2023 Video Consumption Landscape Survey

November 24, 2023

Survey Details

Background:

- With the availability of different free TV players and OTT streaming media players, audiences' viewing habit has been constantly changing.
- Under a fast growth of social, the way for how audiences consume video contents has expanded from traditional to social environment. Traditional, digital and social are becoming the new mix of choices empowering by the audiences in anytime at anywhere.

Specifications:

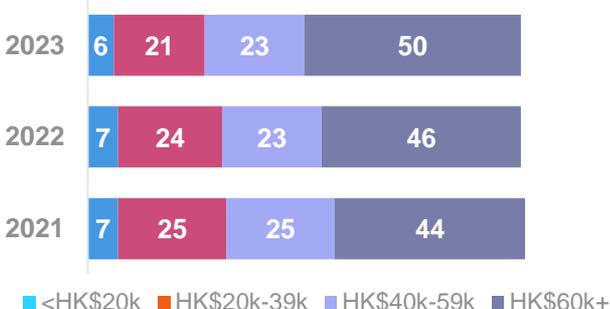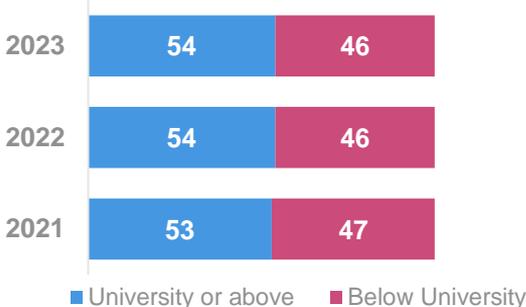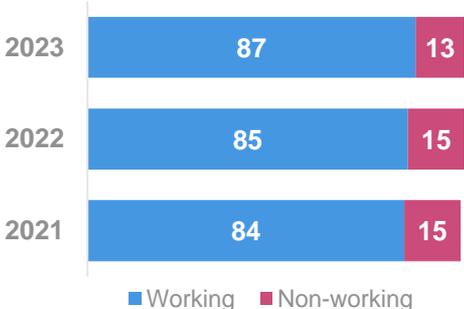Targets: HK residents aged 15-64 who have ever watched any TV or online video in the past 7 days.
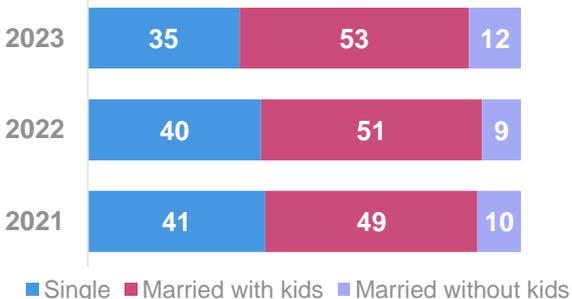
Sampling: n=1,000 (±3,10%) with quota on age & gender to well representative for HK population.

Fieldwork: Aug 2 - 10, 2023

Methodology: Hybrid with mix of online and offline approaches

The respondent profile remains similar across the past years.

Respondent Key Profile

Gender

Year	Male	Female
2023	44	56
2022	47	53
2021	48	52

■Male ■Female

Age

Year	15-24	25-34	35-44	45-54	55-64
2023	12	19	22	23	24
2022	13	19	22	22	24
2021	13	20	21	22	24

■15-24 ■25-34 ■35-44 ■45-54 ■55-64

Marital Status

Year	Single	Married with kids	Married without kids
2023	35	53	12
2022	40	51	9
2021	41	49	10

■Single ■Married with kids ■Married without kids

Working Status

Year	Working	Non-working
2023	87	13
2022	85	15
2021	84	15

■Working ■Non-working

Education

Year	University or above	Below University
2023	54	46
2022	54	46
2021	53	47

■University or above ■Below University

Income

Year	<HK$20k	HK$20k-39k	HK$40k-59k	HK$60k+
2023	6	21	23	50
2022	7	24	23	46
2021	7	25	25	44

■<HK$20k ■HK$20k-39k ■HK$40k-59k ■HK$60k+

Base: Hong Kong residents aged 15-64 who have watched any online or offline video content in the past 7 days
2023 (n=1,000); 2022 (n=2,538); 2021 (n=2,556)

The top 3 players in reach and frequency are TVB Linear, YouTube and Facebook.

Video landscape - Overall

	Reach TV & Digital (P7D)	Frequency #Day a Week		Time Spent Min Daily Ave	
TVB (Linear)	84	#1	5.7	#1	139 min
YouTube	82	#2	5.2	#3	48 min
Facebook	73	#3	5.1		30 min
Instagram	62		4.9		33 min
myTV SUPER	60		4.0	#2	64 min
ViuTV (Linear)	52		3.7		31 min
Netflix	46		3.7		42 min
HOY TV (Linear)	36		3.3		19 min
HK01	35		3.2		12 min
Disney+	32		3.2		26 min

Reach	Frequency	Time Spent
(TVB)	(TVB)	(TVB)
YouTube	YouTube	myTV SUPER
Facebook	Facebook	YouTube

The weekly reach has improved yet the attention paid to each TV channel has dropped.

Video landscape (Free/ Pay TV) – Weekly Reach, Frequency & Time spent

Key Platforms

Weekly Reach (%)

	TVB (Linear 5 FTA)	ViuTV (Linear 2 FTA)	HOY TV (Linear 3 FTA)	RTHK (Linear 5 FTA)	Now TV
2023	84	52	36	26	18
2022	78	57	24	17	17
2021	76	53	31	21	19

Frequency (days per week)

	TVB (Linear 5 FTA)	ViuTV (Linear 2 FTA)	Now TV	HOY TV (Linear 3 FTA)	RTHK (Linear 5 FTA)
2023	5.7	3.7	3.5	3.3	2.6
2022	5.9	4.4	3.6	3.4	2.9
2021	5	3.9	3.1	3.1	2.7

Daily Time Spent (mins per viewer)

	TVB (Linear 5 FTA)	ViuTV (Linear 2 FTA)	Now TV (Pay TV Box)	HOY TV (Linear 3 FTA)	RTHK (Linear 5 FTA)
2023	139	31	24	19	13
2022	174	56	34	23	19
2021	184	59	47	38	38

% change vs 2022

2023	TVB	ViuTV
	7%	-8%

2023	TVB	ViuTV
	-4%	-17%

2023	TVB	ViuTV
	-20%	-44%

TVB linear has the highest reach among free/pay TV across all ages, followed by ViuTV and HOY TV.

Reach of TVB linear increases with age.

Video landscape (Free/ Pay TV) – Weekly Reach by age

Key Platforms

15-34:
- TVB (Linear 5FTA): 2023: 77, 2022: 69, 2021: 67
- ViuTV (Linear 2FTA): 46, 62, 59
- HOY TV (Linear 3 FTA): 32, 22, 24
- Now TV: 24, 16, 18
- RTHK (Linear 5 FTA): 21, 16, 18

35-49:
- TVB (Linear 5FTA): 2023: 81, 2022: 77, 2021: 79
- ViuTV (Linear 2FTA): 56, 64, 60
- HOY TV (Linear 3 FTA): 41, 20, 39
- RTHK (Linear 5 FTA): 28, 16, 24
- Now TV: 21, 18, 24

50-64:
- TVB (Linear 5FTA): 2023: 93, 2022: 86, 2021: 82
- ViuTV (Linear 2FTA): 53, 45, 39
- HOY TV (Linear 3 FTA): 34, 30, 28
- RTHK (Linear 5 FTA): 28, 19, 20
- Now TV: 11, 18, 14

Similarly, the average frequency for TVB Linear is the highest among free/pay TV.
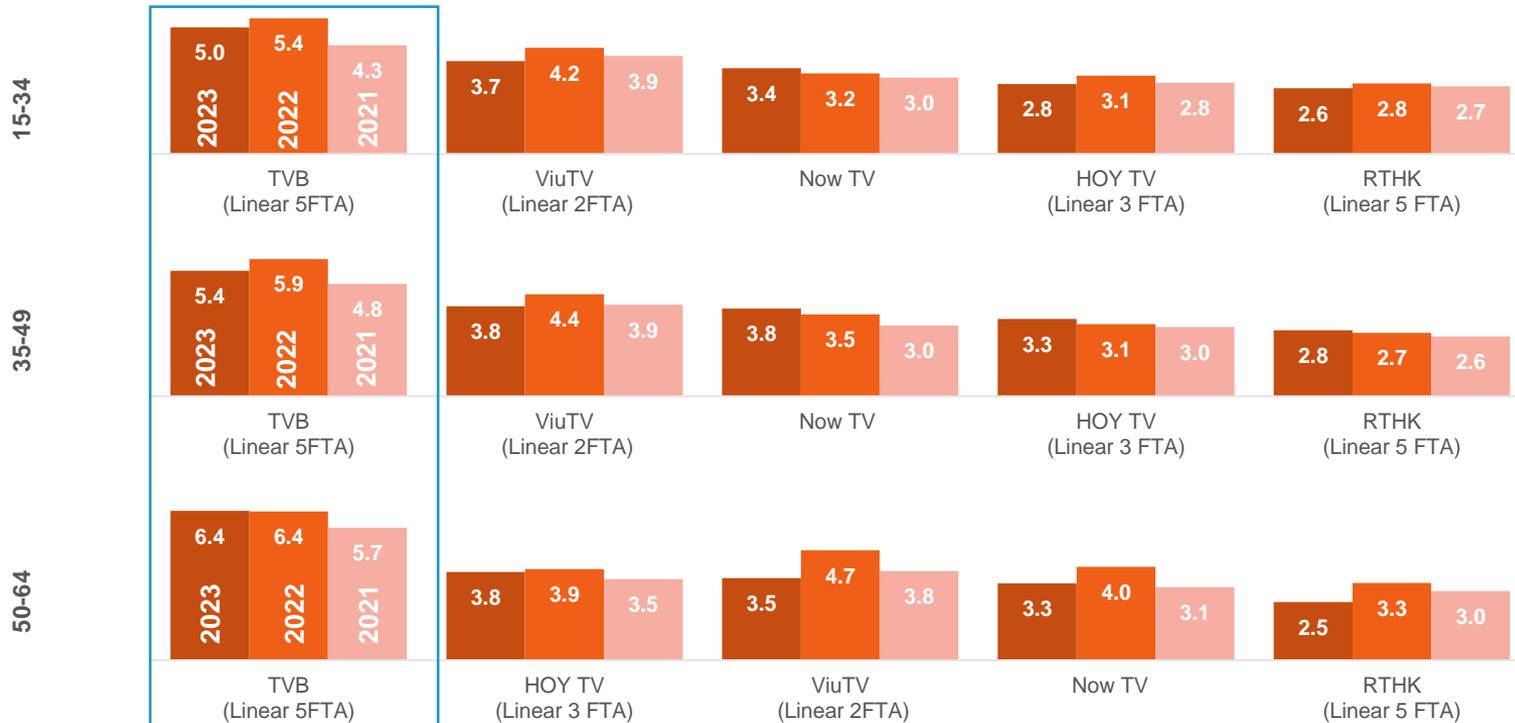
The frequency has slightly dropped for TVB linear in 15-49 y.o. while sustained for 50-64 y.o. group.

Video landscape (Free/ Pay TV) – Average Frequency (Number of days per week) by age

Key Platforms

15-34

	TVB (Linear 5FTA)			ViuTV (Linear 2FTA)			Now TV			HOY TV (Linear 3 FTA)			RTHK (Linear 5 FTA)		
2023	5.0			3.7			3.4			2.8			2.6		
2022		5.4			4.2			3.2			3.1			2.8	
2021			4.3			3.9			3.0			2.8			2.7

35-49

	TVB (Linear 5FTA)			ViuTV (Linear 2FTA)			Now TV			HOY TV (Linear 3 FTA)			RTHK (Linear 5 FTA)		
2023	5.4			3.8			3.8			3.3			2.8		
2022		5.9			4.4			3.5			3.1			2.7	
2021			4.8			3.9			3.0			3.0			2.6

50-64

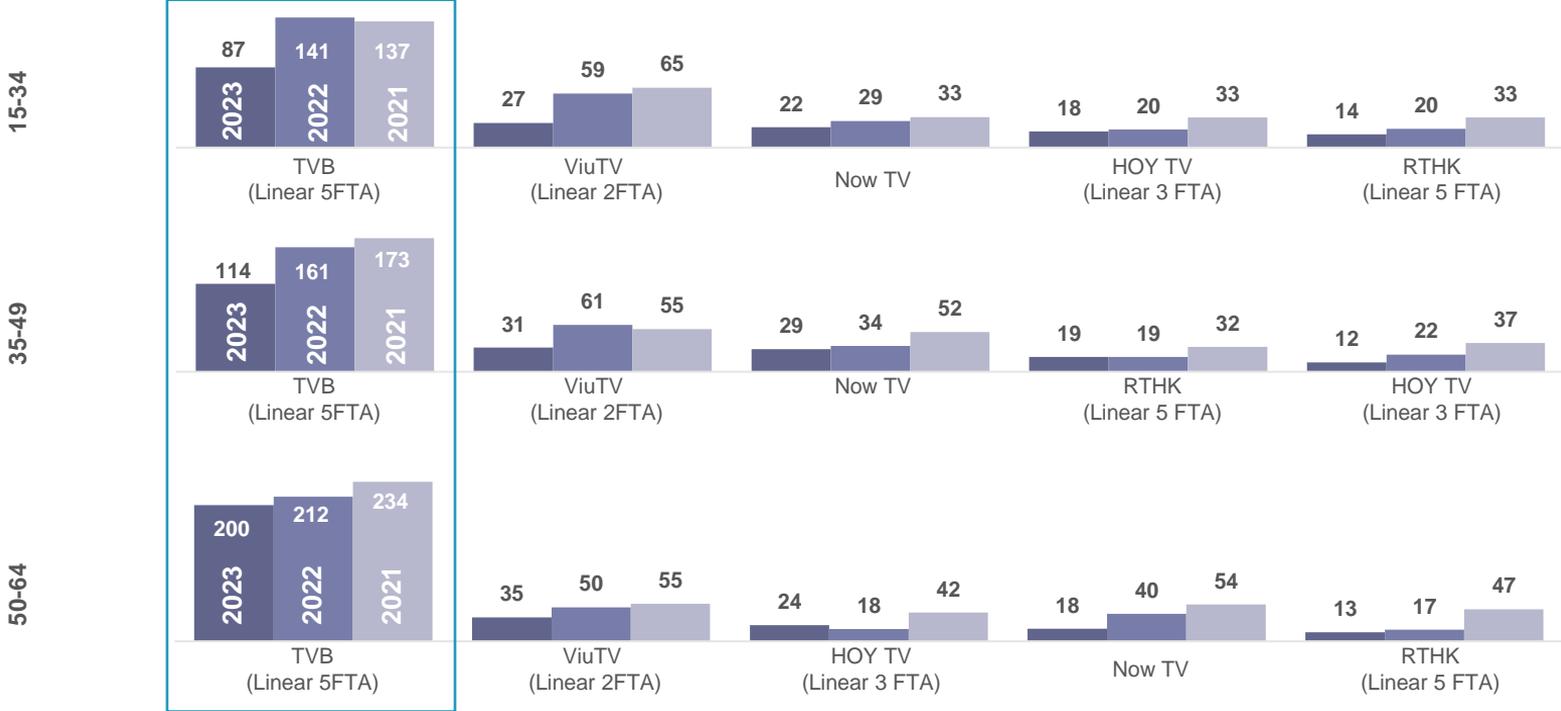|	TVB (Linear 5FTA)			HOY TV (Linear 3 FTA)			ViuTV (Linear 2FTA)			Now TV			RTHK (Linear 5 FTA)		
2023	6.4			3.8			3.5			3.3			2.5		
2022		6.4			3.9			4.7			4.0			3.3	
2021			5.7			3.5			3.8			3.1			3.0

TVB linear remained to be the channel with highest daily time spent across all ages.

**Video landscape (Free/ Pay TV) – Average Daily Time Spent per week by age**

Key Platforms

15-34

	TVB (Linear 5FTA)	ViuTV (Linear 2FTA)	Now TV	HOY TV (Linear 3 FTA)	RTHK (Linear 5 FTA)
2023	87	27	22	18	14
2022	141	59	29	20	20
2021	137	65	33	33	33

35-49

	TVB (Linear 5FTA)	ViuTV (Linear 2FTA)	Now TV	RTHK (Linear 5 FTA)	HOY TV (Linear 3 FTA)
2023	114	31	29	19	12
2022	161	61	34	19	22
2021	173	55	52	32	37

50-64

	TVB (Linear 5FTA)	ViuTV (Linear 2FTA)	HOY TV (Linear 3 FTA)	Now TV	RTHK (Linear 5 FTA)
2023	200	35	24	18	13
2022	212	50	18	40	17
2021	234	55	42	54	47

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Audience has a higher reach to a more variety of long form digital platforms with lower time spent.

Video landscape (Digital – Long form) – Weekly Reach, Frequency & Time spent
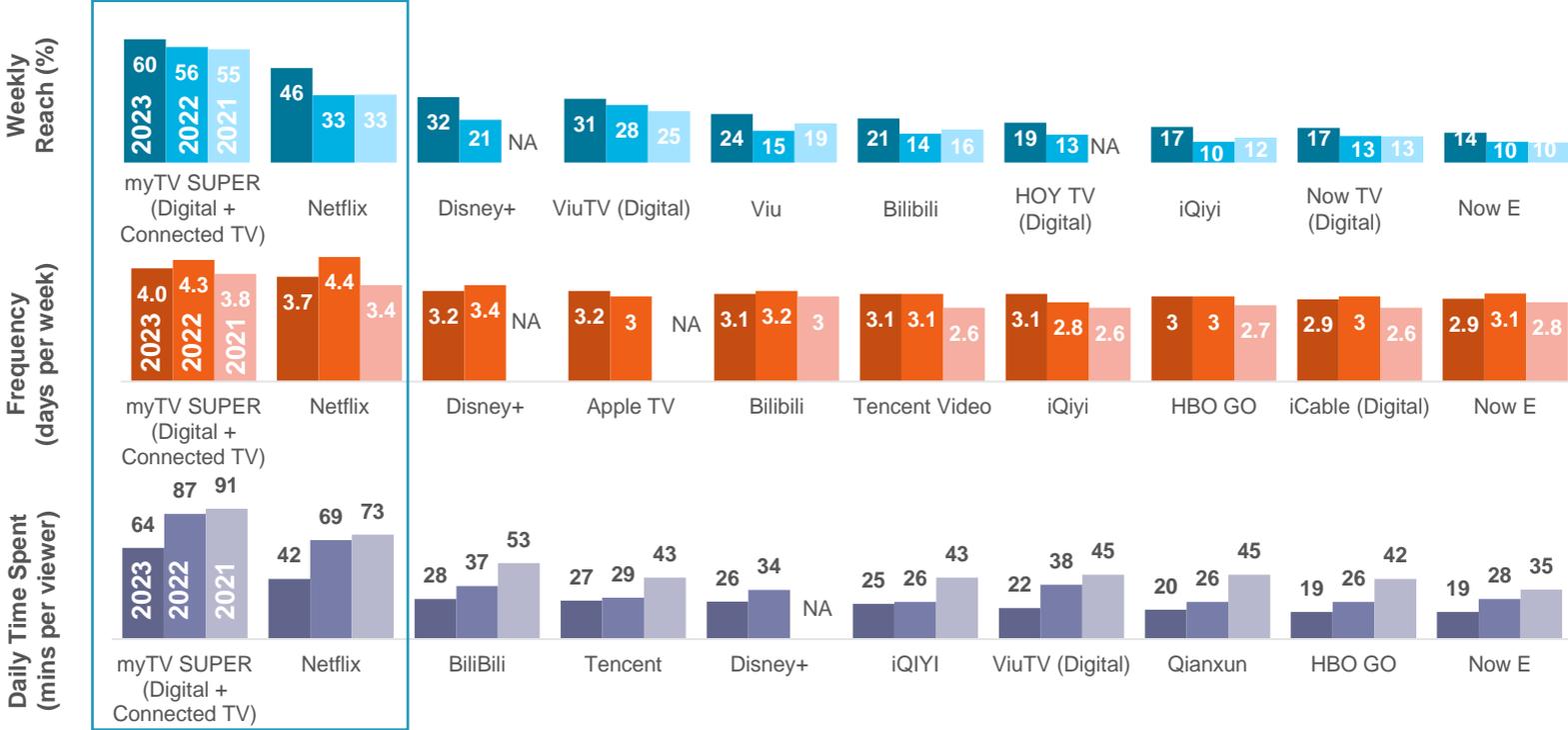
% change vs 2022

	2023		
	myTV SUPER	Netflix	Disney+
	7%	39%	51%

	2023		
	myTV SUPER	Netflix	Disney+
	-8%	-16%	-4%

	2023		
	myTV SUPER	Netflix	Disney+
	-27%	-39%	-24%

Weekly Reach (%)

Platform	2023	2022	2021
myTV SUPER (Digital + Connected TV)	60	56	55
Netflix	46	33	33
Disney+	32	21	NA
ViuTV (Digital)	31	28	25
Viu	24	15	19
Bilibili	21	14	16
HOY TV (Digital)	19	13	NA
iQiyi	17	10	12
Now TV (Digital)	17	13	13
Now E	14	10	10

Frequency (days per week)

Platform	2023	2022	2021
myTV SUPER (Digital + Connected TV)	4.0	4.3	3.8
Netflix	3.7	4.4	3.4
Disney+	3.2	3.4	NA
Apple TV	3.2	3	NA
Bilibili	3.1	3.2	3
Tencent Video	3.1	3.1	2.6
iQiyi	3.1	2.8	2.6
HBO GO	3	3	2.7
iCable (Digital)	2.9	3	2.6
Now E	2.9	3.1	2.8

Daily Time Spent (mins per viewer)

Platform	2023	2022	2021
myTV SUPER (Digital + Connected TV)	64	87	91
Netflix	42	69	73
BiliBili	28	37	53
Tencent	27	29	43
Disney+	26	34	NA
iQIYI	25	26	43
ViuTV (Digital)	22	38	45
Qianxun	20	26	45
HBO GO	19	26	42
Now E	19	28	35

Key Platforms

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Among digital long form, Netflix has the highest reach among 15-34 y.o. while myTV SUPER is leading for 35-64 y.o. group.

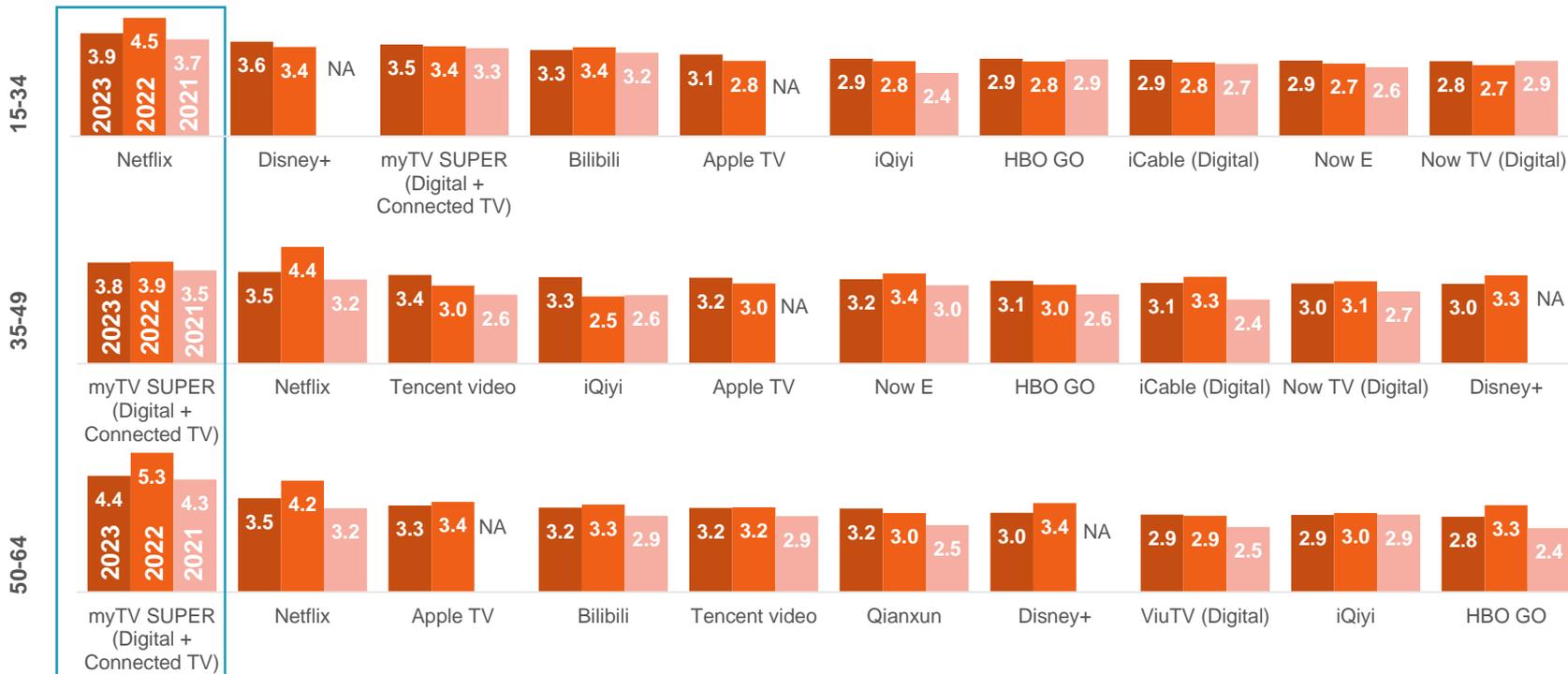**Video landscape (Digital – Long form) – Weekly Reach by age**

Key Platforms

15-34

Netflix	myTV SUPER (Digital + Connected TV)	Disney+	ViuTV (Digital)	Bilibili	Viu	iQiyi	RTHK (Digital)	Apple TV	Now TV (Digital)
63 (2023)	51	45	39	39	36	24	21	20	20
42 (2022)	44	28	33	22	20	13	10	11	13
49 (2021)	46	NA	35	27	29	14	6	NA	13

35-49

myTV SUPER (Digital + Connected TV)	Netflix	ViuTV (Digital)	Disney+	Viu	HOY TV (Digital)	Now TV (Digital)	Bilibili	iQiyi	RTHK (Digital)
59 (2023)	50	40	37	29	29	22	21	20	19
56 (2022)	32	34	22	19	14	15	11	9	10
56 (2021)	34	29	NA	20	NA	17	15	12	11

50-64

myTV SUPER (Digital + Connected TV)	Netflix	Disney+	ViuTV (Digital)	HOY TV (Digital)	RTHK (Digital)	Now TV (Digital)	YouKu	iQiyi	Viu
68 (2023)	28	15	14	13	12	10	9	8	8
67 (2022)	25	14	18	11	8	11	9	8	8
64 (2021)	15	NA	10	NA	5	7	10	10	8

Weekly reach - Base: All respondents; 2023 (n=1,000); 2022 (n=2,538); 2021 (n=2,556)
Frequency & Time spent - Base: All respondents who have watched video content on the respective channels in past 1 month

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There is a drop of frequency for myTV SUPER among 50-64 y.o. and Netflix across all ages.

Video landscape (Digital – Long form) – Average Frequency (Number of days per week) by age
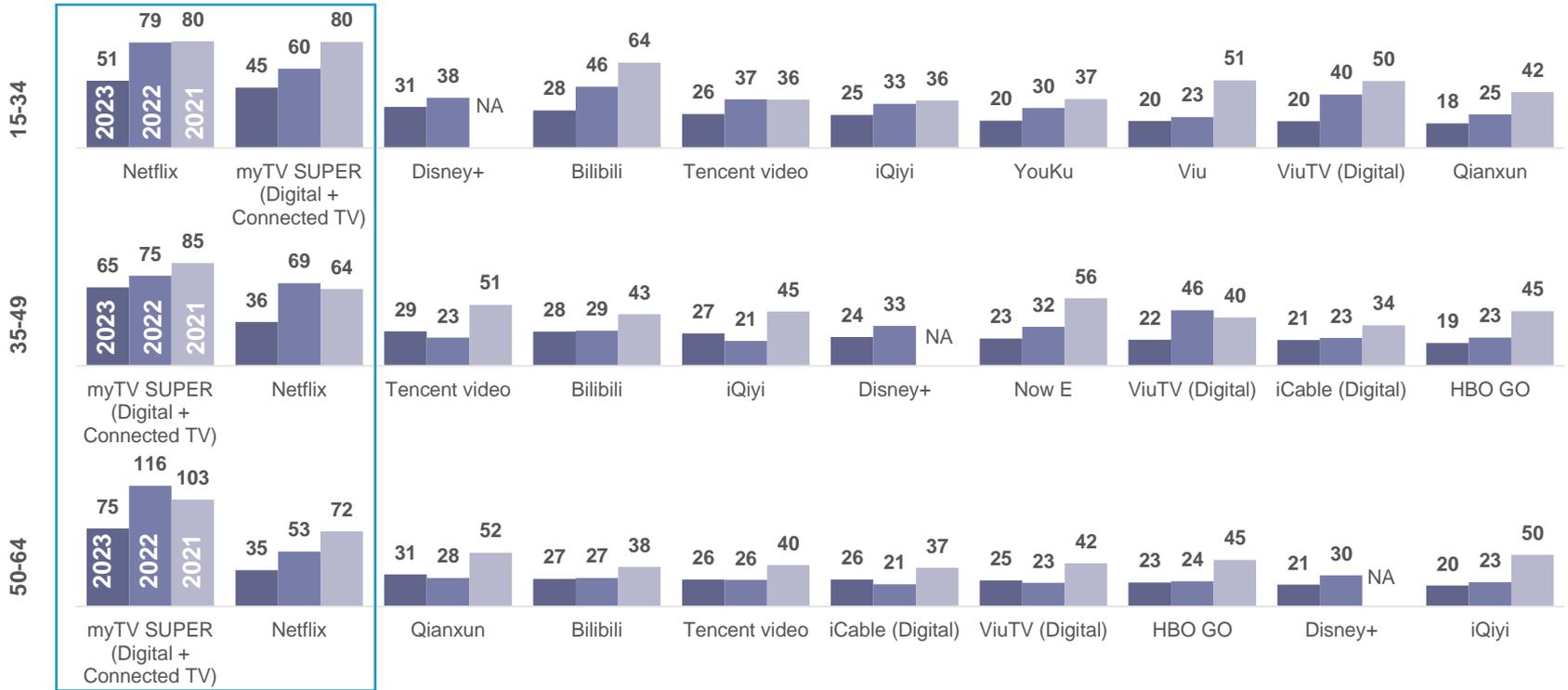

Key Platforms

15-34

	Netflix	Disney+	myTV SUPER (Digital + Connected TV)	Bilibili	Apple TV	iQiyi	HBO GO	iCable (Digital)	Now E	Now TV (Digital)
2023	3.9	3.6	3.5	3.3	3.1	2.9	2.9	2.9	2.9	2.8
2022	4.5	3.4	3.4	3.4	2.8	2.8	2.8	2.8	2.7	2.7
2021	3.7	NA	3.3	3.2	NA	2.4	2.9	2.7	2.6	2.9

35-49

	myTV SUPER (Digital + Connected TV)	Netflix	Tencent video	iQiyi	Apple TV	Now E	HBO GO	iCable (Digital)	Now TV (Digital)	Disney+
2023	3.8	3.5	3.4	3.3	3.2	3.2	3.1	3.1	3.0	3.0
2022	3.9	4.4	3.0	2.5	3.0	3.4	3.0	3.3	3.1	3.3
2021	3.5	3.2	2.6	2.6	NA	3.0	2.6	2.4	2.7	NA

50-64

	myTV SUPER (Digital + Connected TV)	Netflix	Apple TV	Bilibili	Tencent video	Qianxun	Disney+	ViuTV (Digital)	iQiyi	HBO GO
2023	4.4	3.5	3.3	3.2	3.2	3.2	3.0	2.9	2.9	2.8
2022	5.3	4.2	3.4	3.3	3.2	3.0	3.4	2.9	3.0	3.3
2021	4.3	3.2	NA	2.9	2.9	2.5	NA	2.5	2.9	2.4

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Weekly reach - Base: All respondents; 2023 (n=1,000); 2022 (n=2,538); 2021 (n=2,556)
Frequency & Time spent - Base: All respondents who have watched video content on the respective channels in past 1 month

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There is a drop in the average daily time spent in most of the channels across ages.

Video landscape (Digital – Long form) – Average Daily Time Spent per week by age

Key Platforms

15-34

Netflix: 2023=51, 2022=79, 2021=80
myTV SUPER (Digital + Connected TV): 45, 60, 80
Disney+: 31, 38, NA
Bilibili: 28, 46, 64
Tencent video: 26, 37, 36
iQiyi: 25, 33, 36
YouKu: 20, 30, 37
Viu: 20, 23, 51
ViuTV (Digital): 20, 40, 50
Qianxun: 18, 25, 42

35-49

myTV SUPER (Digital + Connected TV): 2023=65, 2022=75, 2021=85
Netflix: 36, 69, 64
Tencent video: 29, 23, 51
Bilibili: 28, 29, 43
iQiyi: 27, 21, 45
Disney+: 24, 33, NA
Now E: 23, 32, 56
ViuTV (Digital): 22, 46, 40
iCable (Digital): 21, 23, 34
HBO GO: 19, 23, 45

50-64

myTV SUPER (Digital + Connected TV): 2023=75, 2022=116, 2021=103
Netflix: 35, 53, 72
Qianxun: 31, 28, 52
Bilibili: 27, 27, 38
Tencent video: 26, 26, 40
iCable (Digital): 26, 21, 37
ViuTV (Digital): 25, 23, 42
HBO GO: 23, 24, 45
Disney+: 21, 30, NA
iQiyi: 20, 23, 50

Similar scenario is seen in digital short form platforms.

Video landscape (Digital – Short form) – Weekly Reach, Frequency & Time spent

Key Platforms

Weekly Reach (%)

	YouTube	Facebook	Instagram	TikTok	Yahoo TV	Xiaohungshu
2023	82	73	62	26	24	21
2022	73	57	44	18	16	NA
2021	66	55	41	14	8	

Frequency (days per week)

	YouTube	Facebook	Instagram	TikTok	Xiaohungshu	Yahoo TV
2023	5.2	5.1	4.9	3.7	3.6	3.2
2022	5.3	5.1	4.9	3.6	NA	3.2
2021	5.1	4.7	4.6	3.2		2.9

Daily Time Spent (mins per viewer)

	YouTube	Instagram	Facebook	Xiaohungshu	TikTok	Yahoo TV
2023	48	33	30	28	28	14
2022	65	41	37	NA	33	23
2021	75	39	38		48	29

% change vs 2022

2023		
YT	FB	IG
12%	28%	41%

2023		
YT	FB	IG
-2%	0%	0%

2023		
YT	FB	IG
-26%	-19%	-20%

Weekly reach - Base: All respondents; 2023 (n=1,000); 2022 (n=2,538); 2021 (n=2,556)
Frequency & Time spent - Base: All respondents who have watched video content on the respective channels in past 1 month

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As for short form, YouTube, Facebook and Instagram are the top 3 platforms with highest reach.

Video landscape (Digital – Short form) – Weekly Reach by age

Key Platforms

15-34

Platform	2023	2022	2021
YouTube	89	84	79
Instagram	82	67	69
Facebook	77	60	64
TikTok	34	20	15
Xiaohungshu	29	NA	
Yahoo TV	26	13	9

35-49

Platform	2023	2022	2021
Facebook	82	64	61
YouTube	79	77	69
Instagram	69	44	39
TikTok	29	19	16
Yahoo TV	27	18	10
Xiaohungshu	24	NA	

50-64

Platform	2023	2022	2021
YouTube	77	60	51
Facebook	61	48	38
Instagram	37	23	14
Yahoo TV	18	16	6
TikTok	15	16	11
Xiaohungshu	11	NA	
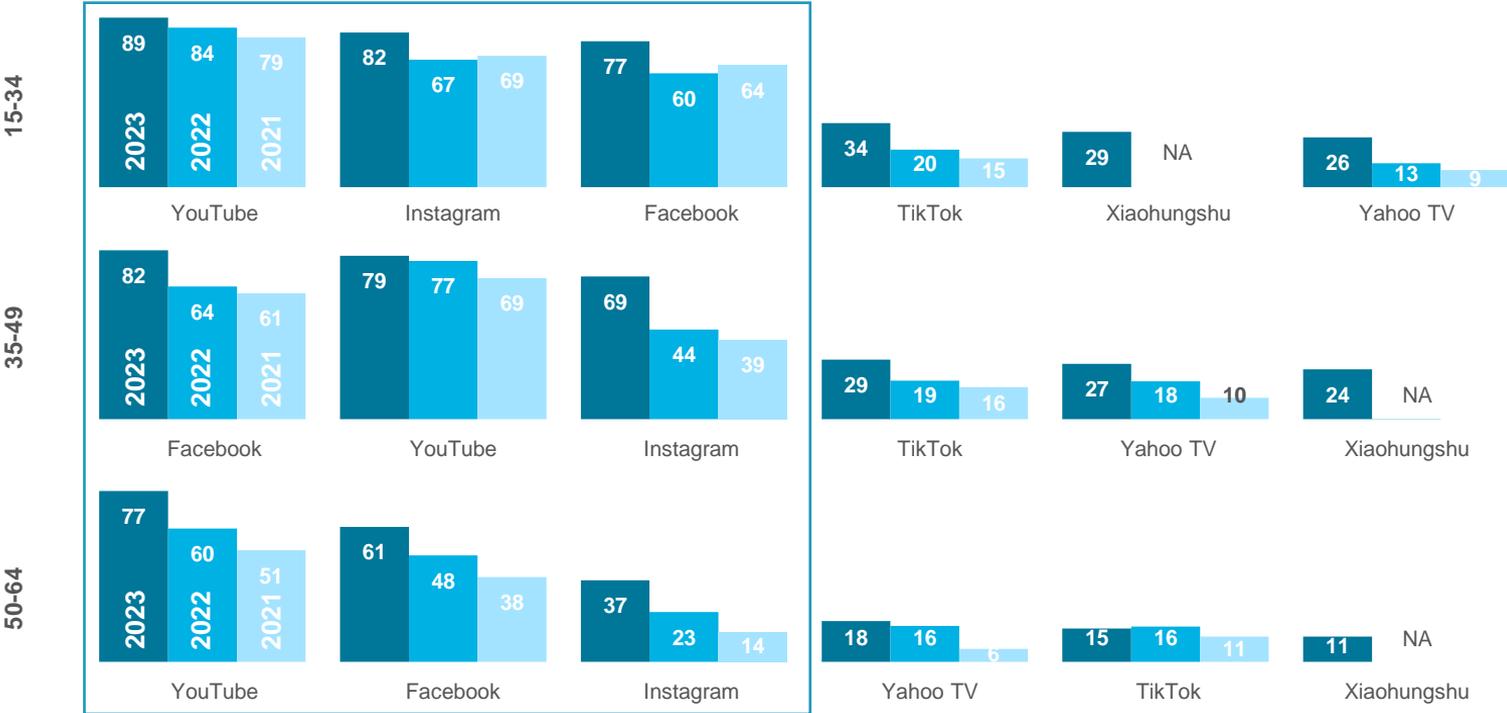
The average frequency for each platform was mostly stable.

Video landscape (Digital – Short form) – Average Frequency (Number of days per week) by age

Key Platforms

15-34

Platform	2023	2022	2021
YouTube	5.4	5.7	5.7
Instagram	5.3	5.4	5.4
Facebook	4.9	5.1	4.9
TikTok	3.8	3.7	3.3
Xiaohungshu	3.6	NA	
Yahoo TV	3.0	2.9	3.0

35-49

Platform	2023	2022	2021
YouTube	5.3	5.1	4.7
Facebook	5.3	5.3	4.6
Instagram	5.0	4.5	3.9
TikTok	4.0	3.6	3.0
Xiaohungshu	3.5	NA	
Yahoo TV	3.4	3.3	2.8

50-64

Platform	2023	2022	2021
Facebook	5.0	5.1	4.4
YouTube	4.9	5.2	4.6
Instagram	4.2	4.4	3.6
Xiaohungshu	3.6	NA	
TikTok	3.2	3.4	3.3
Yahoo TV	3.1	3.4	3.1

YouTube has the longest time spent daily in digital short form platform.

Video landscape (Digital – Short form) – Average Daily Time Spent per week by age

Key Platforms

15-34

	YouTube	Instagram	Xiaohungshu	TikTok	Facebook	Yahoo TV
2023	64	46	33	32	32	13
2022	97	64	NA	45	49	26
2021	104	50		49	48	28

35-49

	YouTube	Facebook	TikTok	Instagram	Xiaohungshu	Yahoo TV
2023	42	32	28	25	21	15
2022	53	36	33	26	NA	25
2021	56	31	50	27		27

50-64

	YouTube	Xiaohungshu	Facebook	Instagram	TikTok	Yahoo TV
2023	39	32	26	25	21	13
2022	45	NA	25	21	20	18
2021	58		31	31	45	32
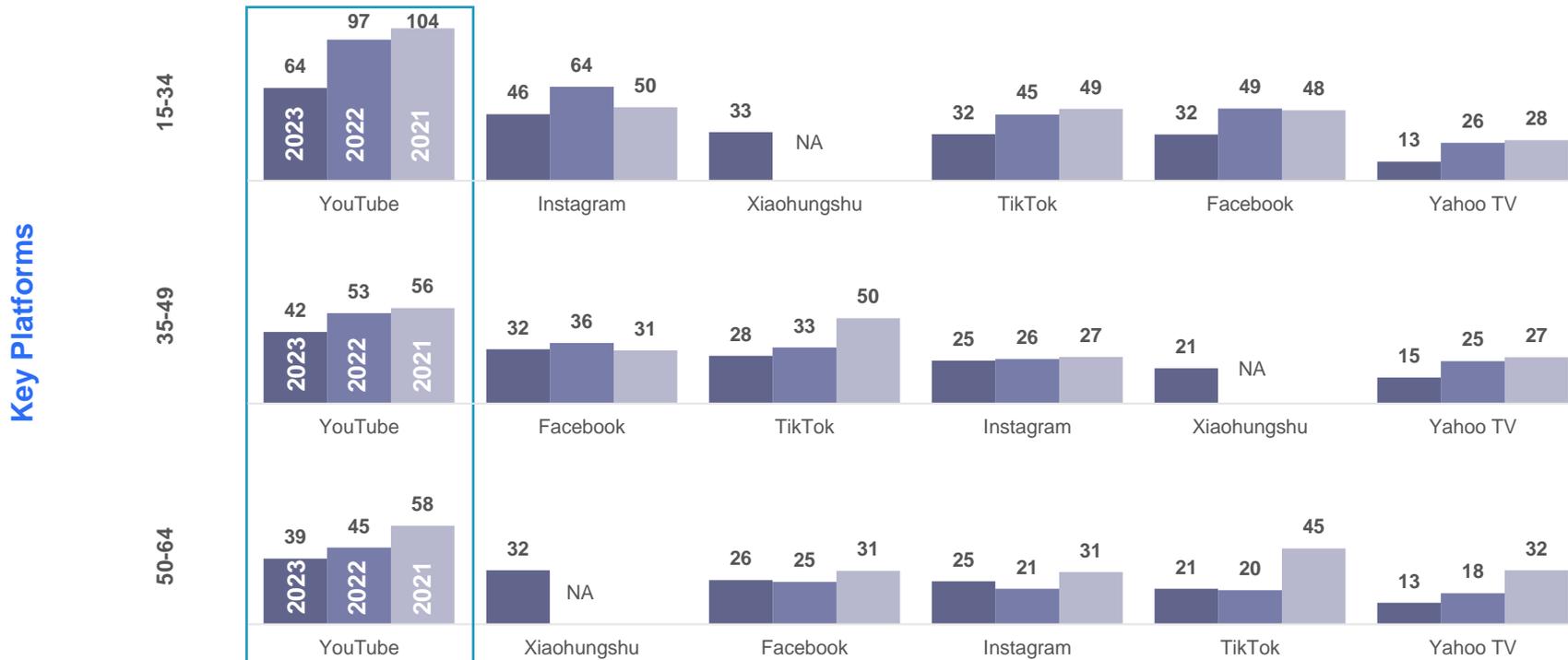
YouTube continues to be the platform with highest usage and preference, followed by TVB Jade and myTV SUPER.

Affinity Towards Different Media Platforms

■ Top 1 Ranking
■ Top 2/3 Rankings

最常用(%)

	Top1	Top2-3
YouTube	18	46
TVB Jade	21	40
myTV SUPER	19	30
Facebook	5	22
TVB News	4	21
Netflix	7	21
Instagram	5	19
ViuTV	5	17
TVB J2	2	15
Disney+	1	8

最喜歡(%)

	Top1	Top2-3
YouTube	21	47
TVB Jade	16	32
myTV SUPER	16	28
Netflix	11	27
Facebook	3	20
ViuTV	6	18
Instagram	3	17
TVB News	3	16
TVB J2	3	14
Disney+	3	13

會推薦 (%)

	Top1	Top2-3
YouTube	20	48
Netflix	15	30
myTV SUPER	16	28
TVB Jade	13	27
ViuTV	7	19
Facebook	2	17
Disney+	4	17
Instagram	3	16
TVB News	3	15
TVB J2	3	14

Yr2022		
最常用	最喜歡	會推薦
YouTube	YouTube	YouTube
TVB Jade	TVB Jade	Netflix
myTV SUPER	myTV SUPER	myTV SUPER
TVB News	Netflix	TVB Jade
Netflix	ViuTV	ViuTV

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Social Exposure of TV Contents

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Top 2 channels are seen with improvement in social media with TVB social media has a large extent of improvement, particularly in YouTube and Facebook.

Social exposure of TV contents

Channel	Channel watched in Social (%)		YouTube		Facebook		Instagram	
	2023	2022	2023	2022	2023	2022	2023	2022
TVB	50	44	36	32	36	33	24	25
ViuTV	49	47	35	35	33	32	29	28
myTV SUPER	41	42	29	32	27	29	21	22
Now TV	37	39	25	27	23	26	21	22
J2	36	33	24	23	23	22	19	20
TVB variety	34	34	24	24	20	23	20	19
HOY TV	33	35	23	25	21	24	19	19
Seesaw先	32	31	21	21	20	21	18	18
None	31	34	41	42	44	43	55	54
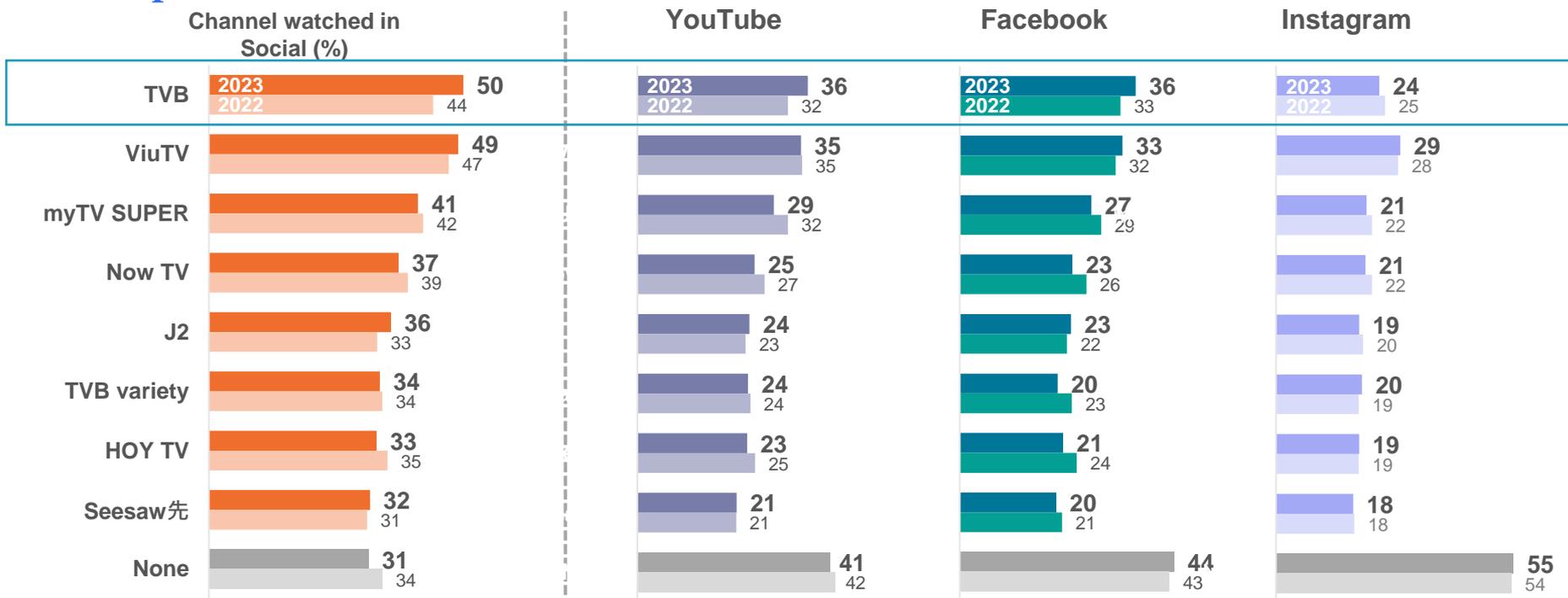
Program Highlights (49%), Review (48%) and Clipping on Coming Program (41%) are the top 3 content audiences commonly watched on TVB / myTV SUPER's social channel.

Review has gained more usage than in 2022 and becomes the most watched content on social platforms. Positive there are improvements on attractiveness and continue to watch the relative programs.

TV contents and TVB's attractiveness

TVB

	Content watched in social platform (%)	2022
節目花絮	49	45
已上影的節目回看	48	42
未上影的節目預告	41	46
相關藝人的動向 / 花邊新聞	37	33
廣告資訊	27	28
其他相關節目推介	18	17

Attractive (64%)
(60%)

Attractiveness

9	26	48	17
(13)	(26)	(38)	(22)

■ Not attractive　　■ Very attractive

Likely to watch (67%)
(63%)

Likelihood to keep watching in other official sources

8	25	47	20
(12)	(25)	(40)	(23)

■ Not likely　　■ Very likely
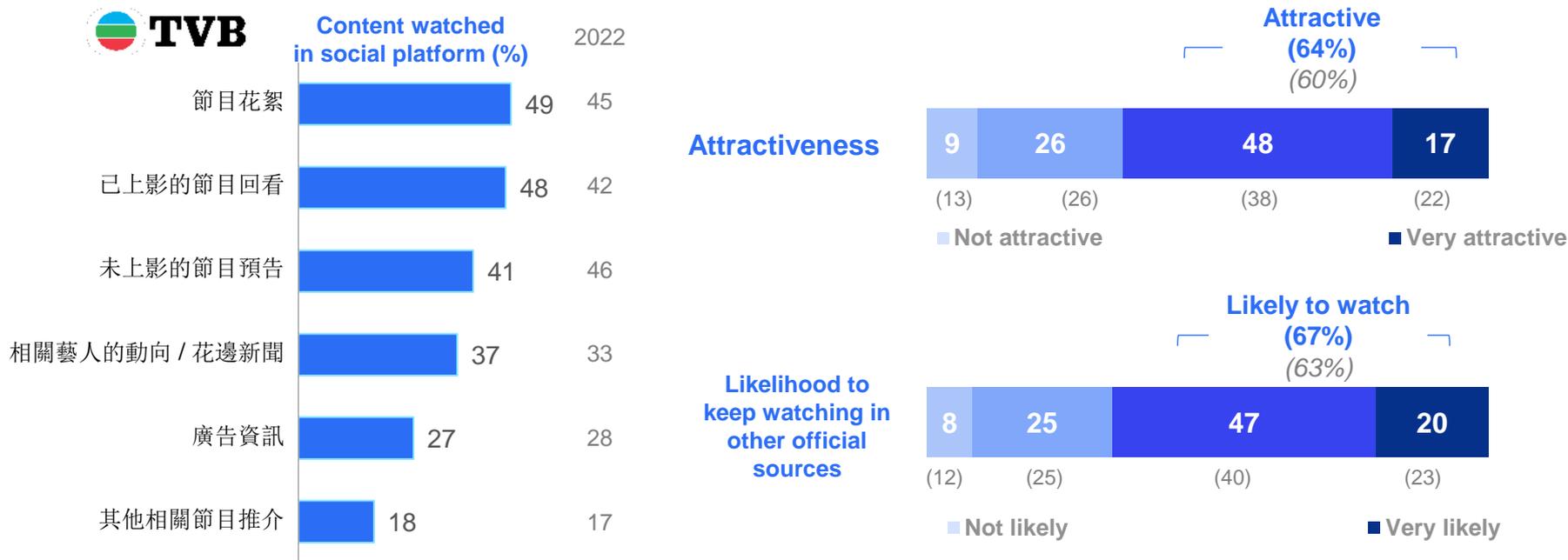
( ) denotes figures in 2022

已上影的節目回看 is more watched by younger audience while 35+y.o. audience watched 節目花絮 the most in social platform for TVB.

The attractiveness of content in social platform is higher for 35+ y.o. group while it's average for 15-34 y.o. group, thus they are less likely to keep watching in other official sources.

TVB

Content watched in social platform (%)

	15-34	35-49	50-64
節目花絮	43	49	56
已上影的節目回看	49	39	55
未上影的節目預告	37	41	43
相關藝人的動向 / 花邊新聞	38	41	33
廣告資訊	26	26	28
其他相關節目推介	14	14	24

- ■ 15-34
- ■ 35-49
- ■ 50-64

Attractiveness

Top 2 boxes
vs 2022 %pt

	Not attractive			Very attractive	Top 2 boxes	vs 2022 %pt
15-34	13	29	44	14	58%	(+9)
35-49	7	22	48	22	70%	(+5)
50-64	7	28	52	14	66%	(-3)

■ Not attractive   ■ Very attractive

Likelihood to keep watching in other official sources

Top 2 boxes
vs 2022 %pt

	Not likely			Very likely	Top 2 boxes	vs 2022 %pt
15-34	13	29	42	16	58%	(+4)
35-49	6	20	44	30	75%	(+6)
50-64	6	25	54	15	69%	(+2)

■ Not likely   ■ Very likely

NIQ

Review (54%), Highlights (52%) and Celebrity related content (42%) are the top 3 most commonly watched programs on the social channels.

Clipping on coming programs (32%) has softened than a year ago. The attractiveness and likelihood to watch the relative programs has slightly softened.

TV contents ViuTV's attractiveness

ViuTV | **Content watched in social platform (%)** | 2022

已上影的節目回看	54	56
節目花絮	52	50
相關藝人的動向 / 花邊新聞	42	43
未上影的節目預告	32	41
廣告資訊	28	31
其他相關節目推介	27	28

Attractive (68%)
(72%)

Attractiveness

| 8 | 25 | 47 | 20 |
| (9) | (20) | (51) | (21) |

■ **Not attractive** ■ **Very attractive**

Likely to watch (70%)
(72%)

Likelihood to keep watching in other official sources

| 5 | 25 | 50 | 20 |
| (5) | (23) | (54) | (18) |

■ **Not likely** ■ **Very likely**
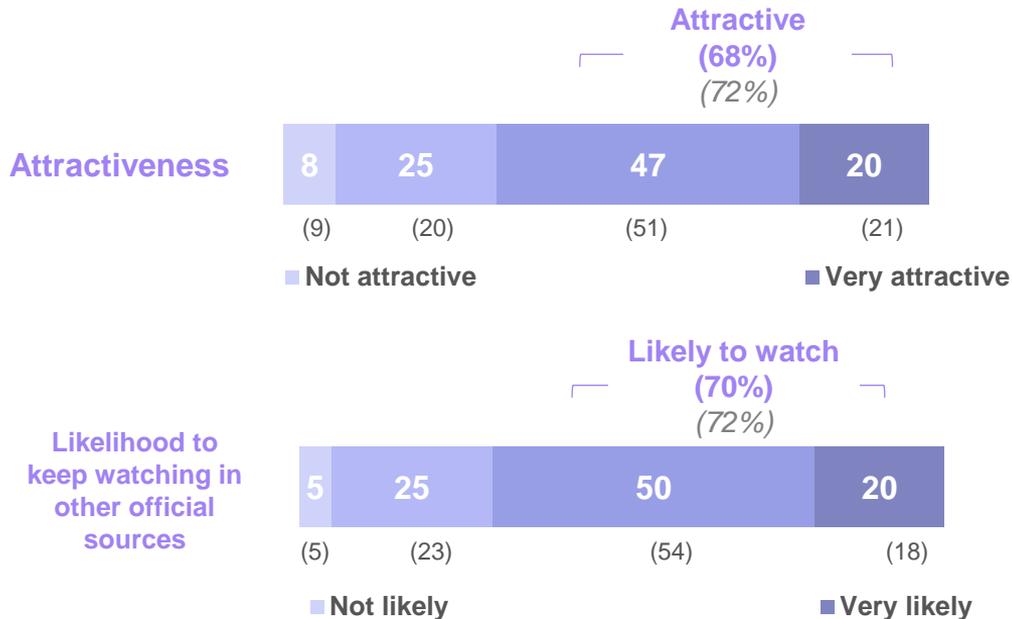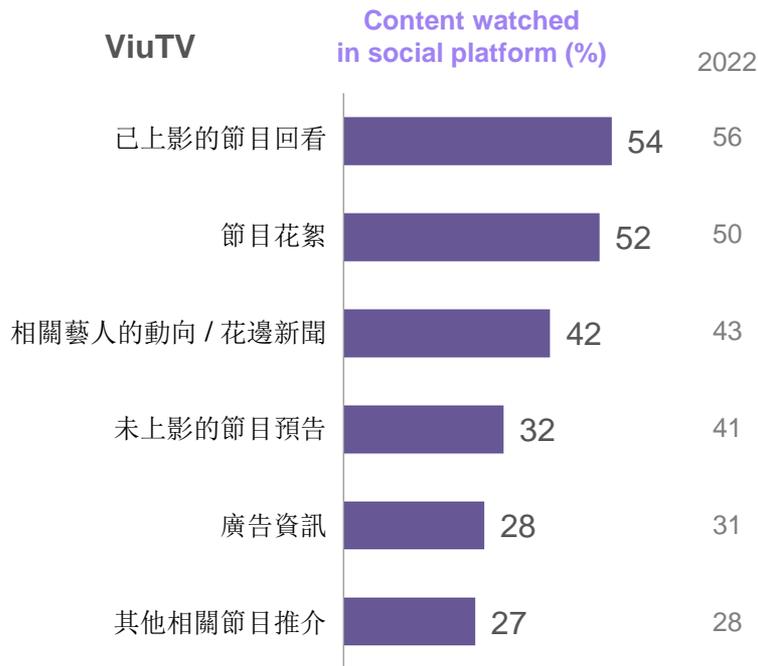
Similarly, 已上影的節目回看 and 節目花絮 are the most watched content in social platform for ViuTV.

15-34 y.o. found ViuTV content more attractive and showed higher interest in watching ViuTV content in other official sources. Rating of ViuTV and TVB are similar towards 35-64 y.o. audience.

ViuTV

Content watched in social platform (%)

已上影的節目回看
- 54
- 57
- 50

節目花絮
- 54
- 54
- 44

相關藝人的動向 / 花邊新聞
- 39
- 48
- 35

未上影的節目預告
- 35
- 30
- 33

廣告資訊
- 34
- 23
- 28

其他相關節目推介
- 25
- 26
- 30

Legend: ■ 15-34 ■ 35-49 ■ 50-64

Attractiveness

Age	Not attractive			Very attractive	Top 2 boxes	vs 2022 %pt
15-34	8	24	45	23	68%	(+2)
35-49	7	22	49	22	71%	(-7)
50-64	8	30	49	13	62%	(-10)

■ Not attractive   ■ Very attractive

Likelihood to keep watching in other official sources

Age	Not likely			Very likely	Top 2 boxes	vs 2022 %pt
15-34	5	26	46	24	70%	(+2)
35-49	4	21	53	21	74%	(-3)
50-64	7	30	50	13	63%	(-10)

■ Not likely   ■ Very likely

Content watched on social platforms are relatively similar as 2022 with Highlights (41%) is the most commonly watch content on HOY TV's social platform.

Slightly more has watched the Program Recommendation (23%) on the social platforms than before. Though attractiveness and likelihood to watch are relatively lower than TVB and ViuTV, however it has improved performance than 2022.

TV contents and Hoy TV's attractiveness

HOY TV

Content watched in social platform (%)   2022

Content	2023	2022
節目花絮	41	44
已上影的節目回看	36	36
相關藝人的動向 / 花邊新聞	34	34
廣告資訊	32	34
未上影的節目預告	24	23
其他相關節目推介	23	18

Attractive (49%)
(45%)

Attractiveness

15	36	34	14
(15)	(39)	(31)	(15)

Not attractive — Very attractive

Likely to watch (58%)
(51%)

Likelihood to keep watching in other official sources

12	30	43	15
(13)	(37)	(37)	(14)

Not likely — Very likely
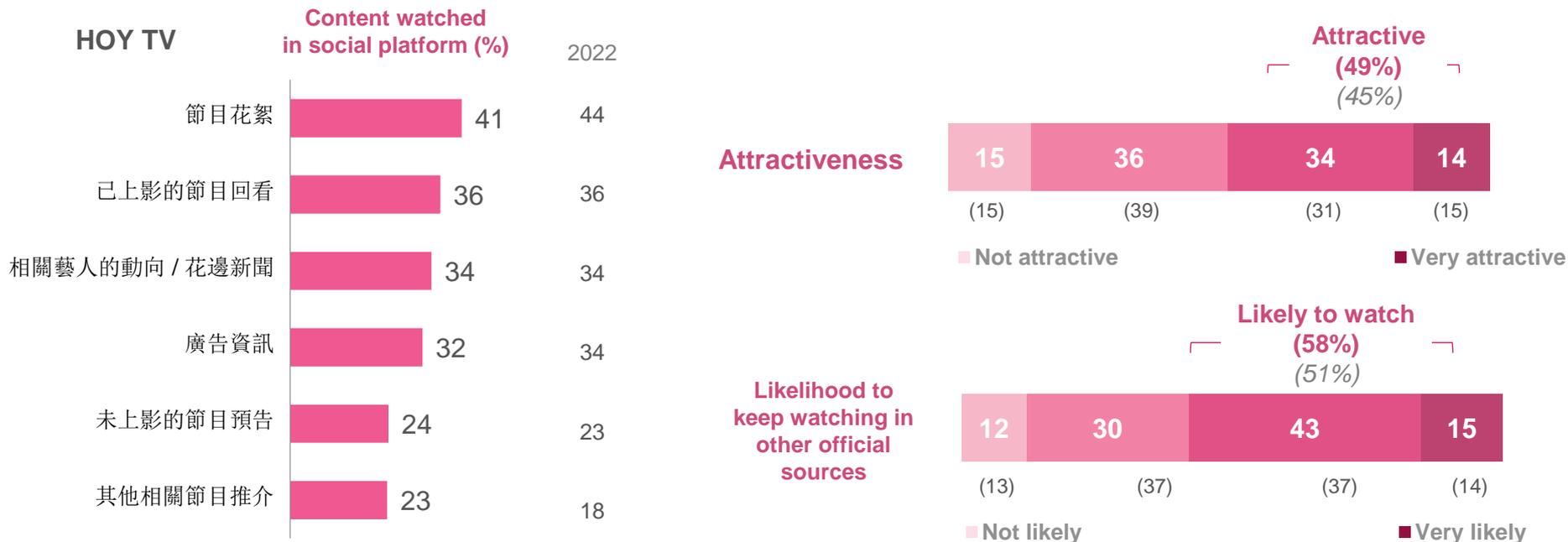
Remarks: HOY TV was named "香港開電視" in 2022

節目花絮 of HOY TV is the most watched content across different ages.

15-49 y.o. group is more likely to watch HOY TV content in other official sources.

HOY TV

Content watched in social platform (%)

Content	15-34	35-49	50-64
節目花絮	40	45	38
已上影的節目回看	40	34	33
相關藝人的動向 / 花邊新聞	40	30	32
廣告資訊	32	29	35
未上影的節目預告	26	24	21
其他相關節目推介	19	22	32

■ 15-34
■ 35-49
■ 50-64

Attractiveness

					Top 2 boxes vs 2022 %pt
15-34	21	31	29	19	48% (+4)
35-49	10	35	39	16	55% (+10)
50-64	13	47	35	5	40% (-14)

■ Not attractive   ■ Very attractive

Likelihood to keep watching in other official sources

					Top 2 boxes vs 2022 %pt
15-34	16	21	45	17	63% (+20)
35-49	10	27	46	18	63% (+12)
50-64	11	48	35	6	41% (-19)

■ Not likely   ■ Very likely

Remarks: HOY TV was named "香港開電視" in 2022

Audience Characteristics & Audience Duplication

NIQ

TVB and ViuTV has similar audience profile, with TVB has the highest reach among FTV across all age groups.

FTV Audience Characteristics

TVB
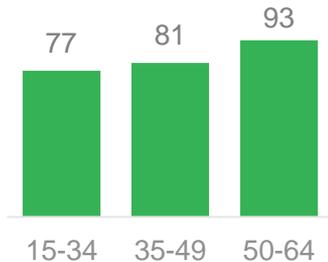
84% Weekly reach

- Female (56%), Male (44%)
- A15-34 (28%), A35-49 (33%), A50-64 (39%)
- MHI $73,383
- Married (68%) and 82% with kids
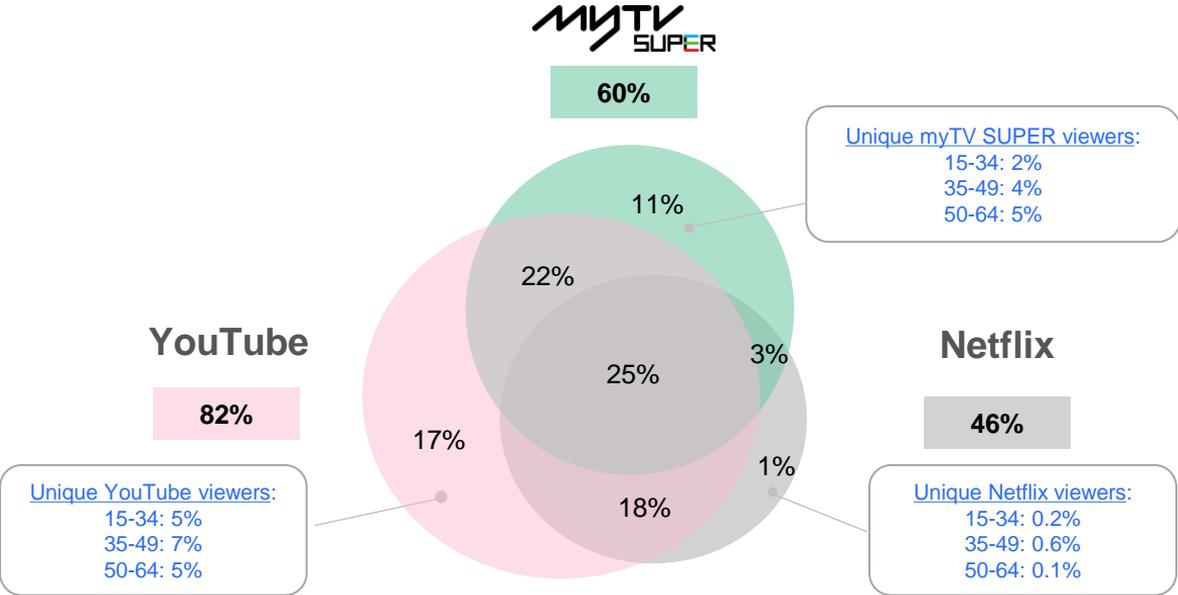
Weekly reach by age group

15-34	35-49	50-64
77	81	93

- 74% Insurance products
- 76% Saving products
- 71% Stock or bonds
- 33% Virtual bank account

67% Spent on supplements (Monthly spending HK$1,407)

ViuTV

52% Weekly reach
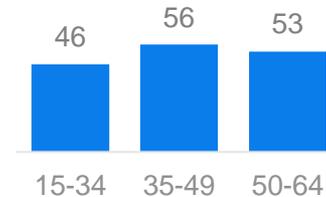
- Female (52%), Male (48%)
- A15-34 (27%), A35-49 (37%), A50-64 (36%)
- MHI $75,346
- Married (67%) and 82% with kids

Weekly reach by age group

15-34	35-49	50-64
46	56	53

- 75% Insurance products
- 75% Saving products
- 74% Stock or bonds
- 36% Virtual bank account

67% Spent on supplements (Monthly spending HK$1,405)

57% of TVB Linear audience have viewed ViuTV Linear in the past 7 days.

Audience Duplication for FTV

TVB Linear v.s ViuTV Linear

TVB

84%

ViuTV

52%

36% 48% 4%

Unique TVB viewers:
15-34: 11%
35-49: 10%
50-64: 15%

Unique ViuTV viewers:
15-34: 1%
35-49: 2%
50-64: 1%

- **TVB:** 5FTA
- **ViuTV:** 2FTA
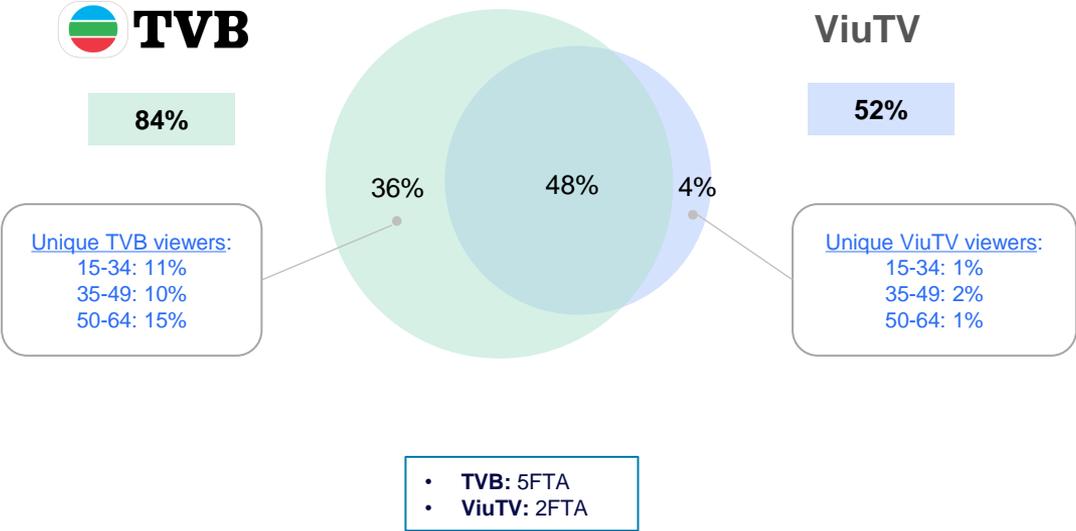
Only top 2 FTV with highest reach is shown.

YouTube and Netflix have more single audience while myTV SUPER skewed to married family and more likely to invest on self-improvement.

OTT/ Social Audience Characteristics

YouTube

82% Weekly reach

- Female (55%), Male (45%)
- A15-34 (33%), A35-49 (33%), A50-64 (34%)
- MHI $70,550
- Married (62%) and 81% with kids

Weekly reach by age group

15-34	35-49	50-64
89	79	77
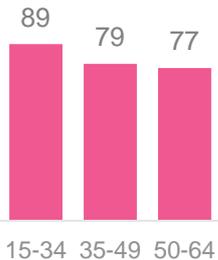
- 74% Insurance products
- 74% Saving products
- 72% Stock or bonds
- 36% Virtual bank account

69% Spent on supplements (Monthly spending HK$1,336)

MYTV SUPER

60% Weekly reach

- Female (54%), Male (46%)
- A15-34 (26%), A35-49 (33%), A50-64 (41%)
- MHI $78,222
- Married (75%) and 87% with kids

Weekly reach by age group

15-34	35-49	50-64
51	59	68
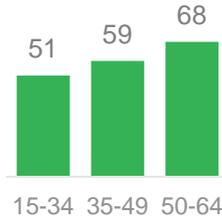
- 75% Saving products
- 72% Insurance products
- 70% Stock or bonds
- 33% Virtual bank account

Willing to invest time & money for self improvement. Average allocated HK$25,022 on advanced study annually

Netflix

46% Weekly reach

- Female (56%), Male (44%)
- A15-34 (41%), A35-49 (37%), A50-64 (22%)
- MHI $80,838
- Married (63%) and 84% with kids

Weekly reach by age group

15-34	35-49	50-64
63	50	28
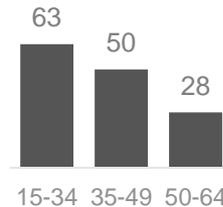
- 75% Insurance products
- 73% Saving products
- 72% Stock or bonds
- 42% Virtual bank account

74% Spent on supplements (Monthly spending HK$1,611)

Only top 3 OTT with highest reach is shown.
Base: YouTube viewers (n=817); myTV SUPER viewers (n=599); Netflix viewers (n=459)

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Stronger overlapping is seen among myTV SUPER and YouTube, while solus Netflix audience is low.

Audience Duplication for OTT

myTV SUPER v.s YouTube v.s Netflix

myTV SUPER
60%

YouTube
82%

Netflix
46%

11%

22%

25%

3%

17%

18%

1%

Unique myTV SUPER viewers:
15-34: 2%
35-49: 4%
50-64: 5%

Unique YouTube viewers:
15-34: 5%
35-49: 7%
50-64: 5%

Unique Netflix viewers:
15-34: 0.2%
35-49: 0.6%
50-64: 0.1%

Only top 3 OTT with highest reach is shown.

myTV SUPER and TVB Jade Enhanced the Total Reach to 84%

Viewership of Past 7 Days - myTV SUPER v.s TVB Jade (Ch.81) (By age)

Total

11% 49% 24%

myTV SUPER **60%**
TVB Jade **73%**

Total reach – 84%

15-34

15% 36% 27%

myTV SUPER **51%**
TVB Jade **63%**

Total reach – 78%

35-49

14% 45% 23%

myTV SUPER **59%**
TVB Jade **68%**

Total reach – 82%

50-64

5% 63% 24%

myTV SUPER **68%**
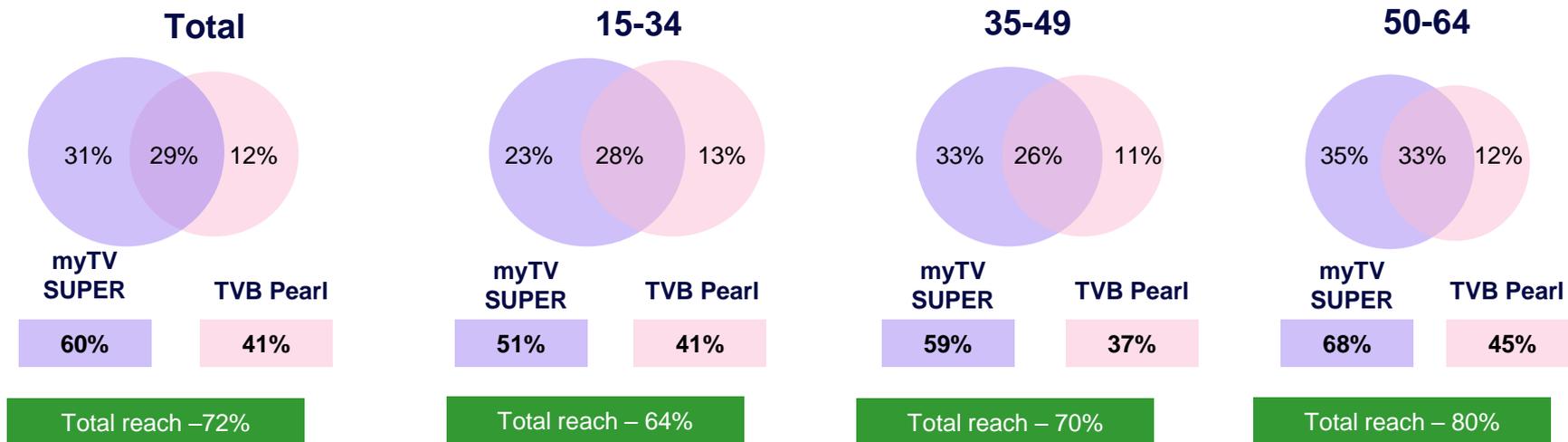TVB Jade **87%**
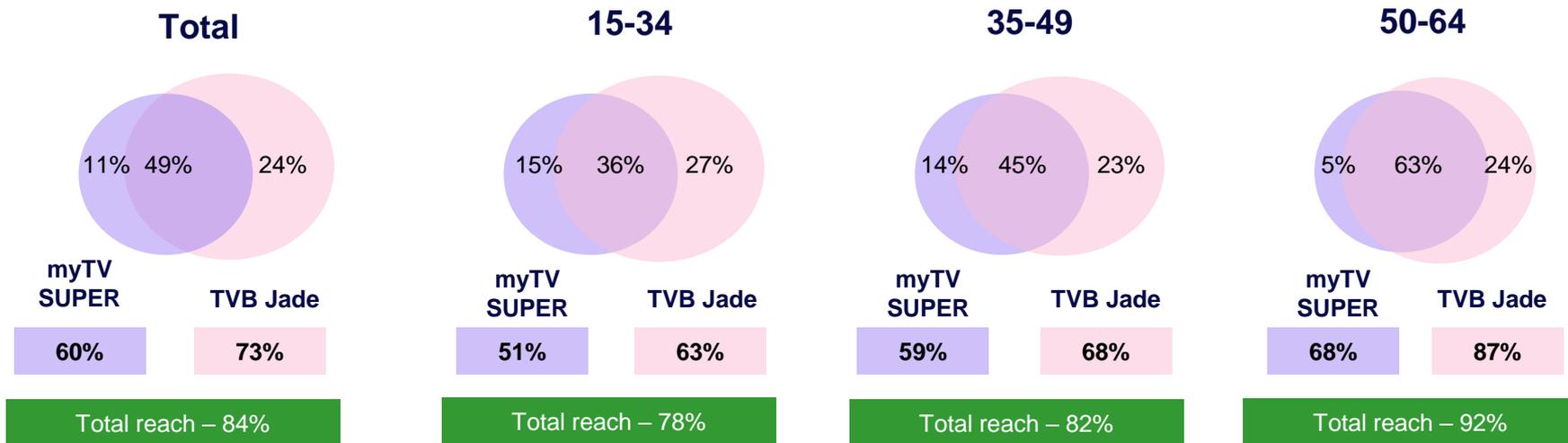
Total reach – 92%

Calculation illustration on Total aged 15-64:
- **Total reach – 11% + 49% + 24% = 84%**
- Incremental of <u>additional channel</u> to base channel
  - <u>myTV SUPER</u> to TVB Jade: 11%/ 73% = 15%
  - <u>TVB Jade</u> to myTV SUPER: 24% / 60% = 40%

- **myTV SUPER:** OTT + APP + Web + Smart TV
- **TVB Jade:** Ch.81 Free-to-Air channels

myTV SUPER and TVB J2 Enhanced the Total Reach to 82%

Viewership of Past 7 Days - myTV SUPER v.s TVB J2 (Ch.82) (By age)

Total	**15-34**	**35-49**	**50-64**

Total
17% 43% 20%
myTV SUPER — TVB J2
60%   63%
Total reach – 80%

15-34
20% 31% 20%
myTV SUPER — TVB J2
51%   51%
Total reach – 71%

35-49
19% 40% 21%
myTV SUPER — TVB J2
59%   61%
Total reach – 80%

50-64
13% 55% 20%
myTV SUPER — TVB J2
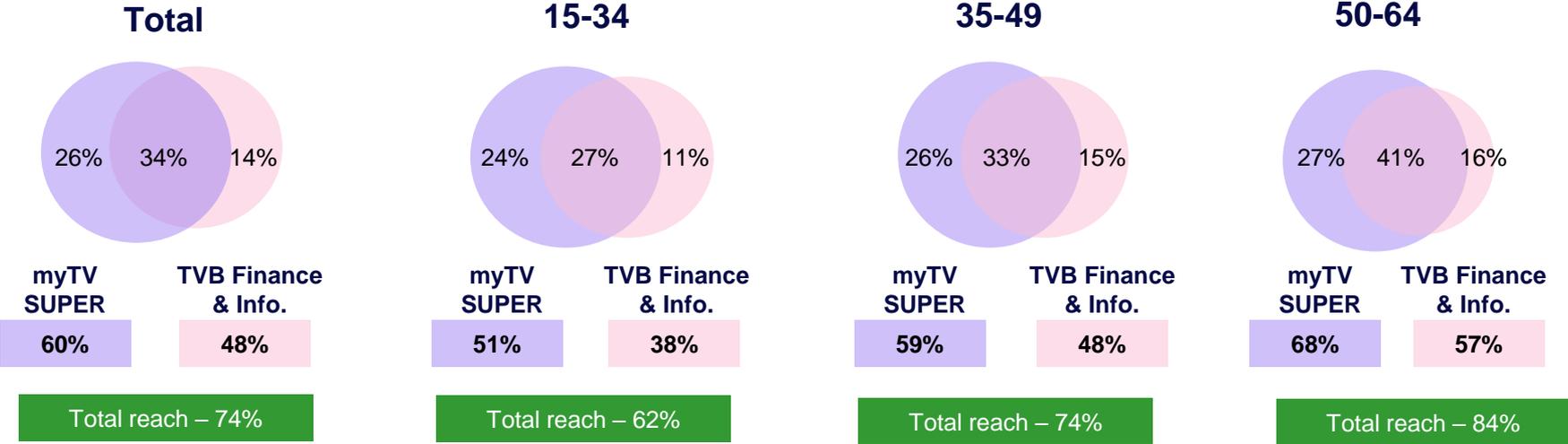68%   75%
Total reach –88%
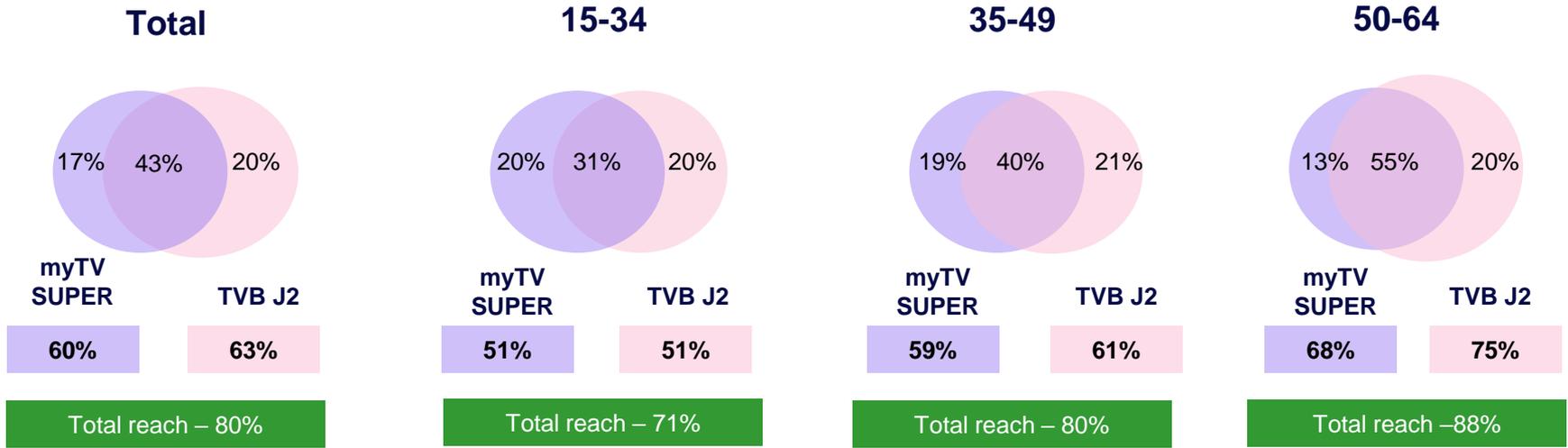
Calculation illustration on Total aged 15-64:
- **Total reach – 17% + 43% + 20% = 80%**
- Incremental of <u>additional channel</u> to base channel
  - <u>myTV SUPER</u> to TVB J2: 17%/ 63% = 27%
  - <u>TVB J2</u> to myTV SUPER: 20% / 60% = 33%

- **myTV SUPER:** OTT + APP + Web + Smart TV
- **TVB J2:** Ch.82 Free-to-Air channels

myTV SUPER and TVB News Enhanced the Total Reach to 82%

Viewership of Past 7 Days - myTV SUPER v.s TVB News (Ch.83) (By age)

Total

19% | 41% | 22%

myTV SUPER — 60% **TVB News** — 63%

Total reach – 82%

15-34

21% | 30% | 23%

myTV SUPER — 51% **TVB News** — 53%

Total reach – 74%

35-49

20% | 39% | 21%

myTV SUPER — 59% **TVB News** — 60%

Total reach – 80%

50-64

15% | 53% | 22%

myTV SUPER — 68% **TVB News** — 75%
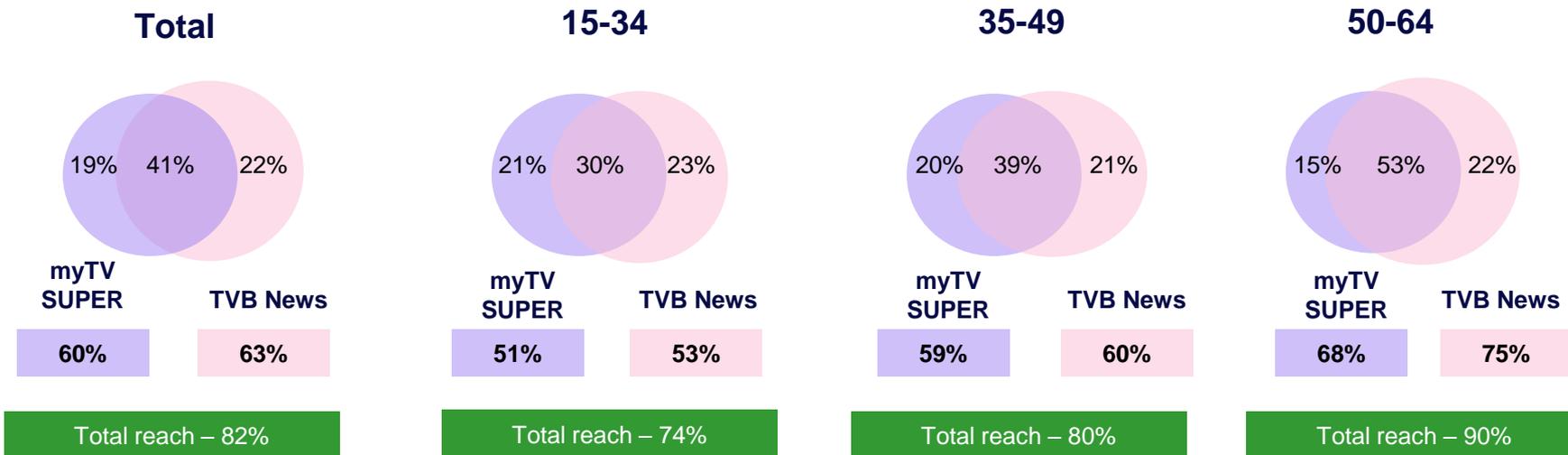
Total reach – 90%

Calculation illustration on Total aged 15-64:
- **Total reach – 19% + 41% + 22% = 82%**
- Incremental of additional channel to base channel
  - myTV SUPER to TVB News: 19%/ 63% = 30%
  - TVB News to myTV SUPER: 22% / 60% = 37%

- **myTV SUPER:** OTT + APP + Web + Smart TV
- **TVB News:** Ch.83 Free-to-Air channels

myTV SUPER and TVB Pearl Enhanced the Total Reach to 72%

Viewership of Past 7 Days - myTV SUPER v.s TVB Pearl (Ch.84) (By age)

Total

myTV SUPER		TVB Pearl
31%	29%	12%

myTV SUPER	TVB Pearl
60%	41%

Total reach –72%

15-34

myTV SUPER		TVB Pearl
23%	28%	13%

myTV SUPER	TVB Pearl
51%	41%

Total reach – 64%

35-49

myTV SUPER		TVB Pearl
33%	26%	11%

myTV SUPER	TVB Pearl
59%	37%

Total reach – 70%

50-64

myTV SUPER		TVB Pearl
35%	33%	12%

myTV SUPER	TVB Pearl
68%	45%

Total reach – 80%

Calculation illustration on Total aged 15-64:
- **Total reach – 31% + 29% + 12% = 72%**
- Incremental of additional channel to base channel
  - myTV SUPER to TVB Pearl: 31%/ 41% = 76%
  - TVB Pearl to myTV SUPER: 12% / 60% = 20%

- **myTV SUPER:** OTT + APP + Web + Smart TV
- **TVB Pearl:** Ch.84 Free-to-Air channels

myTV SUPER and TVB Finance & Ino. Enhanced the Total Reach to 74%

Viewership of Past 7 Days - myTV SUPER v.s TVB Finance & Info. (Ch.85) (By age)

Total

26% | 34% | 14%

myTV SUPER | TVB Finance & Info.
60% | 48%

Total reach – 74%

15-34

24% | 27% | 11%

myTV SUPER | TVB Finance & Info.
51% | 38%

Total reach – 62%

35-49

26% | 33% | 15%

myTV SUPER | TVB Finance & Info.
59% | 48%

Total reach – 74%

50-64

27% | 41% | 16%

myTV SUPER | TVB Finance & Info.
68% | 57%

Total reach – 84%

Calculation illustration on Total aged 15-64:
- **Total reach – 26% + 34% + 14% = 74%**
- Incremental of <u>additional channel</u> to base channel
  - <u>myTV SUPER</u> to TVB Finance & Info: 26%/ 48% = 54%
  - <u>TVB Finance & Info</u> to myTV SUPER: 14% / 60% = 23%

- **myTV SUPER:** OTT + APP + Web + Smart TV
- **TVB Finance & Info:** Ch.85 Free-to-Air channels

87% of YouTube viewers can be gained by TVB platforms
- With Unique Reach of 17% from TVB that Cannot be Reached by YouTube

Viewership of Past 7 Days – TVB v.s YouTube (By age)

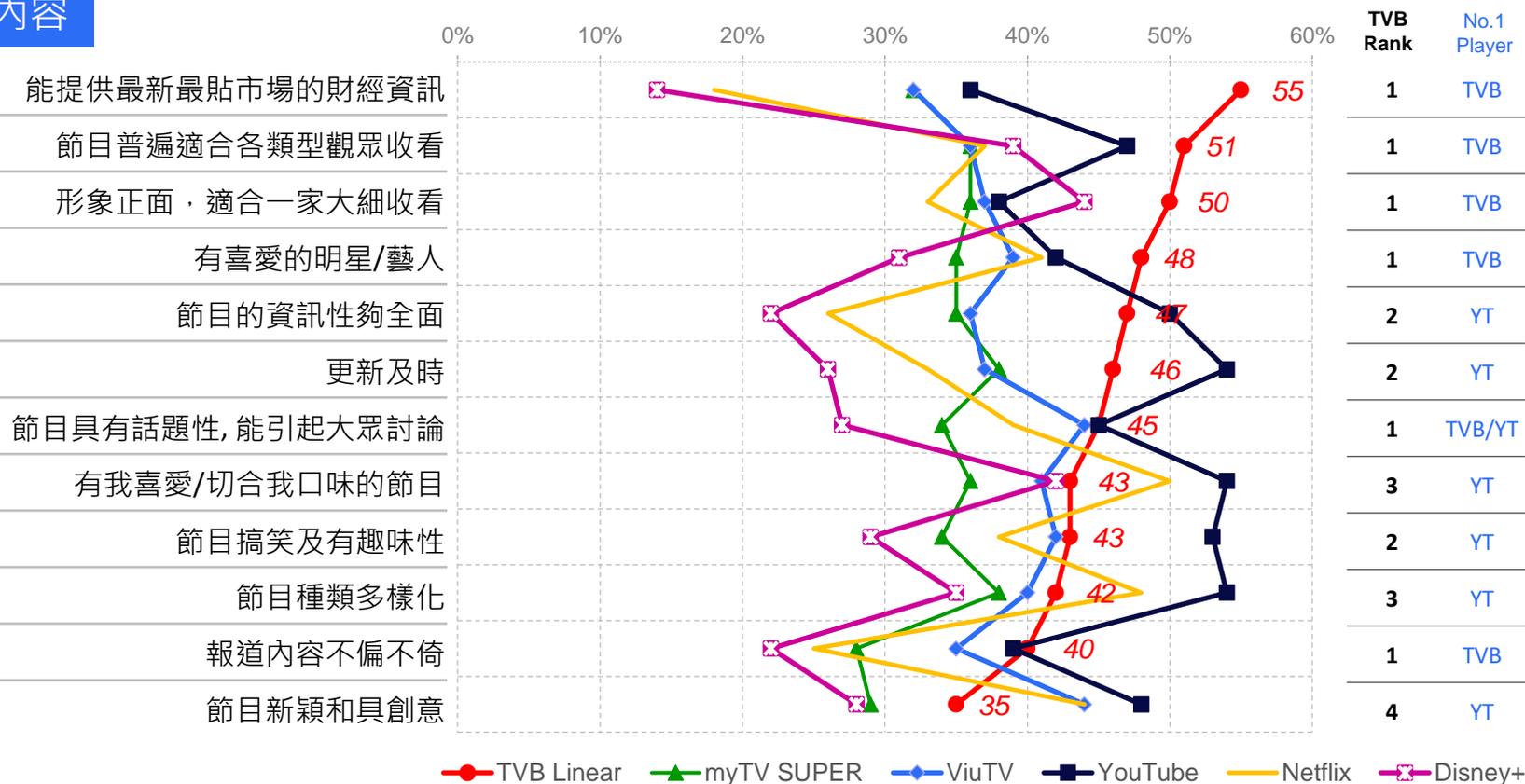| Total	15-34	35-49	50-64
17% 71% 11%	10% 72% 17%	19% 68% 11%	23% 71% 6%

Total

TVB Linear + Digital: **88%** YouTube: **82%**

87% YouTube viewers can be gained by TVB platforms <71%/82% = 87%>

15-34

TVB Linear + Digital: **82%** YouTube: **89%**

81% YouTube viewers can be gained by TVB platforms <72%/89% = 81%>

35-49

TVB Linear + Digital: **87%** YouTube: **79%**

86% YouTube viewers can be gained by TVB platforms <68%/79% = 87%>

50-64

TVB Linear + Digital: **94%** YouTube: **77%**

92% YouTube viewers can be gained by TVB platforms <71%/77% = 92%>

- **TVB:** 5FTA + myTV SUPER
- **YouTube:** All platforms

57% of YouTube viewers can be gained by myTV SUPER platforms
- With Unique Reach of 13% from myTV SUPER that Cannot be Reached by YouTube

Viewership of Past 7 Days - myTV SUPER v.s YouTube (By age)

Total

myTV SUPER	YouTube
13%	47%	35%

60%	**82%**

57% YouTube viewers can be gained by myTV SUPER platform
<47%/82% = 57%>

15-34

| 8% | 43% | 46% |

| **51%** | **89%** |

48% YouTube viewers can be gained by myTV SUPER platform
<43%/89% = 48%>

35-49

| 16% | 43% | 36% |

| **59%** | **79%** |

54% YouTube viewers can be gained by myTV SUPER platform
<43%/79% = 54%>

50-64

| 15% | 53% | 24% |

| **68%** | **77%** |

69% YouTube viewers can be gained by myTV SUPER platform
<53%/77% = 69%>
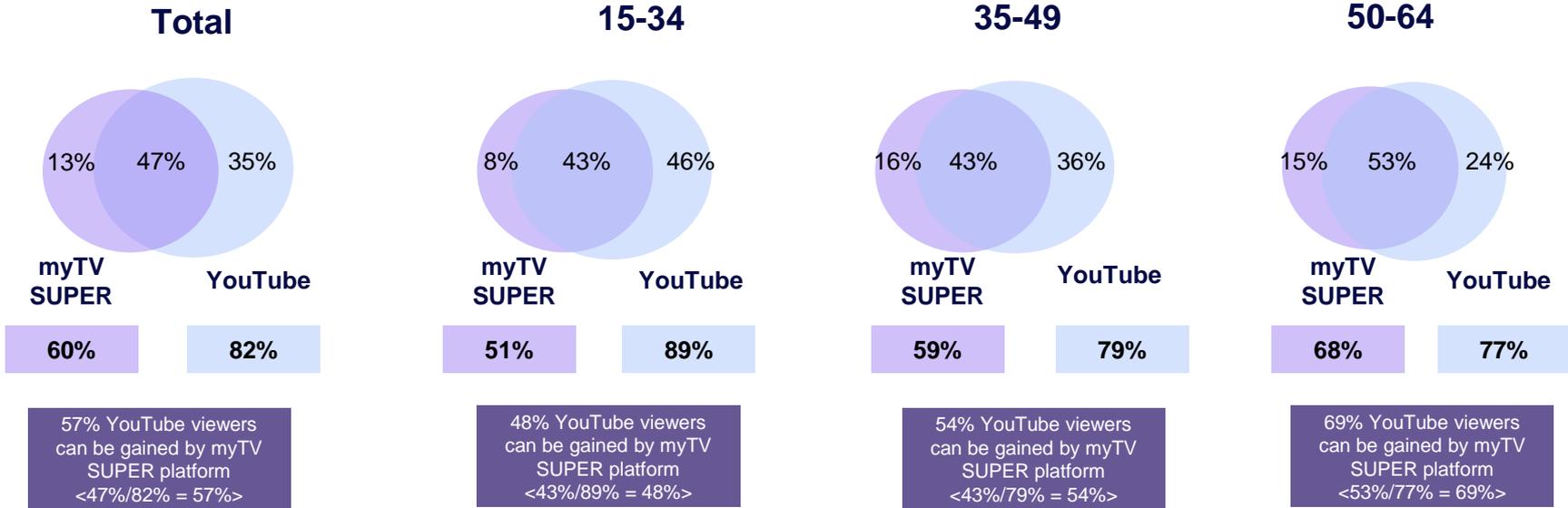
- **myTV SUPER:** OTT + APP + Web + Smart TV
- **YouTube:** All platforms

Brand Equity

Brand Perceptions (By Attributes) (Aged 15-64)

內容

能提供最新最貼市場的財經資訊	TVB Rank: 1	No.1 Player: TVB
節目普遍適合各類型觀眾收看	1	TVB
形象正面，適合一家大細收看	1	TVB
有喜愛的明星/藝人	1	TVB
節目的資訊性夠全面	2	YT
更新及時	2	YT
節目具有話題性, 能引起大眾討論	1	TVB/YT
有我喜愛/切合我口味的節目	3	YT
節目搞笑及有趣味性	2	YT
節目種類多樣化	3	YT
報道內容不偏不倚	1	TVB
節目新穎和具創意	4	YT

TVB Linear values: 55, 51, 50, 48, 47, 46, 45, 43, 43, 42, 40, 35

Legend: TVB Linear, myTV SUPER, ViuTV, YouTube, Netflix, Disney+

Brand Perceptions (By Attributes) (Aged 15-64)

Legend: TVB Linear | myTV SUPER | ViuTV | YouTube | Netflix | Disney+

形象		TVB Rank	No.1 Player
緊貼時事	56	1	TVB
係香港人的媒體	55	1	TVB
展示香港社會人情味	53	1	TVB
關注社會	52	1	TVB
貼近生活	51	1	TVB
有親切感	51	1	TVB
同聲同氣	50	1	TVB
引起共鳴	46	2	YT

廣告		TVB Rank	No.1 Player
廣告產品的品牌形象正面	51	1	TVB
提升我對產品的認知度	50	1	TVB
出現的廣告大多數都和我相關	50	1	TVB
為我購物提供具價值的參考資訊	48	2	YT
出現的廣告我會特別信任	48	1	TVB
廣告形式多元化/互動性高	47	2	YT
提升我對廣告品牌的好感度	47	1	TVB

Q17ab. 請問你認為以上句子適合形容邊啲媒體?
Base: Hong Kong residents aged 15-64 who have watched any video content on the respective channels in past 7 days ?

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Brand Perceptions (By Attributes) (Aged 15-64)

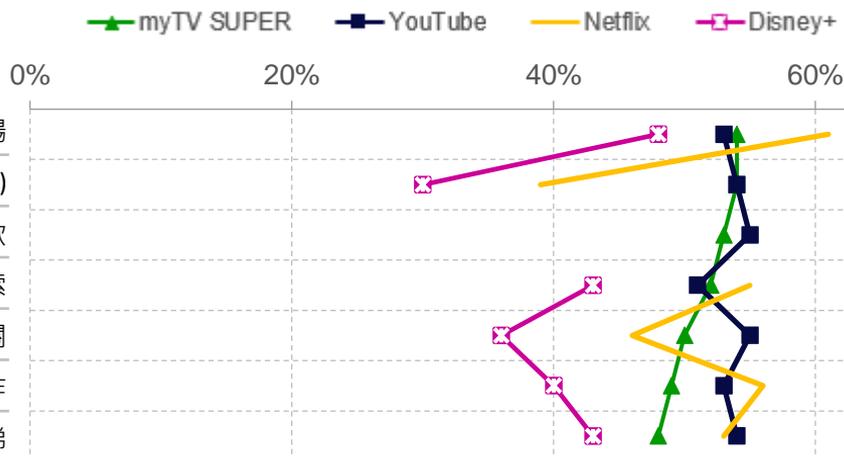Legend: myTV SUPER ▲ | YouTube ■ | Netflix — | Disney+ ☒

體驗

	No.1 Player
清晰度高/流暢	Netflix
多種播放模式(e.g.直播, 點播)	YouTube
會因為太多廣告而減低收看意欲	YouTube
分類清晰，容易搜索	Netflix
推薦的內容個人化, 大多數與我看過的相關	YouTube
界面人性化，容易操作	Netflix
能夠推介啱心水的節目俾我睇	YouTube

訂購

	No.1 Player
希望有更多的訂閱計劃以供考慮	Netflix
相比其他收費平台, 佢既價格有競爭力	Netflix
訂購和取消的手續都是簡約方便	Netflix
收費合理	Netflix

Axis: 0% 20% 40% 60%

Q17ab. 請問你認為以上句子適合形容邊啲媒體?
Base: Hong Kong residents aged 15-64 who have watched any video content on the respective channels in past 7 days ?

myTV SUPER
User Experience

NIQ

myTV SUPER Audiences are……

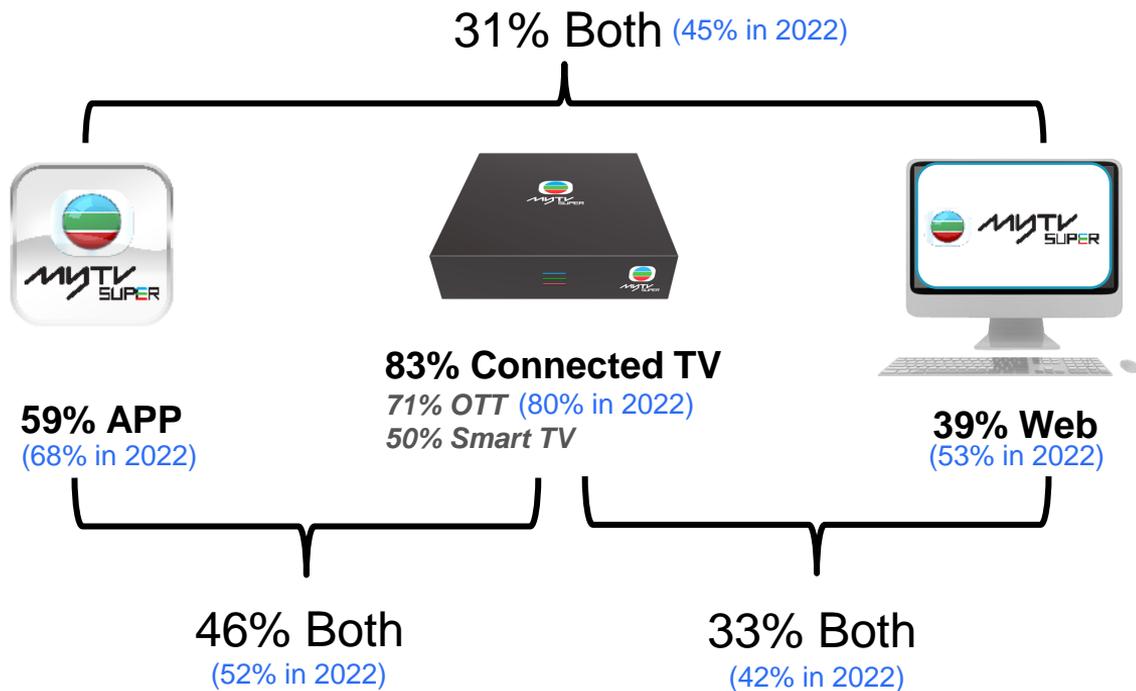**All platforms: 28%** (39% in 2022)

31% Both (45% in 2022)

64 min (87) daily time spent per viewer

27% (37%) viewers watch everyday

Viewers watch **4.0 days (4.3)** a week on average

( ) is 2022 data

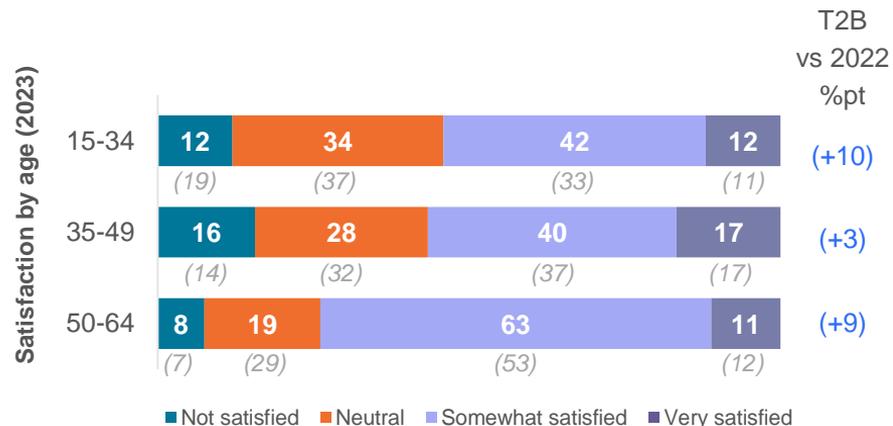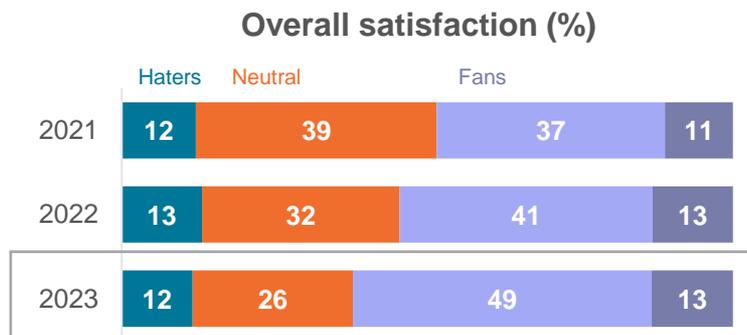**83% Connected TV**
71% OTT (80% in 2022)
50% Smart TV

59% APP
(68% in 2022)

39% Web
(53% in 2022)

46% Both
(52% in 2022)

33% Both
(42% in 2022)

Q9. 請問你最近什麼時候用以下媒體收看電視節目或影片 ／ Q10. 一般來說，你透過以下媒體收看電視或影片有幾頻密 ／ Q11.平均來說，在你有收看的日子,你每天花幾多時間收看各影視平台的節目/影片? Base: All respondents who have watched any video in myTV SUPER (box/app/web) in past 1 month (n=677)

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Overall satisfaction level has further enhanced with more have shifted from neutral to fans.

Level of satisfaction

Overall satisfaction (%)

	Haters	Neutral	Fans	
2021	12	39	37	11
2022	13	32	41	13
2023	12	26	49	13

Satisfaction by age (2023)

	Not satisfied	Neutral	Somewhat satisfied	Very satisfied	T2B vs 2022 %pt
15-34	12	34	42	12	(+10)
	(19)	(37)	(33)	(11)	
35-49	16	28	40	17	(+3)
	(14)	(32)	(37)	(17)	
50-64	8	19	63	11	(+9)
	(7)	(29)	(53)	(12)	

■ Not satisfied ■ Neutral ■ Somewhat satisfied ■ Very satisfied

Q19. 整體而言，你對myTV SUPER有多滿意？
Base: myTV SUPER viewers (Ever) by age 2023 Total (n=836); 15-34 (n=242); 35-49 (n=288); 50-64 (n=306); 2022 (n=2,018); 2021 (n=2,100)

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myTV SUPER Audiences are……

Gender

46% VS 54%
(+1pt) (-1pt)

Age

11% A15-24 *(+3pts)*
16% A25-34 *(-2pts)*
21% A35-44 *(same)*
24% A45-54 *(+1pt)*
29% A55-64 *(-2pts)*

University

51% 50%

2023 | 2022

Working

87% 86%

2023 | 2022

PMEB

47% 49%

2023 | 2022

Married

75% Married

9 out of 10 have Kids

Grocery Shoppers

88% 88%

2023 | 2022

Head of Household

81% 83%

2023 | 2022

Household Monthly Income

55% HK$60k+

2022 (52%)

Median of HK Household: HK$30,000*

Personal Monthly Income

57% HK$30k+

2022 (53%)

Median of Personal Income: HK$19,100*

Thank you.