

# What Type of People Will Enjoy the New Digital Services?

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Terrestrial digital broadcasting made its debut in Japan in December 2003, setting in motion the ongoing digitization of television. The digital mode is likely to give a strong push to multiple channels and development of advanced features of television, but how will viewing behavior change once this becomes reality? How will people choose from a multitude of channels and programs? How will they decide which program to watch at a given time, and what kind of information or system they find most useful? How appealing and necessary do digital home stations and server-based broadcasting sound to the viewing public? To answer these questions, we decided first to gather more detailed information on how people perceive programs and programming, and how they choose and view programs. To this end, from late September to early October 2003 focused group interviews were held to learn how viewers usually watch television, choose programs or record and replay taped material.

## DESCRIPTION OF THE STUDY

The subjects for this study were men and women aged 35–49. We chose this age bracket in order to focus on television viewing and program selection within families, and because it is the one most likely to adopt new digital services. Figure 1 describes the subjects' characteristics. Since the subjects were interviewed about daily television viewing and videotape viewing behavior, we defined certain criteria for viewing and videotaping frequency, as described in the table. Using the same criteria, similar numbers of respondents who viewed terrestrial broadcasts or NHK satellite broadcasting (conventional channel viewers) and those who, in addition to the terrestrial and satellite broadcasting just mentioned, also had access to an additional 15 or more channels (multiple-channel viewers) were interviewed, to find out more about interest in multiple channels and changes in viewing behavior in a multiple-channel environment.

In addition, two groups of male and female students aged 18–22 who were multiple-channel viewers were interviewed as a comparative segment, to get

an idea of changes in viewing behavior among the younger generation, and to highlight generational differences.

Since subjects were chosen from among residents of the Tokyo metropolitan area who were available for the interviews, the terrestrial channels to which they had access were limited to those broadcasting in this area.<sup>1</sup>

Basically, the focused group interview method was followed, but each group was limited to four persons, who were all interviewed in depth. The interviews covered the following items:

- What program genres do you often watch? Do you like television?
- In your family, who turns the TV on; who chooses the channels to watch; when is the TV turned off?
- Television viewing on weekdays and weekends. Participants were asked to keep a diary logging time spent sleeping, time at home, eating meals, watching TV, and so forth, on a weekday and on a Saturday or Sunday of their choice immediately prior to the survey. During the interviews, participants were questioned in detail about conditions pertaining to viewing and their reasons for viewing, on the basis of this diary.

**Figure 1. Survey Subject**

	Criteria			No. of groups	No. of subjects
	Age	Viewing habits	TV environment		
Core Group	35–49 yrs old	Watch TV almost daily	Terrestrial TV alone or plus NHK BS 1 and 2	6 groups of 4 (male and female workers, homemakers)	24
		Replay a taped program at least once a month	Plus 15 channels or more accessible		Same as above
Comparative Group	18–22 yrs old	Watch TV almost daily Replay a taped program at least once a month	Plus 15 channels or more accessible	2 groups of 4 (male and female students)	7 (1 absent)

<sup>1</sup> The channel names and numbers for the terrestrial analog (VHF) key stations which can be viewed in the Tokyo metropolitan area are as follows:

- 1 NHK General (public broadcaster)
- 3 NHK Educational (public broadcaster)
- 4 NTV (commercial broadcaster)
- 6 TBS (commercial broadcaster)
- 8 Fuji TV (commercial broadcaster)
- 10 TV Asahi (commercial broadcaster)
- 12 TV Tokyo (commercial broadcaster)

- What materials do you base your choice of programs on, how widely do your choices range, how do you channel-surf (order of pressing buttons on the remote control, extent of channel-surfing, when channel-surfing occurs, etc.)
- Level of choice involved in programs watched/to be watched. Level of choice was divided into four patterns using the wording below; participants were asked the level according to which they chose programs viewed, and the level according to which they most often chose programs during ordinary viewing.

*Selective viewing:* Programs you choose yourself/that you like to watch/that you watch attentively.

*Habitual viewing:* Programs that you watch more or less out of habit.

*Accompanying viewing:* Programs that the family has chosen and that you watch together with them.

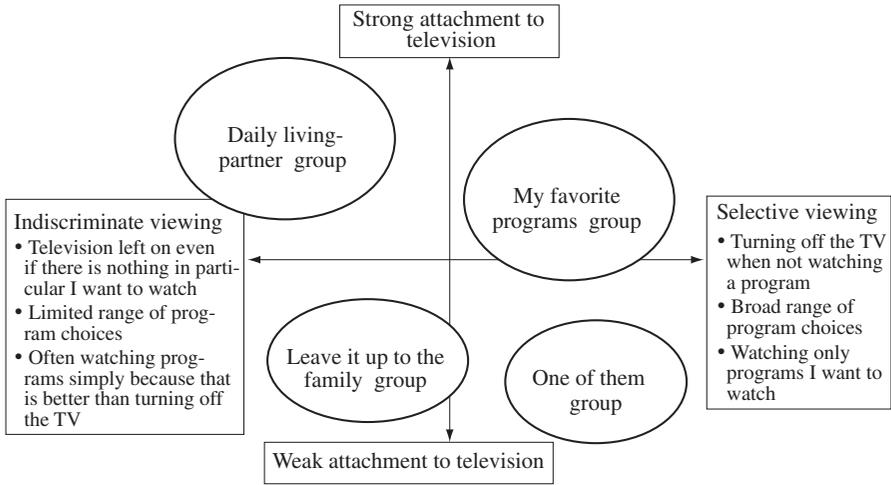
*Process of elimination viewing:* Programs you watch simply because that is better than turning off the TV.

- How often do you record and replay taped programs, what programs are they, and how often do you use rented and/or purchased material?
- What are your expectations concerning terminals that can store programs for later viewing (digital home stations), server-based broadcasting, electronic program guides, and other new functions?

#### FOUR TYPES OF TELEVISION VIEWING AND PROGRAM SELECTION

We will begin with a summary of participants' answers when they were asked how they usually watched television and the levels of choice for programs they watched. After collating information on television viewing and program selection collected through interviews with the 55 participants, we divided the group into four main types, as described in Figure 2. The vertical axis represents the participants' attitude toward television, or the strength of their attachment to television; in other words, how strongly they like television or feel it is an essential part of their lives, with attachment to and interest in television increasing proportionately up on this axis. The horizontal axis represents television viewing behavior, with selective viewing ("television turned off when not watching a program," "broad range of program choices, including multiple channels") proportionally stronger the farther to the right on this axis, and more or less indiscriminate viewing ("television left on even if there is nothing in particular I want to watch," "limited range of program choices") stronger the farther to the left. Some subjects showed neutral attitudes or

**Figure 2. Groupings by Attitude and Behavior**



viewing behavior on each axis; attitudes and viewing behavior sometimes also differed depending on the time slot or circumstances, but generally speaking, some subjects occupied each quadrant.

The characteristics of each of the four types of program selection and viewing behavior are described below.<sup>2</sup>

**The “Daily Living-Partner” Group**

These subjects, whom we dubbed the “daily living-partner” group, shown in the upper left quadrant of Figure 2, are people who love television and consider it essential, leaving the television on all the time and rarely turning it off.

In this survey, the number of subjects in the daily living-partner group was roughly equal to that in the “my favorite programs” group, to be described below. We interviewed equal numbers of conventional channel and multiple-channel viewers in this survey, although in general about 30 percent of people across the country were multiple-channel subscribers.<sup>3</sup> As will be described

<sup>2</sup> Each type is given a name that indicates what television means to that type of person. For the “daily living-partner” group, television is like a partner in daily life; for the “my favorite program” group, television is a device for watching favorite programs; for the “leave it up to the family” group, watching television means watching programs chosen by other family members; and for the “one of them” group, television is simply one of many media.

<sup>3</sup> As of March 31, 2002, 15,140,000 households subscribed to cable television stations, a penetration rate of 31.2 percent. In a study conducted by our Institute in the city of Yokkaichi, Aichi prefecture, where all households have cable service, a similar proportion, approximately 30 percent, subscribed to multiple-channel service.

below, a relatively large proportion of multiple-channel viewers are in the “my favorite programs” group. Accordingly, the daily living-partner type individuals probably account for the majority of people in this age group. This type of viewer is found not only among housewives but also among men and women including workers and students. Verbatim comments from some of these individuals are presented below.

*The television is always on*

“The first thing I do when I get home is to turn the TV on; it stays on until I go to bed. It’s always on, even though I might not actually be in the room.” (Woman, 35, working)

“The TV is my friend. It’s not so much that I am always watching television, but I always have it on when I’m home.” (Woman, 46, homemaker)

“I almost never turn the TV off. I dislike it when the TV isn’t on. It’s always on, even though I may not be watching, or even if I’m not paying much attention to it.” (Man, 47)

*Limited range of program choices*

“I think I just channel-surf at random. I just keep switching among channels 4, 6, 8, 10 and 12. I don’t go to 1 and 3. If there’s really nothing on I might switch to a (satellite) channel that concentrates on one thing, but basically I stick to terrestrial broadcasts. I try to watch shows that are enjoyable, or programs on which people I’m interested in appear.” (Woman, 46, homemaker)

“(Channels) 4, 6, 8, 10, 12. I don’t surf 1 or 3, because I only watch certain programs on those channels. Channel 4 is easy to press on the remote, so I usually start with 4.” (Woman, 39, homemaker)

“I go through (channels) 4, 6 and 8. I don’t watch 1, 3 or 12, because those channels always just have the same kinds of programs all the time . . . they seem to just always be the same. On Channel 12, it’s usually programs about ‘ramen’ Chinese noodles or hot-spring resorts; Channel 1 has popular singing shows. Come to think of it, I don’t watch Channel 10 that much either.” (Man, 45)

*Choose programs for laughs or enjoyment*

“I tend to go for entertainment programs. When my husband goes out, I switch channels to programs featuring my favorite entertainers, or to something that seems interesting. I often watch ‘wide show’ [news and gossip show]-type programs.” (Woman, 46, homemaker)

“These days I often select programs because certain personalities appear on them. If someone I dislike is on a program I will turn the TV off or switch to

another channel, opting for the least distasteful alternative.” (Woman, 36, working)

“I watch news, sports or variety<sup>4</sup> programs. I rarely watch dramas, because they are usually serialized, and you can’t tell where the story is going if you start watching partway through the series. I just watch programs that will give me a good laugh, or news, so that I can keep abreast of what’s going on.” (Man, 40)

“I like variety programs, because they don’t leave a bad aftertaste and they’re good for passing the time.” (Woman, 46, homemaker)

#### *Can generally recall programs*

“I don’t remember exactly what programs air at what time, but when the time comes I recall a program I always watch, and so I tune in. For certain time slots I have programs I always watch, but if the content is boring I’ll switch channels.” (Woman, 46, homemaker)

“I don’t look at the program guides very much. I generally remember which program is on when, on which channel.” (Man, 35)

“When you watch TV, they always repeat teasers for other programs. So I watch those programs.” (Woman, 42, homemaker)

#### *Generally satisfied with programs*

“I’ve never really thought about that. I’m in the habit of choosing from what’s available. I’m not dissatisfied, really. I generally feel that I’m watching the kinds of programs I want to see.” (Woman, 35, working)

“I’m quite satisfied. Programs could improve, of course, but things are okay as they are now.” (Man, 19, student)

“Although the programs are not completely satisfactory, I think housewives consider them quite acceptable.” (Woman, 40, working)

“The programs on nowadays are fine, and I don’t expect any further improvements.” (Man, 35, working)

The characteristics of the daily living-partner group can be described as follows:

<sup>4</sup> Many programs falling under the “variety” genre of television programs in Japan include not only singing, music and talk but many other elements as well. In a study of program classifications, we define current “variety” programs as follows: 1) programs that can be watched enjoyably because they arouse laughter, excitement, empathy, fear or are intellectually stimulating; 2) the basic format consists of studio programs hosted by TV personalities and celebrities, with other entertainers taking part; and 3) in many cases, the program, true to the genre name, includes a variety of segments.

- The television is on during virtually all of their waking hours at home, and they rarely turn it off, even though there might not be anything on they especially feel like watching.
- Many men are in the habit of channel-surfing, and they flip from news to sports to variety programs.
- They like watching terrestrial programming by commercial broadcasters, and they confine their surfing to terrestrial channels. They think of NHK as providing channels for watching certain programs only, and many people exclude the NHK channels from their surfing.
- Variety programs are a favorite genre of many people in this group, and they often watch this type of program.
- Many of these people watch the same programs regularly, and many of them know what time these programs are on without having to refer to program guides.
- A relatively large number of people watch programs after seeing announcements for those programs from the broadcaster.
- Some respondents, even though they subscribed to cable TV, did not often watch cable/satellite channels (i.e., all-sports, etc.), or had dropped their subscription.
- The majority were more or less satisfied with current program quality or found the programs enjoyable. They seemed to feel that they would have a problem if they spent more time watching television than they already did.

### **The “My Favorite Programs” Group**

Participants in the upper right quadrant of Figure 2 liked television and believed that it was necessary, but in terms of viewing behavior they only watched the programs they wanted to watch and turned the television off when they were not watching. Here are some of the comments these people made.

#### *Television off when not watching*

“Even if it’s a favorite program of mine, I won’t watch if the topic is boring. I make a conscious decision to watch a program each time; there are no programs that I watch just because it’s that time of day. It’s not a question of feeling unsettled if I don’t watch a certain program—I have other things I want to do during that time.” (Man, 35)

“Once the news programs are over, TV just becomes a distraction so I turn it off. I used to dislike not having the TV on all the time, but lately it is off once in a while. There aren’t any programs I want to watch in the hour before I go to bed, so I turn it off.” (Man, 46)

“After watching the news for about 20 minutes, I surf through various channels. If I stumble across something I want to see I’ll watch it, but otherwise I’ll turn the TV off.” (Woman, 37, working)

*Check newspapers or prior announcements*

“I don’t read the newspaper in the morning, so I check the program guides after I get home to see what programs will be on while I’m at home. If a program deals with topics I’m interested in, then I’ll watch.” (Man, 39)

“I can’t decide on my schedule for the day unless I check the newspaper first thing in the morning. I also check (the program guides) when the evening paper comes. I read the comments about the programs too.” (Woman, 48, homemaker)

“Whenever you watch TV you see previews for programs that will appear later, and if I see something I feel I’d like to watch, I remember it or make a note somewhere and make a point of watching it.” (Woman, 37, working)

“Once I decide on the programs I want to watch, such as dramas, I jot them down. I have the list next to the refrigerator, with notes like ‘Wednesday, at X o’clock, Y program.’” (Woman, 37, working)

*Viewing with a purpose in mind*

“I like going to concerts in the evening, so I go out and consequently I don’t watch television that much any more. I don’t watch variety shows at all. I used to watch them, mind you; I liked programs like *Hyokin-zoku* [The Zany Crew]<sup>5</sup> or *Kin-chan*.<sup>6</sup> The reason I don’t watch any more is that TV is boring.” (Woman, 48, homemaker)

“Television is necessary as a means of keeping up with the latest information. I think it’s the most important source of information that’s readily accessible. Not having television would be a real problem.” (Man, 35)

“I watch programs that will stimulate my motivation to work, documentaries like *Project X*<sup>7</sup> or *Gaia no yoake* [Dawn of Gaia],<sup>8</sup> or else dramas with an energetic, single-minded fellow as the hero.” (Man, 35)

<sup>5</sup> *Oretachi hyokin-zoku* was a variety program aired by Fuji TV between May 1981–October 1989. It featured comedians with an individualistic style, such as Beat Takeshi and Akashiya Sanma, who took part in nonsensical gags and parodies to make audiences laugh.

<sup>6</sup> The nickname of comedian Hagimoto Kin’ichi. He starred in popular prime-time comedy shows such as *Kin-chan no doko made yaru no!* [How Far Will Kin-chan Go?](TV Asahi) and *Kin-chan no don to yatte miyo!* [Go All-out With Kin-chan!](Fuji TV) which aired in the 1970s and early 1980s. During that period he was known as “the man with the 100 percent viewership rate.”

<sup>7</sup> *Project X*: a documentary aired weekly on Tuesdays at 9:15 P.M. on NHK General.

<sup>8</sup> *Gaia no yoake*: a documentary aired weekly on Tuesdays at 10 P.M. on TV Tokyo.

“I haven’t been using English lately, so I like to watch CNN’s *American Morning*<sup>9</sup> to get used to hearing English again. I watch it once or twice a week. (Man, 39)

This group showed the following characteristics:

- Many think of television as an information source or an information-gathering tool.
- They know the type of program contents they like and want to enrich their lives through watching those programs. They also tend to watch programs with a certain purpose in mind.
- They choose programs from a broad range of sources, and consider NHK among the alternatives. In addition to selecting from among all the terrestrial broadcasters, viewers in this category who have access to multiple channels also select programs from cable TV or CS (communications satellite)<sup>10</sup> channels.
- Many surf for desired programming, going systematically through all the channels on their multi-channel remote control device using the “forward” or “backward” buttons. If they find no suitable program, they turn the TV off.
- They choose programs not only with the help of newspaper TV program guides but also by reading letters from viewers or program reviews. They jot down or otherwise make note of programs they want to see, aided by program announcements or advertising.
- In addition to those who subscribe to and watch multiple-channel TV, many conventional channel viewers are interested in getting into a multi-channel environment.

### **The “Leave It Up to the Family” Group**

The lower left-hand quadrant in Figure 2 represents participants who were not very interested in television but who nevertheless watched and did not turn the TV off. Ten out of the 55 participants were of this type, and all of them were women. In all cases, their husbands or children controlled channel selection, and most of them watched the programs selected by their families along with them. Some of their comments are as follows:

<sup>9</sup> *American Morning* is a live news show aired by CNN/US. On CNN’s Japan-only channel (CNNj), it is broadcast Monday to Friday from 10 to 11 P.M.

<sup>10</sup> CS digital broadcasting is available from two platforms: SkyPerfecTV! (using communications satellites JCSAT-3 and JCSAT-4A) and SkyPerfecTV! 110 (using satellite N-SAT-110, on the same orbit as the communications satellites), operated by SkyPerfect Communications.

*Can't watch television in a relaxed manner*

"I think the television is on, but I can't really remember. My children are still young, so I'm busy with many school-related matters. I'm just really busy preparing things and so much else that I don't have time [to really watch]." (Woman, 35, working)

"The reason I don't watch much television is that if I sit down, the housework doesn't get done. My children generally decide what's going to be on, and they're older now so they watch TV late into the night. (Even if there is something I want to watch) my only choice is to videotape it or watch it then and there with the children. I don't have any say in which channel gets chosen." (Female, 41, working)

*Checking the newspaper listings and forgetting*

"Although I check the TV program guides once a day, choosing programs, and checking the time, I often forget [to watch] when the time comes around." (Woman, 39, homemaker)

*End up going along with what the family chooses*

"It's the children who end up choosing the programs, so we watch a lot of animation and variety programs. I'd like to get them to bed early so that I can watch dramas that are on in the 9 and 10 P.M. slots. But I end up watching more variety programs with them than dramas." (Woman, 39, working)

"I usually watch dramas aimed at young people, which are what my daughter likes. We watch together. I usually watch programs with my daughter." (Woman, 45, working)

"At night I go along with the programs my husband wants to watch, and in the daytime I watch the animation programs my children like. Personally, I like fashion-related programs or movies, so I videotape those. I videotape programs that I want to pay close attention to because otherwise I get distracted if someone talks to me." (Woman, 39, homemaker)

*Used to watch more TV in the past*

"I used to like TV more. The television used to be on longer, too, and I watched one drama a day without fail. Once your children take over the remote control, you can't watch your programs at the usual time anymore and you drift away from TV." (Woman, 40, homemaker)

"In the old ways I could watch everything that I wanted to watch. Nowadays it's the children who control the remote, so it just ended up this way. I can't watch the programs I want to any more." (Woman, 42, homemaker)

*Want to watch something worthwhile*

“(I’d like to watch) information-centered programs (*joho bangumi*) that everyone is talking about these days, something that I can talk about with other people.” (Woman, 42, homemaker)

“I don’t watch variety programs. I used to watch them before, but I would get this empty feeling after the program ended. That kind of program really left me with nothing. I’d rather watch programs where I can gain something. Even though I don’t study foreign languages, I like watching German or Spanish lessons and coming away from that thinking I’ve learned something new.” (Woman, 39, homemaker)

“I always watch the news at least once a day, because I’ve always been a homemaker and I feel I need to keep up with what’s going on in the world.” (Woman, 37, homemaker)

This group included many women with children from elementary to high school age. Although some homemakers watched television in the daytime as did members of the “daily living-partner” group, watching or videotaping programs they liked, in most cases they did not often have the opportunity to take the initiative to watch TV, so some of them were beginning to lose interest in television per se. This tendency was especially evident among women who worked in the daytime.

One wonders whether these women’s interest in television will be rekindled after they regain control over the remote once their children have grown and they can once again choose the programs they want to watch, or whether their interest will shift to other media or they will adopt different pastimes.

**The “One of Them” Group**

This group, in the lower right-hand quadrant of Figure 2, consists of people who have little interest in television, who only watch programs they have selected, and who turn the television off when not watching. For them television is “one of them,” that is, just one of the media.

Since “watch television almost daily” was included as a recruiting criterion, we had expected that this quadrant would not include many subjects to begin with, but we learned that even though the people in this group do watch television every day, some of them have begun to distance themselves from it. Although few subjects could be clearly seen as belonging to this group, we observed some individuals in the “leave it up to the family” and “my favorite programs” groups with leanings in this direction.

The following is a comment made by a homemaker in the “my favorite pro-

grams” group who said she did not want to spend any more time than she did now watching television.

“My husband used to subscribe to WOWOW,<sup>11</sup> but he eventually cancelled the service because we didn’t have time to watch. We’re watching enough television as it is, or you could say, we don’t want to spend any more time watching TV than we are now. My husband and son follow foreign news and so forth on the Internet, and they seem to be satisfied with that. I think that films and foreign documentaries are excellent, but with the way my life is right now I can’t spend all my time in front of the television.” (Woman, 45, homemaker)

Another comment by a man in the “my favorite programs” group was:

“I consider television a means of obtaining information, not an end in itself. I watch TV to find out the time, or the weather, or hear the news. Or else I’ll watch programs about things I’m interested in, such as films or Formula One racing. Lately I’ve been surfing the Internet after I get home and finish eating (although the TV is on, too).” (Man, 45)

Most of the students surveyed as a comparative segment belonged to the “daily living-partner” group, but some demonstrated feelings quite distant from television.

“To me, TV is like taking a break from playing video games. Or else it’s there to fill the time until I start doing something else. I’m not that dependent on television.” (Man, 20, student)

“I think I could survive without watching TV, although having it is all right too. Some days, I watch it a lot and other days very little. On days when I watch it, I just watch without paying much attention; on days when I don’t watch, I really don’t watch it at all.” (Woman, 21, student)

University students’ viewing patterns were affected by their irregular schedules and because they were busy with studies and extracurricular activities. Their relationship with television is expected to change as they move from one stage of life to another.

What is perhaps more important, we will need to be more concerned about how far certain trends will progress. For example, some of those in the “my favorite programs” group who watch selectively said there were fewer programs they wanted to watch nowadays, and that their televisions were turned off for increasingly longer periods. In the “leave it up to the family” group, participants’ already low involvement with television was shifting to other interests.

<sup>11</sup> WOWOW offers both analog and digital programs via broadcast satellite. As of March 2004, it had 2,484,681 subscribers.

## FUTURE DEVELOPMENTS FOR EACH TYPE

All interview participants in this study were under the age of 50; television had been part of their lives from the start and they had grown up watching it as a matter of course. Among the four groups characterized here, the people in the “daily living-partner” group have emerged as if in response to the changes in television. In other words, this group is typical of a rapidly growing segment of audiences in recent years who favor the recent fashion of “variety” and “wide show” genres<sup>12</sup> and for whom watching television is an inextricable part of daily life,<sup>13</sup> as exhibited by those who turn the TV on as soon as they come home, who may not watch programs in their entirety but just the parts they want to watch, and who “turn on the television to pass the time enjoyably.”<sup>14</sup>

In contrast, the “my favorite programs” group are people who “watch a program from start to finish,” “watch specific programs,” and “watch attentively” and “appreciate” the program content.<sup>15</sup> In the early days of television, this was how most people watched.

A look at what participants said in the interviews shows the “daily living-partner” group experienced satisfaction and fulfillment from television today. Although they were not perfectly satisfied, this did not induce them to search other channels like the “my favorite programs” group did. In such cases, in fact, there are signs that suggest their attention may shift to something other than television.

Some sample comments from the “daily living-partner” group:

“I don’t want to become more of a couch potato than I am now. I don’t want to get cable TV, because there aren’t any programs that I would be willing to pay to view.” (“Daily living-partner” group, woman, 35, working)

<sup>12</sup> For more information regarding the increasing tendency toward “variety” and “wide show” programming, see Shigemori Maki and Hara Yumiko, “Terebi hensei no goju-nen: Nama hoso, waido, joho/hodoka e no kiseki” [50 Years of Television Programming: The Path Leading to Live Broadcasts, “Wide Shows” and Information/News], *Hoso kenkyu to chosa*, July 2003, and Tomomune Yumiko, Hara Yumiko, and Shigemori Maki, “Nichijo kankaku ni yorissou baraeti bangumi: Bangumi naiyo no bunseki ni yoru ichi kosatsu [Variety Shows That Cater to Popular Tastes: Discussion Based on Analysis of Program Contents], *Hoso kenkyu to chosa*, March 2001.

<sup>13</sup> Shiraishi Nobuko and Ida Yumiko, “Shinto shita ‘gendaiteki na terebi no mikata’: Heisei 14-nen 10-gatsu ‘Terebi goju-nen chosa’ kara” [The Spread of Contemporary-style Television Viewing: October 2002 Survey on 50 Years of Television], *Hoso kenkyu to chosa*, May 2003.

<sup>14</sup> Tomomune Yumiko and Hara Yumiko, “Television as a Diversion Device,” *NHK Broadcasting Studies*, No. 1, 2002.

<sup>15</sup> In Shiraishi and Ida above, this television viewing behavior is described as “classic television viewing,” in contrast to “contemporary-style viewing.”

“Residents in my apartment building can subscribe to cable TV if they wish. That means I could watch cable TV if I felt like it, but I feel as though I barely have enough time to watch just regular terrestrial and BS<sup>16</sup> broadcasts. (“Daily living-partner” group, but very close to “leave it up to the family” group, woman, 48, homemaker)

“Thinking in terms of cost and of programs I want to watch, I don’t think I have that much time to watch TV these days. If I were paying that much, I think it would probably work out cheaper to actually go and see a soccer match once.” (“Daily living-partner” group, man, 35)

The above comments indicate that these people feel that their television viewing has reached the saturation point. As was mentioned in the preceding section, some people in the “my favorite programs” and the “leave it up to the family” groups also feel they cannot afford to or don’t want to spend more time watching TV, and that they would in fact like to cut down on their viewing time and use the time thus freed to do something else instead. These people are becoming increasingly disconnected from television and could turn into the “one of them” group.

As we have seen so far, it is mainly the “my favorite programs” group who either are already in a multiple-channel environment or express interest in this type of broadcasting. In that sense, one wonders how much this group will increase, and about the potential for “daily living-partner” and “leave it up to the family” type viewers to become part of this group rather than ending up as the “one of them” type.

“Daily living-partner” group participants were not necessarily that interested in multiple channels. It may be noteworthy that some people in the “my favorite programs” group who had signed up for multiple channels, either because of events like the World Cup soccer championships or Internet use, found out about new content and channels and were beginning to discover the appeal of the multiple-channel environment. Further growth of multiple channels will depend on how well this broadcasting can stimulate latent needs or attract interest among the “daily living-partner” or the “leave it up to the family” groups.

<sup>16</sup> “BS” stands for “broadcasting satellite.” Uses the satellite broadcasting frequency (12GHz band) allocated to each country under an international agreement, and viewers are able to receive signals directly through small parabola antennas. The first satellite broadcasts, from NHK, started in June 1989. As of March 31, 2004, 12,000,000 households had contracts for satellite broadcasting.

## NEEDS FOR NEW DIGITAL SERVICES FROM THE PERSPECTIVE OF VIEWING BEHAVIOR

The preceding sections discussed various types of viewers, classified according to their viewing behavior. Now the focus will be on more specific viewing behavior, in order to examine emerging directions in digital services.

Data to substantiate these findings was obtained from three sources: usage of videotape recorders and TV remote control devices, and responses to the multiple-channel environment.

One of the dreams of television viewers so far has been the ability to enjoy TV programs freely, without restrictions of time or place. Digital broadcasting has made this technologically much more feasible than before.

Here we will analyze participants' behavior in regard to the three sources above, from the perspective of freedom from time and place restrictions.

### **Recording and Time Shifting**

Since one of the criteria for selection of participants in the study was that they replay videos once a month or more, this was very common behavior among the viewer types described above.<sup>17</sup>

#### *Why record on video?*

Here is what participants had to say about video recording. First, they gave these reasons for recording programs:

- When a program they want to watch is on at the same time as another program a member of the family wants to watch, or when two programs they want to watch are being aired at the same time
- To enable them to view programs broadcast when they are out, or late at night or early in the morning, when it is difficult for them to watch
- As one way of making quite sure they won't miss a program
- To save time, fast-forwarding through the commercials
- Because they can't concentrate for long periods in real time, such as for films or long programs and want to spread out their viewing
- To save the program, so that they can watch it again later

Some reasons were given only by women. For example,

- So that they can concentrate on watching the program without being interrupted by a member of the family

<sup>17</sup> The household penetration rate for videotape recorders was 81.4 percent as of March 31, 2002 (Cabinet Office, Consumer Trend Survey). In terms of usage frequency, 55.7 percent of VTR owners reported taping programs a few times a month (Video Research Co., General Survey on Digital Media, 2001).

- Whether they are watching the program or not, they tape all the episodes of serialized dramas, because they don't want to miss any parts of the series
- In order to be able to watch two or more episodes of a serialized drama at once

One man also gave the following reason:

- To tape all the programs between 7–9 P.M., so that he can replay them and watch them while eating dinner after he gets home

These reasons were basically concerned with time shifting, but a few individuals mentioned the following interesting reasons:

- To watch favorite actors or gain needed information but fast-forward through the rest of the program
- As a substitute for note-taking, in the case of information that might be necessary later
- To edit the needed portions themselves
- To rewind and go over certain scenes in dramas with complicated plot lines

These last reasons showed that videos were being used not only for time-shifting but also for secondary processing by using the VTR's other functions. People who were watching programs according to their own tastes in that way were in the "my favorite programs" group.

#### *Films and dramas are the main genres taped*

In the study participants' age group, the program genres most often taped were films and dramas. Some men also taped sports or information programs. In the case of sports, they taped the programs because these were shown on all-sports channels late at night, or because the programs were very long; they taped information programs in order to use them in their work.

A considerable number of homemakers taped dramas while watching them at the same time. They did this because they wanted to replay them the next day, if they liked the programs.

#### *Videos are replayed on weekend afternoons*

Many participants replayed taped videos on weekend afternoons. Many also watched rental videos during this time. Weekend afternoons are most often used either for going out or for watching videos, which makes this time slot quite a peculiar one for broadcasting.

As far as other times for watching videos went, many housewives could watch taped material the following day, but many of them apparently found it difficult to make time to watch: they watched late at night on the day they

taped a program, late at night on Saturdays after the children were asleep, or else in between the hours of certain other programs they wanted to watch. Some even watched videotapes in snippets between commercials.

Participants did not record programs very often, only about once or twice a week. However, all of them said that they used to record much more often in the past. They related how they felt guilty about taping over earlier programs they had taped without ever having watched them, and how this cycle repeated itself. As far as serialized dramas were concerned, they said "I will definitely have watched by the time the next installment airs, even if I have to cut down on sleep to do so," but in the case of other programs they tended to lose interest in watching after a while and ended up feeling they would not be missing much by not watching them. Sports and information programs seemed to have an especially short "shelf life" for replaying, often never being watched if more than a day went by after taping. Some people restricted themselves to taping on one video cassette only, in order to force themselves to watch what they had taped.

*"I won't tape any more programs"*

Some people have even started saying they would no longer tape programs, based on their past experiences with recording and replaying.

"I end up not watching the tapes" or "the videotapes just keep piling up" were some of the reasons these people gave, but another reason is the desire to watch broadcasts in real time.

Some women said about dramas that "there's something about a specific time slot that has a special atmosphere; I don't feel like watching a love story in the middle of the day." Others remarked that "television viewing moves in step with the day's rhythm, and it's rather enjoyable to watch a program at a certain time, although it may not really be the most convenient time" or "one of the good points about television is that you feel that everyone is watching at the same time, and that you can talk about last night's program the next day with your friends."

Another trend is the rapid decline in the number of people taping programs for possible viewing in the future. Many participants related how they had recently disposed of large quantities of videotapes.

VTRs have been available for a long time now, leading to the large variations in behavior and attitudes toward taping described above. When a new service similar to videotaping emerges, people's reactions to it will, for better or worse, be colored by their past experiences.

### **The Two Meanings of Channel Surfing**

Next to be examined, through comments by participants, are the changes that channel-surfing or “zapping” using a remote controller have brought to television viewing. People who watch the same programs on a certain day of the week, or who turn the television on after checking the program guides in the newspaper, do not channel-surf.

#### *Two types of zapping*

The reason that people channel-surf, of course, is look for some program other than what they are watching right now. But careful study of participants’ comments reveals two types of searching.

One type is the search for a program more interesting than what they are watching right now, and the other is basically information-gathering. In the latter case, viewers are not looking for a program to watch as a whole; they are not particular about which program they watch, as long as it has value as information. Therefore, these people tend to flip from one program to another within the same genre. For example, they will switch from one news program to another in order, watching the special-topic segments aired on each, or search for interesting-looking scenes in variety programs. These differences in the reasons people jump from one channel to another may have an unexpectedly important significance in forecasting future viewing behavior.

As mentioned earlier, people channel-surfing for a program more interesting than the one they are watching are found in both the “daily living-partner” and “my favorite programs” groups, but those who channel-surf for the purpose of gathering information are found only in the “daily living-partner” group. The difference between these two types of channel-surfing is whether individuals also search through the CS channels.

#### *Escalating channel-surfing*

One interesting aspect of the channel-surfing phenomenon is that some people zap not just during commercials but continuously throughout whatever they are watching. They go through all the channels, watching every type of program genre indiscriminately. Most of the people who channel-surf like this are men, and their wives strongly disapprove. Sample comments: “I can’t understand why he does that; it’s so unpleasant,” “it makes me dizzy,” “it irritates me and I don’t want to be near him when he does that.”

What do those people see on the TV screen? Do they think of all the channels they zap through and watch as “television?”

Men, for their part, offer excuses such as “there’s nothing new on television

nowadays” or “I can get an idea of what a program is about by just watching for a few moments.”

This situation is quite similar to zapping for fragmentary information described above, in that viewers are not watching television for coherent content.

#### *Programs at opposite extremes*

Seen from a different perspective, one could say that program content is moving in two different directions. From the viewpoint of zapping, programs such as dramas, films, sports or documentaries are coherent wholes, while those in the variety, “wide show,” and news program genres are more fragmentary. Viewers are also beginning to use television more for certain elements, in a way that is different from zapping.

For example, they might only listen to the audio (music), watch the screen with the sound off, or turn the television on just to catch a weather forecast or check the time. There are signs that some viewers have begun to think that using television in this way is entirely natural.

#### *Combination viewing behavior*

One factor that must be borne in mind, however, is that the viewing behavior of individuals is not consistent. Typical examples, based on interviews, are described here. One person zaps through the morning news programs before leaving for work, watches one news program at home in the evening while eating dinner, and then settles down to watch sports broadcasts on CS. Another only listens to TV as she gets everyone ready to leave the house in the morning. Once she has gotten through the housework in the afternoon, she watches the previous evening’s drama that she had taped. In the late afternoon, she zaps through the channels in search of information on good places to eat. Later in the evening, she tunes into a CS music program and plays it in the background as she surfs the Internet on a computer. People watch television in different ways, depending on the time of day, the day of the week, and what is going on at a particular time. This type of combination viewing behavior is increasingly becoming the norm.

The videotaping behavior just described, and the way that people channel-surf, are similar in the sense that they free viewers from time constraints. But people are taping less frequently now and seem to channel-surf and use the remote control as a convenient tool for choosing programming to suit their tastes.

## **Response to Multiple-Channel Broadcasting**

The following describes how interview participants respond to a multiple-channel environment.

### *Interest in multiple channels*

First, participants were asked why they had subscribed to a multiple-channel service. The following were the most typical answers given.

- To watch specific contents such as films, baseball, live performances or adult-oriented material
- Wanted to watch something different, because all the terrestrial channels offer similar fare
- It seemed like a good deal, in combination with Internet service
- It was a group subscription for everyone in my apartment building
- It was a way of getting better reception, because we couldn't get clear reception otherwise
- Subscribed to a multi-channel service instead of erecting a BS antenna

Conversely, reasons given by those who do not subscribe, or who cancelled their subscription, to multiple-channel service were as follows:

- Felt that as long as I had subscribed I wanted to get my money's worth, but that was stressful, or I worried I would overdose on television
- Satisfied with terrestrial broadcasting; don't have more time to watch than I do now; not interested
- Would like to subscribe, but other family members won't agree
- Fees are expensive. If you calculate the cost, it may be cheaper to rent videos
- Don't want to spend that much money on television

### *Satisfaction with multiple-channel viewing*

How satisfied were subscribers? The differences were considerable. To a marked degree, satisfaction with multiple-channel viewing depended on what expectations the individual had at the time of subscribing and his/her degree of involvement in the decision to subscribe.

In cases where husbands decided to subscribe because they wanted to see specific content, many wives were not that interested in multiple-channel broadcasting and only surfed through the channels occasionally.

Some people, of course, stumbled across programs they liked. They were individuals who were curious to begin with and who did not mind trial and error. They enjoyed various channels depending on their mood on a particular day and were viewing television quite a bit longer than before.

*Cable/satellite channels watched alone*

Working people often watched CS or BS late at night on weekdays, or on weekend afternoons. Weekend afternoons are a time slot with a special character, as was the case with replaying of videotapes described above. Another characteristic of the multiple-channel environment, possibly reflecting each channel's narrow viewer niche, was that most people watched these channels alone.

*Dissatisfaction with multiple-channel broadcasting*

What aspects of multiple-channel broadcasting were participants dissatisfied with?

- It's hard to find programs sought in the program guides sent by the cable TV company
- Too many reruns
- The cable TV broadcaster changes channel configuration at will
- Too many channels, so it's hard to remember which is which, hard to get familiar with them
- Remote controller operation is complicated

The comment about the remote control refers to the fact that when switching from terrestrial broadcasts to cable, etc., viewers first have to switch over to the video channel on the remote controller for the TV and then operate the cable TV remote control. This is a minor operation, but this age group seems to find it bothersome. Many people said that they might watch cable TV more often if only they could switch channels more smoothly.

Some individuals disappointed with multiple-channel broadcasting were thinking of canceling their subscriptions, but others felt that even though they did not often watch cable, "knowing that you have a wide range of program choices is enjoyable in itself, so that's why I'm not canceling."

**Interest in New Services**

In the last part of the interviews, participants were asked what they thought about the digital home station concept (combining broadcasting, Internet and home server functions). Since it was difficult for them to picture something that does not yet exist, they necessarily likened it to things they were familiar with, but even so their answers were diverse.

*Do digital home stations have an all-purpose function?*

Participants' answers ranged from the enthusiasts who said, "I would like to

use it to customize and create my own program lineup” to others who indicated they would not be using it.

The digital home station concept was described to participants as “a home server that stores a week’s worth of television programs and allows users to search for programs they wish to see, at any time.” In a sense, it is a partial substitute for the videotape recorder and the remote controller, and it can address viewers’ dissatisfactions or inconveniences mentioned above or meet their expectations all at once.

But even such a fully outfitted system will not necessarily stimulate everyone’s interest in television, given that different people feel differently about it. For example, many people in the “my favorite programs” group expressed interest, saying “that sounds really convenient,” but others commented that “knowing I can look at programs or search for them any time means that I will end up not watching or searching for any at all.” This reaction was common among participants satisfied with current terrestrial channel offerings, and it has an element of truth in it.

#### *Young people’s needs*

The university students, who served as a comparative group, were also asked about the digital home station idea but expressed little interest. More of them said they would prefer to watch TV on their cell phones.

What about the reactions of people even younger than university students? Although people in this age group were not questioned directly, judging from the comments their parents made about their behavior, youngsters can use a cable TV remote controller with ease. They jump from the remote for the television to the one for video or cable and find television and video games equally enjoyable. Although considerably influenced by their parents, these young people watch all-cartoon, -music or -sports channels just as they do terrestrial channels. Will their familiarity and facility with the use of computers from a young age have an impact on the spread of new services in the future?

#### *Growing DVD and Internet usage*

One development that was particularly striking in this survey was the shift from videotape to DVD recorders and widespread Internet use.

Once they had used DVD, which offers a sharp picture, is easy to operate, and takes up little space, participants said, “I just don’t feel like using videotape any more.” And they were increasingly turning to the Internet when television was boring or when their spouse expressed a desire to watch television, upon which they meekly handed over the remote control. These may be either positive or negative developments, but they are connected with how digital

home stations and other new services will be received in the future. Accumulated experience with interactive services, through elementary random access operation and searches, is a plus, whereas interest drifting from television to other telecommunications services or games is a minus factor.

### **The “My Favorite Programs” Group and the New Services**

In terms of the freedom from restrictions as one direction that the new digital services may move in, judging from their current television viewing behavior it is the “my favorite programs” group that show interest in new services and would be likely to be most receptive to them. These individuals have relatively well-defined tastes in programs, they choose from a broad variety of programs, and they actively seek out ways of deriving enjoyment from television on their own terms.

Their comments about their tastes and expectations are likely to contain hints as far as new services are concerned. However, it is difficult to judge whether concentrating on the needs of this type of viewer will be best for the new services themselves.

## **FUTURE ISSUES IN RESEARCH**

Since this study was a qualitative survey examining viewing behavior among only selected segments, a quantitative survey using different methods as well as a comparison of the results of surveys on different groups would also be necessary to verify whether the conclusions reached concerning the relationship between viewer behavior types and needs for new services are appropriate.

Discussion from a broader variety of viewpoints would also be needed concerning specific services to be offered, because this involves digitization of broadcasting, although this is a topic on a somewhat different level than this survey. In other words, the connection between digital broadcasting and the current terrestrial broadcasting business model would need to be further explored.

In the case of analog broadcasting, viewers have only limited “influence,” whether through videotaping or channel surfing, on programs beamed by broadcasters in the order in which they are programmed. But with digital broadcasting, broadcasting services offered by operators become part and parcel of the reception terminals, but there is no point in having high-tech terminals if broadcasting services do not keep up.

But the new digital services will merely stimulate more individualization, niche-ing, and diversity in the viewing behavior of the “my favorite pro-

grams” group, who even now display considerable individuality in that behavior. This leads to the question of what kind of business model can work in that situation.

It is also difficult to determine whether viewers will be able to blend new services with current viewing behavior. It is possible, after all, that once viewers experience something new that never existed previously, completely unforeseen needs could arise.

In digital broadcasting, broadcasting services, reception terminals and viewing behavior will be linked much more strongly than before and will continue developing through continual interaction. If this is the case, research into new services may necessitate building active research models that are interactive and circulating among broadcasting services, reception terminals and viewing behavior.

*(Translated by Julie Kuma)*