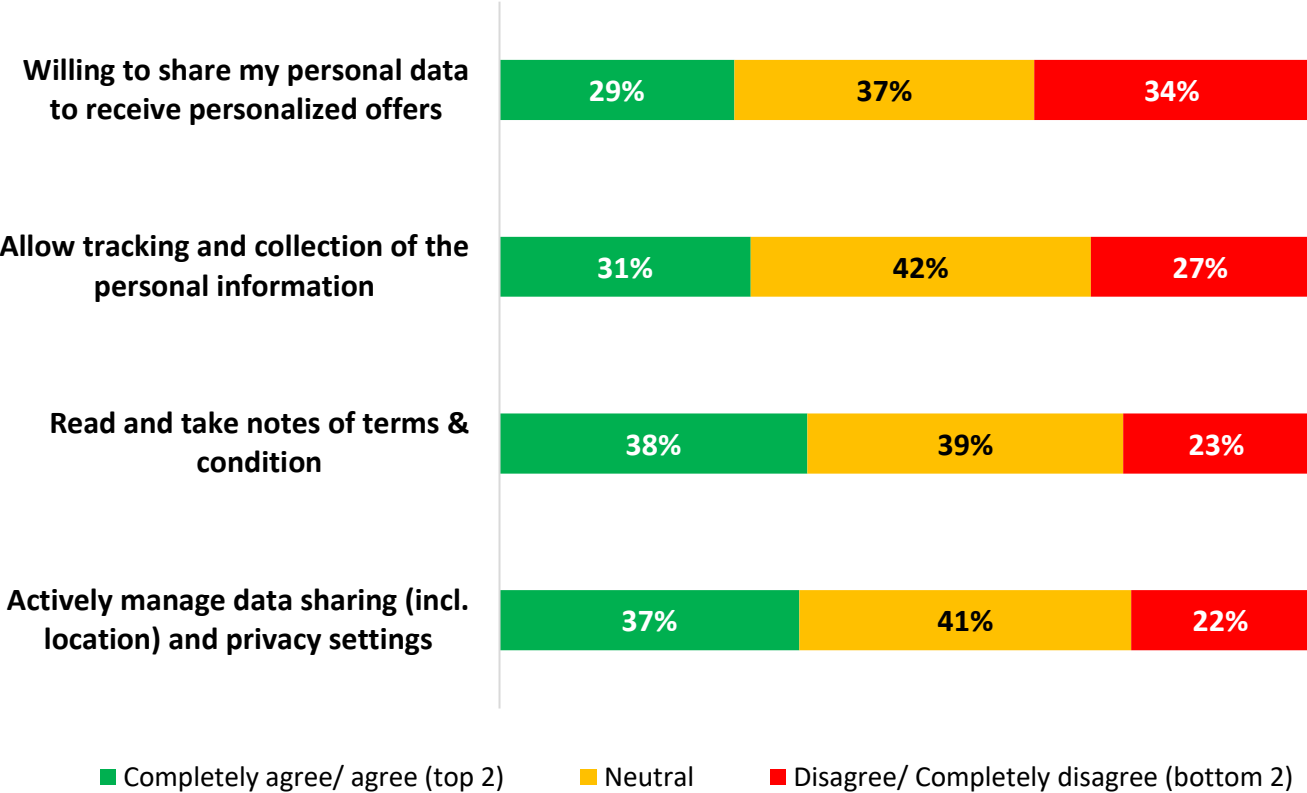


Youngsters seldom/ never use the disappearing function in instant messaging platforms (62%).

Their use of different platforms for conversation with exceptional subjects is more streamlined

# Youngsters are aware of personal data privacy but they are not doing much about it

Top 2 boxes of agreement



# Instant Messaging

## Implications

**Discord** is popular among the younger Gen Z as it allows users to connect to many communities centered around different hobbies and interests. It is kind of like a portable forum providing a common space for talking to them.

**Instagram Messenger** serves to provide direct and seamless communication with their followed IG shops/ stores to check out service/product details. Gen Z tends to opt for more genuine and transparent conversations with brands.

## Opportunities

**Build long-lasting consumer relationships and drive business outcomes – WhatsApp Business**

Engage audiences, accelerate sales and drive better customer support outcomes on WhatsApp Business Platform. Keep prospects and customers on the path to purchase and satisfied with your products with personal messaging experiences.



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Youngster Study Wave 2 2022

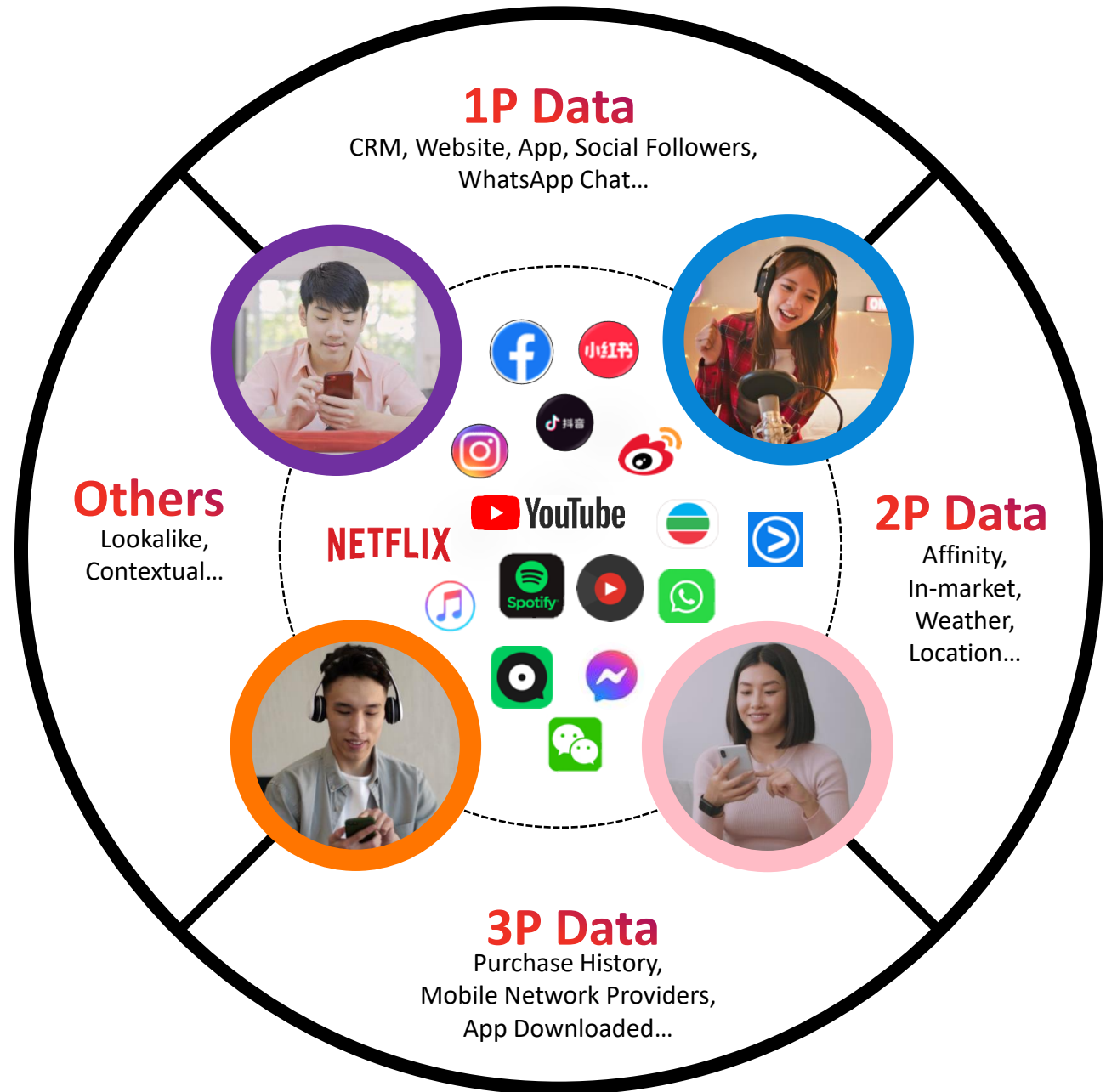
# Conclusion and Takeaways



# Meeting your audience where they are

Audience first media approach, design digital activation around Gen Z needs and interests.

Reaching Gen Z through different data sources, leverage programmatic marketing to launch personal, relevant and measurable ads on all devices and platforms.







Gen Zers are born in a world that operated at speed, scale, and scope; they are the most internet-dependent generation, so they have developed an early skill with digital technology that allows them to be self-reliant.

They are used to finding what they need on their own, they are diverse, pragmatic, and platform-neutral.

They value direct communication, authenticity, relevance, and convenience; they are the generation that drives digital fluency.

# Multi-dimensional Space

## Extend beyond platform boundaries toward meaningful content

### Creation

The **short-form video format** is deemed to attract youngsters' eyeballs. Marketers need to ensure the content is presented in an interesting and explorative way **to enable discovery and provide visual excitement.**

### Community

Brand building is not necessarily through one-way communication, brands could consider **using community around youngster's interests/ hobbies to build an authentic, closer relationship with youngsters** and loyalize them with instant/ exclusive updates

### Connection

We connect and target youngsters no longer by platforms, instead, we should utilize first-party data and data signals to do **interest-based targeting, e.g. anime, gaming, music, foreign dramas**

### Commerce

When we expected more digital platforms to become commerce-enabled, **convenience-oriented and tech-enabled** are expected to be the key drivers to address Gen Z's need for seamless CX.





08.2022

A group of young people, mostly of Asian descent, are smiling and cheering. In the center, a young man with black-rimmed glasses and a pink shirt points his right index finger directly at the viewer. To his left, another young man with glasses and a red shirt smiles. Below them, three young women are also smiling and cheering. The background is white, and a large, semi-transparent red circular graphic is on the right side of the image.

# THANK YOU