



*Survey on Digital Television Take-up
(2019-2021)*

- Executive Summary -

Prepared for

**Communications and Creative Industries Branch
Commerce and Economic Development Bureau**

Survey Objectives and Methodology

1. The objectives of the Survey are to obtain factual information relating to Digital Television (DTV) take-up and to identify possible measures that could encourage and/or assist non-DTV households to switch to DTV broadcast before the switch-off of analogue television (TV) broadcast (i.e. “analogue switch-off” or “ASO” in short). The Survey covered the land-based non-institutional population of Hong Kong, excluding foreign domestic helpers.
2. The Survey made use of the frame of quarters maintained by the Census and Statistics Department as the sampling frame. A sample of quarters was selected from all permanent quarters and quarters in segments that are for residential and partially residential purposes in Hong Kong in accordance with a scientifically designed sampling system. The sampling units include permanent quarters in built-up areas and segments in non-built-up areas.
3. Survey data were collected through face-to-face interviews during household visits based on a structured questionnaire. The household member who was the most informed or responsible for the decision to purchase TV set(s) in the enumerated household was invited for an interview.
4. The Survey was conducted in five rounds, with details as follows:

	Round 1	Round 2	Round 3	Round 4	Round 5
Fieldwork period	2 Sep to 30 Nov 2019	10 Feb to 22 Mar 2020	1 Jun to 19 Jul 2020	7 Sep to 25 Oct 2020	1 Feb to 6 Apr 2021
No. of households that were enumerated / with data processing completed	8 192	8 050	8 045	8 064	8 078
Response rate	70.0%	77.5%	73.7%	74.6%	75.4%

Summary of Key Findings

A. DTV Take-up

5. According to the survey results, the number of households who had switched to DTV broadcast (i.e. DTV households) had gradually increased from

some 2 438 500 during September to November 2019 (or 92.2% of all households in Hong Kong) to some 2 529 400 (95.6%) during February to April 2021. On the contrary, the number of households who had analogue TV set(s) only (i.e. analogue TV households) had gradually decreased from some 100 400 (3.8%) during September to November 2019 to some 36 100 (1.4%) during February to April 2021. The number of households who had no TV sets (i.e. no-TV households) had also decreased from some 105 800 (4.0%) during September to November 2019 to some 79 100 (3.0%) during February to April 2021.

6. The numbers of DTV households, analogue TV households and no-TV households recorded in the respective rounds of survey are as follows:

	Round 1	Round 2	Round 3	Round 4	Round 5
No. of DTV households (percentage)	2 438 500 (92.2%)	2 466 000 (93.2%)	2 487 700 (94.1%)	2 503 100 (94.6%)	2 529 400 (95.6%)
No. of analogue TV households (percentage)	100 400 (3.8%)	83 500 (3.2%)	68 400 (2.6%)	58 200 (2.2%)	36 100 (1.4%)
No. of no-TV households (percentage)	105 800 (4.0%)	95 100 (3.6%)	88 500 (3.3%)	83 300 (3.2%)	79 100 (3.0%)

7. Analysis of the results of the several rounds of surveys reveals that no significant difference was found in the major characteristics of DTV households and no-TV households. However, as a considerable number of analogue TV households had gradually switched to receive DTV broadcast, significant changes were recorded in the following characteristics of analogue TV households –

- The proportion of analogue TV households living in public rental housing had dropped significantly from 45.1% during late 2019 to 34.6% during early 2021. On the contrary, the proportion of analogue TV households living in private housing had increased from 45.2% during late 2019 to 58.1% during early 2021.
- The proportion of analogue TV households who were one-person households had decreased from 24.1% during late 2019 to 16.8% during early 2021.

- The proportion of analogue TV households whose members were all elderly (“elderly households”) had decreased significantly from 23.8% during late 2019 to 11.0% during early 2021.
- The proportion of analogue TV households receiving the five prescribed Government subsidies (including Comprehensive Social Security Assistance Scheme (CSSA), Old Age Living Allowance (OALA) (for elderly households only), Working Family Allowance Scheme, medical fee waiver mechanism of public hospitals and clinics, and/or all means-tested student financial assistance schemes) had decreased significantly from 19.4% during late 2019 to 9.1% during early 2021.

B. Awareness of “Full DTV Broadcast” and “Community Care Fund Digital Television Assistance Programme” among Analogue TV Households

8. Awareness of “Full DTV Broadcast” (i.e. ASO) among analogue TV households had increased significantly from 45.7% during late 2019 to 72.0% during September to October 2020, and continued to rise after the implementation of “Full DTV Broadcast” (84.7% during early 2021).

9. Regarding the “Community Care Fund Digital Television Assistance Programme” (“Assistance Programme”), the respective awareness had increased substantially from 8.4% during late 2019 to 53.4% during September to October 2020, and continued to rise after the implementation of “Full DTV Broadcast” (76.2% during early 2021).

Conclusion and Recommendations

10. As indicated in the survey results, the vast majority of households in Hong Kong had switched to receive DTV broadcast. The DTV take-up rate had steadily increased by 3.4% from 92.2% during late 2019 to 95.6% during early 2021. Until early 2021, only some 36 100 households (1.4%) had analogue TV set(s) only and some 79 100 households (3.0%) did not have TV sets.

11. Based on the results of the round 1 survey in late 2019, the proportions of households living in public rental housing, one-person households, elderly households or households currently receiving Government subsidies such as CSSA, OALA, etc, were higher for analogue TV households compared to DTV households. However, as a significant number of these groups of households had switched to receive DTV broadcast, the proportion of analogue TV households belonging to these groups of households during early 2021 had

dropped substantially, indicating that these target groups of analogue TV households had successfully switched to receive DTV broadcast.

12. Since the promulgation of Full DTV Broadcast (i.e. ASO) by the Government in 2019 and the implementation and promotion of the Assistance Programme in 2020, the awareness of “Full DTV Broadcast” and the Assistance Programme among the analogue TV households had increased significantly, reflecting the considerable success of the publicity works of the two programmes.

13. Based on the results of the round 5 survey in early 2021, even though the “Full DTV Broadcast” had been implemented for over two months, there were still some 36 100 analogue TV households, with nearly 90% of them indicating no plans to switch to receive DTV broadcast. Of those who had no plans to switch to DTV broadcast, nearly half (47.6%) stated the main reason being “using a computer/mobile phone/the Internet (include TV box) to watch DTV broadcast/online videos/movies/television programmes”. It was very likely that they had already made use of a computer/mobile phone/the Internet (including TV box) instead of a TV set to watch DTV, and hence there was no need to replace their TV sets. Some 40% of them said that they “seldom watch TV/had no time to watch TV” (19.9%) or “were not interested in watching TV/consider TV programme contents unattractive” (18.6%). Since their demand for watching TV was relatively low, there was also no need for them to replace their TV sets. The number of analogue TV households who specified that they would not switch to receive DTV broadcast maintained at around 30 000 during the period from late 2019 to early 2021, indicating that the intention of this group of households remained unchanged.

14. Overall, the transition from receiving analogue TV broadcast to DTV broadcast among Hong Kong households had proceeded smoothly and in an orderly manner. Those public rental housing households, one-person households, elderly households, households receiving Government subsidies such as CSSA, OALA, etc, which originally accounted for a relatively higher proportion of analogue TV households had switched to receive DTV broadcast smoothly and in an orderly manner according to their needs. The vast majority of households who remained to have analogue TV set(s) only had no need to switch to DTV broadcast. Therefore, Hong Kong had successfully migrated from analogue TV broadcast to full DTV broadcast and opened a new era of TV broadcasting.
