Passport

CONSUMER LIFESTYLES IN HONG KONG, CHINA

June 2021

Lifestyles Country Report Series: Set of Four Reports

This report is part of a series of four highly-visual reports covering the 40 markets surveyed in our annual Lifestyles survey.

Consumer Lifestyles: This report draws together the insights identified by the Lifestyles survey and provides analysis on the key trends.

Megatrends: Combines insights using the survey and how they connect with our eight Megatrends. Case studies demonstrate how companies are responding to changing attitudes and expectations in relation to each Megatrend.

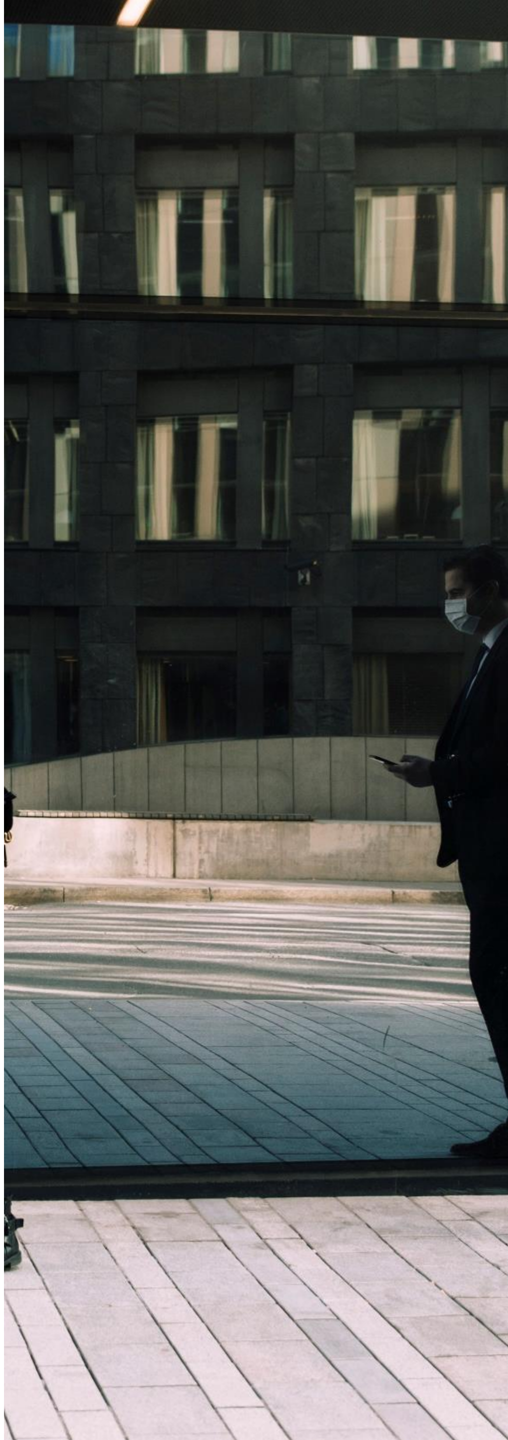
Consumer Types: Understanding consumers beyond their demographic profile and providing a different perspective on country-specific consumer insights, particularly shopping habits and the path to purchase.

Consumer Values and Behaviour: Reviews shifting consumer traits and values that influence purchasing and consumption behaviours. (Visual only report)

Passport

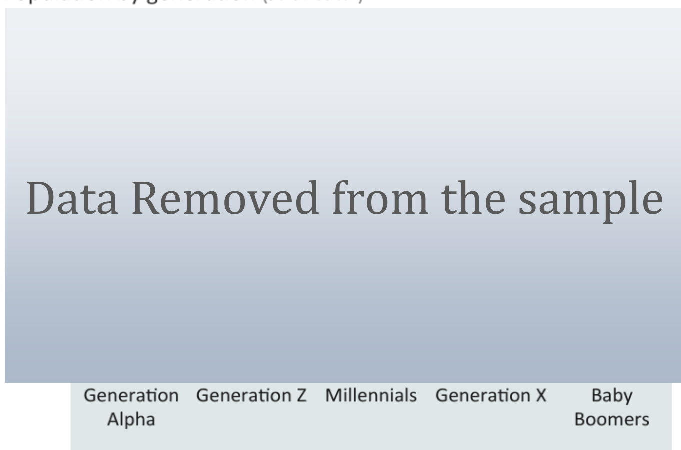
Consumer Lifestyles in Hong Kong, China

- Consumer Landscape
- Life Priorities
- Home Life
- Eating Habits
- Working Life
- Sustainable Living
- Leisure Habits
- Health and Wellness
- Shopping
- Technology

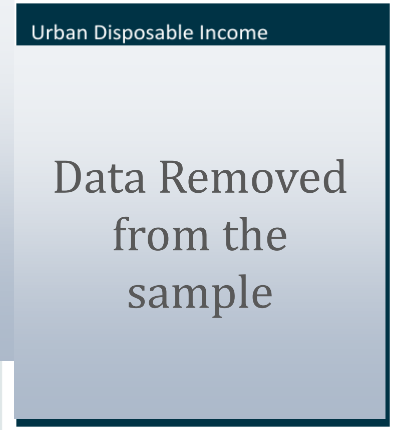


Consumer landscape 2021

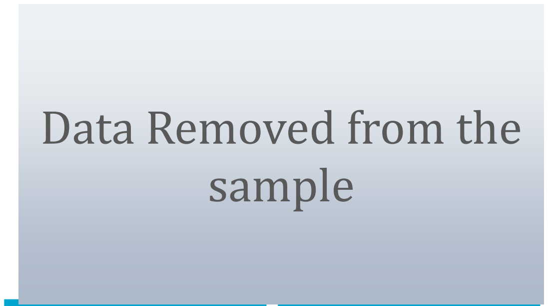
Population by generation (% of total)



Disposable income



Old-age dependency ratio
(percentage of people older than 65 compared to those aged 15-64)

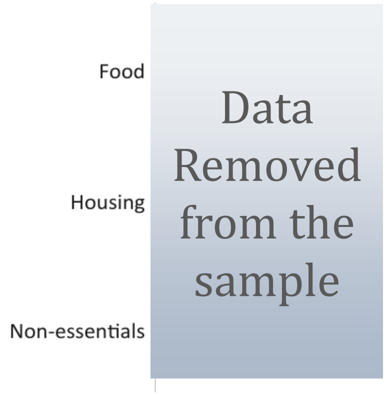


Fertility rate: 1.0 children born per female

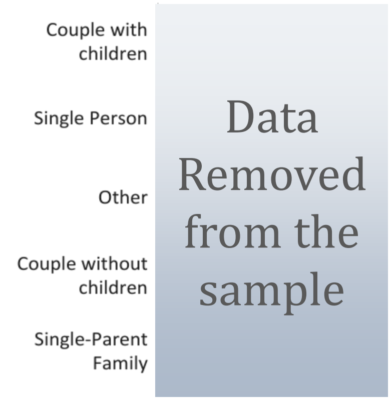
Median age: 45 years

Urban vs rural population

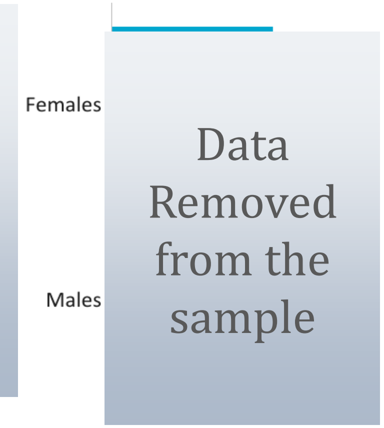
Household spending



Households by type



Life expectancy at birth



Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Life priorities

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Data Removed from the sample

feel under constant pressure to get things done

like to be actively engaged with brands

of Millennials are willing to spend money to save time

Data Removed from the sample

prefer to spend money on experiences, rather than things

use technology to improve their day-to-day life

of Gen Z only buy from companies and brands they trust completely

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Nearly half of Hong Kong consumers like to have some “me time”

Prioritising time
n=1,036

% of respondents

Global

Data Removed from the sample

Note: Respondents who ranked these priorities in their Top 3

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Time for favourite activities is a top priority for busy lifestyles

Prioritising time for activities

n=1,036

% of respondents

Time for my favourite activities

Time for work

Time with friends

Time to travel

Time to volunteer

Data Removed from the sample

Global

Data Removed from the sample

Note: Respondents who ranked these priorities in their Top 3

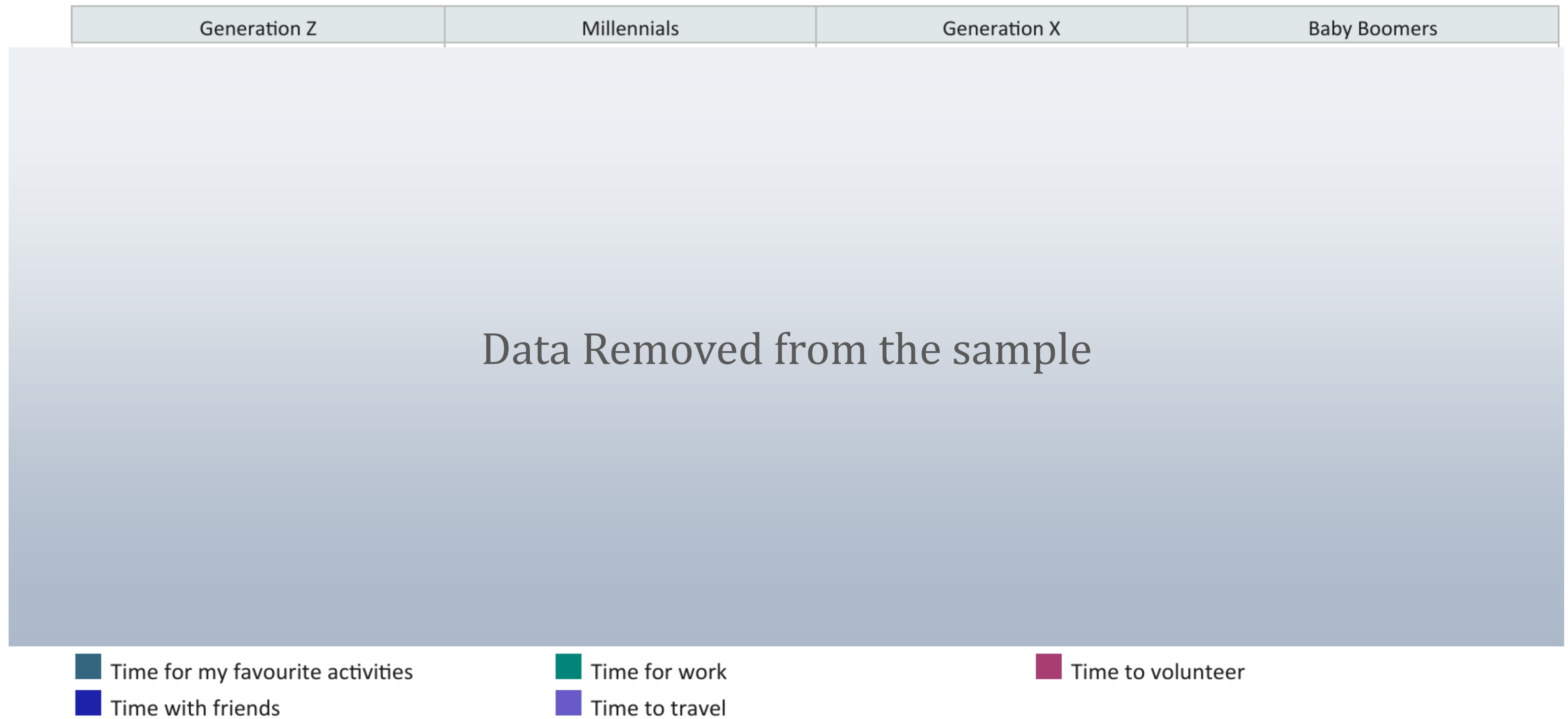
Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Time for work less of a priority over other activities for young consumers

Prioritising time for activities by generation

n=1,036

% of respondents



NOTE: Respondents who ranked these activities from 1-3 in order of importance

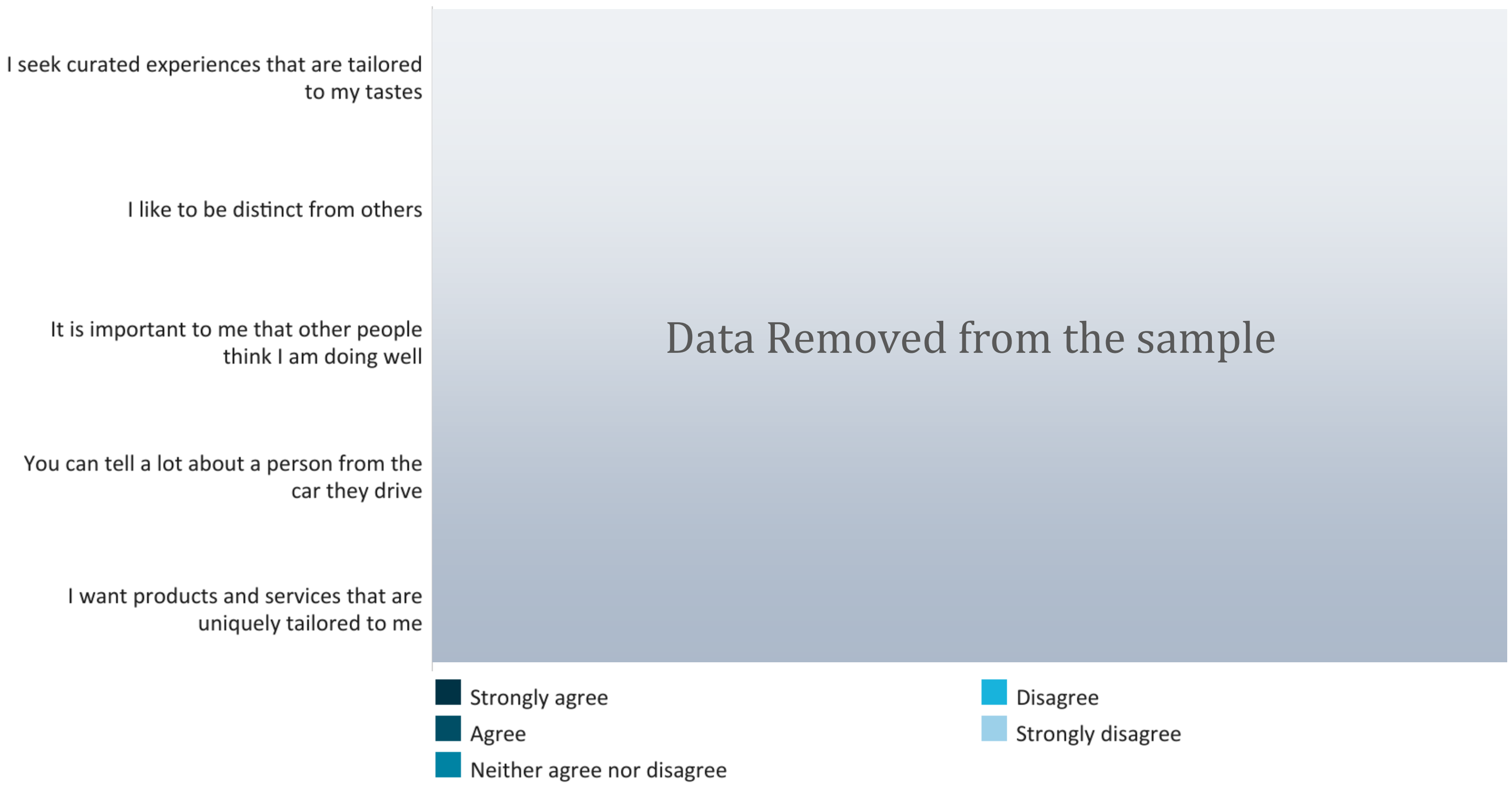
Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Consumers want experiences that are tailored to them personally

Values: Status

n=1,036

% of respondents



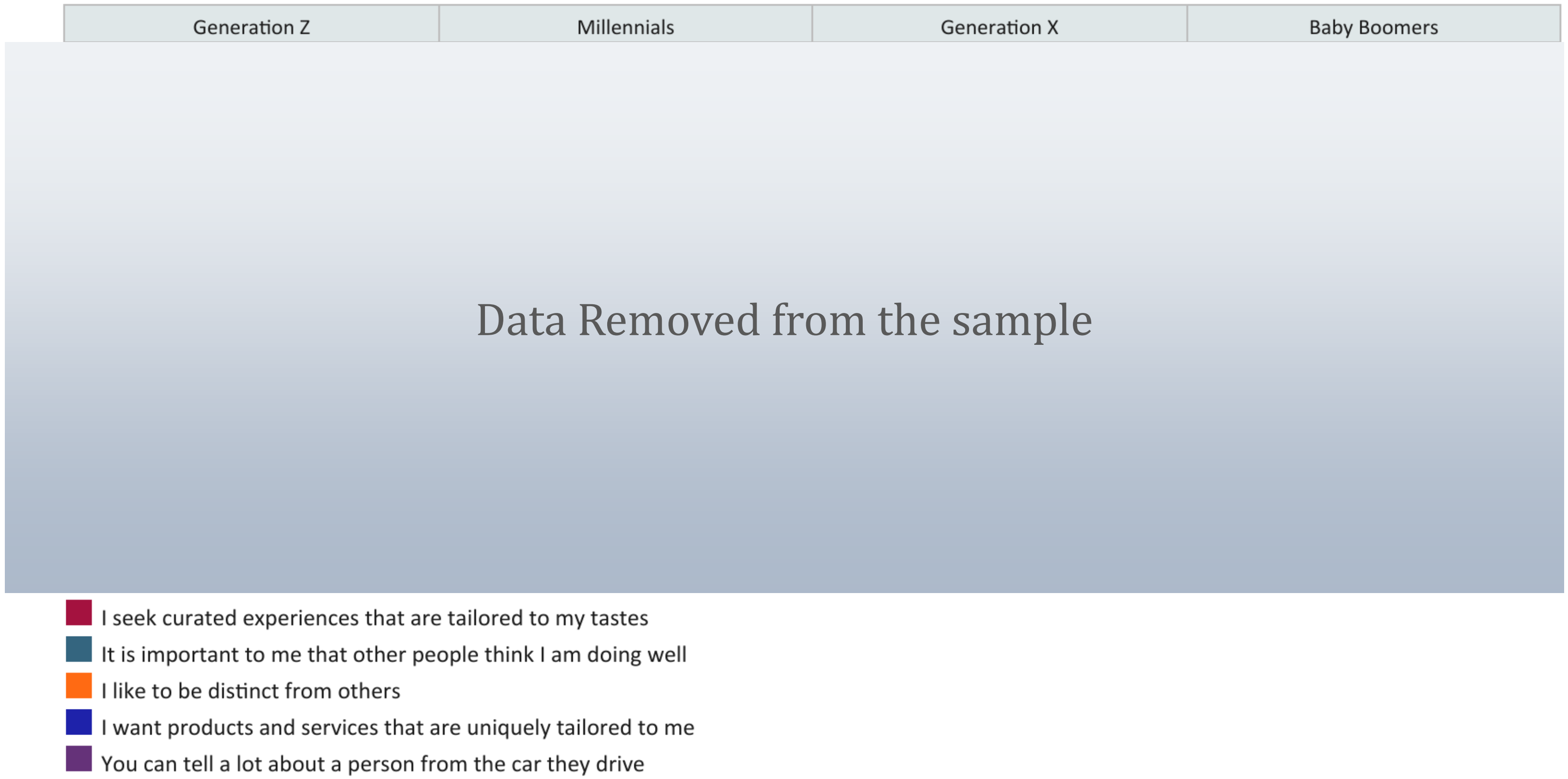
Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Successful image is import to all generations, after tailored experiences

Values: Status by generation

n=1,036

% of respondents (Agree or strongly agree)



Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Consumers enjoy innovative products produced by trustworthy brands

Consumer values

n=1,036

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Older generations more likely to research first and buy based on trust

Consumer values by generation
n=1,036

% of respondents (Agree or strongly agree)

Generation Z	Millennials	Generation X	Baby Boomers

Data Removed from the sample

- I like to try new products and services
- I prefer branded goods to non-branded alternatives
- I like to be actively engaged with brands
- I extensively research the products and services I consume
- I only buy from companies or brands that I trust completely

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Home life

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feel that pets are part of their family

regularly engage in home-based hobbies

of Millennials want a smart home

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partipate in online fitness classes

regularly work from home

of Baby Boomers prioritise energy efficiency

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

High levels of activity in households, but being connected is the main event

Home activities

n= 1,036

% of respondents (At least weekly)

Connect with friends/family virtually

Exercise

Play video games

Work from home (eg, activities and tasks related to my job)

Study

Hobbies (eg, gardening, knitting, crafts, etc.)

Entertain friends and family who do not live with me

Take an online or virtual fitness class

Data Removed from the sample

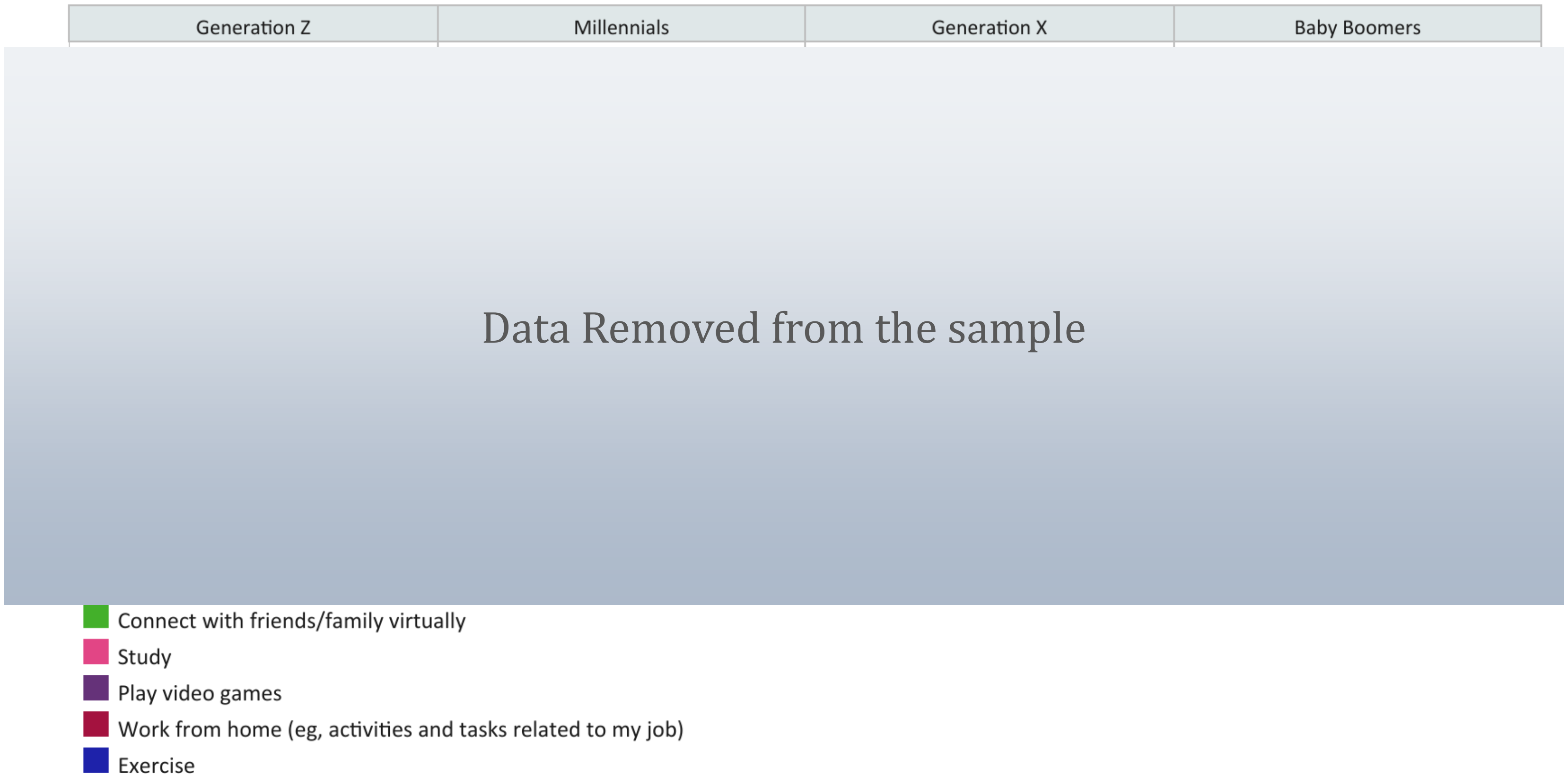
Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Virtual connections important for all generations

Home activities by generation

n= 1,036

% of respondents (At least weekly)



Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Residents want homes that are well-connected to public transport

Most desirable home features
n= 1,036

% of respondents

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Gen Z more enthusiastic about smart homes and multi-functionality

Most desirable home features by generation
n= 1,036

% of respondents

Generation Z	Millennials	Generation X	Baby Boomers

Data Removed from the sample

- Safe location
- Proximity to public transport
- Smart home functionality
- Multi-functional space (work-live space)
- Outside space
- Urban or inner city location

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Eating habits

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do not have time to cook

of Gen Z often snack during the day in between meals

order food for home delivery at least weekly

Data Removed from the sample

of Millennials closely read nutrition labels

look for healthy ingredients

cook or bake every week

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Out of home meals, delivery and convenience food above global average

Meal preferences
n= 1,036
% of respondents (At least weekly)

Global

Home cooked or baked

Eat at a restaurant

Order food for takeaway or pick up ready-made food

Reheat or prepare a ready meal

Order food for home delivery

Data Removed from the sample

Data Removed from the sample

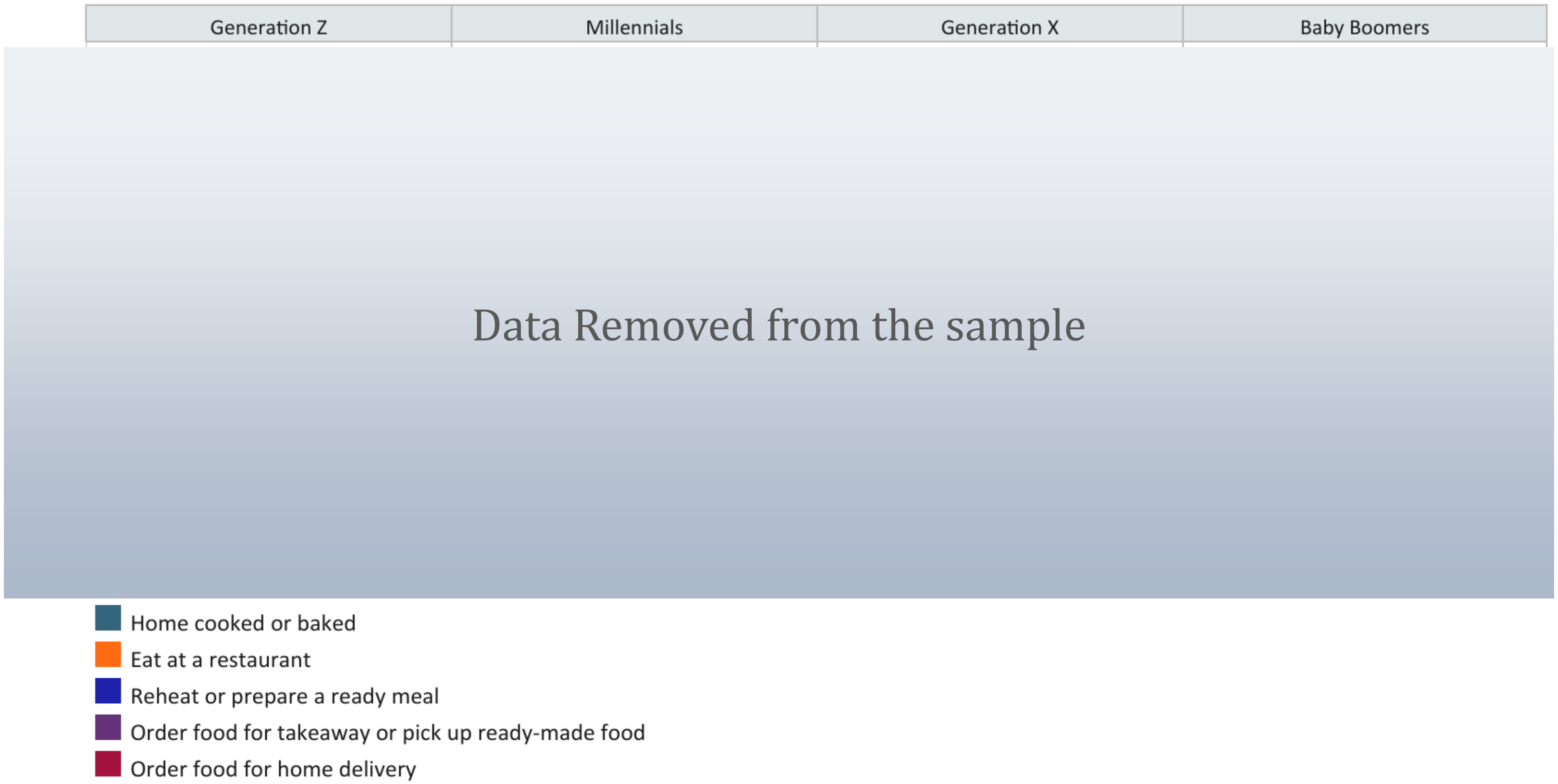
Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Preparing food at home only slightly more popular than eating out

Meal preferences by generation

n= 1,036

% of respondents (At least weekly)



Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Consumers seek premium foods with added health benefits

Most selected food features and attributes
n= 1,036

% of respondents

Premium or gourmet

Health and nutritional properties (e.g. omega-3)

Low price

All natural

Superior taste

Ready to cook

Hormone free

100% organic

Non-GMO (genetically modified organism)

Strong or well-known brand

Data Removed from the sample

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Snacks are often consumed between meals by over 40% of consumers

Eating and snacking behaviours
n= 1,036

% of respondents

I often snack during the day in between meals

I typically eat snacks while watching TV/streaming video content

I eat meals at the same time each day

My typical mealtimes vary and depend on my schedule

I look for snacks that are easy to take with me

Data Removed from the sample

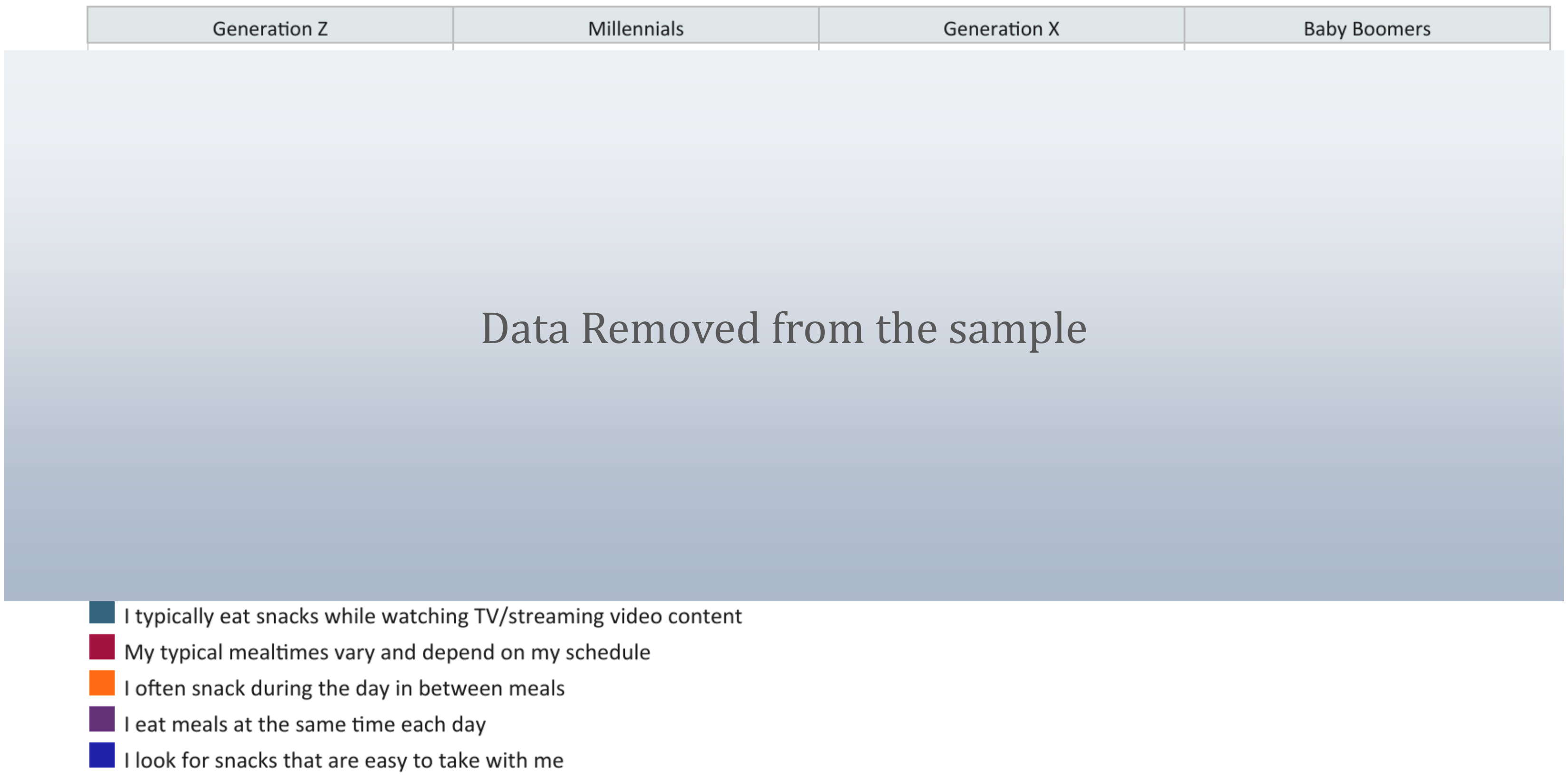
Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Gen Z meal times more variable, and half enjoy screen time snacking

Eating and snacking behaviours by generation

n= 1,036

% of respondents



Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Working life

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of Gen X want a job that allows for a strong work-life balance

expect to work from home in the future

of Gen Z want to start their own company

Data Removed from the sample

want to set their own working hours

want to have job security

want to work for a company that prioritises health and safety

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Ability to earn a high salary outweighs importance of work-life balance

Most important work-related factors

n=1,036

% of respondents

To earn a high salary

To have job security

To have a job that allows for a strong work-life balance

To work for a company that takes ethical/social responsibilities seriously

To work close to home

To set my own work hours

To have responsibility and challenging work

To work for myself

To be able to work from home

Data Removed from the sample

Data Removed from the sample

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Work-life balance important for all generations, but especially Boomers

Selected work-life related factors by generation

n=1,036

% of respondents

Generation Z	Millennials	Generation X	Baby Boomers

Data Removed from the sample

- To have a job that allows for a strong work-life balance
- To set my own work hours
- To work for myself
- To be able to work from home

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

All generations expect to earn high salaries

Selected work-related expectations by generation
n=1,036

% of respondents

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Flexibility and home-working front-of-mind for future working life

Future work expectations

n= 1,022

% of respondents

Have flexible start and finish times

Work from home

Work past typical retirement age

Work part-time

Retire before retirement age

Start my own company

Work on contract or freelance

Work abroad

Have more than one job at a time

Be self-employed

Change industries

Leave work to care for dependents

Data Removed from the sample

Global

Data Removed from the sample

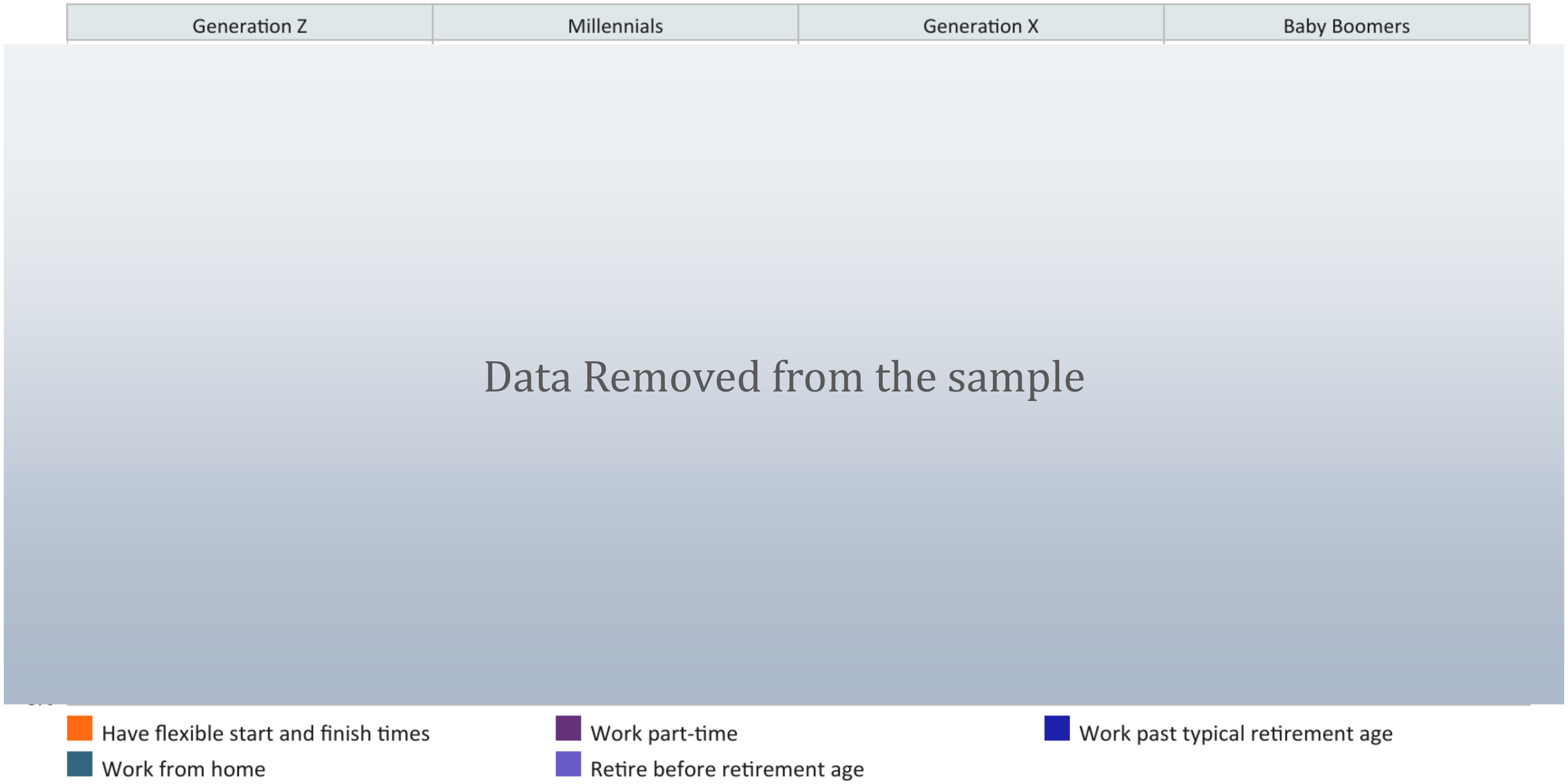
Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Prospects of working past retirement age high amongst Baby Boomers

Future work expectations by generation

n= 1,022

% of respondents



Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Sustainable living

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Data Removed from the sample

try to have a positive impact on the environment

only buy from companies and brands that they trust completely

are worried about climate change

Data Removed from the sample

feel being active in the community is important

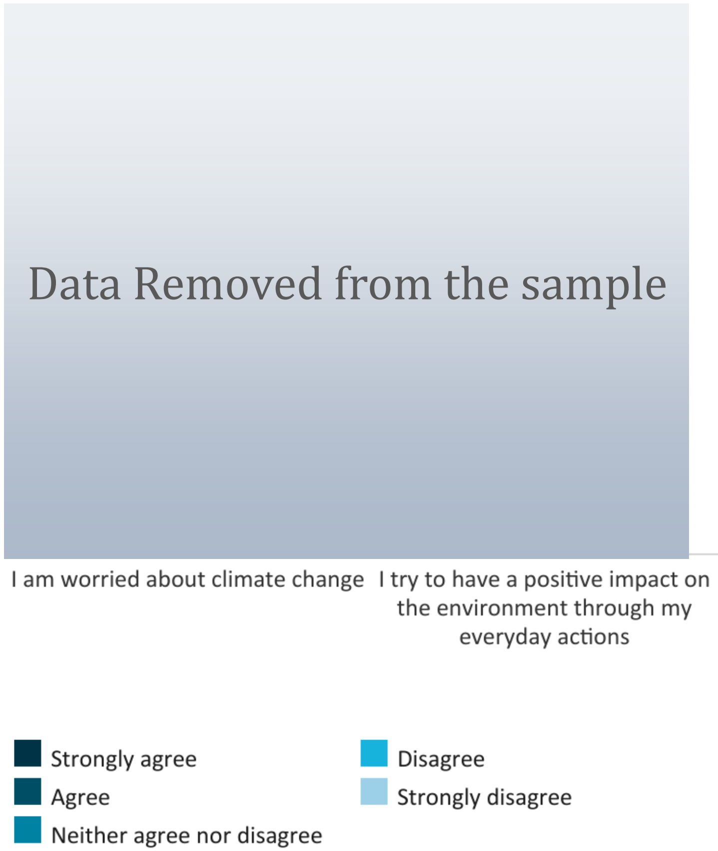
buy sustainably produced items

are reducing use of plastics

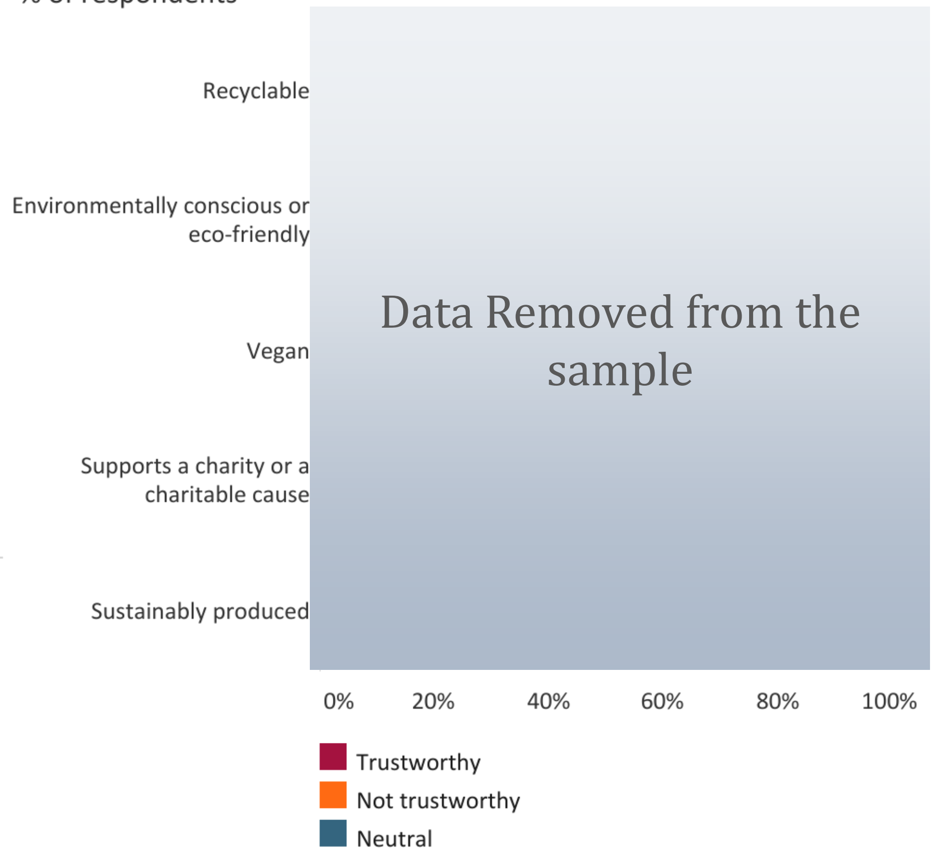
Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Nearly 60% of respondents are worried about impact of climate change

Key concerns
(n=1,036)
% of respondents



Trust in ethical labels
(n= 1,016)
% of respondents



Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Older generations more engaged in actions to protect the environment

Key concerns by generation
n=1,036

% of respondents (Agree or strongly agree)

Generation Z		Millennials		Generation X		Baby Boomers	
Strongly agree	Agree	Strongly agree	Agree	Strongly agree	Agree	Strongly agree	Agree

Data Removed from the sample

- I am worried about climate change
- I try to have a positive impact on the environment through my everyday actions

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Plastics and food waste biggest issues for consumers

Green behaviours
n= 547

% of respondents

Global

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Reducing plastics use and food waste key concerns for Baby Boomers

Green behaviours by generation
n= 547

% of respondents

Generation Z	Millennials	Generation X	Baby Boomers

Data Removed from the sample

- Reduce food waste
- Recycle items
- Use less water
- Reduce plastics use
- Reduce carbon emissions

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Respondents less likely to repair than replace items than global average

Green activities
n= 547

% of respondents

Use more energy efficient products

Use sustainable packaging

Repair broken items, rather than replacing

Donate to charities supporting the environment

Buy sustainably-produced items

Buy products and services from purpose-driven brands/companies

Data Removed from the sample

Global

Data Removed from the sample

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Using sustainable packaging and energy-efficient products important

Green activities by generation
n= 547

% of respondents

- Buy sustainably-produced items
- Use more energy efficient products
- Use sustainable packaging
- Donate to charities supporting the environment
- Buy products and services from purpose-driven brands/companies
- Repair broken items, rather than replacing

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

30% of consumers ready to boycott brands that go against their beliefs

Political and social activities

n= 490

% of respondents

Donate to non-profits and charities supporting causes aligned with my values

Buy from brands that support social and political issues that are aligned with my values

Boycott brands/companies' that don't share my social/political beliefs

Share my opinion on social/political issues on media

Make my purchasing decisions based on brands/companies' social and political beliefs

Attend community meetings

Participate in rallies and protests

Data Removed from the sample

Global

Data Removed from the sample

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Gen Z feel strongly about buying from brands that support their values

Political and social activities by generation

n= 490

% of respondents

Generation Z	Millennials	Generation X	Baby Boomers

Data Removed from the sample

- Buy from brands that support social and political issues that are aligned with my values
- Share my opinion on social/political issues on media
- Boycott brands/companies' that don't share my social/political beliefs
- Donate to non-profits and charities supporting causes aligned with my values
- Make my purchasing decisions based on brands/companies' social and political beliefs

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Leisure habits

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Data Removed from the sample

of Millennials feel it is important to spend money on experiences

of Gen Z play video games every week

value online virtual experiences

Data Removed from the sample

seek curated experiences that are tailored to their tastes

expect to increase spending on leisure travel

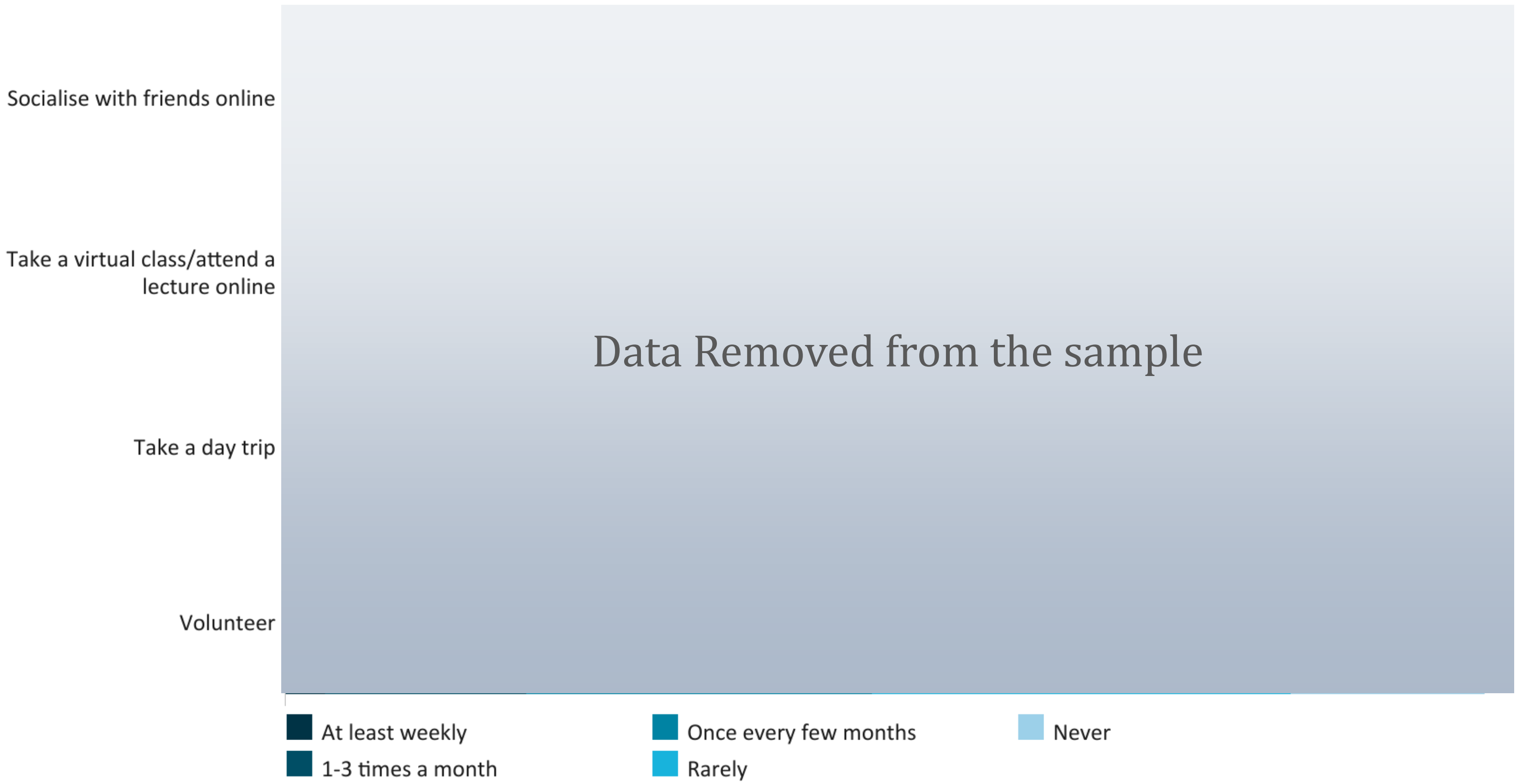
will be spending more on experiences

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Over a third of respondents socialise online every week

Frequency of selected leisure activities
n= 1,036

% of respondents



Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Next to socialising, online classes are popular among all generations

Frequency of selected leisure activities by generation

n= 1,036

% of respondents (At least monthly)

Generation Z	Millennials	Generation X	Baby Boomers

Data Removed from the sample

- Socialise with friends online
- Take a virtual class/attend a lecture online
- Volunteer
- Take a day trip

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Highest percentage of respondents shop as a leisure activity weekly

Frequency of other leisure activities

n= 1,036

% of respondents

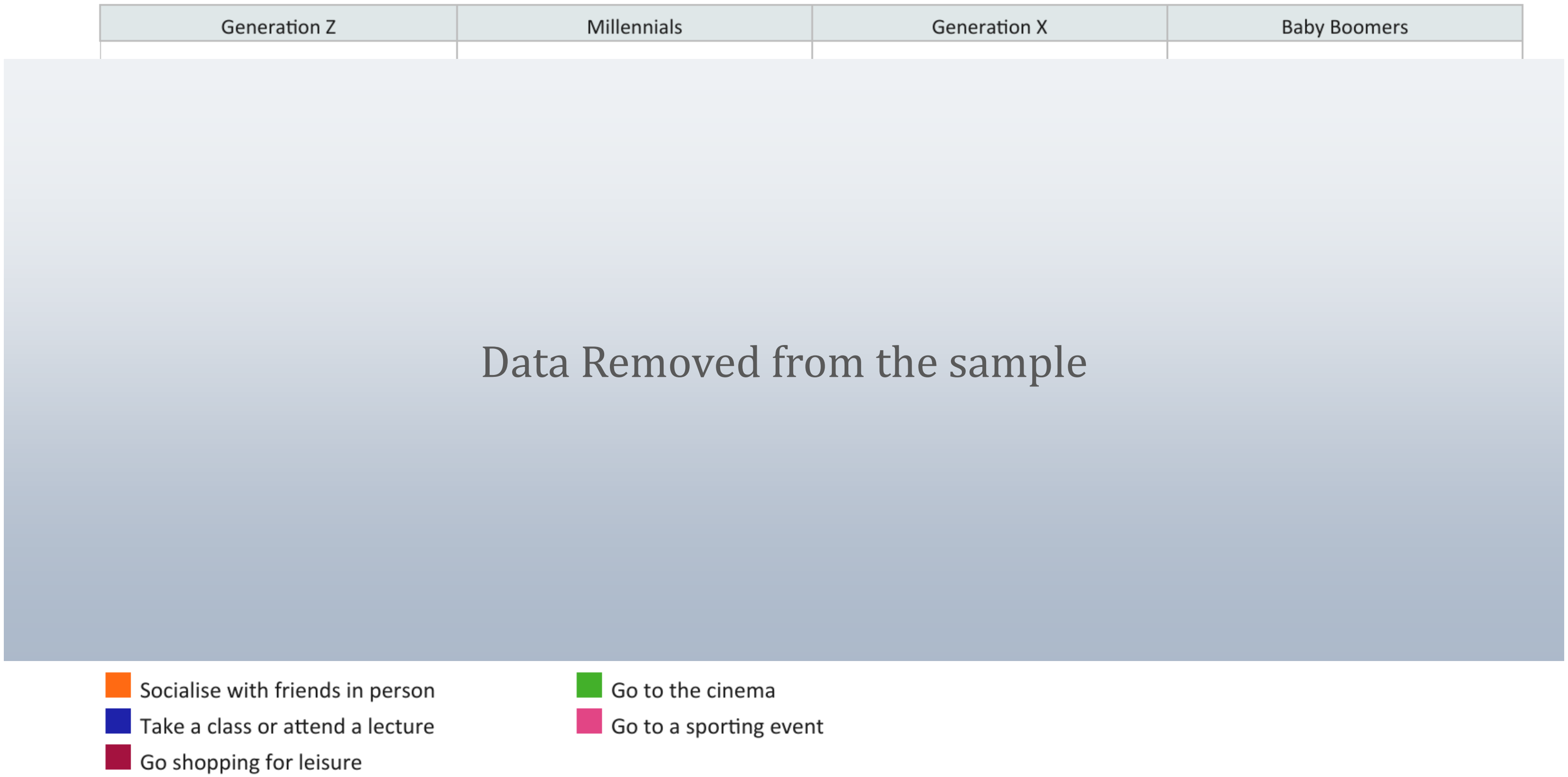
Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Only Gen Z socialise more with friends in person than shop for leisure

Frequency of other leisure activities by generation

n= 1,036

% of respondents (At least monthly)



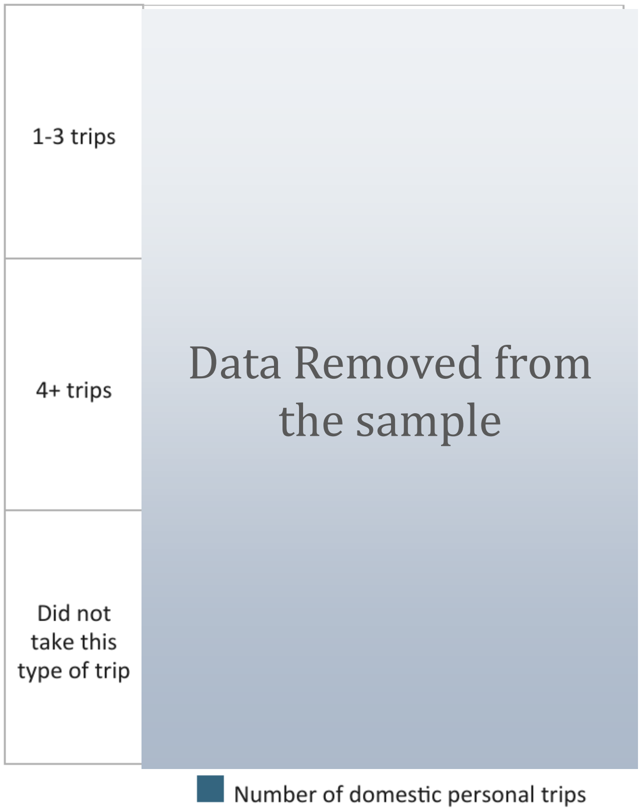
Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Gen X and Millennials most active in going on domestic trips

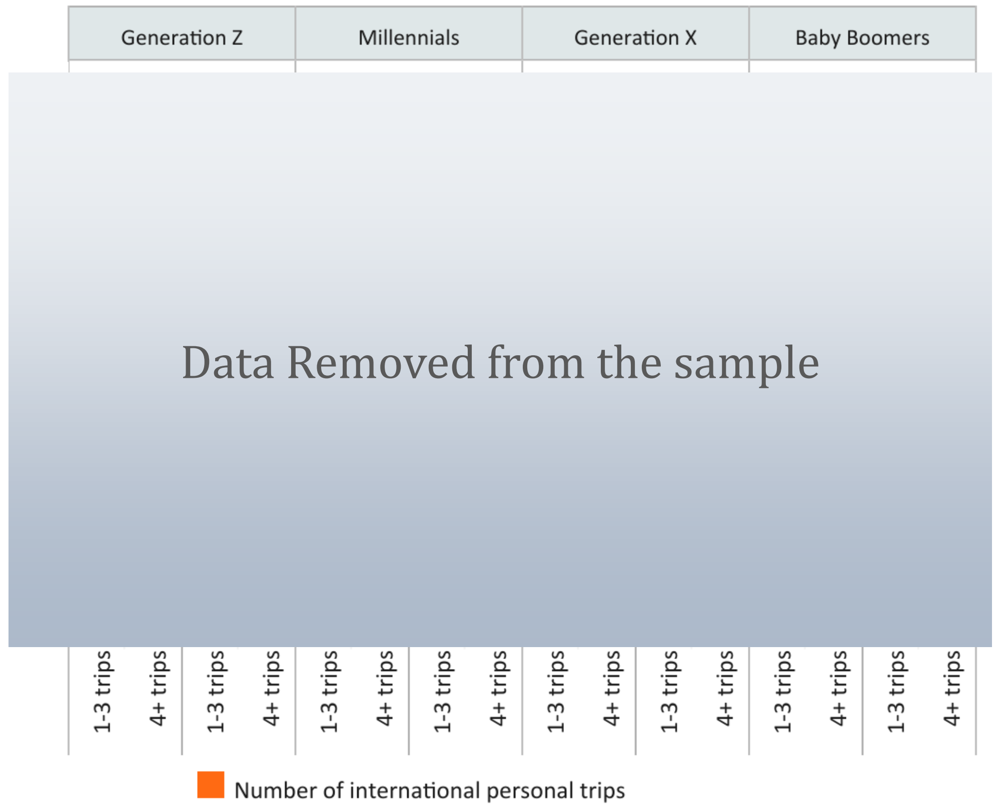
Number of domestic and overseas trips in the previous 12 months

n= 1,036

% of respondents



% of respondents by generation

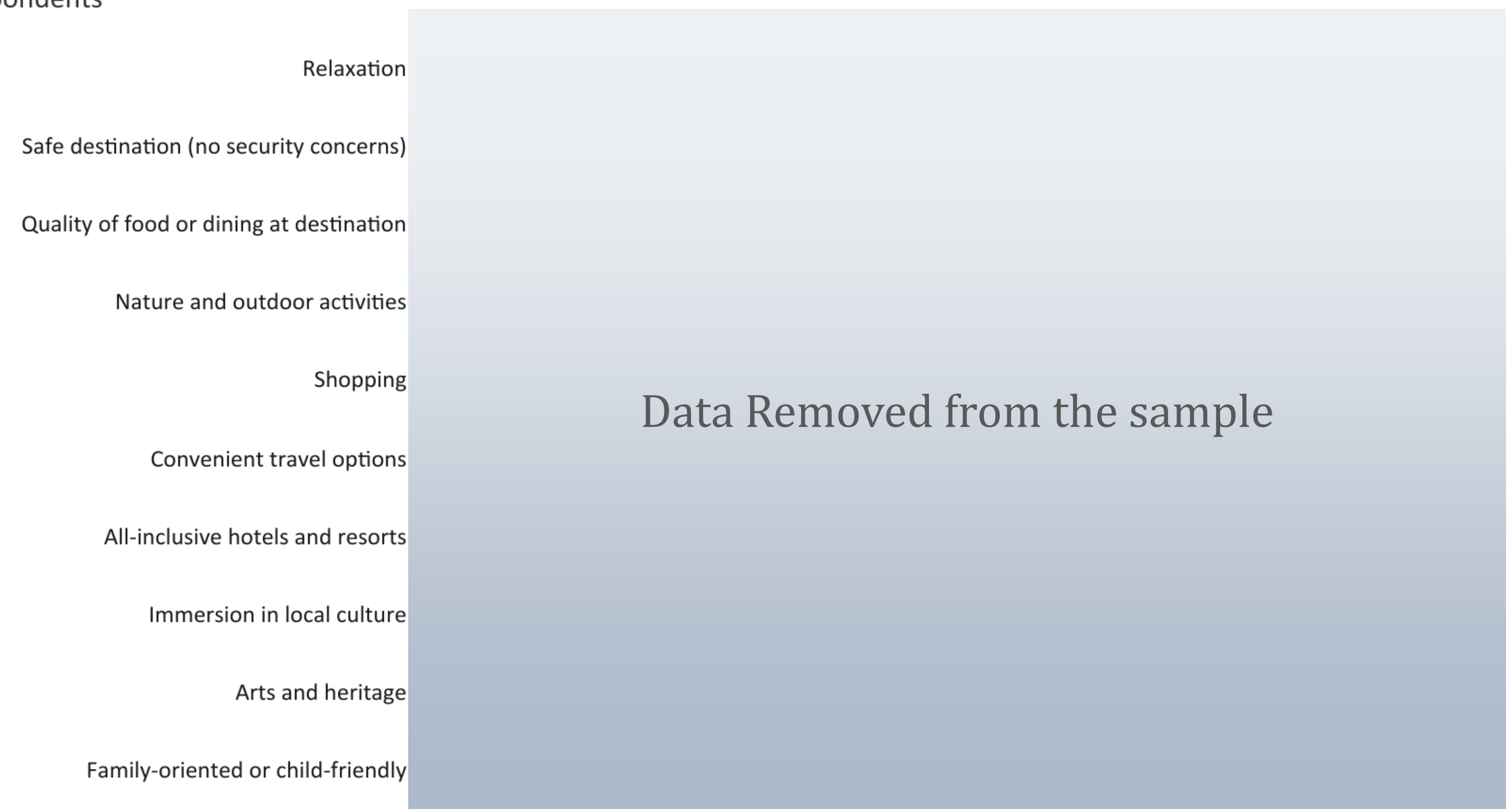


Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Majority of holiday-makers want to go somewhere where they can relax

Most important travel features
n= 1,036

% of respondents



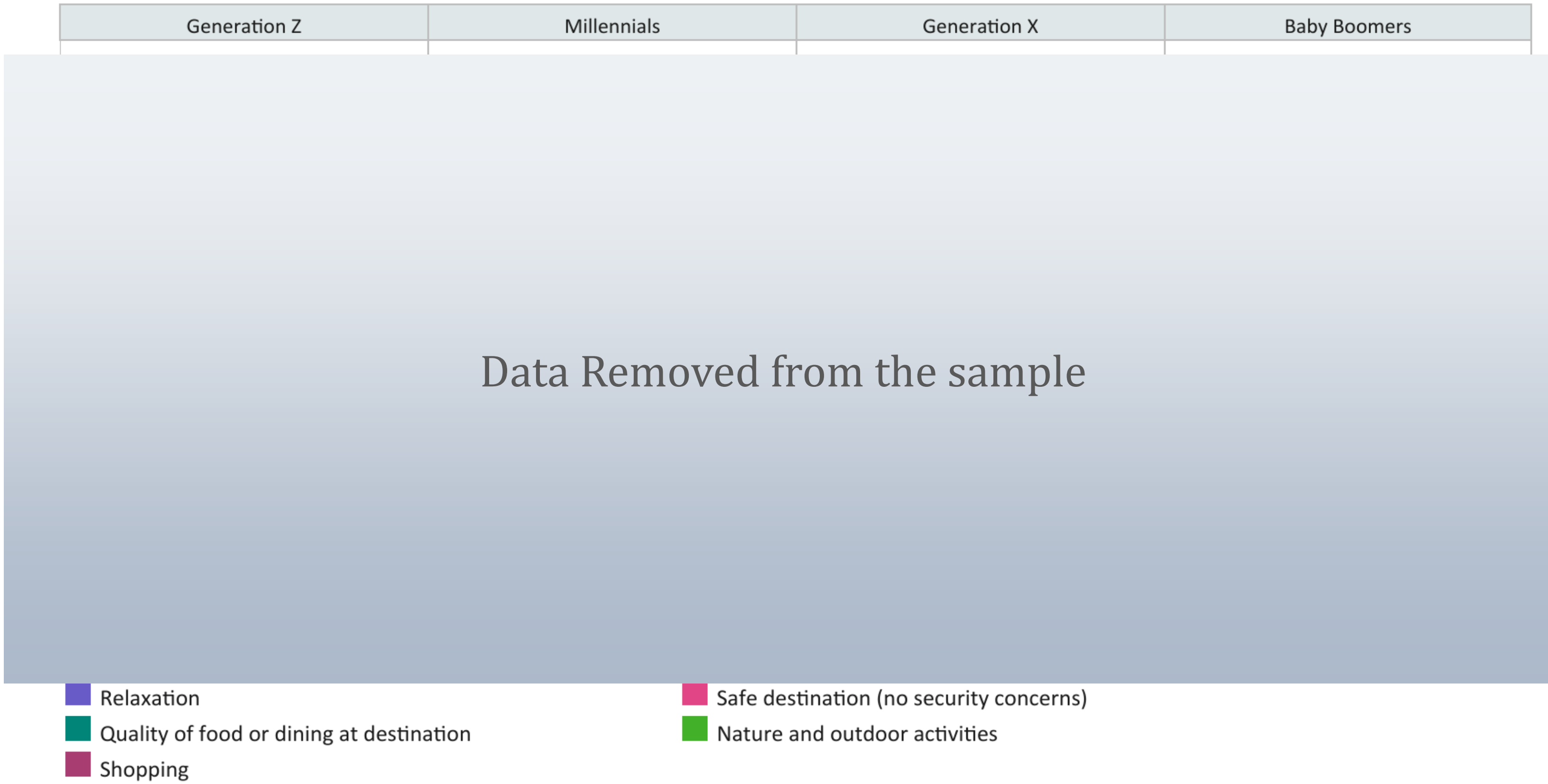
Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Quality of food and dining opportunities important considerations

Most important travel features by generation

n= 1,036

% of respondents



Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Health and wellness

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Data Removed from the sample

expect to increase spending on health and wellness

participate in physical exercise every week

of Millennials participate in regular stress-reduction activities

Data Removed from the sample

regularly take health supplements/vitamins

own a fitness wearable/health tracking device

take health and safety precautions when leaving home

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Women more actively engaged with caring for their health and wellness

Health-related activities

n= 1,036

% of respondents

	Almost every day	1-2 times a week	1-2 times a month
Take health supplements/vitamins			
Participate in physical exercise			
Participate in stress-reduction activities			

Data Removed from the sample

% of respondents by gender

	Almost every day		1-2 times a week		1-2 times a month	
	Female	Male	Female	Male	Female	Male
Take health supplements/vitamins						
Participate in physical exercise						
Participate in stress-reduction activities						

Data Removed from the sample

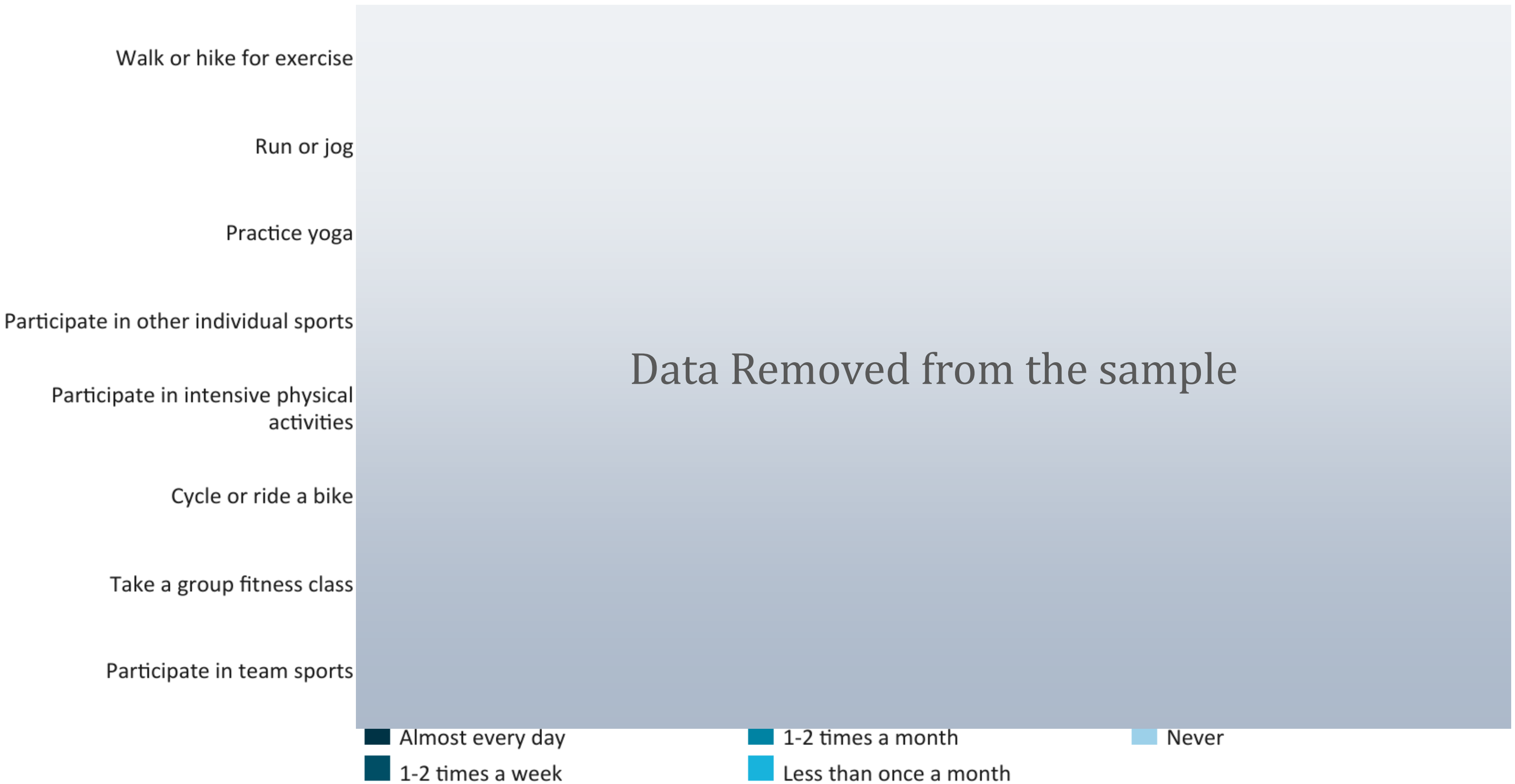
Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Walking and running most regular exercise habits

Exercise habits

n= 895

% of respondents



Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Running is the exercise of choice for younger generations

Exercise habits by generation
n= 895

% of respondents (At least weekly)

Generation Z	Millennials	Generation X	Baby Boomers

Data Removed from the sample

- Run or jog
- Walk or hike for exercise
- Participate in team sports
- Take a group fitness class
- Cycle or ride a bike
- Practice yoga

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Majority use massage to alleviate stress, but yoga above global average

Stress-reduction activities in previous 6 months
n= 722

% of respondents

Global

Note: Questions shown to respondents who participate in stress-reduction activities at least once every few months

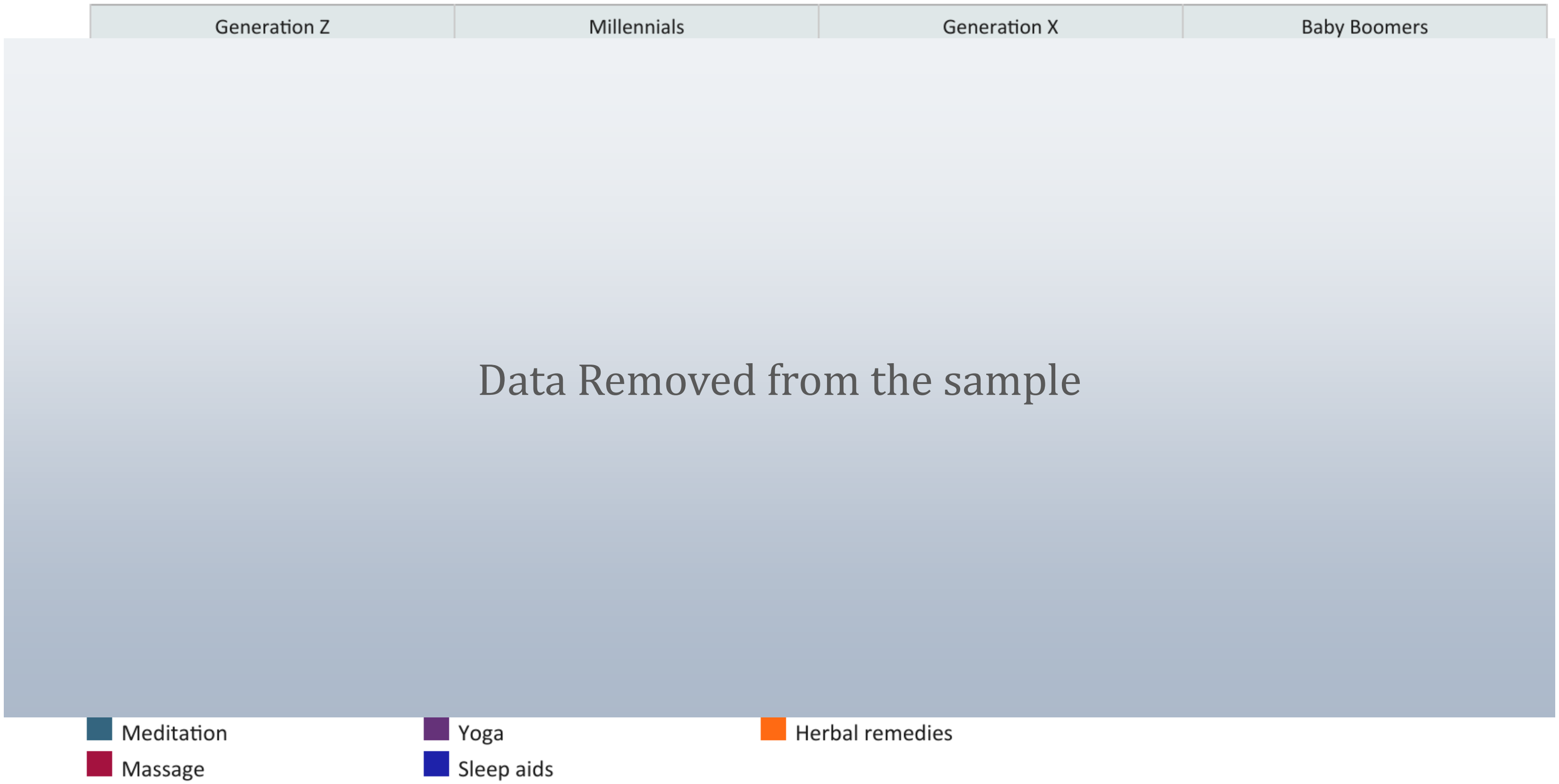
Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Gen Z less likely to use herbal remedies than other generations

Stress-reduction activities in previous 6 months by generation

n= 722

% of respondents



Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Shopping habits

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Data Removed from the sample

buy/shop more often where they have a loyalty card

of Gen Z expect to increase visits to discount stores

currently use a subscription service

Data Removed from the sample

try to purchase locally-sourced products and services

recently bought something via a social media platform

of Millennials would rather buy fewer but higher quality things

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Mall shopping popular, but consumers buy less to afford higher quality

Attitudes and preferences
n= 1,036

% of respondents

Global

I like to visit shopping malls

I would rather buy fewer, but higher quality things

I seek products with easy to understand labels

Buying eco/ethically-conscious products makes me feel good

I try to purchase locally-sourced products and services

I regularly buy gifts for my family and/or friends

I look for personalised and tailored shopping experiences

I seek niche brands that are hard-to-find or unique

Data Removed from the sample

Data Removed from the sample

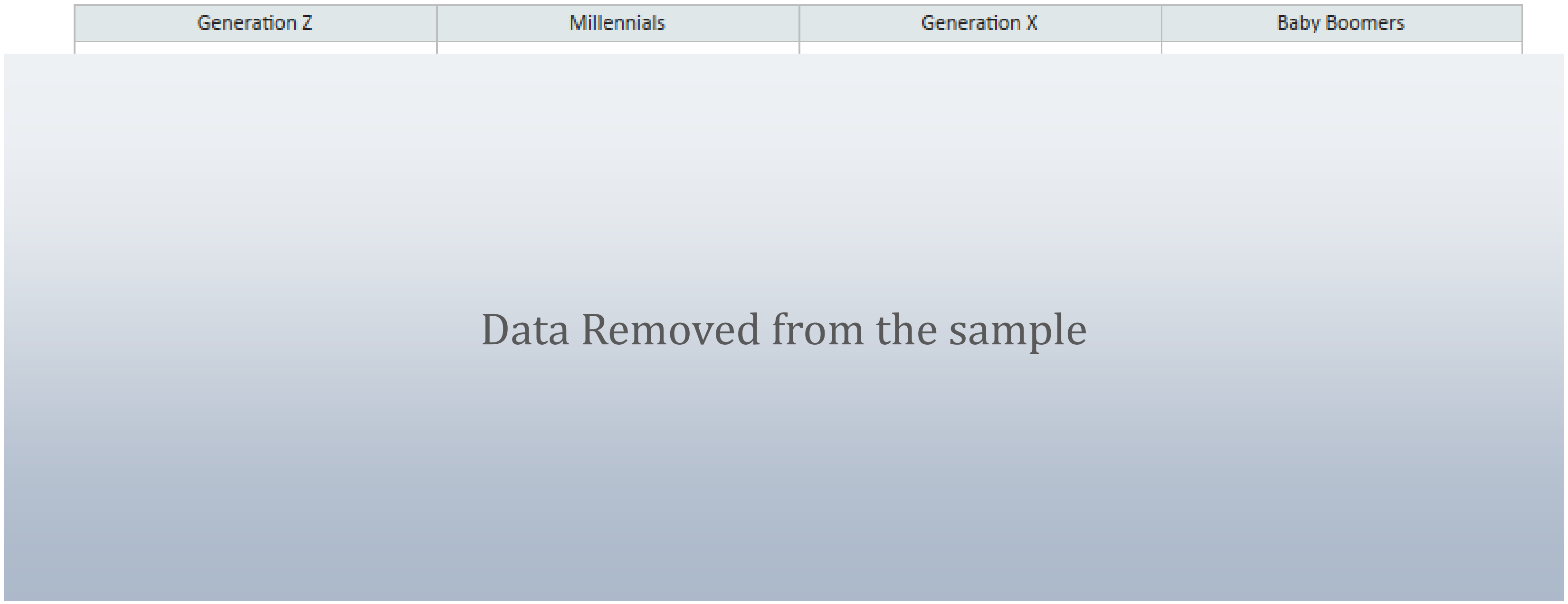
Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Baby Boomers most avid mall shoppers; Gen Z more likely to shop local

Attitudes and preferences by generation

n= 1,036

% of respondents



- I like to visit shopping malls
- I regularly buy gifts for my family and/or friends
- I try to shop in locally-owned stores
- Buying eco/ethically-conscious products makes me feel good
- I seek products with easy to understand labels

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

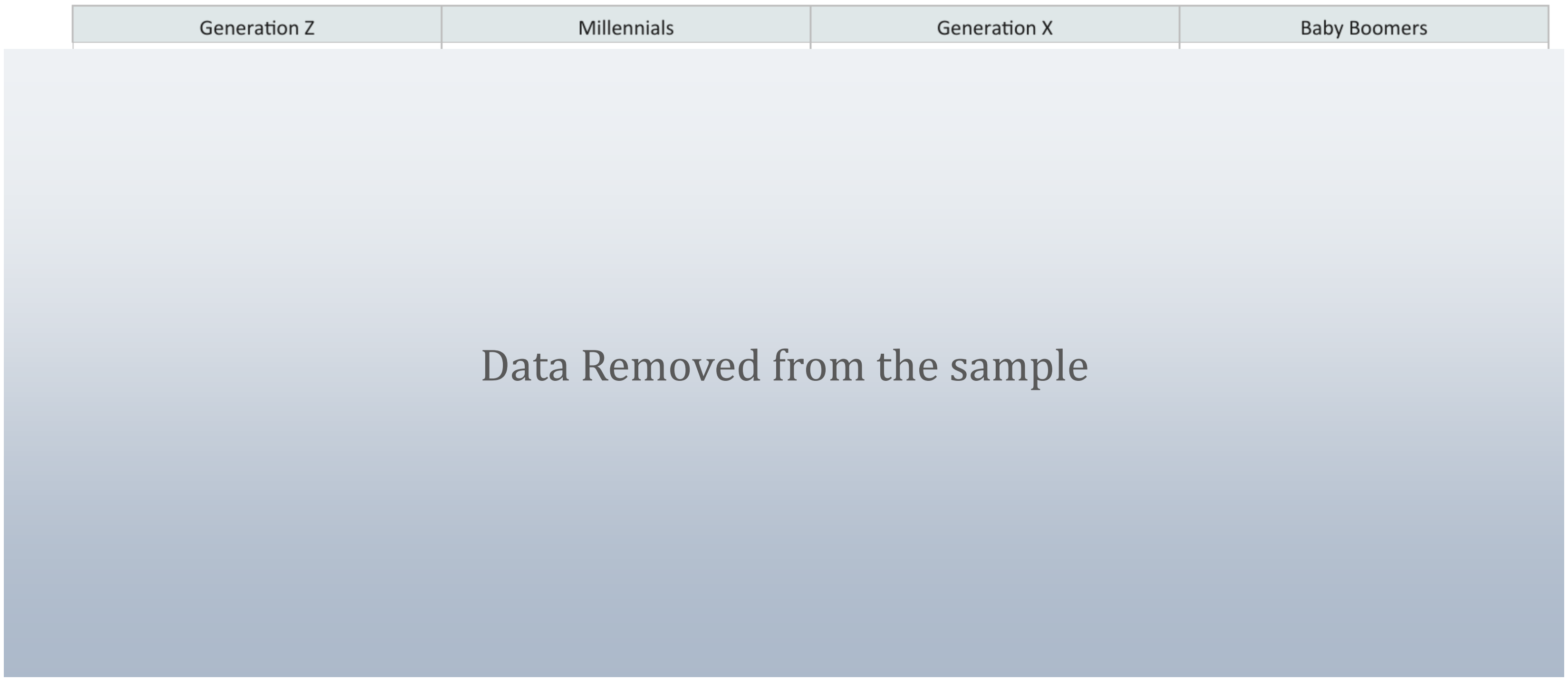
Consumers less likely to trust independent consumer reviews

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Younger consumers more influenced by friends/family recommendations

Shopping influences by generation
n= 1,036

% of respondents



Friends and family recommendations
My social media network
Product label/information
Advertisement from company or brand
Brand/company website

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

The convenience factor of subscription services biggest motivator

Subscription service motivations

n= 568

% of respondents

Convenience

I was given a subscription as a gift

Enjoy the products and/or brand

Able to try a variety of new products

I had a discount code to try for free or reduced rate

Recommendation from friends/family

Receive tailored products according to my preferences

Novelty/to try something new

To save money

I do not have time to shop

Better value than buying on my own

Data Removed from the sample

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Seeing and trying products a strong motivation to shop in-store

Key in-store shopping motivations
n= 1,036

% of respondents

See or try before buying

Immediate purchase

Convenient location/access

To avoid paying for shipping

Stores are more trustworthy

Better warranty/easier to return

Able to use loyalty/rewards

In-store advice

See new products/trends

No delivery-related hassles

Data Removed from the sample

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

All generations share the see, try, buy immediate purchase motivations

Key in-store shopping motivations by generation

n= 1,036

% of respondents

Generation Z	Millennials	Generation X	Baby Boomers

Data Removed from the sample

Immediate purchase
See or try before buying
To avoid paying for shipping
Convenient location/access
Stores are more trustworthy

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Online shoppers more motivated by the satisfaction of instant purchase

Key online shopping motivations
n= 1,025

% of respondents

Immediate purchase

Best price

Product information, comparison, and reviews

Ability to order at any time, from anywhere

Variety of brands

Free shipping

Ability to access site on different devices

To buy products/brands not available locally

Desired model of the product was not available

Ease and availability of delivery

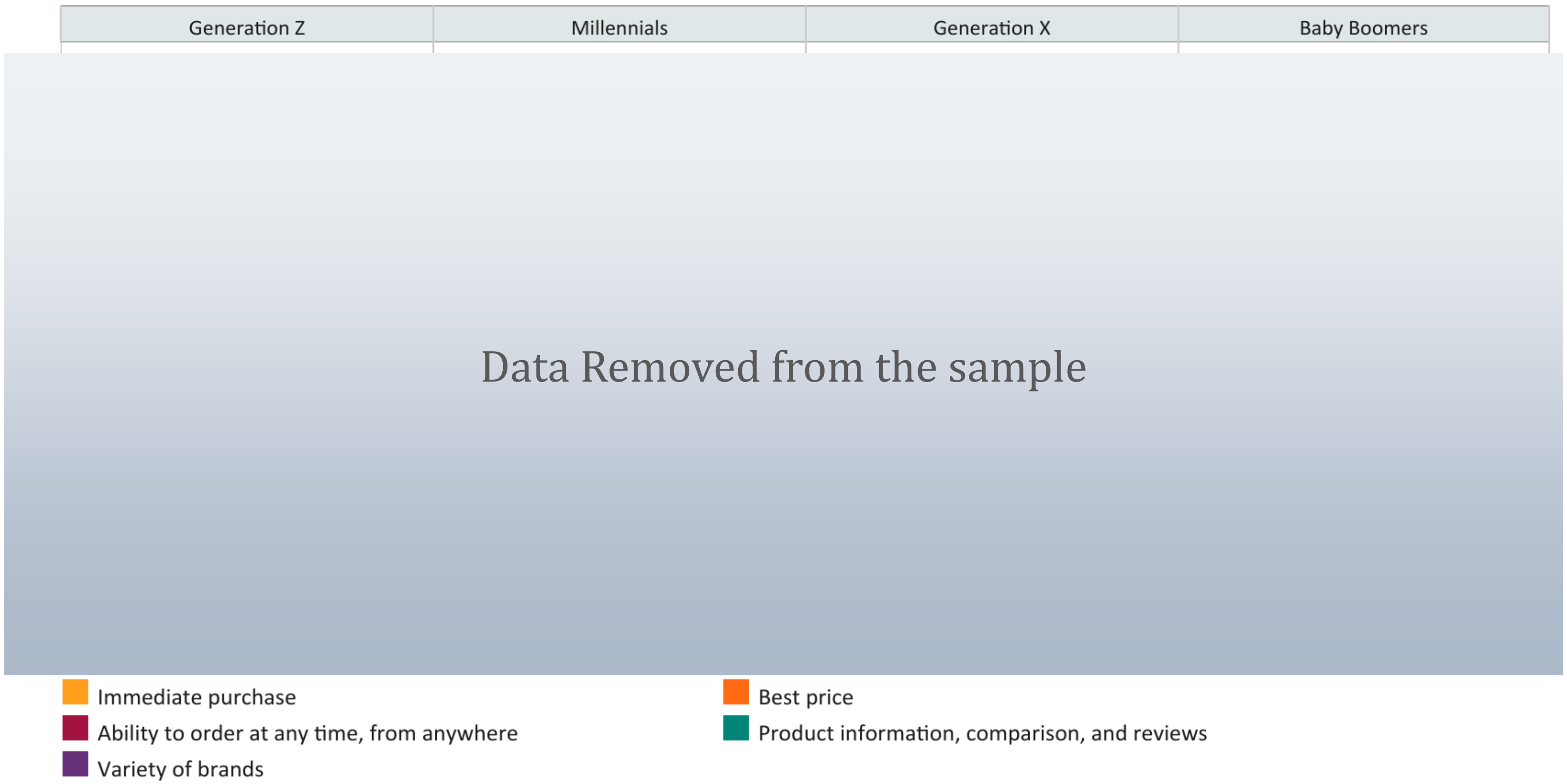
Data Removed from the sample

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Best prices found online also a key motivation for Millennials and older

Key online shopping motivations by generation
n= 1,025

% of respondents



Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Technology

Content Removed from the sample

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use technology to improve their day-to-day life

of Millennials make an in-store mobile payment at least weekly

actively manage data sharing and privacy settings

Data Removed from the sample

use AR or VR to enhance their shopping experience

of Gen Z take part in online video gaming at least weekly

feel that more of their everyday activities will shift to online platforms

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

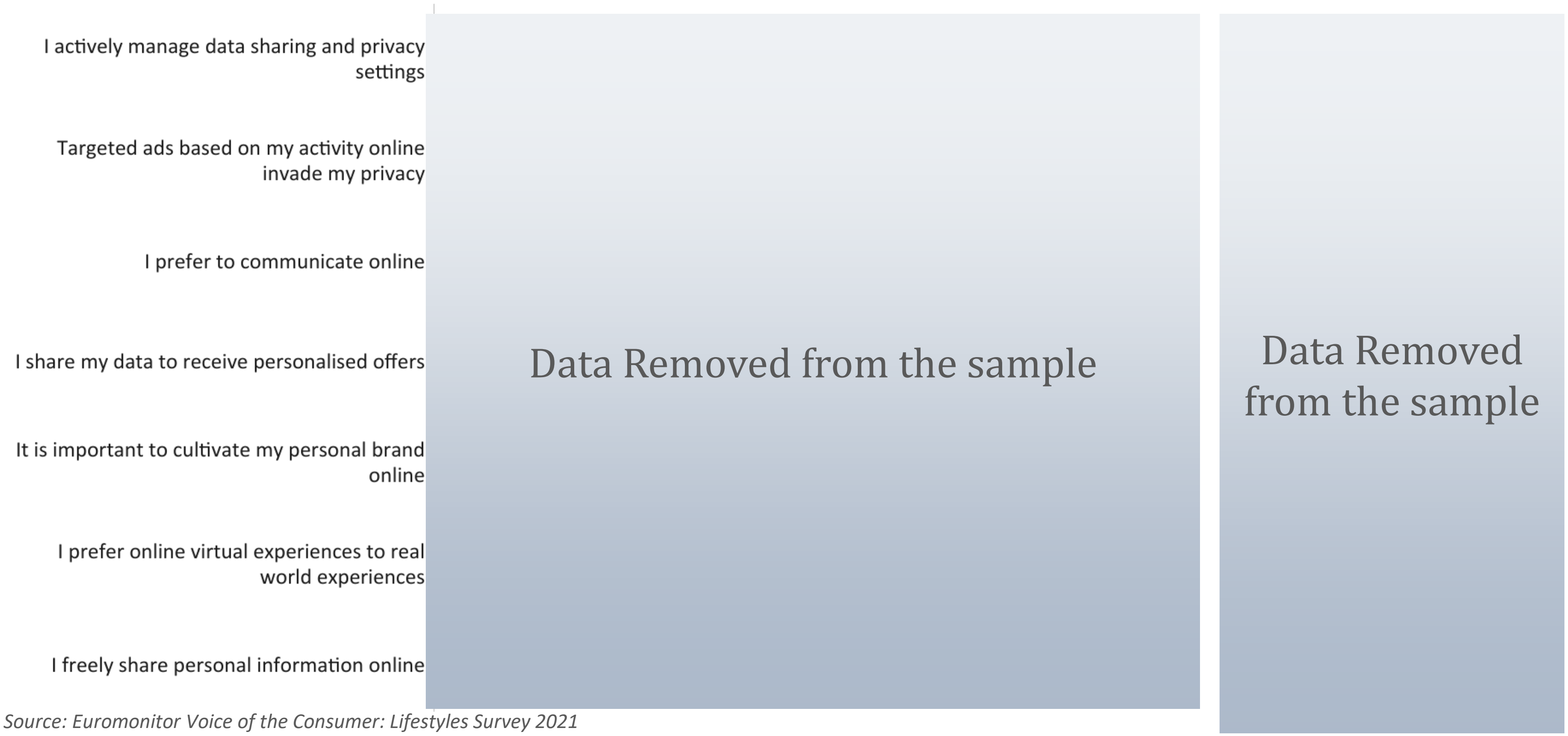
Managing privacy settings and protecting personal data biggest concern

Attitudes towards technology

n= 1,036

% of respondents (Agree or strongly agree)

Global



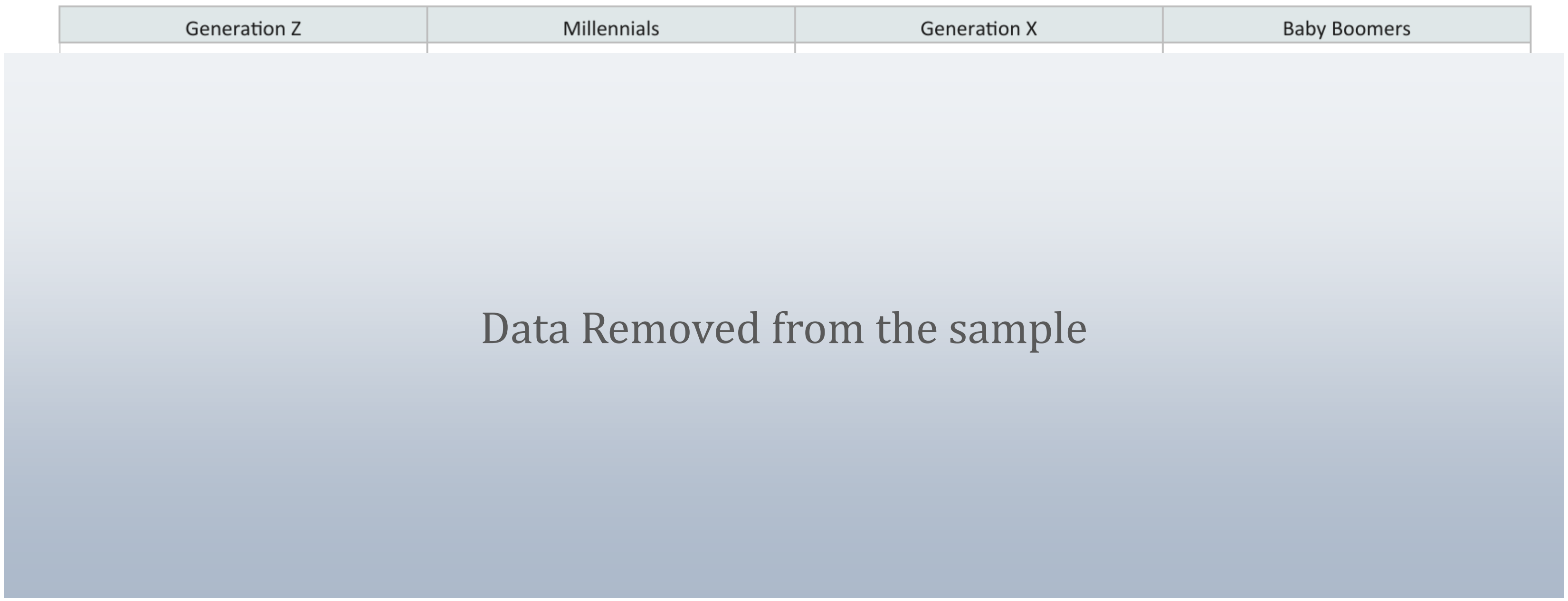
Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Older generations more likely to see targeted advertisements as invasive

Attitudes towards technology by generation

n= 1,036

% of respondents (Agree or strongly agree)



- I actively manage data sharing and privacy settings
- It is important to cultivate my personal brand online
- I share my data to receive personalised offers
- I prefer to communicate online
- Targeted ads based on my activity online invade my privacy

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

In-home virtual assistant ownership behind global average

Ownership of non-wearable devices

n= 1,036

% of respondents

Smartphone

Desktop or laptop computer

Tablet with full capabilities

Gaming system – console

Gaming system – portable player

Smart appliances

In-home virtual assistant device

Data Removed from the sample

Global

Data Removed from the sample

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Smartwatch ownership above global average

Ownership of wearable devices
n= 1,036

% of respondents

Wireless earphones/headphones

Wired earphones/headphones

Smartwatch

Fitness wearables/health tracking device

Data Removed from the sample

Global

Data Removed from the sample

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

Nearly half of all respondents participate in online video gaming

Online activities

n= 1,036

% of respondents (At least weekly)

Browse online

Visit or update social networking sites

Visit online news sites

Take part in online video gaming

Visit health-related or medical sites

Write a review for a product or service

Visit an online dating or matchmaking website

Use augmented or virtual reality to enhance my shopping experience

Data Removed from the sample

Global

Data Removed from the sample

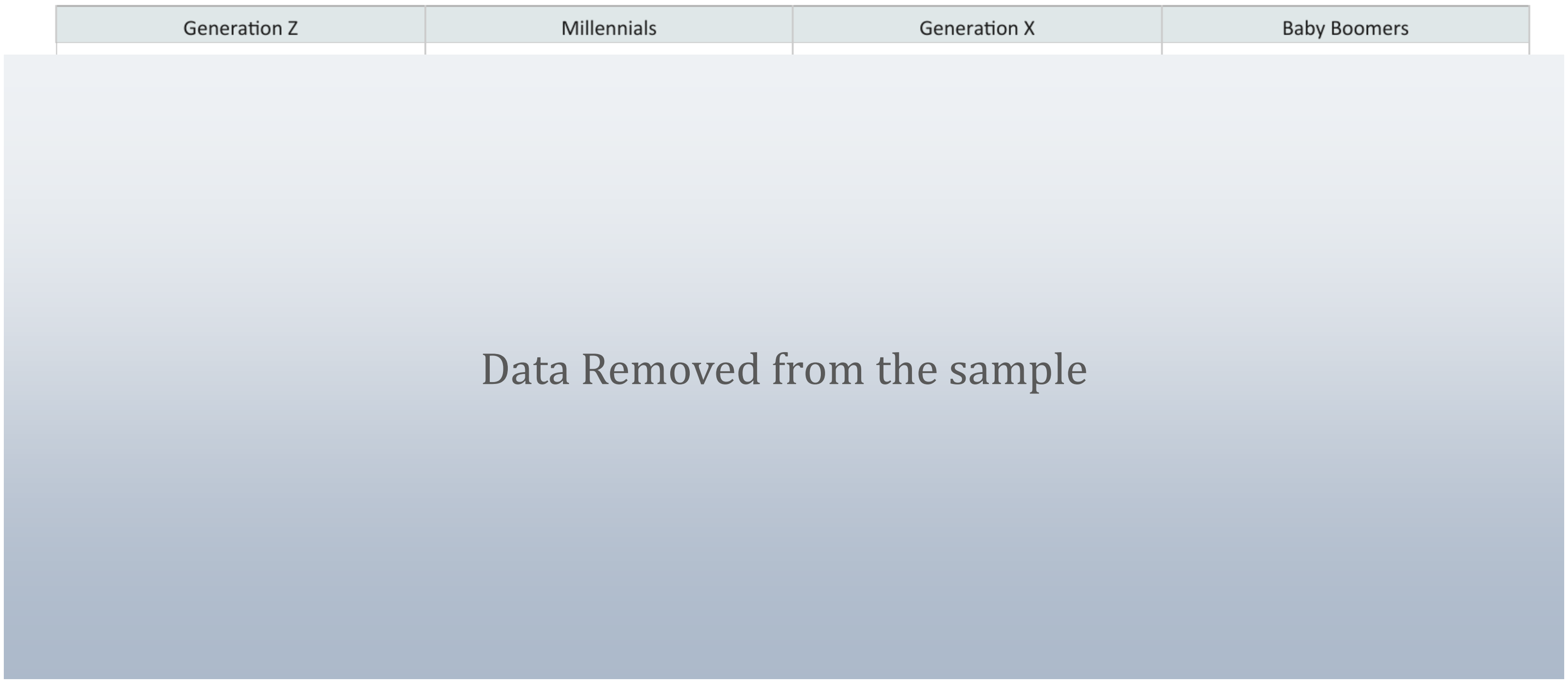
Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

All generations active on social networks, including over 70% of Boomers

Online activities by generation

n= 1,036

% of respondents (At least weekly)



- Visit or update social networking sites
- Browse online
- Take part in online video gaming
- Visit online news sites
- Visit health-related or medical sites
- Use VR to enhance shopping experience

Source: Euromonitor Voice of the Consumer: Lifestyles Survey 2021

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