

MDR

Quality, Dedication & Expertise

Prepared for

Broadcasting Authority

**Broadcasting Services Survey
2005**

- Executive Summary -

Executive Summary

Objectives

1. The objectives of the survey are –
 - (a) To assess the penetration and use of different types of television and sound broadcasting services as well as new forms of multimedia that are capable of providing broadcast-like services in Hong Kong households;
 - (b) To assess the public's satisfaction with programme diversity in the existing total broadcast output and to gauge their opinions on whether there is insufficiency in certain genres of programming;
 - (c) To assess the public's views on the appropriate degree of regulation for different types of broadcasting contents and services, as well as on the need for regulating broadcast-like services in emerging media like the Internet and the mobile phone platform; and
 - (d) To assess the public's awareness of and the effectiveness of the present complaint avenues for broadcasting contents provided by the Broadcasting Authority as well as the licensed broadcasters.

Sample Design and Data Collection Method

2. A random sample of living quarters was taken from the Frame of Quarters maintained by the Census and Statistics Department. Household visits were made to the sampled quarters and one member of age 15 or above was randomly selected from each household for interview. A total of 1 500 persons of age 15 or above were successfully enumerated by face-to-face interviews during household visits. The sample size achieved would generally produce survey findings with acceptable levels of precision. The following cases are taken for illustration –

Variable	Sample estimate	Coefficient of variation ¹	95% confidence interval
Proportion of households that were able to access domestic pay television programme services in their premises	33.8%	3.6%	(31.4%, 36.2%)
Proportion of persons aged 15 or above who had watched broadcast-like video materials via the Internet or mobile phones	13.9%	6.4%	(12.2%, 15.6%)

¹ Coefficient of variation is obtained by expressing the standard error as a percentage of the estimate to which it refers.

Fieldwork Period and Response Rate

3. Fieldwork was carried out between 15 April and 19 May 2005. The response rate was 72.0%.

Survey Findings

4. A summary of the key survey findings is presented below.

A. Penetration² and Use of Various Broadcasting Services

5. Domestic free television programme services (free TV) had 99.6% penetration of all households in Hong Kong. The penetration rate of sound broadcasting services (radio) was 95.2%. The household penetration rate of domestic pay television programme services³ (pay TV) was 33.8%.

6. Nearly all (98.9%) persons aged 15 or above had watched free TV in the month prior to the survey while 60.4% had listened to radio broadcast, 29.6% had watched pay TV, and 8.6% had watched the materials broadcast by other TV stations.⁴

7. Of the 98.9% persons who had watched free TV in the month prior to the survey, 85.1% often watched free TV, 14.4% occasionally, and 0.5% rarely. For those persons who often or occasionally watched free TV, their habits of watching free TV are as follows –

- (a) On average, they spent 3.0 hours watching free TV per day.
- (b) They normally watched free TV in the hours from 18:00 to 23:59.
- (c) 90% claimed TVB Jade as the channel they watched most often. The next most often watched channel was ATV Home, at 7.1%, followed by TVB Pearl at 2.5% and ATV World at 0.4%.

² “Penetration” is defined as the ability to access the services inside the premises irrespective of the device used.

³ The household penetration rate of domestic pay television programme services was based on residential households only and did not include pay TV subscribers from institutions and commercial establishments, such as pubs, restaurants and hotels.

⁴ Recorded TV programmes, video tapes, VCDs, DVDs, programmes on the Internet, and programmes of companies not licensed by the BA were not counted as TV broadcast.

8. Of the 60.4% persons who had listened to radio broadcast in the month prior to the survey, 53.2% often listened to radio broadcast, 40.6% occasionally, and 6.3% rarely. For those who often or occasionally listened to radio broadcast, their habits of listening to radio broadcast are as follows –

- (a) On average, they spent 2.0 hours listening to radio broadcast per day.
- (b) The two most common time slots when they listened to radio broadcast were the hours from 08:00 to 12:59 and 23:00 to 23:59.
- (c) Regarding the radio channel mostly listened to, those of more mentions were CR1 (24.2%), CR2 (19.7%), RTHK Radio 1 (17.9%) and RTHK Radio 2 (17.8%), followed by FM 997 Metro Showbiz (9.2%), RTHK Radio 5 (4.3%) and FM104 Metro Finance (3.6%).

9. Of the 29.6% persons who had watched pay TV in the month prior to the survey, 65.2% often watched pay TV, 28.5% occasionally, and 6.3% rarely. For those persons who often or occasionally watched pay TV, their habits of watching pay TV are as follows –

- (a) On average, they spent 1.6 hours watching pay TV per day.
- (b) They normally watched pay TV in the hours from 20:00 to 23:59.
- (c) Regarding the pay TV channel mostly watched, those of more mentions were all Cable TV channels including News 2 (18.0%), News 1 (13.3%) and Movie 1 (13.1%), followed by Entertainment channel (7.1%), Super Soccer (6.5%), Channel A (3.9%) and EPL (3.5%).

10. Free TV programmes classified as "Parental Guidance Recommended" (PG) are programmes with contents unsuitable for children's viewing⁵. Children can still watch these programmes but they are expected to be accompanied by and under the guidance of their parents or guardians. Of all persons aged 15 or above –

- (a) 85.2% were aware of these "PG" programmes while 14.8% were not.

⁵ In the Generic Code of Practice on Television Programme Standards, "children programmes" are defined as programmes designed specifically for children age groups up to the age of 15.

- (b) 72.6% had expressed their views on the age range of household members who should be accompanied by and under the guidance of their parents or guardians when they watch these “PG” programmes. The median age suggested was 12 years old or below. 2.7% considered that the company and guidance of parents or guardians were not necessary and 24.7% did not express any views.
- (c) 33.8% (500 respondents)⁶ of persons aged 15 or above claimed to have young members aged 15 or below in their household. Among this group, 62.9% (315 respondents) claimed that their young household members had watched “PG” programmes in the month prior to the survey. 54.2% (272 respondents) said that the young household members were accompanied by adult household members when watching “PG” programmes.
 - (i) The usual hours for those (272 respondents) who accompanied the household members aged 15 or below to watch “PG” programmes were 20:00 to 22:59.
 - (ii) The reasons for parents or other adult members to accompany members of age 15 or below to watch TV were that “they also enjoyed these programmes” (43.3%), “they had the responsibility to do so” (33.7%), “some contents of these TV programmes were unsuitable for members of age 15 or below to watch on their own” (26.6%), “they had time to do so” (19.5%) and “they wanted to get closer to members of age 15 or below” (6.7%).

B. Views on Programme Contents

Views on Free TV Programmes

11. For those persons who had watched free TV in the month prior to the survey, their views on free TV programmes are as follows –

- (a) 62.3% were satisfied with the programme variety and 29.0% gave an average rating. Only 2.0% were dissatisfied with the programme variety. 6.6% had no opinion.

⁶ For paragraphs 10(c) and 10(c)(i), figures in brackets are number of respondents giving the respective answers.

- (b) 5.9% had suggested other types of programmes to be broadcast on TVB and ATV such as geographical programmes (1.2%), historical programmes (1.2%), documentary (1.1%), educational programmes (0.8%), language programmes (0.7%) and health care programmes (0.6%).
- (c) Regarding the various types of programmes currently broadcast by TVB and ATV, over half considered them sufficient in quantity, particularly for dramas (81.7%), entertainment programmes (76.0%), news (74.9%) and current affairs programmes (70.2%). Apart from dramas and entertainment programmes, one-tenth or over considered certain types of programmes insufficient, particularly for arts and cultural programmes (23.1%), sports programmes (18.5%) and informative programmes (18.5%). Note that over one-tenth (12.6% to 26.0%) of the respondents did not express any views on the sufficiency of the different types of programmes.
- (d) As for the programmes of local productions broadcast on the Chinese channels of TVB and ATV⁷, such as dramas, entertainment programmes and informative programmes, 51.6% of free TV viewers considered them sufficient in quantity while 15.4% thought the opposite. 23.5% gave an average rating and 9.5% did not express any views.
- (e) 30.9% of free TV viewers claimed that they had come across offensive materials when watching TVB and ATV in the year prior to the survey while a substantially larger proportion (69.1%) had not. The offensive contents were “indecent materials” (44.5%), “violence” (34.3%), “disgusting scenes / plots” (23.5%), “crude language” (18.9%), “misleading factual materials” (17.6%), “horror” (16.8%), “nudity” (11.0%), “denigration” (8.2%), “sex” (6.6%) and “bias towards a certain community or organization” (6.3%).

Views on Radio Programmes

12. For those persons who had listened to radio broadcast in the month prior to the survey, their views on radio programmes are as follows –

- (a) 64.5% were satisfied with the variety of radio programmes and 25.0% gave an average rating. Only 0.5% were dissatisfied with the variety of radio programmes. 10.1%, however, did not express any views.

⁷ “Programmes of local productions” refer to those programmes (or most part of the programmes) produced by the TV stations themselves or those programmes produced locally without dubbing.

- (b) Only 1.4% had suggested other types of radio programmes to be broadcast the top suggestion was language programmes (0.5%).
- (c) Regarding the various types of programmes currently broadcast by radio stations, over half considered them sufficient in quantity, particularly for news (79.1%), current affairs programmes (75.9%), finance programmes (73.8%), music programmes (72.3%), informative programmes (69.3%) and entertainment programmes (68.5%). Over one-tenth considered the following four types of programmes insufficient. They were children programmes (16.3%), sports programmes (12.1%), arts and cultural programmes (11.3%) and radio dramas (10.7%). Note that about one-fifth or over (18.1% to 30.1%) did not express any views on the sufficiency of the respective types of programmes.
- (d) Only 11.4% of radio listeners said that they had come across offensive materials when listening to radio broadcast in the year prior to the survey while the majority (88.6%) had not. The offensive contents were “bias towards a certain community or organization” (29.3%), “indecent materials” (27.6%), “misleading factual materials” (27.1%), “crude language” (18.0%), “denigration” (12.8%), “horror” (11.3%) and “sex” (5.1%).

Views on Pay TV Programmes

13. Of those respondents who had watched the programmes broadcast by pay TV stations in the month prior to date of interview,

- (a) 37.2% considered programmes of local productions broadcast on the Chinese channels of pay TV, such as dramas, entertainment programmes and informative programmes, sufficient in quantity while 24.5% held the opposite view. 24.1% gave an average rating and 14.2% did not express any views.
- (b) 14.1% said that they had come across offensive materials when watching pay TV in the year prior to the survey while the majority (85.9%) had not. The offensive contents were “violence” (32.7%), “indecent materials” (30.2%), “horror” (18.4%), “crude language” (17.7%), “sex” (16.1%), “nudity” (11.2%), “misleading factual materials” (9.8%), “disgusting scenes / plots” (9.3%), “bias towards a certain community or organization” (5.7%) and “denigration” (4.6%).

Views on the “Locking Device” of Domestic Pay Television Programme Services

14. Of those persons aged 15 or above who were able to access pay TV in their premises, 56.4% considered that the locking device could effectively prevent persons aged under 18 from watching the adult materials broadcast on pay TV while 15.3% thought the opposite. 28.4% were uncertain about its effectiveness.

Views on Films on Adult Channels of Pay TV

15. Some films are never shown in cinemas but their VCDs, DVDs or video tapes can be sold or rented in video shops. The Obscene Articles Tribunal (OAT) may classify these films into articles and films classified as Class II articles can only be sold or rented to persons aged 18 or above. Of those persons aged 18 or above, 58.8% considered that it was appropriate for these Class II articles to be shown on the adult channels of pay TV while 20.3% considered it inappropriate. The remaining 20.8% had no opinion.

16. When asked whether films with standards slightly looser than those of Category III films shown in cinemas should be shown on the adult channels of pay TV, 43.4% of persons aged 18 or above considered that it was inappropriate, while 33.8% considered it appropriate. The remaining 22.8% had no opinion.

C. Views on Advertisements and Programme Promotional Messages

Acceptance of Different Types of Advertisements

17. Among the seven categories of unacceptable products or services⁸, whose advertisements are currently either prohibited on any TV and radio channels or allowed to be broadcast only on the adult channels of pay TV, over 60% of persons aged 15 or above were of the view that advertisements of the following three categories should be subject to the current prohibition or restriction. The three categories were escort services in general and dating services targeting young persons under the age of 18 (70.4%), pay-per-call information services offering adult material of sexual nature (68.2%) and vice establishments (60.4%).

⁸ The seven categories of unacceptable products or services are “fortune-telling (excluding publications of general interest)”, “betting (including pool)”, “organizations / companies / persons advertising for the purpose of giving betting tips”, “undertakers or others associated with death or burial (except columbaria)”, “vice establishments e.g. night clubs and massage parlours involving sexual activities”, “escort services in general and dating services targeting at young persons under 18”, and “pay-per-call information services offering adult material of sexual nature” which are allowed to be broadcast only on adult channels.

18. More respondents would accept advertisements for fortune-telling with 35.1% of them considered that such advertisements could be broadcast with restrictions on broadcast time or on certain channels and 39.6% considered these advertisements acceptable on any channel. For advertisements for undertakers or others associated with death or burial, 19.2% of respondents found them acceptable on any channels and 42.2% considered them acceptable subject to restrictions. For advertisements related to betting and provision of betting tips, more than 40% of respondents considered these advertisements acceptable subject to restrictions.

Acceptance of Cross-Programme Promotional Messages Unrelated to the Programme on Air

19. As regards the insertion of unrelated programme promotional messages into the programme on air, 62.9% of persons aged 15 or above found it acceptable but 29.2% had the opposite opinion, and 2.8% said that the acceptance depended on conditions such as the broadcast frequency and duration of occurrence.

20. Of the 62.9% persons who considered the insertion of unrelated programme promotional messages acceptable,

- (a) 53.0% supported that the frequency of occurrence of these messages should be regulated while 30.3% thought there was no such need and 16.6% had no opinion in this respect.
- (b) 48.9% considered that these messages could appear in all types of programmes. 29.6% thought that these promotional messages could appear in certain types of programmes only, with 24.4% suggesting dramas, 15.1% entertainment programmes (including game shows) and 11.5% films. The remaining 21.5% did not express any views.

D. Awareness of and Views on Complaint Avenues for Broadcasting Contents

21. The Broadcasting Authority provides complaint avenues for the public to lodge complaints about the materials broadcast by TV and radio stations. At the same time, TV and radio stations also provide complaint avenues for the public to lodge complaints to them directly. The survey results indicated that 47.6% of persons aged 15 or above were aware of the avenues provided by both parties while 18.1% were aware of the avenues provided by the Broadcasting Authority only and 5.8% the avenues provided by TV or radio stations only. The remaining 28.6% were aware of neither.

22. Of all persons aged 15 or above, 40.6% considered that lodging complaints to TV or radio stations first would help TV or radio stations to take follow-up actions effectively because “it let TV or radio stations know the problem directly and they would make improvement accordingly” (86.3%) and “TV or radio stations were accountable to the public” (19.7%). However, 28.4% held the opposite view mainly because they thought “TV or radio stations were only concerned with their own interests” (60.2%) and “TV or radio stations gave little importance to complaints made by the public” (47.6%). The remaining 31.0% had no opinion in this regard.

E. Views on the Need for Regulating Broadcast-like Services on the Internet and Mobile Phones

Video Materials Broadcast via the Internet or Mobile Phones

23. Clips of films, sports matches and video programme materials provided by TV stations are available via the Internet or mobile phones. The survey results indicate that 13.9% of persons aged 15 or above had watched such video materials through these media, with 11.4% having watched such materials via the Internet and 3.6% via mobile phones.

- (a) The major reasons for watching such video materials via the Internet or mobile phones were “able to watch such materials at any time and at any place” (65.9%), “able to watch the desired programmes at times other than the broadcast time” (28.5%), “such video materials were broadcast via the Internet or mobile phones only” (11.3%) and “for acquiring new information” (5.3%).
- (b) As for the 86.1% who had not watched such video materials via the Internet or mobile phones, their reasons were mainly “no such need” (57.3%), “did not know how to download such materials” (21.8%), “did not have the necessary devices or mobile phones to access Internet services” (19.7%), “inconvenient / troublesome” (11.5%) and “extra charges would be incurred” (5.5%).

24. 46.1% of persons aged 15 or above supported that there was a need to regulate the video materials broadcast via the Internet or mobile phones. Among them,

- (a) 56.3% considered that the regulations on such online video materials should be the same as those on TV broadcasting materials. The dominant reason was “similar materials should be subject to similar regulations” (91.5%).
- (b) 33.8% considered that the regulations on such online video materials should be tighter than the regulations on TV broadcasting materials. The dominant reason was “parents could hardly accompany their children to watch such materials” (88.0%).
- (c) 9.9% considered that the regulations on such online video materials should be lighter than the regulations on TV broadcasting materials. The two major reasons were “viewers of such online materials were fewer than TV viewers” (48.7%) and “to let viewers watch a wider variety of materials” (40.7%).

25. 20.1% of persons aged 15 or above thought that there was no need to regulate online video materials because “one could choose not to watch such materials” (45.9%), “viewers of such online materials were fewer than TV viewers” (24.3%), “to let viewers watch a wider variety of materials” (23.3%) and “providers of such materials would exercise self-discipline” (9.4%). The remaining 33.8% did not express any views.

Radio Programmes Broadcast on the Internet

26. The survey results indicate that 13.9% of persons aged 15 or above had listened to the radio programmes broadcast on the Internet⁹ and the most common reason was “they were able to listen to the desired programmes at times other than the broadcast time” (73.0%). However, the majority (86.1%) had not listened to these online radio programmes because “they did not know how to download those programmes” (31.2%), “they were not used to listening to radio programmes” (30.3%), “they found it inconvenient because of the need to get connected to the Internet” (28.8%) and “they did not have the necessary devices to access Internet services” (14.8%).

⁹ Online programmes broadcast by RTHK, Commercial Radio, Metro Broadcast and other online radio stations, etc. were included.

27. 37.3% of persons aged 15 or above supported that there was a need to regulate these online radio programmes. Among them,

- (a) 72.5% considered that the regulations on such online radio programmes should be the same as those on radio broadcasting materials. The dominant reason was “similar materials should be subject to similar regulations” (95.9%).
- (b) 20.0% considered that the regulations on such online radio programmes should be tighter than the regulations on radio broadcasting materials. The dominant reason was “parents could hardly accompany their children to listen to such materials” (95.2%).
- (c) 7.5% considered that the regulations on such online radio programmes should be lighter than the regulations on radio broadcasting materials. The two major reasons were “to let people listen to a wider variety of materials” (54.3%) and “online listeners were fewer than those who listened to the radio” (41.0%).

28. 24.1% thought that there was no need to regulate online radio programmes because “one could choose not to listen to such materials” (43.2%), “to let people listen to a wider variety of materials” (22.2%), “online listeners were fewer than those who listened to the radio” (16.6%) and “providers of such materials would exercise self-discipline” (16.1%). The remaining 38.6% had no opinion in this regard.