Public Broadcasting and Changing Audiences in the Digital Era: Services and Social Mission

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The NHK Broadcasting Culture Research Institute carried out an international comparative survey on attitudes toward public broadcasting between February and March of 2006. The purpose of the survey was to assess current public perceptions of NHK, and to evaluate issues NHK faces due to the new multimedia, multichannel, and digital technologies currently transforming the media environment. It also sought to determine how public broadcasters are regarded by their audiences and to analyze the need for services. The survey covered seven countries, including Japan, the United Kingdom, the United States, South Korea, Germany, France, and Italy. In order to better assess the current state of affairs for public broadcasters, however, this article limits its analysis to four: Japan, South Korea, the United Kingdom, and the United States.

This article undertakes a quantitative analysis of the relationship between viewership and changes in the media environment, the differences among the respective countries, and the impact of people's perceptions and attitudes concerning public broadcasters. We also examine possible responses by broadcasters.

As we approach a fully digital era, it will become increasingly important for public broadcasters to respond to changes in the media environment. They will need to build better ties with their audiences by offering more services through a range of different platforms and by ensuring that they reflect the views of their audiences and show that they are accountable for their actions. We also investigate how perceptions of public broadcasters relate to other attitudes and evaluations pertaining to public broadcasters, and examine issues that arise when such broadcasters try to maintain and build on their relationship with viewers.

In his somewhat sensationally titled book *The Decline and Fall of Public Service Broadcasting*, Michael Tracey, professor at the University of Colorado, who has acted as a consultant for the BBC in the United Kingdom, offered the following pessimistic observation and prophecy concerning the future of public broadcasting around the globe:

> . . . The notion of paying for television from the public treasury will become increasingly rare, replaced by commercial funding and direct payment. . . . The ability of governments to regulate the contents of audiovisual culture will be diminished, partly because the implicit patricianism has come to be seen as *passé* and partly as an act of self-withdrawal in the interest of encouraging new communication technologies.

This view stems from Tracey's own understanding and predictions regarding the vast currents in the media realm in the shape of digital technology, which in turn have opened the way to multichannels and multimedia. However, instead of offering anything new and different per se, his argument serves as a typical example of the debate that has been elaborated by numerous proponents. Since the publication of Tracey's book, the pace of change in the media environment has surpassed his predictions. In the midst of those changes, public broadcasters around the world have certainly been confronted with various major issues, including deregulation and the attendant fierce competition with commercial and pay channels; uncertain funding; the high cost of going digital; and having to come to grips with the fusion of broadcasting, telecommunications, and globalized broadcast media. Public broadcasting nonetheless remains a force in most major countries. Furthermore, with few exceptions, public broadcasters retain a certain presence and influence in their respective societies, and maintain high viewer ratings.

What is the best way to evaluate the current situation? What are the issues? And what roles and directions should public broadcasters take as the entire world begins to enter the digital age? To answer these questions, we should look at the various surveys and studies that have already been completed in various countries around the world. Most of these surveys, however, have approached singular questions regarding public broadcasting only within the context of their respective countries.[1] Given the extent of the problem and its complex nature, perhaps we should not be directing our attention to circumstances in particular countries; it would be more effective to evaluate the present state of public broadcasting by conducting an international comparison and examining various political, social, and cultural differences. This requires looking at issues that countries have in common, as well as issues that should be addressed separately. In consideration of these circumstances, the NHK Broadcasting Culture Research Institute undertook a comparative survey of seven different countries.[2]

[1] McKinsey (1999), and Makita and Ida (2001), provide some of the very few examples of comparative surveys and analyses of public broadcasters.

[2] An overview of this survey is available at http://www.nhk.or.jp/bunken/english/report/pdf/report_070801.pdf.

METHODOLOGY

Of the various public broadcasters around the world, the survey dealt with seven countries—the United Kingdom, Germany, France, Italy, the United States, South Korea, and Japan—taking into consideration such factors as history, presence, and influence.[3] The survey, carried out over a one-week period between February 27 and March 6, 2006, was conducted by telephone using random direct-dialing (RDD) to collect data from approximately 1,000 people over the age of 20 in each country. Quotas of samples were obtained for each age group, though the lack of female respondents over the age of 70 in South Korea could not be weighted in the compilation of results.[4]

"Public broadcasting," furthermore, is a vague term without a generally accepted definition. This survey adopted the following tentative definition from the perspectives of (1) funding, and (2) editorial independence:

(1) An entity is regarded as a public broadcaster when it is operated with public funding, or public funds in the form of license fees and government subsidies;

(2) The entity's editorial decisions are made independent of government influence.

The diverse nature of funding for public broadcasters around the world is well known. NHK in Japan and the BBC in the United Kingdom are basically funded by license fees[5] and do not receive any revenue from advertising, while public broadcasters in Germany, France, Italy, and South Korea do obtain a certain amount of advertising revenue. Funding of PBS in the United States is varied, relying on private and corporate donations, and federal and state subsidies, instead of license fees. More similarities are evident with respect to the second point: the seven public broadcasters we surveyed all exercise relative editorial independence under the law from the government and commercial concerns.

This article is limited to public broadcasters in four of the seven countries

[3] In the United Kingdom, public broadcasting is normally referred to as Public Service Broadcasting, and while commercial and other terrestrial broadcasts fall under this term in the broad sense, this study uses a narrower definition and restricts itself to the BBC. South Korea likewise uses the term *kongyong bangsong* or "publicly operated broadcasts," which encompasses the Munhwa Broadcasting Corporation (MBC) and the Educational Broadcasting System (EBS) in addition to KBS; this study, however, restricts itself to KBS.

[4] See http://www.nhk.or.jp/bunken/english/report/pdf/report_070801.pdf

[5] In Japan, people pay a "receiving fee," whereas people in the United Kingdom pay a "license fee," i.e., they obtain a license from the government to receive broadcasts. In this article, the term "license fee" is used interchangeably for both.

covered in the comparative survey—the U.K.'s BBC, the United States' PBS, South Korea's KBS, and Japan's NHK—in order to more clearly pinpoint the problems and their parameters when discussing the issues. The specific reasons for choosing these four broadcasters are as follows.

First, these countries are well ahead of others in multichannel and multimedia availability, and thus well illustrate how changes in the media environment have affected public broadcasters there. Second, these public broadcasters have experienced a drop in viewership over the past 10 to 20 years. As a result, there has been ongoing public debate concerning license fees, which provide most of the funding for public broadcasting in those countries, with the exception of PBS in the United States. In the United States, cutbacks in federal subsidies for PBS have become a major problem. Funding is a major consideration when examining and comparing current attitudes toward public broadcasting. Third, while the BBC, PBS, KBS, and NHK differ from one another in terms of the pledges they make to their audiences, their self-evaluation programs, and their public-access programs, they are all similarly keen to improve relations with audiences by displaying accountability to their viewers and reflecting the viewers' voices. Finally, a wealth of research materials on these countries is available, extending far beyond the scope of this comparative study, including local surveys carried out by researchers of NHK; surveys undertaken by the BBC (which has been a model for public broadcasters around the world), and those conducted by KBS and PBS, broadcasters with strong historical ties to NHK.

THE MEDIA ENVIRONMENT AND PUBLIC BROADCASTING IN FOUR COUNTRIES

As mentioned above, the arrangements and circumstances of public broadcasting vary from one country to another. Public broadcasters are closely associated with the general media environment, including its social and cultural concerns; the attendant social and institutional positions; the nature of services (e.g., number of channels, air time, programming guidelines); the relationship with other broadcasters in the form of commercial stations, cable TV, and so on; and the extent of multichannel and Internet access. Before examining the results of the comparative survey, let us summarize first of all the current state of the media environment vis-à-vis public broadcasting in the United Kingdom, the United States, South Korea, and Japan.

United Kingdom

In the United Kingdom, digital broadcasts from terrestrial, satellite, and cable

TV platforms grew steadily after their first appearance in October 1998. As of September 2006, 73 percent of all households owned a digital television set.

Unlike the other three countries surveyed in this article, digital terrestrial broadcasts in the United Kingdom are for the most part provided in a multichannel format. When digital broadcasts were first introduced, there were attempts to popularize pay channels in the same manner as satellite and cable broadcasts. However, digital terrestrial broadcasts are currently provided free of charge under the brand name Freeview. There are approximately 40 digital terrestrial channels. By comparison, the satellite TV firm Sky Digital offers more than 200 digital satellite channels, and 170 digital cable channels are available. Sky Digital was initially well ahead of other broadcasters in digital broadcasts, but a balance is increasingly developing between terrestrial and satellite digital broadcasts, with 36 percent of people as of September 2006 receiving them from a terrestrial platform, 43.7 percent from satellite, and 16 percent from cable. Some predict that terrestrial will become the biggest digital platform, surpassing satellite. If this comes to pass, more than half of U.K. households in the future would be accessing multiple channels from a direct terrestrial format.

The BBC's reliance on license fees is well known. Although there was considerable domestic debate about the BBC when digital terrestrial broadcasts first began to spread, the corporation now earns ample revenue from its digital services—more than any other public broadcaster. The BBC generated £2 billion (or approximately ¥436 billion) from license fees in the 1997 financial year. This figure rose by almost 50 percent to £3 billion (or approximately ¥654 billion) in 2005. A large portion of these funds was spent on the establishment and expansion of digital services, enabling the BBC to offer multichannel service more rapidly than any other terrestrial broadcaster. The BBC currently offers a total of eight channels. In addition to its comprehensive BBC One and BBC Two services from the analogue era, it offers BBC Three, which targets young people; BBC Four, a culture and art channel; CBBC and Cheebies, two channels for children; the 24-hour news service BBC News 24; and BBC Parliament, which provides broadcasts of Parliament.

Channel 4 (run by a non-profit body), ITV, and Five, the other three terrestrial broadcasters in the United Kingdom, have each established two to four entertainment channels. Their digital terrestrial channels, like those of the BBC, are available free of charge from satellite and cable; the services are the same irrespective of the platform. This is in accordance with the U.K. government policy supporting a complete transition to digital, which rules that the BBC and other terrestrial broadcasters are public-service channels and therefore obliges all transmitting entities and channel providers to carry and offer those channels.

The BBC share of the TV market is shrinking amid the development of multiple channels. In 1991, at the inception of BSkyB's analogue satellite service, the BBC's share through its BBC One and BBC Two channels was 44 percent; by 2001 it had dropped below 40 percent. The BBC's total share through all eight channels fell further, to 29.8 percent, in 2005. In 2005, Channel 4 had a 10.2 percent share; ITV's was 21.6 percent, Five had 5.2 percent, and BSkyB's entertainment, film, and sports channels had 9.2 percent. While the BBC is still ahead of the rest, the competition for market share among the channels is becoming increasingly fierce.

The BBC has deliberately oriented specific channels to appeal to certain age groups such as youngsters and children, in order to attract viewers who are drifting away in the competition. It is also making considerable use of a third medium: the Internet. Among other strategies, the BBC is aiming to generate more viewing opportunities with its free online on-demand services.

United States

Digital terrestrial broadcasts commenced in the United States in November 1998, and had reached almost 100 percent of households by September 2006. Digital broadcasts are provided by 307 PBS stations, in addition to 1,277 commercial stations either directly run or affiliated with ABC, CBS, NBC, FOX, CW, Pax, and MyTV, representing 90 percent of all stations in the country.

Digital satellite broadcasts began in June 1994 and as of 2006 were offered by two firms, DirecTV and EchoStar. These providers have subscription contracts with a total of 28 million households; access to their services has become available to one quarter of U.S. households over the past 12 years.

Cable TV, both analogue and digital, reaches 65.6 million households, or 58.9 percent of the total. Digital cable TV became available after the Telecommunications Act of 1996 allowed for combined TV and telecommunications entities; availability now extends to 30 million households, or about half of all those with access to cable TV.

As in Japan and South Korea, digital terrestrial broadcasts in the United States are characterized by an emphasis on HDTV, which differentiates them from analogue broadcasts. Meanwhile, the adoption of digital technology by cable TV and the entry of digital satellite broadcasts have rapidly increased the multichannel services introduced by cable TV in the analogue era. For example, the biggest satellite broadcaster, DirecTV, offers a total of more than 1,000 channels.

PBS is notably different from the other public broadcasters covered by this survey in terms of its establishment, its funding, and the nature and content of its services. University-run educational stations, the predecessors of the PBS member stations, were organized into a loose network under the Public Broadcasting Act of 1967. Each station is run as a non-profit organization by state governments and universities. Stations do not levy license fees, but instead receive funding from private donations, state government subsidies, federal subsidies for the Corporation for Public Broadcasting, and some advertising underwriting. As to the scale of funding, PBS received $2.3 billion (approximately ¥267.8 billion) in the 2004 financial year—less than 5 percent of the funds that the TV market received as a whole.[6]

The programming on PBS centers on art, history and science-related documentaries, children's shows, and current affairs and discussion programs, providing none of the sports, dramas and other entertainment found on the commercial stations. Because the historical and institutional role of PBS has been to compensate for "market failure" by the commercial stations that predated it, it occupies a somewhat different position from public broadcasters in other countries, which compete with the commercial terrestrial stations for viewers.

Among the multiple channels and platforms available, PBS had an annual average viewer rating of 1.7 percent for the 2004–2005 season, a figure that has remained more or less the same for the past several years. It is almost identical to the average viewer ratings for the HBO and TNT cable channels that specialize, respectively, in films and entertainment. Given its commitment to retaining its character as an educational service, PBS is putting up a good fight. However, its network presence is relatively small in comparison to ABC, FOX, CBS and NBC, the major networks; PBS earns only a quarter to a third of the viewer ratings that they receive.

PBS is trying to respond to the opportunities offered by digital terrestrial broadcasts in a number of ways. Several new channels have been established offering high-definition programs, children's shows, news and current affairs programs, lifestyle shows, and educational programming. Some PBS member stations combine these into multichannel services, while others offer free VOD (video-on-demand) services to cable subscribers. In recent years, PBS has also made a greater effort to provide and market programs for the Internet.

[6] The figure of $2.3 billion applies not only to PBS but also to National Public Radio and public broadcasting as a whole. The U.S.-based firm TNS Media Intelligence puts the worth of the nationwide TV market at approximately $57.2 billion. www.tns-mi.com/news/02282005.htm.

South Korea

At the end of 2001, South Korea became the first country in Asia to begin digital terrestrial broadcasts. Digital satellite broadcasts, known as Sky Life, commenced in 2002, and digital cable started in 2005. Cable TV has been spreading since the analogue era, and 67 percent of all households now have access to it. As of 2006, 1.97 million households—approximately 11 percent of all households—had access to digital satellite broadcasts, while about 22 percent had direct access to digital terrestrial broadcasts. Although digital terrestrial and cable services have already started, the digitization of infrastructure has not proceeded as planned.

Korean cable and satellite services offer between 60 and 80 channels, compared to the five offered by terrestrial services. Of the latter, one is provided by the regional commercial station SBS (Seoul Broadcasting System), while the other four are provided by KBS and two other public broadcasters. In digital terrestrial, the emphasis is on HDTV; accordingly, KBS and the other broadcasters do not offer multichannel services. KBS, the biggest of the public broadcasters, has two channels: KBS1, which provides news and educational programs; and KBS2, which provides cultural and entertainment programs for the family. It relies on a mixture of funding from license fees and advertising, but advertising is only shown on KBS2. The Educational Broadcasting System, or EBS, which became independent of KBS in 1990, has a single channel that is financed by a broadcasting fund, advertising, and license fees. The Munhwa Broadcasting Corporation (MBC), which is 70 percent owned by the government-affiliated Foundation for Broadcast Culture, officially falls into the category of public broadcasters, but it is a commercial channel, relying wholly on commercial advertising.

Among the terrestrial channels, KBS1 and KBS2 have maintained higher viewer ratings, earning a 47 percent share in 2000. In 2004, 63.5 percent of households with multichannels—cable or satellite—had access to the five terrestrial channels. As in the U.K., however, the ratio is gradually falling. KBS is keenly pursuing Internet broadcasts, given the widespread availability of Internet and broadband service in South Korea. People at home and abroad can register and access the broadcaster's website to view news and other programs, including simultaneously streamed programs from KBS1 and KBS2. In addition, a pay-per-view service is available from a subsidiary's website.

Japan

Digital terrestrial broadcasts started in Japan in December 2003. By the end of 2006 they extended to all prefectural capitals, giving access to 84 percent of all households. As of October 2006, there were 14.65 million digital terrestrial TV sets;[7] assuming one set per household, 30 percent of households have access to digital terrestrial broadcasts. Meanwhile, digital BS (broadcasting satellite) broadcasts began in December 2000, and had reached more than 20 million households as of December 2006 (this figure includes households that receive the broadcasts via cable).[8] No other country provides this platform, and while it offered ten channels as of November 2006—a limited number for satellite broadcasting—it has grown into the third-largest platform after terrestrial and cable, offering something extra to terrestrial services. In addition, the CS (communications satellite) based SKY PerfecTV and SKY PerfecTV 110° platforms offer more than 200 channels; they had approximately 4.12 million subscribing households as of September 2006.

In digital terrestrial in Japan, as in the United States and South Korea, the emphasis is on HDTV. The inauguration of BS broadcasts in 1989, and NHK's involvement in the development of this new platform, however, led NHK to offer a multichannel service in addition to its terrestrial broadcasts. It currently has five terrestrial and satellite channels, including a HDTV channel.

Multichannel services are being developed via cable, BS, and CS platforms, but the seven terrestrial channels, consisting of NHK's two terrestrial channels and the five terrestrial channels of the commercial networks, have an overwhelming share of viewers. The average Japanese viewer watches 3 hours and 58 minutes of television each weekday, according to the NHK national viewer survey of November 2006. The commercial stations account for 2 hours and 54 minutes of this time, while NHK accounts for the remaining 1 hour and 4 minutes.

In terms of the pattern of competition between NHK and commercial stations, there has been little change from the analogue era, even with the appearance of the new cable and satellite platforms. However, with the entry of new forms of broadcasting linked to the spread of broadband, such as online distribution of TV programs and Internet-protocol TV, NHK and the other terrestrial broadcasters are starting to work seriously on the development of new services like video-on-demand.

VIEWING TRENDS IN PUBLIC BROADCASTING

Having outlined the respective media environments and situations of public broadcasters above, we will proceed to analyze the results of the international

[7] Figure from JEITA (Japan Electronics & Information Technology Industries Association): www.jeita.or.jp/japanese/stat/digital/2006/index.htm.

[8] Figure from BPA (Association for Promoting Satellite Broadcasting): www.bja.or.jp/news

survey regarding viewers and viewing trends; the relationship between public broadcasters and viewers in an Internet and multichannel environment; and the way public broadcasters are perceived by their viewers, mainly with respect to accountability and how broadcasters reflect the outlook of their viewers.

Viewers' Perceptions of Their Public Broadcasters

Figure 1 shows the results for the question: "Which do you watch more often, public television or commercial television?" The greatest proportion of people expressing a preference for public channels was found in South Korea, with 33 percent; elsewhere, the proportion was 25 percent in the United Kingdom, 23 percent in Japan, and 13 percent in the United States. Adding in the proportion of people who say they watch about equal amounts of public and commercial TV, the figures in South Korea and the United Kingdom exceed 60 percent, while they are relatively low in Japan (43 percent) and the United States (31 percent).

In Figure 2, two major trends can be seen with respect to the age of people who are well-disposed toward the public channels. First, in Japan and South Korea, the preference for the public channels tends to follow an ascending pattern with respect to age: the proportion of viewers increases as people grow older. In Japan, less than 10 percent of people under the age of 50 express a preference for the public channels, but this number ascends sharply thereafter, reaching 47 percent among people past the age of 70. This is almost six times greater than the number of people under 30 who prefer public channels. In South Korea, while the figures are higher than for Japan overall, they, too, ascend as people get older, showing that 49 percent of those in

Figure 1. Preference for Public or Commercial TV

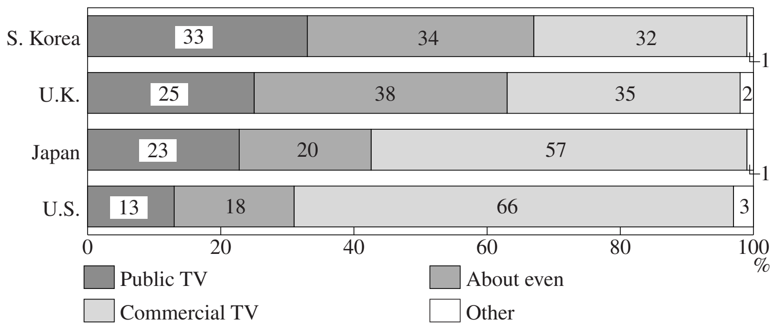
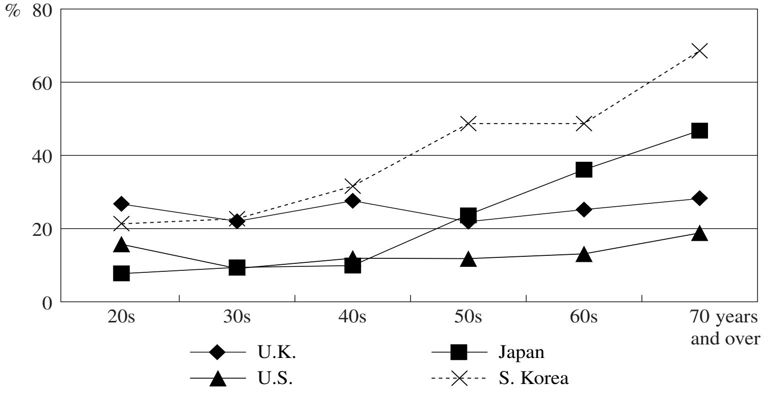


Figure 2. People with a Preference for Public TV (across age groups)



their sixties prefer public channels, compared to 21 percent of those in their twenties and 32 percent of those in their forties.

On the other hand, a flat pattern was evident in the United Kingdom and the United States, revealing no major differences among the age groups. In the United Kingdom, 25 percent of the population as a whole expressed a preference for the public channels, in marked contrast to the 13 percent in the United States, but the proportion does not vary much across age groups. Even though the figures were lowest for people in the 30-39 age group, and highest among people over the age of 70, there was a more or less even distribution overall. Additionally, in Japan and South Korea, the figures were at their lowest for people under the age of 30, but slightly above the averages in the United Kingdom and the United States, where the figures were 27 percent and 16 percent.

The survey also posed questions concerning basic attitudes toward public TV, asking viewers to gauge their satisfaction with and need for public TV, the importance of license fees or donations, and whether viewers felt the public broadcaster was "my station."[9] A correlation is evident between the responses to these questions and a reported positive disposition toward public broadcasting.

Figures 3, 4, 5, and 6 compare the age distribution of people who have a preference for the public channels to that of people who gave favorable

[9] Respondents answered such questions as:
"Are you satisfied with the public channels?"
"Do you think the public channels are necessary?"
"Do you think it is important to pay license fees (make donations) to maintain public TV?"
"Do you feel that the public broadcaster is 'my station'?"

Figure 3. Attitudes toward Public TV (Japan)

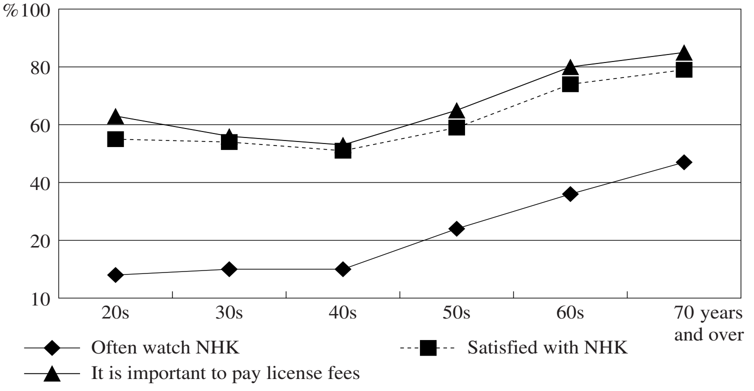


Figure 4. Attitudes toward Public TV (South Korea)

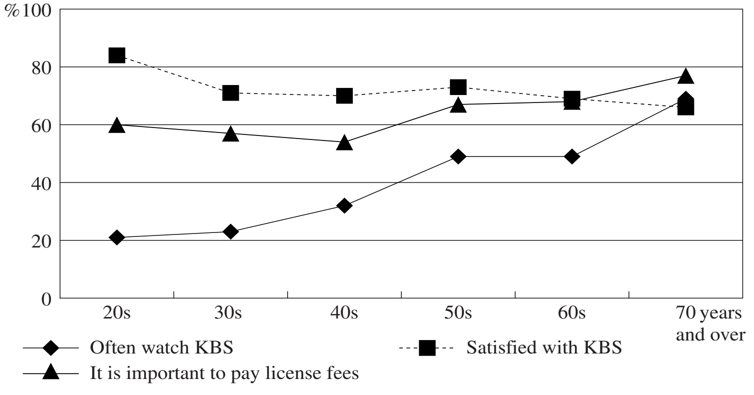


Figure 5. Attitudes toward Public TV (U.K.)

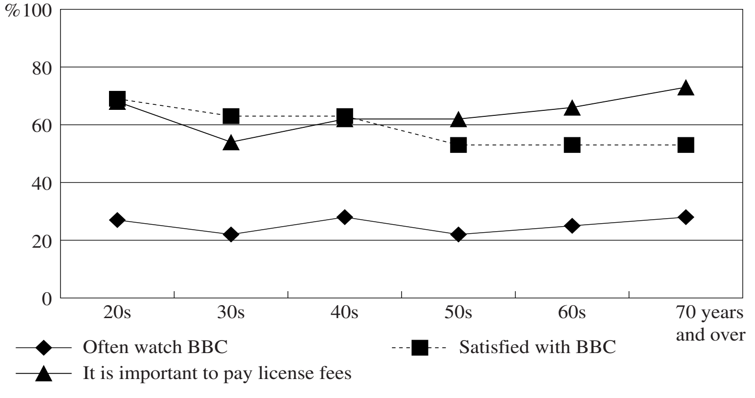
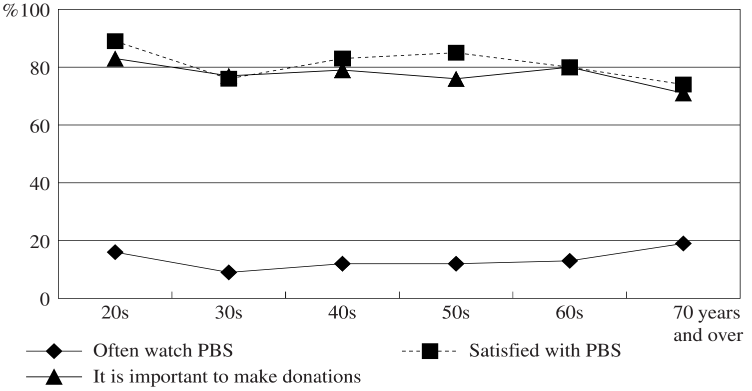


Figure 6. Attitudes toward Public TV (U.S.)



answers to questions about satisfaction and the importance of license fees or donations. We find they all more or less match in every country except South Korea.

In Japan, the patterns for favorable responses are more or less identical to the age patterns corresponding to a preference for public TV; the answers are relatively low (about 50-60 percent) for people under age 50, but increase sharply thereafter. In the United Kingdom, the favorable answers and preference for public TV are evenly distributed among the different age groups. A slight decline in favorability concerning license fees is seen as people get older. The lowest figures are among people in their thirties, while the figures for people in their twenties are higher than the overall average; in all, these figures correlate to the figures on preference. Likewise, in the United States, a more or less even distribution of responses regarding satisfaction and donations was apparent. In South Korea, although a correlation between preference and license fees can be seen—the proportions increase with age—a slight decline is evident with regard to satisfaction.

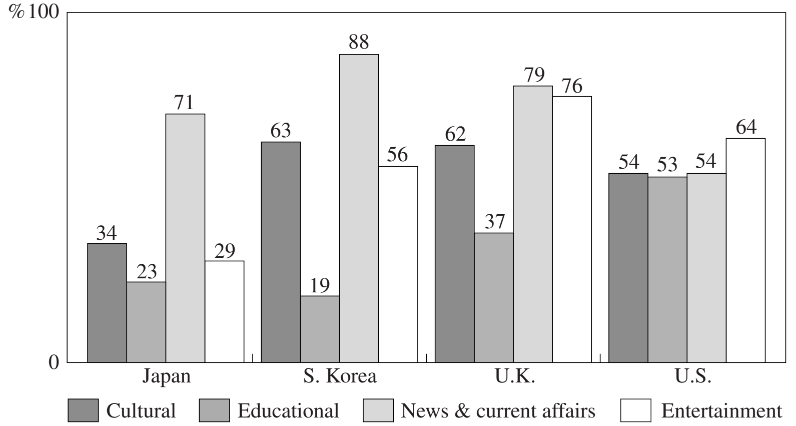
According to this information, if people who watch public channels more than commercial channels are grouped with those who express satisfaction with public TV services and feel that paying license fees is worthwhile, in Japan, the proportion of viewers in this group grows as their age group rises. In the United Kingdom and the United States, however, the proportion of viewers in this group stays about the same across all age groups. In South Korea, people in older age groups express less satisfaction with public channels than others do, but the older people tend to watch them more, and are more inclined to feel there is importance in paying the license fees. In contrast, younger people in South Korea express a greater degree of satisfaction, but actually watch these channels less, and are less in favor of paying the license fees.

Viewing by Genre

What kinds of programs are being watched by the people who tune in to the public channels? And how do these viewing patterns relate to age? To determine the answers to these questions, the survey asked which of four major genres (cultural programs, educational programs, news and current affairs programs, and entertainment programs) respondents watched on public TV.[10] The responses revealed information about viewing patterns in each country. Ready generalizations and comparisons are nevertheless difficult, given that classifications are deeply rooted in the history and culture of broadcasting in each country. In recent years in particular, so-called "off-genre" programs, which defy categorization, are being aired. It should therefore be understood that the results here only indicate overall trends.

Figure 7 shows the ratios for the programs that people often view. The ratios for news and current affairs programs are high—more than 70 percent—for all countries except the United States. The relatively low figure for the United States may stem from the lack of so-called "regular news" pro-

Figure 7. Types of Programs People Tend to Watch on Public TV



[10] While the survey followed the classifications given by Japan's broadcasting legislation—cultural, educational, news and current affairs, and entertainment programs—these are not necessarily applicable in each country.

gramming on PBS, even though it does show programs on current affairs and news analysis. In addition, the figure for educational programs is low in South Korea. This is probably because the survey focused on KBS; children's shows, language programs, and other productions fitting into this narrow category are aired on the Educational Broadcasting System. KBS only airs a few education-related programs concerning hobbies and lifelong learning.

Figures 8, 9, 10, and 11 show the ages of the viewers for each genre of program. In Japan, the number of viewers rises with age for all categories except educational programs. People in the 30-39 age group—31 percent—watched educational programs more than any other age group, followed by people over 70 (30 percent). News and current affairs were the most frequently watched type of program, with an overall viewership of 71 percent; however, in this category, too, the number of viewers increased with age. Whereas 52 percent of people in their twenties frequently watch news shows, viewership rises to 75 percent for those in their fifties, and 92 percent for those over 70. There seems to be a close connection between these viewing patterns and the ratio of viewers who are well-disposed toward the public channels in each age group.

The patterns are very different in South Korea. Entertainment programs in particular exhibit a descending pattern with age: the younger the viewer, the higher the preference for this genre. This may be due to the attention KBS devotes to dramas, variety shows, and other entertainment programs for the young. However, while 88 percent of viewers overall watch news and current affairs programs frequently, viewership in this genre ascends with age. In the case of South Korea, it is difficult to relate program genres to the increase in preference for public channels with age.

Figure 8. Preferred Genre of Programs by Age Group (Japan)

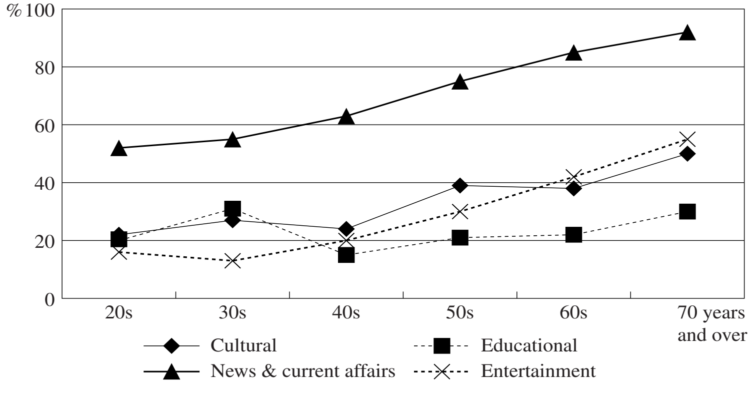


Figure 9. Preferred Genre of Programs by Age Group (South Korea)

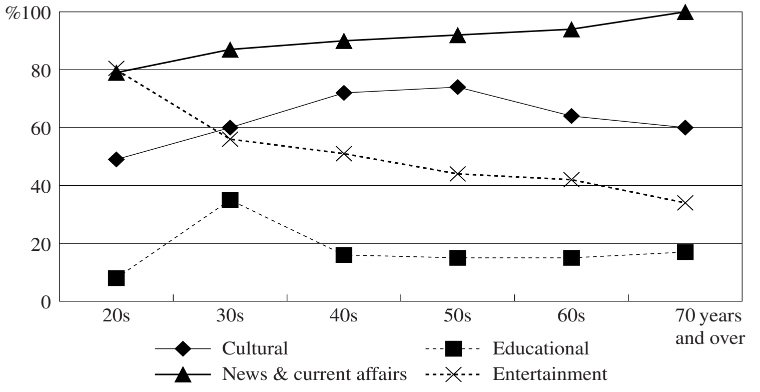


Figure 10. Preferred Genre of Programs by Age Group (U.K.)

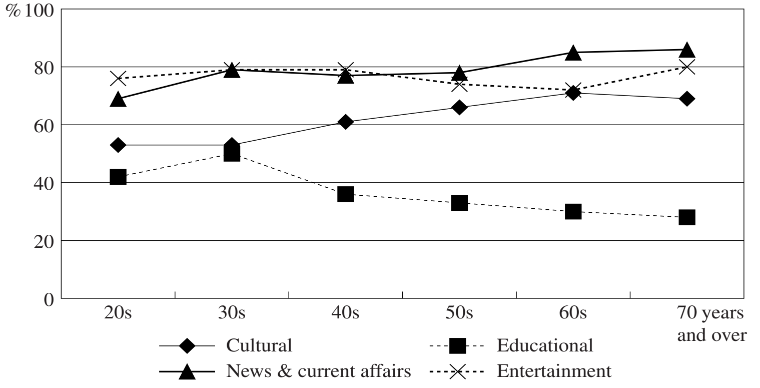
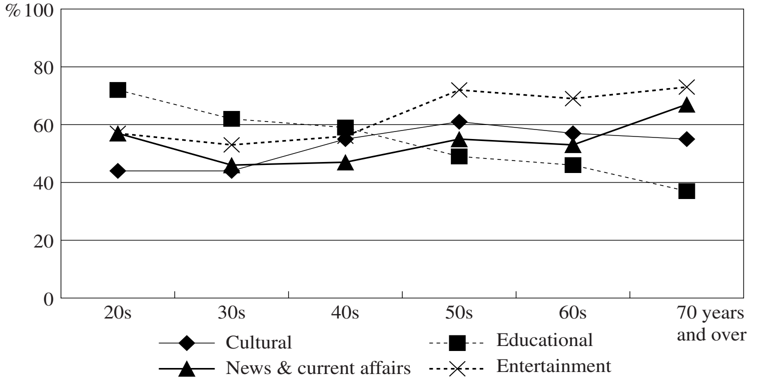


Figure 11. Preferred Genre of Programs by Age Group (U.S.)



As stated above, the preference for public TV in the United Kingdom and the United States is evenly dispersed across the different age groups. A similar trend is evident in both countries with regard to program genres. In the United Kingdom, viewership of educational programs descends with age, but ascends slightly for cultural programs, whereas all age groups expressed an even and relatively high preference for news and entertainment programs. This stands in contrast to the pattern in Japan.

In the United States, viewership of educational programs tends to decrease with age, but a more or less even pattern is evident for other types of programs. Since its establishment in the wake of commercial networks in 1967, PBS has functioned as a loose network of numerous educational stations across the United States; even now its stations revolve around educational programming. It is therefore only natural that PBS educational programs are frequently watched by people in the younger age groups, and that other types of programs show a more even distribution among age groups.

PUBLIC BROADCASTERS AND THE CHANGING MEDIA ENVIRONMENT

Recent changes in the media environment have had an impact on public broadcasters around the world. Public broadcasters are being affected by such changes as the rapidly growing availability of Internet access, the widespread popularity of mobile phones and other mobile devices, and the commencement of digital terrestrial and digital satellite broadcasts in nearly all major countries, as well as multichannel technology stemming from the growth of cable and satellite TV services.

The survey asked people whether they have access to the Internet and multichannels. The spread of the Internet and the development of multichannel technology are representative of the changes in today's media environment. At the same time, their impact on broadcasting—and on public broadcasting in particular—has been a subject of extensive debate. This section examines survey responses regarding the Internet and multichannels, their availability and degree of use, and their relevance (or lack thereof) to public TV viewership and people's perceptions of public broadcasting.

Public Broadcasting and Growing Internet Use

Figure 12 shows the frequency of Internet use in each country excluding e-mail transmissions. Internet use is most prevalent in South Korea, where 42 percent of respondents reported using it on an almost daily basis. South Korea

Figure 12. Internet Use

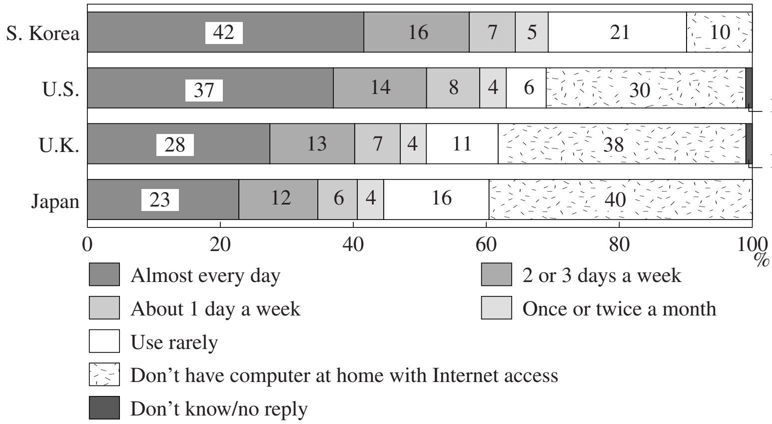
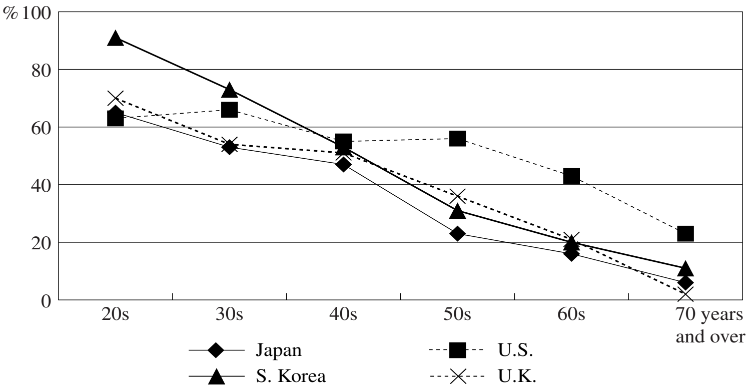


Figure 13. Ages of Frequent Internet Users (people who use the Internet at least two days a week)



is followed by the United States (37 percent of respondents use it almost daily), the United Kingdom (28 percent), and Japan (23 percent). In South Korea another 16 percent of the population reports using the Internet two or three days a week, bringing the number of frequent (at least twice a week) users to 58 percent. In Japan, on the other hand, only about one in three people (35 percent) use the Internet at least two days a week, and more than half (56 percent) use the Internet very little or do not possess a computer with Internet access.

Figure 13 gives the ages for frequent Internet users (those who use the Internet at least two days a week). In nearly all countries, the highest figures were among younger people, with the numbers decreasing in the higher age groups. The tendency is particularly striking in South Korea, where figures show a marked decline in Internet use among older people. Ninety-one percent of those under the age of 30 are frequent users of the Internet, compared to 20 percent of those in their 60s and 11 percent of those over the age of 70. On other hand, this trend is less pronounced in the United States. People in the 30-39 age group were the most frequent users of the Internet (66 percent), followed by people under 30 (63 percent), and while the figures are indeed higher among younger people, the differences across the age groups are relatively small. Fifty-six percent of people in their fifties are frequent users, and as are 43 percent of those in their sixties.

The Relationship Between Internet Use and TV Viewing

What of the frequently mentioned relationship between Internet use and watching TV? A correlation was evident in each country when the amount of Internet use was cross-tabulated against the amount of time spent watching TV. People who use the Internet frequently tend not to watch much television, while those who use the Internet very little or not at all tend to watch a lot. Figures 14 and 15 show the amount of Internet use compared to TV viewing time in Japan and the United Kingdom. In Japan, 51 percent of frequent Internet users watch little TV—a significantly higher percentage than the proportion of the overall population that rarely watches TV—whereas only 24 percent of frequent Internet users also watch a lot of TV. A similar trend can be seen in the United Kingdom. The pattern is also similar, despite some differences, in South Korea and the United States (not shown).

From the results of the survey, there is clearly a tendency among frequent Internet users to watch little television. Furthermore, as noted above, younger people tend to use the Internet more, and watch less TV, than people of other

Figure 14. Internet Use and TV Viewing (Japan)

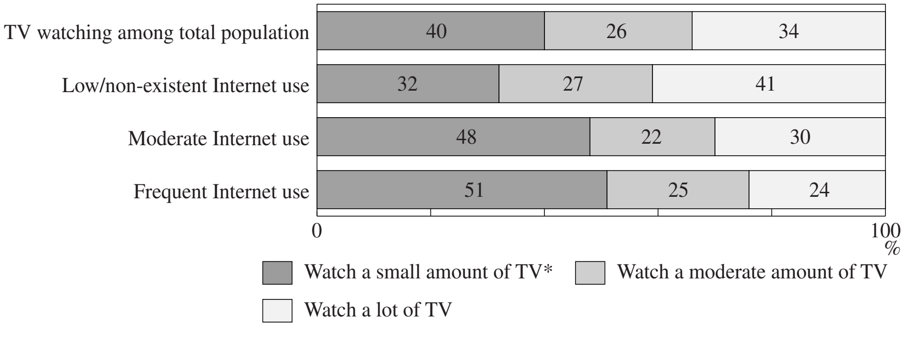
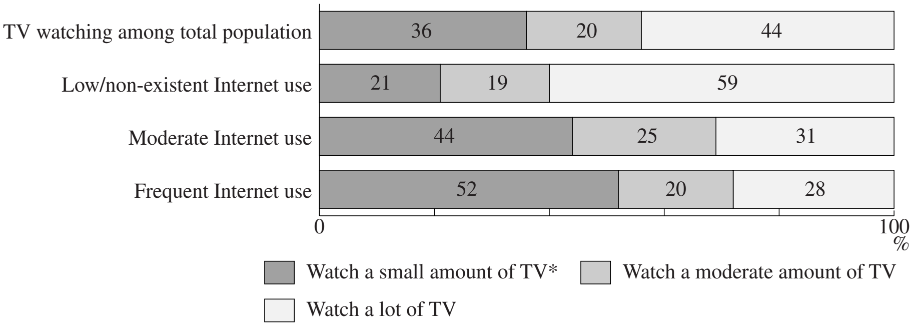


Figure 15. Internet Use and TV Viewing (U.K.)



*Note: 1-2 hours of TV per day is regarded as a "small amount," while 3 hours is considered "moderate," and more than 4 hours "a lot."

ages. We consequently cross-tabulated three attributes to provide a control for the age groups, but the results were the same. We find it very likely that Internet use corresponds to less time spent watching TV, irrespective of age group.[11]

Internet Use and Perceptions of Public Broadcasters

Is there a relationship between Internet use and people's perceptions of public broadcasters? Two major trends were apparent when we compared the amount of Internet use against responses to questions about whether respondents were satisfied with public TV, whether they think public TV is necessary, whether they feel there is importance in paying license fees, and whether they think of public TV as "their station." In Japan and South Korea, Internet users tend to feel critical or even negative about public TV, compared to those who do not use the Internet. In the United Kingdom and the United States, however, either no difference between the two groups could be seen, or Internet users gave positive responses with respect to certain variables.

Figures 16 and 17 show the results of representative cross-tabulations. In Japan, a correlation was evident between Internet use and satisfaction with public TV and its accountability to viewers. Satisfaction with public TV was notably low among frequent Internet users (53 percent), and lack of satisfaction notably high (37 percent). Additionally, only 21 percent of frequent Internet users felt that public TV is accountable to its viewers. A high number

[11] It is possible that the survey fails to accurately reflect reality regarding the amount of Internet use and television viewing, since people were answering subjective questions from researchers rather than being asked to keep a record of their use or viewing. A more detailed study should be carried out in the future.

Figure 16. Internet Use and Perceptions of Public Broadcasters (Japan and South Korea)

(%)

		Total population	Frequent Internet use	Moderate Internet use	Low/non-existent Internet use
Japan	Satisfied with public TV	62	53	64	**67**
	Not satisfied	29	**37**	26	25
	Public broadcaster is accountable enough to its viewers	29	21	18	**35**
	Not properly accountable	66	**76**	**80**	57
S. Korea	Public broadcaster is accountable enough to its viewers	31	24	38	**43**
	Not properly accountable	66	**74**	62	52
	Feel that public broad-caster is 'my station'	45	35	46	**61**
	Do not feel this way	54	**64**	54	36

Figure 17. Internet Use and Perceptions of Public TV (U.K. and U.S.)

(%)

		Total population	Frequent Internet use	Moderate Internet use	Low/non-existent Internet use
U.K.	Satisfied with public TV	59	**69**	64	51
	Not satisfied	39	30	36	**48**
	Paying license fees is important	64	65	65	62
	Not important	36	34	36	38
U.S.	Satisfied with public TV	80	81	82	80
	Not satisfied	9	9	7	10
	Making donations to public TV is important	77	**80**	**84**	70
	Not important	21	20	14	**27**

Note: Figures significantly higher than those for the total population are highlighted in bold.

(76 percent) reported feeling that public TV is not accountable to its viewers, compared to the 66 percent of the total population that reported this view.[12]

Similarly, in South Korea, respondents who use the Internet frequently showed a strong tendency to be negative about public TV. Only 24 percent of

[12] Cross-tabulation of three attributes to provide a control for age groups revealed similar trends for all ages. Furthermore, comparable patterns were found in other cross-tabulations of three attributes.

frequent Internet users felt that public TV is accountable, while a significantly high proportion (74 percent) felt that it is not. This compares to 66 percent of all respondents that felt that public TV is not accountable. As for a sense of affinity, just 35 percent of frequent Internet users felt that public TV is "my station." Sixty-four percent of them did not feel this way, compared to the 54 percent of respondents overall.

Taking into account the negative responses toward public broadcasting among Internet users in Japan and South Korea, and the fact that Internet users tend to be younger, it can be concluded that the spread and growth of Internet use is a factor in the higher interest and level of satisfaction with public TV among older viewers.

In the United Kingdom and the United States, notably, a corresponding relationship between Internet use and attitudes toward public broadcasters was not found. In some cases, depending on the variable, Internet users in these countries are more positive about public TV than the respondents overall. In the United Kingdom, 69 percent of frequent Internet users expressed satisfaction with public TV, as compared to 59 percent of the total respondents. In the United States, also, 81 percent of frequent Internet users expressed satisfaction, whereas the figure was 80 percent for the total respondents. In both countries, a high percentage of frequent Internet users said that paying license fees or making a donation was important; the figures were about the same for the population as a whole. Therefore, in contrast to Japan and South Korea, no negative correlation is evident between the spread of the Internet and attitudes toward public broadcasters in the United Kingdom and the United States; in fact, there are some positive correlations.

Public Broadcasting and Multichannel Services

The following section examines how perceptions of public broadcasters are related to multichannel services and the extent to which viewers take advantage of their availability.

With respect to multiple channels, the survey first asked people about the number of channels they could watch at home. The results in Figure 18 show that multichannel services are most commonly available in the United States, where 61 percent of the population has access to more than 50 channels (that is, 33 percent have access to 50–100 channels, and 28 percent have access to an even greater number). The number of available channels was lowest in Japan: 48 percent of the population has access to 6–10 channels, while 17 percent only have access to 1–5. Only 33 percent of the population has access to 11 channels or more.

Figure 18. Number of Channels That Can Be Watched at Home

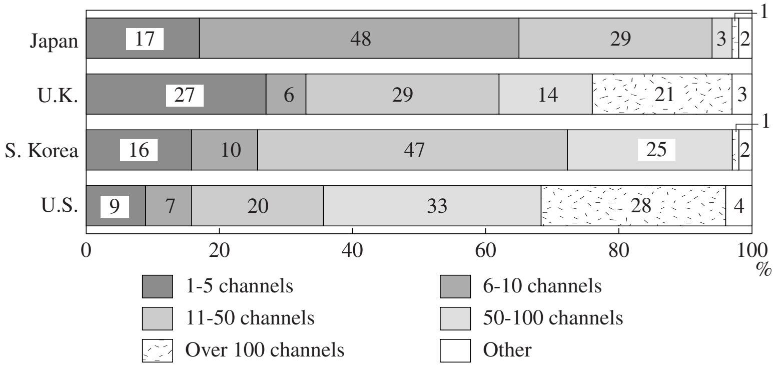


Figure 19. Ages of People Who Have Access to More Than 10 Channels

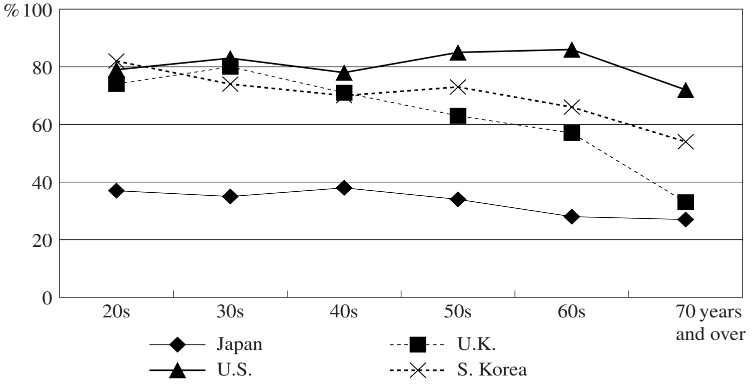


Figure 19 gives the ages of the people who have access to a large number of channels (defined as more than 10 channels). No considerable difference is evident across the age groups in Japan or the United States. The figures are somewhat lower in Japan among people in their sixties and over the age of 70, and in the United States among people over 70, but generally speaking, the proportions are even across the age groups. The United Kingdom, however, shows a descending pattern with respect to age. People in the 30-39 age group have the greatest access to multichannels (80 percent), followed by those in their twenties (74 percent), and forties (71 percent), with the figures getting lower in the higher age groups (57 percent for people in their sixties, and 33 percent for people over 70); a similar pattern is evident in South Korea. The even distribution among age groups in the United States is probably due to the fact that cable and satellite TV are available in approximately 85 percent of homes, and an average of 90 channels are available in each household. In the case of the United Kingdom, the descending pattern reflects the very low proportion of subscribers to terrestrial digital and other digital services among higher age groups, in spite of the fact that 73 percent of households have access to digital broadcasts.

Public TV Viewing and Multichannel Services

What is the relationship between multichannel services and the viewing of public TV? Are there differences between one country and another? Considerable differences were evident between Japan and South Korea on one hand, versus the United Kingdom and the United States on the other, when responses to questions on these issues were cross-tabulated.

In the United Kingdom and the United States, a negative correlation between the availability of multichannels and public TV viewership was evident. Figures 20 and 21 cross-tabulate the answers to questions in the United Kingdom and the United States about the number of available channels, and whether people prefer public or commercial TV. In both countries, the proportion of people who frequently watch public TV and are well-disposed to it grew as the number of available channels decreased. In the United Kingdom, a relatively high proportion of people with access to 1-5 channels (32 percent) tended to watch public TV, while only 19 percent of those with access to more than 100 channels preferred public TV. Although this pattern is less pronounced in the United States, a preference for public TV is still higher among

Figure 20. Number of Available Channels and Preference for Public or Commercial TV (U.K.)

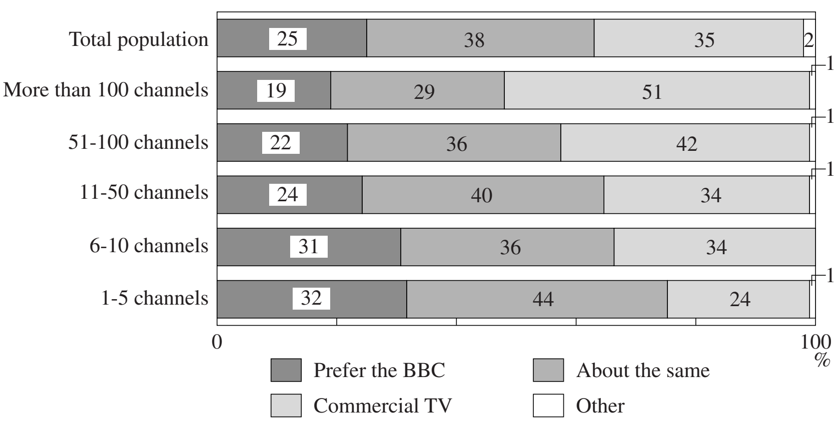
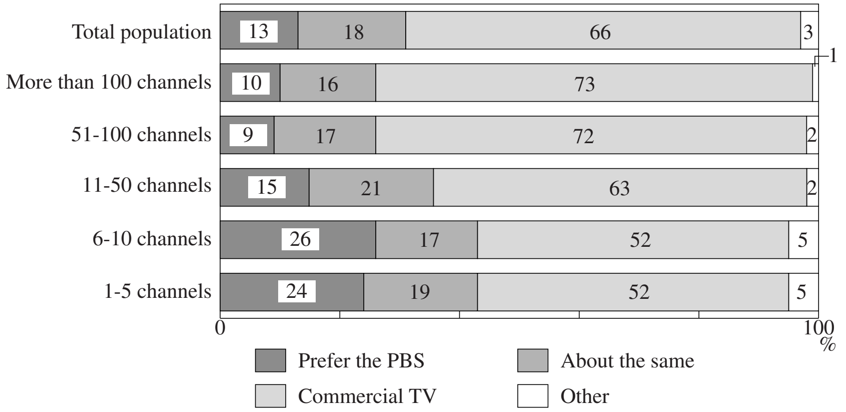


Figure 21. Number of Available Channels and Preference for Public or Commercial TV (U.S.)



viewers with access to only 1-5 channels (24 percent), and 6-10 channels (26 percent). This tendency did not vary when tabulations with three variables were carried out to provide a control for the age groups.

In Japan and South Korea, however, no significant correlation was apparent in the preference for public TV and the number of available channels. As seen earlier, there are considerable differences between these two countries and the U.S. and the U.K. with respect to the availability of multichannel services. However, it would be difficult to attribute the decline in viewing of public TV to the development of such services in Japan and South Korea.

In view of the above, the availability of multichannels per se may have no relation to public TV viewership, but considerable differences can be seen from one country to another. One likely factor in these differences is whether the cable and satellite TV entities that offer multichannels are providing so-called "killer content" (that is, content that is at least as popular as what is available on the public TV and other terrestrial stations). In the United States, for example, CNN, FOX News, Disney and HBO from cable or satellite broadcasters are just as popular as the terrestrial channels. In the United Kingdom, BSkyB provides the popular U.S. channels just mentioned, while Sky One is a popular channel, particularly among younger viewers, for its programming based largely on dramas and entertainment shows. Meanwhile, in both Japan and South Korea, even though the popular—mostly American—foreign channels are available on cable and satellite, they have yet to acquire the same type of viewer ratings and clout, partly due to linguistic and cultural differences. Such variables are probably the reason that there is no evident relationship between declining viewership of public TV and the availability of multichannels.

Multichannels and Perceptions of Public Broadcasters

Next we shall examine the relationship between multichannels and perceptions of public broadcasters. Figure 22 shows significant correlations in each country between these factors when the number of available channels was cross-tabulated against the four questions concerning satisfaction, need, license fees, and affinity for public broadcasting. Moreover, the categories for low, medium, and high availability were adjusted for each country, due to considerable variation in the number of available channels from one country to the next.

In Japan, a correlation was evident between available channels and satisfaction with public TV. A significant proportion (71 percent) of those with a low number of available channels was satisfied with public TV, while a significant proportion (33 percent) of those with a high number of available channels was dissatisfied. In other words, the fewer the channels, the greater the satisfaction with the public broadcaster; likewise, satisfaction decreased when more channels were available. In South Korea and the United Kingdom, a correlation with the payment of license fees was apparent. In both countries, people with fewer available channels were more likely to find importance in paying license fees than those with access to a greater number of channels. Moreover, in the United States, a correlation with affinity for the public broadcaster was seen. Where few channels were available, a significantly high

Figure 22. Available Channels and Perceptions of Public Broadcasters

(%)

		Total pop.	Low no. of channels†	Medium no. of channels	High no. of channels
Japan	Satisfied with public TV	62	**71**	62	59
	Not satisfied	29	19	30	**33**
South Korea	Paying license fees is important	61	64	62	54
	Not important	39	35	37	**44**
U.K.	Paying license fees is important	64	**71**	63	57
	Not important	36	28	36	**43**
U.S.	Feel that public TV is “my station”	49	**61**	45	44
	Do not feel this way	45	33	48	**52**

Notes: Figures significantly higher than those for the total population are highlighted in bold.
† In Japan, 1-5 channels count as “low,” 6-10 as “medium,” and over 10 as “high.” In the U.K. and S. Korea, 1-10 channels count as “low,” 11-50 as “medium,” and over 50 as “high.” In the U.S., 1-25 channels count as “low,” 26-100 channels as “medium,” and over 100 as “high.”

proportion of people (61 percent) reported feeling that the public broadcaster was “my station.” A significant proportion (52 percent) of those with access to a large number of channels said that they did not feel this way.

While correlations are evident between multichannel availability and certain variables in each country, correlations could not be established for all four basic questions concerning public broadcasting. In addition, no correlation was apparent in any of the four countries between availability of channels and a perceived necessity for public broadcasters. There is a limited negative correlation between multichannels and perceptions toward public broadcasters, indicating that the presence of public broadcasting is likely to diminish as more channels appear.

THE RELATIONSHIP BETWEEN VIEWERS AND PUBLIC BROADCASTERS

The media environment is not the only factor affecting people’s perceptions of public broadcasting and public TV viewing. The survey also revealed a strong relationship between attitudes toward public broadcasters and their reflection of viewers’ voices—that is, whether viewers feel their voices are being reflected in programs and services—as well as their accountability (i.e., whether public broadcasters are keeping their viewers informed about their current programming, services, and management guidelines).

Public Broadcasters and Their Reflection of Viewers’ Voices

Figure 23 shows viewer responses to the question of whether they think the public channels are reflecting their voices, cross-tabulated against responses on viewing frequency, satisfaction, license fees, and sense of affinity. Correlations were found in each country except for the United States. Particularly strong correlations were evident in each country with respect to license fees or donations, as well as viewers’ affinity with the public broadcaster and thought of it as “my station.”

In Japan, for example, 85 percent of those who felt that the public broadcaster reflects their voices also felt that paying license fees is important. Among those who felt the public broadcaster does not reflect their voices, only 46 percent saw the importance of license fees. Similarly, a high proportion (86 percent) of those who felt that the public broadcaster reflects their voices also reported an affinity for the public broadcaster, whereas just 45 percent of those who did not feel that the broadcaster reflect their voices felt the same affinity. In the U.K., 75 percent of those who felt their voices are reflected also see importance in paying license fees, whereas 42 percent of those

Figure 23. Reflection of Viewer's Voices Compared to Public TV Viewing and Perceptions of Public Broadcaster.
(Are Public Broadcasters Reflecting the Opinions and Voices of Viewers in Their Programs and Services?)

(%)

		Total pop.	Yes, are being reflected	No
Japan	Frequently watch public TV	23	**32**	15
	Satisfied with public TV	62	**83**	47
	Paying license fees is important	66	**85**	46
	Feel public TV is "my station"	62	**86**	45
S. Korea	Frequently watch public TV	33	37	24
	Satisfied with public TV	73	**81**	56
	Paying license fees is important	61	**67**	42
	Feel public TV is "my station"	45	**55**	20
U.K.	Frequently watch public TV	25	**30**	18
	Satisfied with public TV	59	**70**	39
	Paying license fees is important	64	**75**	42
	Feel public TV is "my station"	55	**69**	32
U.S.	Frequently watch public TV	13	14	9
	Satisfied with public TV	80	**89**	55
	Making donations is important	77	**85**	44
	Feel public TV is "my station"	49	**59**	16

Note: Figures significantly higher than those for the total population are highlighted in bold.

who feel their voices are not being reflected think that license fees are worth paying. On the question of affinity, 69 percent of U.K. respondents who felt that the public broadcaster reflects their voices felt an affinity with the public broadcaster. Of those who claim that the public broadcaster does not reflect their voices, 32 percent felt an affinity.

Therefore, according to these viewer responses, the perception that their voices are reflected in programs and services is strongly linked to satisfaction, payment of license fees, and sense of affinity to public broadcasters.

Viewer responses regarding how well public broadcasters reflect viewer voices varied considerably from one country to another. Figure 24 compares the responses from all four countries. The highest figures were in the United States, where 77 percent of all respondents strongly agreed or tended to agree that their voices were being reflected by public TV, followed by South Korea (69 percent) and the United Kingdom (65 percent), with Japan noticeably last at 40 percent. While many people in the United States, South Korea, and United Kingdom feel that their voices are reflected in programs and services, less than half of the viewers in Japan feel this way about their public broadcaster.

Figure 25 compares these results to responses about the inclination of viewers to make their voices known. The survey asked whether viewers had

Figure 24. Are Public Broadcasters Reflecting the Voices of Viewers?

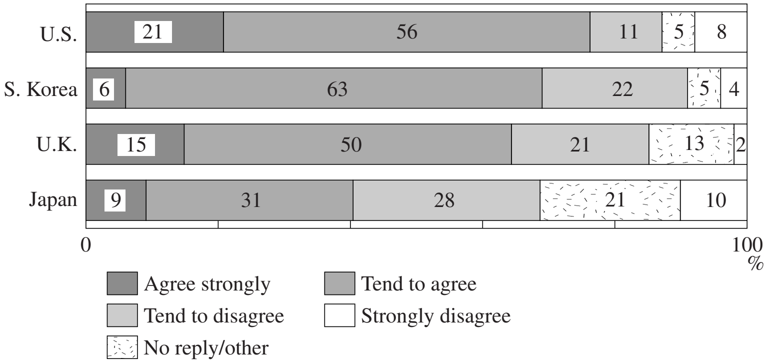
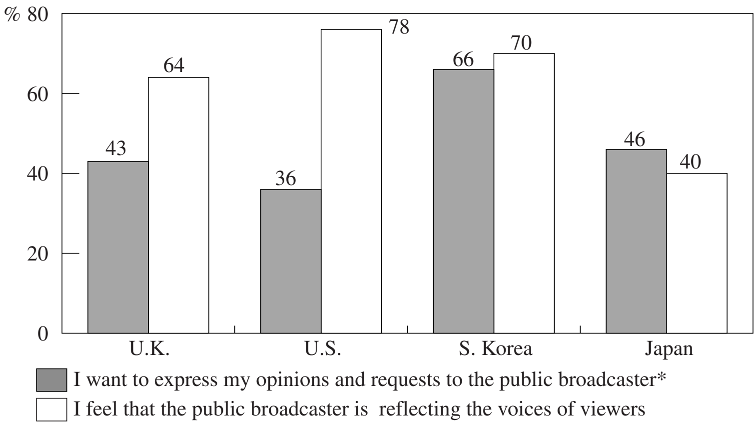


Figure 25. Reflection of Voices Compared to Whether Viewers Actually Make Their Voices Known

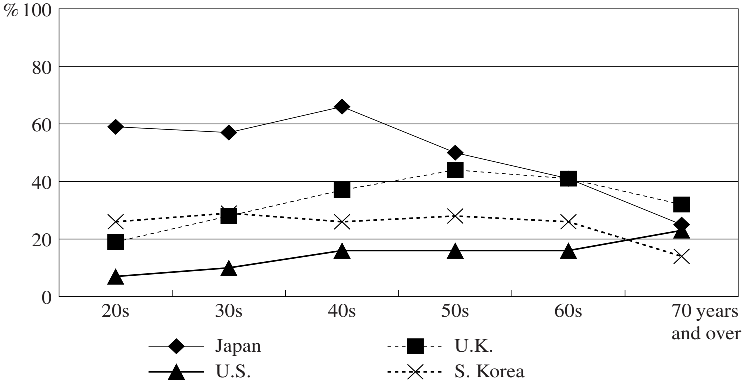


* This category combines two questions: "I have expressed my opinions or made requests to the public broadcaster" and "I have not expressed my opinions or made requests, but want to."

expressed their views to public broadcasters so that they might be reflected in programs. Of the four countries, only in Japan did the proportion of people who want to express their views surpass the proportion of people who feel their voices are being reflected. In Japan, although 46 percent of viewers are ready to convey their opinions and requests to the public broadcaster—a figure which is not very low compared to the other countries—they do not actually feel that their voices are reflected in programming and services.

The greater numbers of younger respondents who feel viewers' voices are not being reflected compared to older respondents is a further noteworthy

Figure 26. People Who Feel the Public Broadcaster Is Not Reflecting Viewers' Voices (by age group)



point concerning Japan. Figure 26 shows the ages of those who strongly feel or somewhat feel that the public broadcaster is not reflecting the voices of viewers. In Japan, the figures are higher than those in the other countries in every group except for the respondents over 70. The figures decrease as age rises: the highest percentage is seen among people aged 20-49 (57-66 percent), falling thereafter among people in their fifties (50 percent), sixties (41 percent), and people over 70 (25 percent). This descending pattern is probably related to the greater preference for NHK among older people.

Accountability

In recent years, along with trying to reflect the voices of their viewers, public broadcasters have been making various efforts to show accountability to their viewers; that is, to keep viewers informed about public broadcaster's ideas and principles, management guidelines, and the thinking that goes into program production. In the last few years, public broadcasters have started to draw up "promises" and make them public, and to make management goals and the extent to which they have been fulfilled known to viewers. This survey found that accountability was also strongly related to people's perceptions of public broadcasters and the viewing of public TV.

Figure 27 shows responses as to whether or not people feel the public broadcasters are adequately accountable, cross-tabulated against responses on viewing frequency, satisfaction, license fees, and sense of affinity. Significant correlations were evident in all countries. Each country tends to show a high proportion of positive responses about viewing and satisfaction, as well as for affinity and a sense of importance in paying license fees (or making donations), among those who feel public broadcasters are accountable.

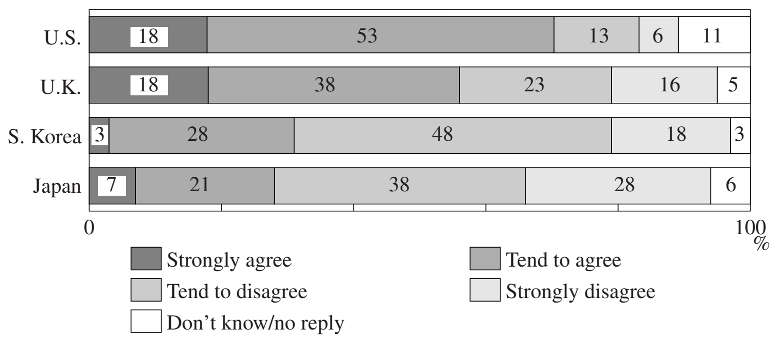
Figure 27. Accountability Compared Against the Watching of Public TV and Perceptions of Public Broadcasters

(%)

		Total pop.	Is the public broadcaster keeping people informed of these matters?	
			Yes†	No
Japan	Frequently watch public TV	23	**35**	17
	Satisfied with public TV	62	**85**	53
	Paying license fees is important	66	**85**	58
	Feel public TV is “my station”	62	**90**	49
S. Korea	Frequently watch public TV	33	**43**	27
	Satisfied with public TV	73	**84**	68
	Paying license fees is important	61	**82**	50
	Feel public TV is “my station”	45	**72**	32
U.K.	Frequently watch public TV	25	**32**	19
	Satisfied with public TV	59	**69**	54
	Paying license fees is important	64	**74**	49
	Feel public TV is “my station”	55	**69**	37
U.S.	Frequently watch public TV	13	15	8
	Satisfied with public TV	80	**88**	60
	Making donations is important	77	**84**	55
	Feel public TV is “my station”	49	**62**	19

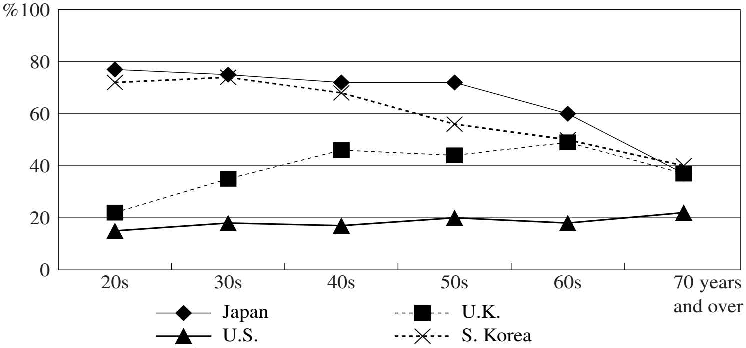
* Figures significantly higher than those for the total population are highlighted in bold.
† “Yes” denotes those who strongly agree or tend to agree, while “no” denotes those who tend to disagree or strongly disagree.

Figure 28. Are the Public Broadcasters Showing Proper Accountability?



In Figure 28, however, considerable differences are apparent from one country to another, similar to differences with respect to the previous question of public broadcasters reflecting viewers’ voices. The highest figures were in the United States, where 71 percent of respondents strongly agreed or tended to agree that the public broadcaster is accountable, followed by the United

Figure 29. People Who Do Not Feel That Public Broadcasters Are Showing Proper Accountability (by age group)



Kingdom (56 percent), South Korea (31 percent), and Japan (28 percent). Although more than half the respondents in the United States and the United Kingdom gave positive evaluations of this issue, more than 60 percent of those in South Korea and Japan gave negative replies.

A contrast in the ages of the respondents was also evident between these two groups of countries. Figure 29 compares the ages of the people who do not feel that public broadcasters are properly accountable. The figures were more or less even (15-22 percent) among different age groups in the United States. In the United Kingdom, 22 percent of those in their twenties felt that public broadcasters were not accountable; among those over 30, the figure ranged from 35 to 49 percent. However, a clear pattern, descending with age, was evident in South Korea and Japan. Negative evaluations were higher among the younger South Korean respondents—72 percent of those in their twenties and 74 percent of those in their thirties—and lower for the older age groups—56 percent of people in their fifties and 50 percent of those in their sixties. In Japan, respondents in their twenties had the highest negative responses regarding accountability (77 percent). Negative responses were 70 percent or higher for people aged 30-59, dropping thereafter to 60 percent for people in their sixties and to 37 percent for people over 70. The high proportion of young people in Japan and South Korea who give negative evaluations about the accountability of public broadcasters is probably a factor in the ascending age pattern with respect to the viewership of public TV.

Summary of Findings

So far we have examined the current situation regarding public broadcasters and the media environment in seven countries. We subsequently used the results of an international survey to analyze trends and differences in the viewing patterns and viewer perceptions of public broadcasters. We then examined the relationship between the public broadcasters and a media environment that includes the Internet and multichannels, as well as the nature of the relationship between the public broadcasters and their viewers. The results of our analysis can be summarized as follows:

1. There are two patterns among viewers who prefer public TV to commercial ones. In Japan and South Korea, an ascending pattern is evident, in which the proportion of viewers increases in the higher age groups. In the United Kingdom and the United States, an even pattern can be seen, with viewers evenly distributed across the different age groups.
2. A correlation can be found between the ages of people who prefer public TV and favorable replies to the questions of satisfaction and importance in paying license fees. In Japan, favorable responses to these questions increase with age, whereas in the United Kingdom and the United States, positive responses decrease with age.
3. In Japan, on the whole, viewership of all program genres of public TV tends to increase as age increases, whereas there is a generally balanced distribution of viewers among all ages in the United Kingdom and the United States. In South Korea, there was considerable variation in viewership according to genre.
4. In all four countries, people who use the Internet frequently tend to watch less television than the rest of the population.
5. Two contradictory trends can be seen regarding the relationship of Internet use to viewer perceptions concerning satisfaction, the payment of license fees, and a sense of affinity toward public broadcasters. In Japan and South Korea, a high proportion of Internet users had negative attitudes toward public channels. In the United Kingdom and the United States, on the other hand, Internet use either had no impact on perceptions toward public broadcasting, or a high proportion of Internet users responded positively to public broadcasting.
6. Although the extent of multichannel services differs greatly from one country to the next, analysis showed that these services have some impact on public TV viewing in the United Kingdom and the United States. In Japan and South Korea, no relationship was evident between public TV viewing and access to multiple channels.
7. Survey analysis showed that multichannel availability is likely to have a negative impact on perceptions concerning public broadcasting. In all four countries, a high proportion of people with access to a large number of channels had negative perceptions of public broadcasters in such matters as satisfaction, license fees, and affinity. However, there was no evident

correlation between multichannels and perception of a need for public broadcasting.

8. Evaluations of whether public broadcasters reflect viewers' voices are strongly linked to how much respondents watch public TV and their attitudes toward public broadcasting. In Japan, a high proportion of young people feel that viewers' voices are not reflected. This is probably related to the fact that preference for public TV in Japan increases with age.
9. Evaluations of accountability are also linked to viewership and perceptions of public broadcasters. Respondents—particularly younger people—in Japan and South Korea gave low evaluations regarding accountability. This may be related to viewership increasing with age.

DISCUSSION

This section offers some different perspectives concerning the results of the survey, and identifies some future tasks.

Public Service Broadcasting and Universality

The survey results show that in Japan and South Korea, the percentage of people who tune in to public broadcasting is higher among older groups. In the United Kingdom and the United States, on the other hand, the audience is more or less evenly distributed across different age brackets.

Public broadcasting is based on the principle of universality. Audiences expect public channels to reach out to a wide range of people across the country. Regardless of where they live, how old they are, and what backgrounds they have, viewers expect public TV to meet the varied tastes and interests of people from all walks of life. Furthermore, in the United Kingdom, South Korea and Japan, public broadcasting is mainly funded by license fees paid by the public. This is not the case with PBS in the United States, however.

In view of these two points, it is contradictory to the principle of public broadcasting to have viewers unevenly distributed among people of specific age groups or social classes. Uneven viewership can also raise questions as to the legitimacy of collecting license fees from the public.

This raises the question of what kind of services public broadcasting should offer in the light of this principle of universality. We will explore this question from three different angles: what kind of entertainment should be offered by public broadcasters, how they should approach young people, and how they should use the Internet in their services.

What Kind of Entertainment Should Public Broadcasting Offer?

Our study examined public TV viewing trends according to program genre among different age groups in the four countries. We found that in the United Kingdom, viewership is fairly evenly distributed among age groups, not only for news and current affairs programs, but also for entertainment programs offered by public broadcasting. In this respect, the United Kingdom is unique among the four countries. Considering that entertainment is an area where public and commercial broadcasters are competing fiercely to win more audience shares, and where commercial broadcasters usually have more advantages, this is an impressive achievement. What entertainment programs does the BBC offer to attract such an unusually even audience distribution?

In the United Kingdom, broadcasting programs are divided into 14 genres, and each genre is further divided into smaller groups.[13] For example, dramas are divided into three groups: shows that only last for one installment; three-month series; and long-term series. Entertainment programming includes variety shows, situation comedies, studio shows with audience participation, quizzes, and animated shows.

Some interesting conclusions can be drawn from the results of a survey on genres of terrestrial programs conducted by the Office of Communications (Ofcom) between 2004 and 2005.[14] Ofcom is the regulatory and supervisory body for broadcasting and communications in the United Kingdom. Survey respondents were asked whether particular genres of programs are important for society or for individuals. A large number of respondents answered that news and current affairs programs are equally important both for society and individuals. But many said dramas are far more important for individuals than for society. They also said the same for comedies, movies and documentary programs. From this, we can see that in the United Kingdom, dramas, comedies and the like are powerfully appealing to individual viewers.

Programs in the comedy and drama genres are usually the principal focus of commercial broadcasters, and their ratings usually attract attention. But if public broadcasters in any country produce entertainment programs in an effort to earn higher ratings, they invariably face the criticism that they are not

[13] This classification has been made in accordance with program genre classifications given by BARB (Broadcast Audience Research Bureau), an audience research company jointly set up by terrestrial television broadcasters in the United Kingdom, including the BBC. BARB (2002).

[14] According to the broadcasting and telecommunications law of 2003, Ofcom is required to survey the state of public service broadcasting in the United Kingdom once every five years, and to make recommendations for the future. The data here is included in a mid-term report, “Phase 1—Is Television Special?” which was released in April 2004.

behaving like public broadcasters; indeed, the BBC faces such criticism in the United Kingdom. But those who run the BBC and others who defend public broadcasting maintain that ratings are vital to their survival. They hold that ratings are the most basic indicator of whether or not people appreciate particular programs. BBC supporters share a sense of crisis that lower ratings could threaten the existence of the BBC as a public broadcaster, and might lead to its privatization.

Decades ago, the BBC was lagging behind a commercial broadcaster, ITV, in a race for audience shares. In the mid-1980s, when signs of the incipient multichannel era were emerging, the BBC started a drama series called *EastEnders*. The show, a typical drama series, was developed with the primary purpose of gaining as many viewers as possible (Buckingham 2000).

EastEnders was introduced in February 1985 with ITV's drama series, *Coronation Street*, in mind. Since then, it has been on the air for more than two decades. Two 30-minute episodes are broadcast each week; on Sunday afternoon, an omnibus edition of the week's shows is aired. The drama centers on two typical families, the Beales and the Fowlers, who live in the inner city of London. It is a daring show, addressing various issues of modern society such as teenage pregnancy, drug addiction, divorce, and caregiving for the elderly and people with mental or physical disabilities. The series has been among the top ten in annual ratings since it started.

The success of *EastEnders* is attributed to support from viewers spanning a wide range of ages and social classes. As Figure 30 shows, more than 40 percent of viewers in each age group, along with 50 percent or more of each social class, watch the series. Another BBC television drama series, *Doctor Who*, is believed to have a similar appeal for viewers. When the renewal of the BBC's Royal Charter was debated, many people cited this series as an example of the kind of program that all family members can enjoy, regardless of age. Public opinion held that providing such entertainment programs for the public should be included among the BBC's roles (Nakamura 2006).

EastEnders has been a regular program for more than two decades. *Doctor Who*, on the other hand, is a three-month series drama. Since the BBC first aired *Doctor Who* in 1962, however, new versions of the show have been made many times. The BBC often does this with popular short-term dramas and comedies; it is one of the characteristics of BBC programming. Whether they are continuous dramas, such as *EastEnders*, or new versions of shorter series such as *Doctor Who*, it is safe to say that common enjoyment of these kinds of television programs has enabled people to connect with one another across generational and social barriers.

Figure 30. Viewership of BBC's *EastEnders*

	No. of viewers (Figures in millions)	Viewer ratings (%)
Total average no. of viewers	14.5	56
Children (up to 15 years)	1.7	63
Adults	12.7	55
Adults (by age group)		
16-24	1.5	71
25-34	2.6	68
35-44	2.5	59
45-54	2	51
55-64	1.8	51
65+	2.4	44
Social group*		
AB	1.7	49
C1	3.6	55
C2	2.7	55
DE	4.7	58

*Note:

AB: Upper middle class or above; includes people in managerial positions, public servants, and doctors

C1: Lower middle-class white-collar workers

C2: Skilled workers

DE: Unskilled workers, unemployed people, and people on welfare

Source: Brookes (2000)

Economist M. Brookes says the ability of *EastEnders* to offer this kind of "shared experience" connecting such a broad array of viewers is a way to build social capital, and claims that this can serve as a basis for defending public service broadcasting in a multichannel age (Brookes 2004).

Social capital can be defined as the adhesive that binds a society together. It works to create relations of trust among people and enables its mechanisms to function more smoothly and efficiently. It must be admitted that television can distract viewers from participating in social activities, turning them from active members of society into passive consumers of television programs. For this reason, some scholars argue that television reduces social capital, rather than enhancing it (Putnam 2000).

Brookes disagrees. He says that some types of television programs can offer viewers opportunities to share experiences, and by doing so, help build social capital. People can talk about popular television programs with friends or colleagues when they are on a bus, shopping together, or at the workplace. According to Brookes, sharing television experiences this way can improve human relations and increase trust among people.

But Brookes says that ratings alone are not an adequate way to evaluate whether certain programs can generate social capital. If ratings alone were used, programs appealing to the rich or the young, or those that attract the most advertisers, would get the highest marks. But such programs cannot necessarily maximize shared experience and generate social capital. It is here that Brookes says public service broadcasting can play an important role. According to its own principles, public broadcasting aims to meet the interests of as many people as possible; as such, it is better suited for creating and nurturing social capital.

Brookes also supports the theory that public broadcasting can justify its existence by offering documentaries, programs on the arts, and other programs that are unlikely to be winners in the commercial market. Furthermore, it is not only those "high-brow" programs, but also dramas, comedies and other popular entertainment programs like *EastEnders* that create social capital if they win the support of a wide range of viewers.

The importance of mass entertainment to public service broadcasting was widely recognized during debate on the renewal of the BBC's Royal Charter (the Charter was renewed for another ten years in 2007). This position is well reflected in the new programming of BBC One, the BBC's flagship channel.[15]

How Should Public Broadcasters Approach Young People?

The number of people who prefer public TV is higher among older viewers, while fewer younger people are watching public TV. Among the countries surveyed, this trend was confirmed not only in Japan and South Korea but also in Germany and Italy. It is probably safe to say that this is a general trend in many countries.

In several ways, however, the digital era offers public broadcasters more opportunities to win young viewers. Going digital gives public broadcasters more channels; this has enabled them to offer cultural and educational programs for the young and programs aimed at children. Some PBS stations in the United States now offer digital channels like "Kids" for children and "Create," which shows education and lifestyle programs. Germany's public broadcaster has also established a digital channel for children, called Kika. This popular channel has been highly acclaimed for its public service programming.

[15] BBC Trust, the BBC's governing body, issued what it calls service licenses in December 2006. They define the main roles and services to be offered by each of the different BBC channels. The license for BBC One obligates the channel to schedule dramas and comedies during prime time.

In a way, digital channels offered by public broadcasters function as a kind of cultural breakwater to defend children from the onslaught of commercial entertainment channels aimed at kids, like the Cartoon Network and Nickelodeon in the United States. Such commercial channels have flooded into homes as cable and satellite channels have grown. Given these circumstances, children's channels offered by public broadcasters may give parents some peace of mind. Unfortunately, it seems that in most countries public broadcasters have yet to take effective action in attracting younger viewers.

The BBC is an exception. The BBC began digital terrestrial television broadcasting in 1998, establishing four digital channels. After reviewing these channels, it opened a new channel in 2002: BBC Three, which is geared to young adults. The wisdom of this move, unprecedented among public broadcasters, is reflected in our survey results, which indicate an even distribution of BBC viewers among people of different age groups. It is clear that after carrying out a review of its digital channels, the BBC took action to prevent younger viewers from slipping away (Thomson 2002).

At present, BBC Three's viewer share is very low, at 0.6 percent. It is too soon to say whether BBC Three has successfully attracted and retained young viewers. Nonetheless, the BBC's flexible and innovative approach to channel programming is one factor behind the relatively balanced distribution of its viewers across age groups.

The BBC's review of its digital services resulted in its allocating each new channel to a specific age group. BBC Three is targeted at viewers between 16 and 34, and features comprehensive programming that focuses on entertainment. BBC Four, aimed at viewers 35 or above, emphasizes culture and art, while CBBC offers comprehensive programming for children from six to 13. CBeebies, for children under six, offers education and entertainment programs. The BBC took this action after an audience survey showed that young people and children were not satisfied with the BBC's digital services (Nakamura 2001). The BBC sought to raise the ratings of its digital channels by assigning specific channels to different age groups.

This kind of strategic response can be traced back to the BBC's radio age during World War II. U.K. media sociologist Paddy Scannell explains the history of the BBC's wartime radio as follows.[16] Soon after World War Two started, the BBC began radio broadcasts aimed at entertaining U.K. soldiers abroad, upon request from the government. After U.K. forces withdrew from the European continent in 1940, the BBC continued this broadcast as its sec-

[16] Given in a lecture entitled "Changes in Public Service Broadcasting in Britain" at the NHK Broadcasting Culture Research Institute on November 21, 1996.

ond service for domestic listeners. It featured entertainment, mostly popular music. This service was very popular, as seen in a survey taken in those days that showed the second service winning 70 percent of listeners, while the home service, which broadcast more serious programs, had a 30 percent listener share.

Scannell argues that the birth of the second service marked the BBC's departure from strict adherence to the paternalistic principle of informing and educating which was upheld by the BBC's founding father, John Reith. According to Scannell, it was at this point that the BBC began to offer services tailored to listeners' viewpoints.

The BBC continued to be the United Kingdom's only radio broadcaster for many years. In the 1970s, local commercial radio stations were introduced for the first time, creating a competitive broadcasting environment. In an attempt to win listeners of all age groups and social classes, the BBC revised its four nationwide radio networks, giving each station distinctive features. Radio 1, geared to the young, broadcast mostly rock music. Radio 2 was for middle-aged and elderly listeners, offering pops and easy-listening music. Radio 3 played classical music. And Radio 4 offered comprehensive programming for the general public (BBC 1969).

The BBC's response to a new age in radio was a foreshadowing of its future strategy. Whenever the BBC has faced new circumstances, it has responded with flexibility and innovation, gaining a broader audience. Public broadcasters are now encountering major changes in the media environment with the arrival of the digital and multichannel era. Furthermore, the audience is also changing. At this point, it is vital that all public broadcasters find the best way to respond to these changes.

How should public broadcasters use the Internet?

Our survey found that in Japan and South Korea, there is a negative correlation between Internet use and public TV viewing, whereas in the United Kingdom and the United States, there is either no particular correlation, or there is a positive correlation, depending on which variables are considered. In Japan and South Korea, those who use the Internet tend to have a negative attitude toward public broadcasting. In the United Kingdom and the United States, on the other hand, either there is no meaningful correlation between the two groups of people, or those who use the Internet tend to tune in to public broadcasting more often. Both trends are distributed fairly equally among different age groups in both sets of countries.

Of course, we cannot conclude from this alone that Internet access exerts a negative impact on public broadcasting in Japan and South Korea. There are many other factors at work. For example, the survey also found that in all the countries surveyed, there are more Internet users in cities than in towns and villages, among white-collar workers than among blue-collar workers, and among people with more education and higher incomes. Though these factors were not addressed in this report, there is a need to examine views held by people on each side of these social, political, and geographic divides.

The Internet is, of course, a formidable presence now. In all four countries included in this report, a large majority of people have access to the Internet. And for the past several years, broadband transmission, capable of sending moving images and large-volume data, has been expanding rapidly. It should therefore be no surprise if the services offered by public broadcasters on the Internet affect people's views of public service broadcasting.

For more than a decade now, public broadcasters in these four countries have become keenly aware that the Internet is a powerful next-generation medium. They have been taking positive action to develop new services to be offered on the Internet, thereby expanding viewership. Public broadcasters began their Internet presence with text-only program information and public relations information. As Internet availability has surged, broadcasters are taking advantage of the Internet's interactive features to create viewer-participation programs.

The BBC was the first public broadcaster to use the Internet to its advantage. From the inception of its Internet services, the BBC put special emphasis on its News Online service and its online educational service. As a result, these Internet services have been highly praised as useful sources of information at home and school.[17]

Japan's NHK is different from public broadcasters in the other three countries. NHK is allowed to use the Internet only to supplement its on-air programs, a limitation that was imposed after heated debate in Japan in 2000 on how Japan's sole public broadcaster could use the Internet. Even so, this has officially opened the way for NHK to use the Internet, and the broadcaster has been developing and testing various Internet services since 2001.

Public broadcasters' Internet presence has been entering into a new phase in the past few years. With technological expansion and the spread of broadband Internet access, their services have been expanding three-dimensionally to include the transmission of television programs on the Internet. South Korea's KBS allows viewers to simulcast its television channels through their personal computers free of charge. Furthermore, KBS uses this simulcasting

[17] According to the BBC's annual report for FY 2005, the BBC website was accessed an average of 638 million times every week by U.K. and overseas users.

to enable viewers to watch programs on demand for a fee. Similarly, in the United States, PBS began to sell popular programs at the iTunes Store, a website selling media files that are accessed through Apple, Inc.'s iTunes application, in October 2006. And in the United Kingdom, the BBC is offering simulcasting of its programs on the Internet free of charge, on an experimental basis. It is also planning to offer catch-up services free of charge. This service, named iPlayer, allows viewers to download programs aired within the past seven days to their personal computers.[18]

These services are aimed at increasing Internet users' access to television programs. This indicates that the BBC is redefining the Internet as a new platform for broadcasting, just like satellite broadcasting and cable television. In Japan, as integration of broadcasting and communications proceeds, the use of the Internet Protocol Television, or IPTV, is being studied as a medium to complement digital terrestrial broadcasting. In addition, the idea of offering television programs in the NHK archive on demand is being cited as a priority task. This would use high-quality programs, created with funding from license fees, for the benefit of the public.

As time goes on, the Internet will be used by an increasing number of people, and will continue to grow as a primary information infrastructure. It is therefore crucial for public broadcasters to think seriously about how they will make use of the Internet in the public services that they offer, and what strategies will enable them to use it most effectively, both now and in the future.

Public broadcasters, having offered Internet services for about ten years now, are also facing a number of pressing tasks. One is to study how their Internet services should be financed. Should their services be funded by license fees or should users be charged? Another undertaking is to study the position of public broadcasters as providers of Internet services in relation to commercial competitors. An appropriate legal framework should be developed to govern such matters. These issues must be settled in each country, not only by public broadcasters, but with the consensus of the society as a whole.

Building Relationships with Viewers

The survey found that audiences evaluate public broadcasters not only by how broadcasters respond to changing media environments such as multimedia, multichannels and the Internet, but also by how accountable they are for their

[18] Between October 2005 and February 2006, the BBC carried out a market survey of five thousand Internet users concerning iPlayer. On August 31, 2006, the BBC announced a plan to introduce iPlayer.

behavior, and by how well they represent the viewer's voices in their programs and services. That is to say, the conduct of public broadcasters as entities, as well as the quality and the content of their programs, is being sternly scrutinized. The audience does not see program quality and content as being separate from the conduct of the entities that create them, but rather perceives that the two are closely interrelated.

In the survey, Japan's NHK fared the lowest among the four countries in viewers' appraisal of its accountability and its readiness to respond to their voices. It is also characteristic of Japan that younger people have more negative appraisals. In 2005, for the first time, NHK issued what it calls "promises" to viewers and listeners regarding its program policy and management goals (Fiscal Promises 2005). Furthermore, it has commissioned an independent organization, the NHK Promises Evaluation Committee, to assess how well the broadcaster is keeping its promises. The committee's evaluation on NHK's first-year promises was released in the NHK Promises Evaluation Committee Report 2006. These efforts appear to be aimed at ensuring the transparency of the organization and strengthening its relations with the audience. As such, their social significance is not small. But it must be noted that the committee itself, after reviewing how well the first-year promises had been fulfilled, says that NHK is not doing enough to reflect the voices of its viewers. It says there is much room for improvement in its policies regarding audience participation and dialogue with the audience. We can say that of all public broadcasters, NHK faces the most urgent need to strengthen its relations with its viewers.

The system of making promises to the audience was introduced by the BBC in the 1990s, and other public broadcasters in Europe quickly followed suit. As noted above, efforts to bring public broadcasters and the audience closer have become more diversified and multi-faceted in the past several years.

In one typical example, some public broadcasters are offering a service called "public access," in which they broadcast programs made by citizens. KBS in South Korea sets aside 30 minutes of air time each week to broadcast such programs, calling it the "open channel." An outside committee selects the programs. Copyrights and editorial rights belong to the citizens who create the programs.

KBS began this service in 2001. The service in itself is significant, as it attempts to reflect varied audience views regarding broadcasting. But it is more than that: KBS is required to offer this service under Broadcasting Law 2000. This indicates that South Korean society defines KBS as a forum for citizens to express their views and form their opinions. The public access service by KBS should be viewed as an attempt to build a functional circuit between citizens and public broadcasting.

Another kind of service offered by public broadcasting can be appraised in the same context. Deliberative Opinion Polling, carried out by some public broadcasters such as PBS in the United States, Channel 4 in the United Kingdom and ABC in Australia (Yonekura 2006a), is an experimental polling method in which respondents are chosen at random. A forum is then set up where the respondents may debate specific political or social themes, or listen to expert opinions. The distribution of the respondents' opinions, both before and after the forum, is then examined. In many cases, the public broadcaster commits itself as the organizer or a co-organizer of such a forum. It may also create and broadcast a program on the whole process. PBS has been doing this in the United States since 2003, with the stated purpose of stimulating communications among different social classes, ethnic groups, and people of different views, and creating a common ground for debate in American society (By the People 2004). At the same time, the PBS move in this direction helps underscore the broadcaster's role as mediator and chair of public debate, cementing its legitimacy as a public service broadcaster.

A number of other notable services involving public broadcasters exist. One, called the ombudsman system, gives a third party the independent right to investigate and report on criticisms or doubts about public broadcasters raised by citizens. Canada's CBC, and PBS and NPR in the United States, are among the broadcasters who use this system. In a related service, public broadcasters also create "ombudsman programs," in which they take up criticisms raised by citizens concerning previously aired programs. In some cases, those who actually produced the programs in question respond to the criticism directly. F2 and F5 in France, and KBS in South Korea, are among the broadcasters taking this approach. These responses are important expressions of the viewers' right to know and the broadcasters' right to reply.

Of course, such measures must be taken over a long period of time if they are to be effective. Their effectiveness is also difficult to verify and evaluate. But the importance of these kinds of services is likely to increase as the digital and multimedia era takes hold.

Our recent international comparative survey indicates that television viewing behavior and viewers' opinions and expectations regarding public broadcasters are undergoing major changes in the digital era. In some countries, multimedia and multichannel availability has resulted in lower audience shares for public broadcasters, or has created a group of viewers who have misgivings about public broadcasters' reason for existence. The growing availability of the Internet is also rapidly changing the ways people communicate with one another and exchange information. At the same time, the Internet has created a platform for public services that is different from conventional mass media offerings. The spread of blogs, social networking services, and the like have instituted social networks on a global scale that is not limited by geographical boundaries. However, in accordance with the well-known paradigms put forth by J. Habermas, social networks like these are constantly put under pressure for corrosion (colonization) by economic systems (market principles) (Habermas 1981).

In fact, on many occasions in the past several years, large entities have absorbed and bought out various network sites on the Internet, turning them into business models.[19] In such a situation, viewers become consumers in huge merchandise service systems, and the public platform that is vital to democracy can easily be lost. Citizens—free and autonomous subjects—use such public platforms to formulate opinions democratically through social communications. Therefore, the media sphere that has been brought into being by the digital era is the site of a fierce struggle. On one hand, there is great pressure to draw viewers into market-economy systems; on the other, there is pressure to offer them a multi-dimensional, democratic public domain.

Thompson stressed that if public broadcasters want to survive as meaningful entities in the digital era, they must change in a fundamental way (Thompson 2000). This is true. And they must change in the direction of creating public platforms for debate, using digital technology and digital networks to the fullest. It is crucial that they maintain and reinforce the relationship between public broadcasters and citizens. Ultimately, as argued by Curran, it is citizens' support that guarantees public broadcasting's autonomy in the face of expanding market principles and accompanying pressures for deregulation, as well as the vagaries of politics, as multichannels and multimedia continue to evolve (Curran 1991).

Tasks for the Future

This study on changes in audiences and in the services and social mission of public broadcasters in the digital era is mainly based on analysis of the results of NHK Broadcasting Culture Research Institute's international comparative

[19] One typical case is Google's buyout of YouTube. Such acquisitions have been frequent, especially within the year 2005–2006. These include the buyout of Grouper.com by Sony USA, and the buyout of Myspace.com by News Corp.

survey conducted February-March, 2006. In closing, we would like to point out a number of tasks that remain to be addressed by future surveys or research on this subject.

First, while the survey covered seven countries, we have limited our analysis here to four: the United Kingdom, the United States, South Korea and Japan. A similar analysis remains to be conducted on Germany, France and Italy, as public service broadcasters in these countries are facing similar changes and challenges. Survey results for these countries should be analyzed following the same methods used for this report.

Second, due to budget and personnel limitations, only 18 questions were asked in the current survey. This allowed us to get a general idea of the current situation facing public broadcasters. Additional surveys are needed that focus on more of the details and the overall structure of individual issues facing public broadcasters. These issues would include how public broadcasters should position themselves in relation to multichannels, multimedia and the Internet; how they should deal with current transformations in audience composition, and how they should build relations with their viewers.

Third, this report dealt only tangentially with the programs offered by public broadcasters, their programming policies, and their strategies. Signs indicate that these factors are also undergoing major changes. International comparative studies should be carried out regarding these changes and viewers' reactions to and evaluation of them.

Fourth, as was pointed out at the beginning of this report, public broadcasting around the world is now at a turning point and changes are occurring very rapidly. Depending on how fast the media environment changes and in what direction it goes, it may become difficult to foresee the direction of public broadcasting from now on. In order to read the future as much as possible, we must continue to collect information on changes in public service broadcasting and the legal frameworks that govern them, and analyze it as comprehensively as possible.

The achievements of public broadcasters around the world reveal enormous possibilities and tasks for the future. In considering the future of public broadcasting in Japan, we need to analyze and understand what has been accomplished as deeply as possible.

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