

Broadcasting Services Survey 2007

~ Executive Summary ~

Prepared for

Broadcasting Authority

By

CONSUMER SEARCH



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Table of Contents

Executive Summary	2
A. Survey Background and Objectives	2
B. Sample Design and Data Collection Method	3
C. Fieldwork Period and Response Rate	3
D. Survey Findings	4
1. Penetration and Usage Habits of Various Broadcasting Services	4
1.1. Penetration of Broadcasting Services	4
1.2. Use of Broadcasting Services	4
1.3. Usage Habits of Broadcasting Services	5
1.4. Views on Programmes that Required Parental Guidance	7
2. Views on Programme Contents	8
2.1. Domestic Free Television Programme Services (Free TV)	8
2.2. Sound Broadcasting Services (Radio)	11
2.3. Domestic Pay Television Programme Services (Pay TV)	13
2.4. Programmes Containing Religious Contents	15
2.5. "Locking Device" of Domestic Pay Television Programme Services	16
3. Awareness of and Views on Complaint Avenues for Broadcasting Contents	17
4. Conclusion	19
E. Acknowledgment	23

Executive Summary

A. SURVEY BACKGROUND AND OBJECTIVES

1. In order to track the viewing/ listening habits and attitudes of the local residents on matters relating to broadcasting in Hong Kong, the Broadcasting Authority (BA) has commissioned Consumer Search Hong Kong Ltd. to conduct the Broadcasting Services Survey 2007 (Survey 2007) in October 2006.
2. As a tracking survey, the findings of the survey have been compared with the survey results of the Broadcasting Services Survey 2005 (Survey 2005).
3. The key objectives of the Survey are to track the trends in:
 - (a) The penetration and use of different types of television and sound broadcasting services in Hong Kong households;
 - (b) The viewing and listening habits of the public;
 - (c) The public's views on programme diversity on television and sound broadcasting services; and
 - (d) The public's perception of the present complaint avenues for broadcasting contents provided by the Broadcasting Authority and the broadcasters.

B. SAMPLE DESIGN AND DATA COLLECTION METHOD

4. A random sample of living quarters was taken from the Frame of Quarters¹ 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 an interview.
5. A total of 1,625 persons of age 15 or above were successfully enumerated by face-to-face interviews during the household visits. The sample size achieved would generally produce survey findings with acceptable levels of precision. The following cases have been taken for illustration:

Variable	Sample Estimate	Coefficient of Variation ²	95% Confidence Interval
Proportion of households that were able to have access to domestic pay television programme services in their premises	45.0%	2.7%	(42.6%, 47.4%)
Proportion of radio listeners aged 15 or above who were satisfied with the programme variety of radio broadcast	55.8%	2.2%	(53.4%, 58.2%)

C. FIELDWORK PERIOD AND RESPONSE RATE

6. Fieldwork was conducted between 17 March and 1 June 2007 with an overall response rate of 71.1%.

¹ The *Frame of Quarters* is divided into two parts, namely, the Register of Quarters and the Register of Segments.

- The *Register of Quarters* (RQ) is a list of addresses of permanent quarters in built-up areas including urban areas, new towns and major developments in the New Territories. Each unit of quarters is identified by a unique address with details on the house number, street name, building name, floor number and flat number. Temporary structures like roof-top and backlane structures are usually not listed in the RQ. Each of them is treated as an attachment to the nearest listed quarters in the RQ. As at mid 2006, there were 2.32 million quarters (excluding those not for residential / partially residential purposes) in the RQ.
- The *Register of Segments* (RS) is a list of area segments in non-built-up areas. Each area segment is a small piece of land delineated by some physical or easily identifiable boundaries such as streams, footpaths, lanes and ditches and each segment contains eight to fifteen quarters. The use of area segments in non-built-up areas is necessary because the quarters in these areas may not have clear addresses and hence cannot be easily identified. The area segments can be identified through segment maps and location maps. As at mid 2006, there were 16,771 area segments (with an estimated total of 0.18 million quarters therein) in the RS.

Source: The Census and Statistics Department, Hong Kong

² Coefficient of variation is obtained by expressing the standard error as a percentage of the estimate to which it refers.

D. SURVEY FINDINGS

7. This executive summary contains the key findings of the Broadcasting Services Survey 2007 (Survey 2007).

1. PENETRATION³ AND USAGE HABITS OF VARIOUS BROADCASTING SERVICES

1.1. Penetration of Broadcasting Services

8. While domestic free television programme services (free TV) reached 99.1% penetration of all households in Hong Kong, the penetration rate of sound broadcasting services (radio) was 94.0%. The household penetration rates of domestic pay television programme services⁴ (pay TV) and other TV stations (including satellite TV) were 45.0% and 18.1% respectively.
9. When compared with the previous survey completed in 2005 (Survey 2005), the level of penetration of most broadcasting services such as free TV, radio and other TV stations had been maintained whereas that of pay TV had significantly increased from 33.8% in 2005 to 45.0% in 2007.

1.2. Use of Broadcasting Services⁵

10. Nearly all persons aged 15 or above (98.8%) had watched free TV in the month prior to the survey. While two-thirds had listened to radio broadcast (66.5%), nearly half of them had watched pay TV (46.8%)⁶. 13.8% had watched the materials broadcast by other TV stations (including satellite TV). Comparing to Survey 2005, significant increase in the use of most types of broadcasting services was observed, except free TV which had maintained a stable usage level.

³ "Penetration" is defined as the ability to have access to the services in residential premises irrespective of the device used.

⁴ The household penetration rate of domestic pay television programme services reflected the penetration among residential households only. It had not included any pay TV subscriptions from institutions or commercial establishments such as pubs, restaurants or hotels.

⁵ Recorded TV programmes, video tapes, VCDs, DVDs, programmes on the Internet, and programmes of services not licensable under the Broadcasting Ordinance were not counted as TV broadcast.

⁶ The usage of pay TV (46.8%), measured in terms of having watched any pay TV programmes at home, restaurants, pubs or other places in the past month, was higher than the penetration rate of pay TV (45.0%) which was referred to the access to the pay TV services in the residential premises.

1.3. Usage Habits of Broadcasting Services

Domestic Free Television Programme Services (Free TV)

11. Among those (98.8%) who had watched free TV in the month prior to the survey, more than four in five watched free TV on a daily basis (i.e. watched daily, 81.8%). While over one-tenth watched three to six days a week (i.e. watched often, 11.5%), 6.5% watched it occasionally (i.e., at least one day a month but at most two days a week). Only a few rarely watched free TV (i.e. one day beyond one month's time, 0.2%).
12. For those who watched free TV at least one day every month, their viewing habits are as follows:
 - (a) On average, they spent 3.0 hours watching free TV per day which was the same as that in Survey 2005.
 - (b) They normally watched free TV in the hours from 18:00 to 23:59 which was identical to Survey 2005.
 - (c) Close to six in seven of them claimed TVB Jade as the channel they watched most often (84.1%), followed by ATV Home (10.9%), TVB Pearl (4.6%) and ATV World (0.3%). When comparing to Survey 2005, a drop for TVB Jade (as the most watched channel) was observed (84.1% versus 90.0% in 2005). On the other hand, both ATV Home (10.9% versus 7.1% in 2005) and TVB Pearl (4.6% versus 2.5% in 2005) registered gain in claimed viewership.

Sound Broadcasting Services (Radio)

13. Among those (66.5%) who had listened to radio broadcast in the month prior to the survey, 40.7% listened to it daily, 25.9%, on an often basis, 32.0% occasionally, and 1.5% rarely.
14. For those who listened to radio broadcast at least one day every month, their habits of listening to radio broadcast are as follows:
 - (a) On average, they spent 1.7 hours listening to radio broadcast per day. This represented a slight decline when compared with the 2.0 hours as noted in Survey 2005.
 - (b) The most common time slot when they listened to radio broadcast was the hours from 08:00 to 11:59. This was shorter than the hours from 08:00 to 12:59 as recorded in Survey 2005.
 - (c) Regarding the radio channel that was most often listened to, those of more mentions were CR1 (22.4%), RTHK Radio 1 (20.0%), CR2 (18.1%) and RTHK Radio 2 (14.7%). Others included FM 997 Metro Showbiz (7.8%), FM104 Metro Finance (6.9%) and RTHK Radio 5 (4.2%). It was worth noting that mentions on FM104 Metro Finance had experienced increase from 3.6% in 2005 to 6.9% in 2007.

Domestic Pay Television Programme Services (Pay TV)

15. Among those (46.8%) who had watched pay TV⁷ in the month prior to the survey, nearly one in two watched it daily (49.5%), 18.0% often, 30.2% occasionally, and 2.3% on a rarely basis.
16. For those who watched pay TV at least one day every month, their viewing habits are outlined below:
 - (a) On average, they spent 1.7 hours watching pay TV per day which was the same as that in Survey 2005.
 - (b) The usual hours these people watched pay TV were from 19:00 to 23:59 which was longer than the hours from 20:00 to 23:59 as reported in Survey 2005.
 - (c) Regarding the most watched pay TV channel, channels with more mentions were mainly Cable TV channels such as the News Channel (18.1%), Movie 1 (7.1%), Entertainment channel (6.4%), Super Soccer Channel (5.0%), Channel A (4.9%) and EPL Channel (4.4%). It was worth noting that mentions on now Broadband TV channels increased significantly from 9.8% in 2005 to 28.0% in 2007, with STAR Chinese Movies (5.8%) and 24-Hour ATV News (3.3%) as the two most popular channels. Mentions on TVB Pay Vision channels also significantly increased (from 1.0% in 2005 to 5.8% in 2007). Its most popular channel remained to be TVBN (1.2%).

⁷ The question specified that "having watched" included watching pay TV programmes at home, restaurants, pubs or other places, which was different from "penetration" referring to "having access to the pay TV services" among residential households under Footnote 4.

1.4. Views on Programmes that Required Parental Guidance

17. TV Programmes classified as "Parental Guidance Recommended" (PG) are programmes with contents unsuitable for children's viewing⁸. Children can still watch these programmes but they are recommended to be accompanied by and under the guidance of their parents or guardians on viewing.
- (a) Among those persons aged 15 or above, seven in eight (87.2%) were aware of the "PG" programmes.
 - (b) 81.0% of them 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 in watching these "PG" programmes. The median age suggested was 12 years old or below. While 2.5% considered that the companion and guidance of parents or guardians were not necessary, 16.5% provided no comments on this issue.
 - (c) More than one third of those aged 15 or above (34.5%) claimed having young members aged 15 or below in the household. Among these households, more than half of them (55.6%) mentioned that their young household members had watched "PG" programmes in the month prior to the survey. This represented a drop when compared with the previous survey (55.6% versus 62.9% in 2005).
 - (d) When asking those households with young household members watching "PG" programmes in the month prior to the survey if they were accompanied by parents or other household members aged 18 or above when they watched the "PG" programmes, the majority of them (93.3%, which was significantly higher than the previous survey of 86.2%) responded that the young members had been accompanied by adult household members (52.3% every time and 41.0% sometimes).
 - i. The usual hours for those who accompanied the household members aged 15 or below to watch "PG" programmes were 19:00 to 22:59 which represented one hour earlier than what was observed in Survey 2005 (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 too, wanted to watch these programmes" (46.2%), "some contents of the TV programmes were not suitable for these members (aged 15 or below) to watch on their own" (36.1%), "they had time" (35.8%), "they thought they had the responsibility to do so" (34.0%) or "they wanted to get closer to these members (aged 15 or below)" (17.4%).

⁸ As defined in the Generic Code of Practice on Television Programme Standards dated 4 May 2007, "Children's Programmes" means programmes which are designed specifically for children of different age groups up to the age of 15.

2. VIEWS ON PROGRAMME CONTENTS

2.1. Domestic Free Television Programme Services (Free TV)

18. For those persons (98.8%) who had watched free TV in the month prior to the survey, their views on free TV programmes are as follows:
- (a) More than one in two persons (56.2%) who had watched free TV in the month prior to the survey found the programme variety satisfactory. While one third of them (34.1%) gave an average rating, 6.6% had expressed their dissatisfaction with the subject matter. 3.1% had no opinion.
 - i. More persons with access to pay TV service expressed their dissatisfaction with the variety of free TV programmes (9.5% versus average of 6.6%).
 - ii. Similarly, more persons who had watched pay TV programme service in the past month (i.e. pay TV viewers) expressed their dissatisfaction with the variety of free TV programmes (8.7% versus average of 6.6%).
 - (b) A significant drop in positive mentions on the programme variety was observed when comparing to the previous survey (56.2% versus 62.3% in 2005). While more of them in the current Survey provided neutral comments (34.1% average rating versus 29.0% in 2005), more of them, across most age groups, offered negative mentions (6.6% very/ quite dissatisfied versus 2.0% in 2005).
 - (c) 12.4% provided suggestions on the additional types of programmes to be broadcast on TVB and ATV. Most mentions were related to documentaries associated with topics related to geography, nature, animal and wildlife (4.1%), documentaries on historical happenings (1.8%), science and technology programmes (1.4%) or documentaries in general (1.0%). A few of them proposed programmes that were related to Chinese opera (0.8%), international information (0.7%), fashion and beauty (0.6%) and religion (0.6%).

- (d) Concerning the quantity of the various types of programmes⁹ currently broadcast by TVB and ATV, the majority of the proposed content types were acknowledged by at least half of the respondents as sufficient, particularly for dramas (84.6%), news (79.3%), entertainment programmes (72.8%) and food programmes (70.1%). While over one-fifth considered the health programmes (34.4%), education programmes (34.2%), arts and culture programmes (26.7%), films (24.6%) and sports programmes (24.5%) as insufficient, more than five percent of the respondents (6.5% to 26.3%) did not express any views on the subject matter.
- (e) Generally speaking, persons with access to pay TV service, when compared with those who did not have access to pay TV service, had higher tendency to consider the quantity of the various types of programmes currently broadcast on TVB and ATV as insufficient. This was particularly obvious with arts and culture programmes (31.9% versus average of 26.7%), sports programmes (29.1% versus average of 24.5%), news and current affairs commentary programmes (20.9% versus average of 17.7%), music programmes (20.8% versus average of 17.7%) and finance programmes (17.3% versus average of 14.2%).
- (f) It was worth noting that some types of programmes had received a relatively higher level of insufficiency ratings than the previous survey. Specifically, they were arts and culture programmes (26.7% versus 23.1% in 2005), films (24.6% versus 16.0% in 2005), sports programmes (24.5% versus 18.5% in 2005), music programmes (17.7% versus 15.0% in 2005), current affairs programmes (17.1% versus 13.1% in 2005), finance programmes (14.2% versus 10.8% in 2005) and entertainment programmes (9.7% versus 7.3% in 2005).
- (g) Regarding the programmes of local productions such as dramas, entertainment programmes and informative programmes that were broadcast on the Chinese channels of TVB and ATV¹⁰, 57.8% of free TV viewers considered these programmes sufficient in quantity whereas 13.2% thought it otherwise (i.e. insufficient in quantity). While 22.3% gave an average rating, 6.6% had no comments. More positive mentions were received as compared with 2005, with more viewers across most age groups supported that the quantity was "very sufficient".

⁹ The types of programmes that were identified for the sufficiency evaluation included arts and culture programmes, children programmes, current affairs programmes, dramas, entertainment programmes (including game shows), films, finance programmes, information programmes that had been broken down into education programmes, food programmes, health programmes, property programmes and travelogues (new arrangement in this Survey), music programmes, news, news and current affairs commentary programmes (new item in this Survey) and sports programmes.

¹⁰ "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.

- (h) Close to seven in ten persons (69.4%) regarded the current standards on programme contents (for example sex, violence and use of language) broadcast on TVB and ATV as appropriate. 15.1% commented that the current standards were too lenient or a bit lenient whereas 7.2% mentioned that the current standards were too tight or a bit tight.
- i. The common reasons for considering the current standards were too lenient or a bit lenient included "contents with crude language" (49.0%), "contents with violence" (33.2%), "programmes with amorous/ sexual/ nudity/ adults contents" (26.0%), "programmes with indecent language" (6.6%) or "programmes with indecent contents that might affect the growth of children" (6.2%). Other reasons comprised "contents with exaggeration" (2.5%) or "contents with attitude toward sex are too open" (1.1%).
 - ii. Over half of those who thought the current standards were a bit tight or too tight because they found "control on language is too tight" (56.4%). Other reasons included "absence of or reduction of programmes with amorous/ sexual/ adults contents" (22.4%), "control of violence contents is too tight" (11.6%), "comments from programme host are too conservative" (9.6%) or "control on contents is too strict leading to too much cut on contents" (7.0%).
- (i) Concerning the incidence of free TV viewers coming across offensive materials in programme contents or advertising contents broadcast on free TV in the past year, the findings were outlined as follows:
- i. Close to seven in ten free TV viewers (69.3%) claimed they had not come across any offensive materials in programme contents when watching TVB and ATV in the year prior to the survey. Only one in three (30.7%) had that offensive experience. Such offensive programme contents were related to "indecent materials (e.g. obscene, bad taste and etc)" (39.1%), "violence" (35.8%), "crude language" (33.5%), "misleading factual materials" (25.2%), "horror" (19.4%), "nudity" (18.7%), "bias towards a certain community or organization" (18.1%), "dangerous acts" (17.6%), "disgusting scenes/ plots" (16.5%), "sex" (16.2%) or "denigration" (13.5%).
 - ii. A relatively larger proportion of free TV viewers had not come across offensive materials in advertising contents (82.6%, advertising contents; 69.3%, programme contents). Less than one-fifth of them (17.4%) had experienced offensive materials in advertising contents. While one third of these experiences were related to "misleading factual materials" (34.1%), or "indecent materials" (33.8%), more than one-tenth were related to "nudity" (16.7%), "horror" (15.5%), "denigration" (15.0%), "disgusting scenes/ plots" (14.3%), "dangerous acts" (11.6%) or "violence" (10.4%). The offensive experiences that were related to "crude language" (8.3%), "bias towards a certain community or organization" (7.9%) or "sex" (7.9%) were mentioned by less than ten percent of the respondents.

- iii. For those persons (15.1%) who considered the current standards on programme contents for free TV as too lenient / a bit lenient, more of them (71.1% versus average of 30.7% in programmes; 39.7% versus average of 17.4% in advertisements) claimed they had come across offensive materials in programmes and/ or advertisements.
- iv. Comparing to the previous survey, a significantly higher proportion of free TV viewers had encountered offensive materials in either programme contents or advertising contents from free TV (35.8% versus 30.9% in 2005). While the incidences that were related to indecent materials (43.2%) or violence (33.1%) were similar to what had reported in the previous survey, more of these offensive contents were related to misleading factual materials (31.9% versus 17.6% in 2005), crude language (30.4% versus 18.9% in 2005), horror (22.4% versus 16.8% in 2005), nudity (21.9% versus 11.0% in 2005), bias towards a certain community or organization (16.9% versus 6.3% in 2005), denigration (16.4% versus 8.2% in 2005) or sex (15.9% versus 6.6% in 2005). There was a drop in mentions of offensive contents associated with disgusting scenes/ plots (18.6% versus 23.5% in 2005).

2.2. Sound Broadcasting Services (Radio)

- 19. For those persons (66.5%) who had listened to radio broadcast in the month prior to the survey, their views on radio programmes were as follows:
 - (a) 55.8% were satisfied with the variety of radio programmes which was relatively lower than what was attained in 2005 (64.5%). While more persons offered neutral views (35.9%, average rating versus 25.0% in 2005), 3.4% had voiced out their dissatisfaction on the variety of radio programmes (versus 0.5% in 2005). Less than five percent of radio listeners (4.9% versus 10.1% in 2005) responded with no comments.
 - (b) The majority of radio listeners (94.1%) did not have any further suggestions on additional types of radio programmes apart from the existing programme types. Even among those who had new suggestions, each of these suggestions was mentioned by a few of the audience. Examples included historical programmes (1.0%), Chinese opera programmes (0.9%), religious programmes (0.8%), science and technology programmes (0.8%), mysterious programmes (0.4%), traffic news (0.4%), community programmes (0.4%), phone-in programmes (0.4%) and women's/ parental programmes (0.4%).
 - (c) At least one in two audiences found the various types of radio programmes currently broadcast by radio stations sufficient in quantity. These were particularly obvious for news (86.0%), current affairs programmes (73.1%), finance programmes (72.7%), news and current affairs commentary programmes (71.5%), music programmes (71.5%), and entertainment programmes (66.9%).

- (d) More than one-fifth considered the following types of programmes insufficient in quantity. They were health programmes (27.1%), education programmes (24.7%), children programmes (23.1%) and arts and culture programmes (19.8%). It was worth noting that for all types of radio programmes except news (8.6%), more than one-fifth (17.4% to 30.5%) had no opinions on the sufficiency or insufficiency in programme quantity. Other than the new items added for the current Survey, all programme types were recorded a significantly higher percentage of perceived insufficiency in quantity than what was reported in 2005, particularly children programmes (23.1% versus 16.3% in 2005), arts and culture programmes (19.8% versus 11.3% in 2005) and sports programmes (18.3% versus 12.1% in 2005). More of them were aged 15-24 (38.4%, children programmes; 31.4%, arts and culture programmes; 33.9% sports programmes).
- (e) More than three-quarters of radio listeners (77.2%) agreed that the current standards on programme contents (for example sex, violence and use of language) broadcast on radio were appropriate. More respondents found the standards too lenient or a bit lenient (9.2%) than those considered the standards too tight or a bit tight (4.0%). A larger proportion of persons aged 18-24 considered the current standards too tight or a bit tight (10.3% versus average of 4.0%).
- i. For those claiming the current standards as too lenient or a bit lenient, the main reason was related to "contents with crude language" (48.0%). This was followed distantly by "programmes with indecent language" (23.8%), "comment without reason/ not respectful" (12.8%), "contents with exaggeration" (11.3%), "contents with misleading factual materials" (7.2%) or "programmes with amorous/ sexual/ nudity/ adults contents" (5.2%).
 - ii. Two-thirds of those who mentioned the current standards as too tight or a bit tight had given the reason that the "comments from programme host are too conservative" (67.6%). One quarter of them observed that the current "control on language is too tight" (23.0%) and one in ten remarked about the "absence of/ reduction of programmes with amorous/ sexual/ adults contents" (13.9%). 7.7% mentioned that the current standards on the "control of violence contents is too tight".

- (f) More than four in five radio listeners (83.3%) did not encounter any offensive materials in programme contents or advertising contents when listening to radio broadcast in the year prior to the survey. In other words, 16.7% of them had been exposed to contents that were considered as offensive in the past year. There was an increase when compared with the previous survey (11.4% in 2005), in particular, those aged 25-34 (19.9% versus 7.8% in 2005). While the report of most types of offensive materials was more or less the same as in the previous survey, there was a significant increase in mentions of contents that were related to denigration (28.5% versus 12.8% in 2005).
- i. While 84.3% of radio listeners had not encountered any offensive materials in programme contents broadcast on radio, 15.7% of them, in particular, those managers, professionals and associate professionals (26.8%) had that experience. At least a quarter of them had been exposed to offensive materials that were related to "bias towards a certain community or organization" (35.2%), "indecent materials" (33.4%), "misleading factual materials" (32.8%), "denigration" (28.8%) or "crude language" (24.6%). Some of them heard contents with "horror" (10.9%), "sex" (5.5%) or "dangerous acts" (1.8%).
 - ii. While the majority of radio listeners (97.2%) did not encounter offensive materials in advertising contents on radio, a few of them did (2.8%). Most of these contents were related to "misleading factual materials" (50.6%) or "indecent materials" (45.1%). Other offensive advertisement contents include "crude language" (24.6%), "denigration" (16.3%), "horror" (13.6%), "bias towards a certain community or organization" (9.1%), "sex" (4.6%) or "dangerous acts" (2.5%).
 - iii. For those persons (9.2%) who considered the current standards on programme contents for radio broadcast as too lenient / a bit lenient, more of them (65.3% versus average of 15.7% in programmes; 9.8% versus average of 2.8% in advertisements) claimed they had come across offensive materials in programmes and/ or advertisements.

2.3. Domestic Pay Television Programme Services (Pay TV)

20. For those persons (46.8%) who had watched the programmes broadcast by pay TV stations in the month prior to the survey, their views on pay TV programmes are as follows:
- (a) While 43.4% pay TV viewers considered programmes of local productions such as dramas, entertainment programmes and informative programmes that were broadcast on the Chinese channels of pay TV as sufficient in quantity, 21.7% of them commented that the quantity was insufficient. 20.2% gave an average rating and 14.7% had no comments on the issue. Similar to free TV, pay TV viewers were more satisfied with the quantity of local productions in this survey (43.4% versus 37.2% in 2005). A significant enhancement was recorded among those claiming that the quantity was "very sufficient" (8.1% versus 1.3% in 2005).

- (b) Both pay TV and free TV viewers demonstrated similar pattern on the current standards on programme contents (for example sex, violence and use of language) broadcast on the corresponding stations. Close to seven in ten pay TV viewers (69.2%) regarded the current standards on programme contents as appropriate. 15.2% commented that the current standards were too lenient or a bit lenient whereas 3.1% mentioned that the current standards were too tight or a bit tight. 12.5% did not express any views on the issue.
- i. For those pay TV viewers who commented that the current standards were too lenient or a bit lenient, their reasons were related to "programmes with amorous/ sexual/ nudity/ adults contents" (45.6%), "contents with crude language" (31.6%) or "contents with violence" (30.2%). Less than one-tenth of them associated it with "programmes with indecent language" (9.9%), "insufficient warning/ guide" (3.4%) or "programmes with indecent contents that might affect the growth of children" (2.6%).
 - ii. For those who mentioned that the current standards were a bit tight or too tight, their reasons were related to "control on language is too tight" (40.1%), "absence of/ reduction of programmes with amorous/ sexual/ adults contents" (33.0%), "comments from programme host are too conservative" (14.2%) or "control on contents is too strict leading to too many cuts" (12.2%).
- (c) More Pay TV viewers (73.2%) did not encounter any offensive materials in programme contents or advertising contents in the year prior to the survey whereas one quarter of them (26.8%) had which represented a substantial increase as compared with the previous survey (14.1% in 2005). The phenomenon was observed across most age groups of pay TV viewers and for most offensive items such as "horror" (37.5% versus 18.4% in 2005), "misleading factual materials" (29.3% versus 9.8% in 2005), "crude language" (28.9% versus 17.7% in 2005), "nudity" (28.8% versus 11.2% in 2005) or "disgusting scenes/ plots" (22.1% versus 9.3% in 2005).
- i. 22.9% pay TV viewers said they had come across offensive materials in programme contents when watching pay TV. The common types of offensive materials included "violence" (40.2%), "horror" (37.7%), "crude language" (33.1%), "nudity" (29.6%), "indecent materials" (27.9%), "sex" (23.3%), "disgusting scenes/ plots" (21.8%), "misleading factual materials" (20.3%), "bias towards a certain community or organization" (16.7%), "denigration" (15.1%) or "dangerous acts" (13.7%).
 - ii. While the majority of pay TV viewers (90.5%) did not encountered offensive materials in advertising contents, close to one in ten had that experience (9.5%). More of these offensive materials were related to "misleading factual materials" (42.9%), "indecent materials" (29.5%), "nudity" (18.4%), "horror" (17.8%), "denigration" (17.4%), "disgusting scenes/ plots" (15.2%), "violence" (13.5%), "dangerous acts" (10.9%), "bias towards a certain community or organization" (9.3%), "sex" (5.0%) or "crude language" (2.6%).

- iii. For those persons (15.2%) who considered the current standards on programme contents for pay TV as too lenient / a bit lenient, more of them (54.7% versus average of 22.9% in programmes; 13.6% versus average of 9.5% in advertisements) claimed they had come across offensive materials in programmes and/ or advertisements.

2.4. Programmes Containing Religious Contents

21. More than two-fifths of persons aged 15 or above (42.4%) had watched programmes containing religious contents on TV or listened to these contents on radio. A significantly higher proportion of the respondents who attained matriculation or above education level (51.6%); respondents who had monthly household income of HK\$40,000 or above (50.0%); and respondents who were students (50.5%) or managers, professionals or associate professionals (47.9%) had watched or listened to programmes with religious contents.
22. Among those who had been exposed to programmes containing religious contents, most of them watched or listened to these contents from free TV (87.6%), followed distantly by pay TV (15.9%) and radio broadcast (13.4%).
23. Persons who had come across programmes containing religious contents were asked about their awareness and acceptance of selected religious contents. These included (i) "explore or query the good or negative aspects of different religious beliefs", (ii) "express one faith as being better than the others", (iii) "include message to promote a particular religious belief", (iv) "include comments that a particular religious belief is the only valid one" and (v) "clearly identify the religion portrayed (e.g. Protestantism, Catholicism, Islam, Buddhism, Taoism, and Hinduism)".
 - (a) More of them were aware of programmes that contained religious contents that were related to "clearly identifying the religion portrayed (e.g. Protestantism, Catholicism, Islam, Buddhism, Taoism, and Hinduism)" (82.9%), "including message to promote a particular religious belief" (66.3%), "including comments that a particular religious belief is the only valid one" (45.1%). While one in four was aware of contents related to "expressing one faith as being better than the others" (26.3%), less than one in five noticed contents that were related to "exploring or querying the good or negative aspects of different religious beliefs" (18.1%).
 - (b) More than three in five persons who had come across programmes containing religious contents acknowledged their acceptance of the various contents highlighted, particularly, on contents related to "clearly identifying the religion portrayed (e.g. Protestantism, Catholicism, Islam, Buddhism, Taoism, and Hinduism)" (83.5%) and "including message to promote a particular religious belief" (75.8%). The acceptance levels of "include comments that a particular religious belief is the only valid one" and "express one faith as being better than the others" were 63.5% and 60.8% respectively.

- (c) Whether the religion portrayed had been clearly identified in programmes containing religious contents had remarkable impact on the level of acceptance of the contents. To illustrate the point, the level of acceptance would drop substantially should the identification of the religion portrayed (e.g. Protestantism, Catholicism, Islam, Buddhism, Taoism, and Hinduism) shifted from "clearly identified" (83.5%) to "not clearly identified" (48.7%).

2.5. "Locking Device" of Domestic Pay Television Programme Services¹¹

24. Two-thirds of those aged 15 or above and who were able to watch pay TV at home (65.0%) recognized the "locking device" for pay TV services provided by the licensees. While more of them were male (74.9%); those aged 25-34 (75.2%); those educated to upper secondary (72.6%); those belonged to the occupation groups of managers, professionals or associate professionals (77.8%) or clerks, service workers or shop sales (73.5%); and those with monthly household income of HK\$20,000 or more (70.8%, HK\$20,000-HK\$39,999 and 74.1%, HK\$40,000 or more).
25. For those who were aware of this service, close to seven in ten (69.9%) considered the locking device as effective tool to prevent persons aged under 18 from watching the adult materials broadcast on pay TV. While one in five (20.4%) thought the device was not effective, one in ten (9.7%) were uncertain about its effectiveness.

¹¹ Questions on the locking device of pay TV were revised in Survey 2007 and comparison with findings of Survey 2005 has not been made.

3. AWARENESS OF AND VIEWS ON COMPLAINT AVENUES FOR BROADCASTING CONTENTS

26. 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.
- (a) The survey results indicated that more than seven in ten persons aged 15 or above (73.1%) were aware of the channel offered by Broadcasting Authority for lodging complaints about the programme or advertising materials broadcast by TV or radio stations, of which 52.6% were aware of the complaint channels provided by both the Broadcasting Authority and the broadcasters. The remaining 47.4% were only aware of the avenues provided by the Broadcasting Authority.
 - (b) While a few of persons aged 15 or above (4.9%) only knew the complaint channels as provided by TV or radio stations, more than one-fifth (22.1%) had no ideas on these complaint avenues. The latter was particularly obvious among those aged 55 or above (28.8%, 55-64; 58.0%, 65 or above); those with primary education (53.2%); those occupying elementary occupations (35.2%) or those who were economically inactive (30.0%, homemakers; 52.4%, retired persons).
 - (c) When comparing to the previous survey, it was encouraging to note that significant improvement in the awareness of the avenues provided by Broadcasting Authority was recorded (73.1% versus 65.7% in 2005). On the other hand, a smaller proportion of persons aged 15 or above was aware of the complaint avenues as provided by TV/radio stations (43.3% versus 53.4% in 2005).
27. Nearly half of persons aged 15 or above (45.8%) would consider complaining directly to Broadcasting Authority, in particular those aged 18-44 (57.8%, aged 18-24; 62.8%, aged 25-34; 57.4%, aged 35-44). Close to one-fifth (18.7%) opted for the electronic media (15.9%, directly to the relevant TV stations or radio stations; 3.4%, through TV stations or radio stations such as in phone-in programmes). Others would complain through online discussion forum (6.7%, particularly so, persons aged 15-24, 22.0%) and print media such as newspapers and magazines (3.1%, in particular, newspaper, 3.0%).

28. To be a preferred channel of lodging complaints, the following factors had to be fulfilled.
- (a) Be seen as an effective channel (62.4%);
 - (b) Be providing quick and efficient services to the complainants (22.4%);
 - (c) Be perceived as a fair, independent and reliable party (18.6%);
 - (d) Be prepared to have high profile, that is, to be known by the complainants (16.6%).
 - i. Broadcasting Authority (BA) was preferred because more persons perceived it as more effective (69.7%, for BA has the authority to regulate broadcasting programmes) or a fair, independent and reliable party (26.0%). Other than these, one-fifth knew this channel only (20.7%).
 - ii. Persons regarded electronic media as their preferred channel because the complainants were able to make complaints/ reflect opinions to the programme provider directly (54.5%). Also more complainants had the views that the electronic media were quick and efficient (39.2%).
29. It was worth noting that more than one third (35.6%) did not prefer to lodge any complaint on broadcasting contents. Among them, 37.4% did not think there was a need as they could switch to other channels. 32.0% commented the process was "too complicated/ troublesome". Other reasons included "don't know avenues of complaint" (24.4%), "too busy" (12.6%) or "don't think complaint is effective" (9.6%).

4. CONCLUSION

30. Observations on the major findings of Survey 2007 are highlighted below.

4.1. Penetration and usage of Broadcasting Services

31. The substantial growth in the penetration and use of pay TV services illustrated the continuing development of the pay TV market.
- (a) The penetration of free TV and radio services remained high at 99.1% and 94.0% respectively and that for the pay TV increased to 45.0% from 33.8% in Survey 2005.
 - (b) The past month usage of free TV maintained high at 98.8%. Growth in the usage of sound broadcasting services (from 60.4% in 2005 to 66.5% in 2007) and pay TV (from 29.6% in 2005 to 46.8% in 2007) was observed.
32. The expansion of pay TV services had been continuously stimulating the development of the local broadcasting services by offering choices and varieties to the current free TV and radio services.
- (a) Cable TV continued to be the most watched pay TV service, though its share of mentions had been substantially eroded as a result of the active participation of the other service providers such as now Broadband TV and TVB Pay Vision. The drop in share reflected a slower growth rate (not a decline in usage) of Cable TV than the other service providers.
 - (b) News, movie, sports and entertainment remained the most watched channels of pay TV programme services.
33. Most viewing/ listening habits of the public were the same as that reported in Survey 2005. While the television programme services continued to be the regular choice of the local residents during the night-time, radio was a more prominent choice in the morning. The trend of more regular viewing in the night-time by pay TV viewers might reflect the growing importance of the pay TV sector in the provision of television programme services in the local broadcasting scene.
- (a) Viewers of television programme services spent an average of 3.0 hours and 1.7 hours per day watching free TV and pay TV respectively which were the same as in 2005. Radio listeners spent an average of 1.7 hours daily on listening to the radio which represented a slight decline when compared with the 2.0 hours reported in 2005.
 - (b) While free TV viewers normally watched free TV at night from 18:00 to 23:59 (same as in Survey 2005), pay TV viewers watched from 19:00 to 23:59 (one hour longer than the time slot from 20:00 to 23:59 as reported in Survey 2005). The usual time slot that radio listeners listened to the sound broadcasting services was from 08:00 to 11:59 in the morning (one hour shorter than the time slot from 08:00 to 12:59 in Survey 2005).

- (c) As compared with Survey 2005, there was a decrease in mentions of TVB Jade as the most often watched free TV channel (84.1% versus 90.0% in 2005). ATV Home (10.9% versus 7.1% in 2005) and TVB Pearl (4.6% versus 2.5% in 2005) revealed gain in this aspect.
- (d) CR1 (22.4%), RTHK Radio 1 (20.0%) and CR2 (18.1%) maintained their mentions as the most frequently listened radio channels. Mentions of FM104 Metro Finance as the most often listened channel increased from 3.6% in 2005 to 6.9% in 2007.

4.2. Programme Variety and Quantity of Different Programme Types

- 34. Only a minority of the free TV viewers (6.6%) and radio listeners (3.4%) expressed their dissatisfaction on the variety of the programme types. However, the marginal increase in the proportion of these discontented groups might reflect the growing diversity of tastes and interests of the community.
 - (a) More than one in two free TV viewers expressed their satisfaction on the programme variety of free TV and one third of them gave an average rating on the issue.
 - (b) A significantly higher proportion of the free TV viewers (raised from 2.0% in 2005 to 6.6% in 2007) had expressed their dissatisfaction on the programme variety of free TV. This dissatisfaction was particularly obvious among persons with access to (9.5%) or persons who had watched pay TV (8.7%) in the past month.
- 35. Generally speaking, the quantity of different programme types provided on existing free TV and radio broadcasting services were at a satisfactory level to most members of the community.
 - (a) Over 70 percent of the respondents commented that free TV offered sufficient amount of dramas, news, entertainment programmes and food programmes, whereas radio offered adequate services on news, current affairs programmes, finance programmes, news and current affairs commentary programmes and music programmes.
 - (b) However, it is worth noting that over one-fifth of the respondents claimed that the following free TV and radio programme types were insufficient: on free TV, programmes related to health, education, arts and culture, sports and films; and on radio, programmes related to health, education and children programmes.

36. Persons with access to pay TV service had higher expectation on the free TV services. More of them expressed their dissatisfaction with the variety of free TV programmes (9.5% versus average of 6.6%). They also had higher tendency to consider the quantity of the various types of programmes of free TV services as insufficient, in particular, arts and culture programmes (31.9% versus average of 26.7%), sports programmes (29.1% versus average of 24.5%), news and current affairs commentary programmes (20.9% versus average of 17.7%), music programmes (20.8% versus average of 17.7%) and finance programmes (17.3% versus average of 14.2%).

4.3. Current Standards and Protection of Children

37. 69.4% of free TV viewers, 69.2% of pay TV viewers and 77.2% of radio listeners acknowledged that the current standards on programme contents as appropriate. The rest of them had a relatively higher tendency to comment the current standards as lenient than tight. The key concern was related to the use of or control on language.
38. Increase in incidences of coming across offensive materials in programmes and/ or advertising contents were observed. These were particularly obvious among those who opined the current standards on programme contents as too lenient or a bit lenient. Indecent materials, crude language were common examples of offensive materials in programme contents whereas misleading factual materials, indecent materials were common examples of offensive materials in advertising contents.
- (a) 35.8 percent of free TV viewers (30.9% in 2005), 16.7 percent of radio listeners (11.4% in 2005) and 26.8 percent of pay TV viewers (14.1% in 2005) claimed that they had encountered offensive materials on TV or radio programme services in the year prior to the survey.
39. There was growing recognition on the importance of protecting of children from materials not suitable for them.
- (a) The awareness of "PG" programmes remained high at 87.2%.
- (b) A smaller proportion (from 62.9% in 2005 to 55.6% in 2007) of young members aged 15 or below in the household had watched the "PG" programmes in the month prior to the survey, and more of them (93.3% in 2007 versus 86.2% in 2005) had been accompanied by adult household members every time or sometimes.
- (c) 65.0 percent of respondents of pay TV households were aware of the locking device and 69.9 percent of these respondents considered the device effective in preventing children from watching adult materials.

4.4. Complaint Avenues

40. Complaining to the BA was the most recognized avenue for dealing with complaints on broadcasting contents as BA was considered as effective, fair, independent and reliable.
- (a) The awareness of the complaint avenues provided by the BA increased from 65.7% in 2005 to 73.1% in 2007.
 - (b) The awareness of the complaint avenues provided by the TV and radio stations decreased from 53.4% in 2005 to 43.3% in 2007.
 - (c) 45.8 percent considered BA as the preferred avenue for complaints (versus 15.9% directly to the stations).

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 - (f) Hong Kong Commercial Broadcasting Company Limited
 - (g) Metro Broadcast Corporation Limited
 - (h) Radio Television Hong Kong