

How Public Service Broadcasting Is Talked About: From a Comparative Web Survey of Japan, the Republic of Korea, and the United Kingdom

NAKAMURA Yoshiko and YONEKURA Ritsu

One of the main functions of public service broadcasting is to establish a public forum within the broad arena of everyday communication.¹ In this context, a “public forum” may be thought of as a sphere in which the members of a society formulate political and social decisions through the expression and exchange of opinions. Public service broadcasting is thus envisioned as an active process whereby a wide variety of broadcast programs reflecting society’s diversity serve not only to facilitate and stimulate communication but also to encourage people as citizens to take active part in such communication.²

What are the implications of the recent growth in Internet use and the shift to digital, multimedia, and multichannel broadcasting for this function of creating a public communicative sphere? In light of various indications of a comparative decline of public service broadcasting’s role and presence in this rapidly evolving media environment, how is its position or impact actually changing in the arena of everyday communication?

With the aim of compiling data for considering such questions, in March 2009 the NHK Broadcasting Culture Research Institute conducted an Internet-based international comparative survey on public service broadcasting in Japan, the Republic of Korea (South Korea; ROK), and the United Kingdom (UK). In this article we provide an overview of the survey findings and consider the current circumstances and issues of public service broadcasting as it relates to people’s daily communication.

¹ The NHK operating plan for the financial years 2009–2011, for example, includes as part of NHK’s mission the role of “a public forum that unites people with people and people with society through broadcasting and a variety of other activities.” The plan (in Japanese) is available online at <http://www.nhk.or.jp/pr/keiei/plan/pdf/20081014-001.pdf>.

² The BBC cites among its public service purposes the promotion and maintenance of “citizenship and civil society,” and defines one of its functions in fulfilling that purpose as to “help audiences understand social and political issues so that they can participate in debate and become more active citizens.” See http://www.bbc.co.uk/info/purpose/public_purposes/citizenship.shtml.

OUTLINE OF THE SURVEY

The survey's basic parameters were as follows:

Target countries: Japan, Republic of Korea, United Kingdom

Survey period: 17–27 March 2009

Survey method: Internet survey

Respondents: 1,000 monitors (per country) registered with an Internet research company

An additional eligibility criterion was that respondents had to have watched at least five minutes of public service broadcasting television during the one-week period prior to their participation in the survey. The purpose of this was to ascertain response trends among people with opportunities to watch public service broadcasting on a regular basis.

The ratio of people who meet this criterion is known at NHK as the “weekly contact rate,” meaning the level of regular contact with and use of media. According to a recent study, the weekly contact rate for NHK General TV is 60.8 percent.³ However, the rate varies considerably according to age: it is high among middle-aged and older people and low among young people. The results of the present survey must be interpreted not as representative of the overall population but only as the response trends among people who have a certain level of opportunities to watch public service broadcasting (and are also Internet users).

Persons registered as monitors with the designated research company were invited to take part in the survey, and responses were then elicited, on a first-come-first-served basis, from applicants who met the above criteria. To get a balanced distribution by gender and age, responses were limited to 100 persons per country in each of a total of ten groups: males and females, respectively, in their teens, those in their 20s, 30s, 40s, and those aged 50–69.

One reason for choosing Japan, the ROK, and the UK as the targets for the survey is that these three countries have quite similar rates of Internet penetration, at 73.6 percent, 71.7 percent, and 65.9 percent, respectively.⁴ Another

³ See Ida Mieko, Hirata Akihiro, and Yoshifuji Masayo, “Terebi rajio shicho no genkyo” [The Present State of TV Viewing and Radio Listening], *Hoso kenkyu to chosa* 59:3, March 2009. The corresponding situations in the Republic of Korea and the United Kingdom are unknown because in those countries data on weekly contact rates is not compiled.

⁴ From the World Bank's World Development Indicators Online as of October 15, 2008. The quoted World Bank data for Japan differs from that released by Japan's Ministry of Internal Affairs and Communications.

reason is that the main public service broadcaster in each—Japan Broadcasting Corporation (Nippon Hoso Kyokai; NHK), Korean Broadcasting System (KBS), and the British Broadcasting Corporation (BBC), respectively—is a large-scale public service broadcaster providing all-round programming that spans various genres, including news, education, and entertainment.⁵

The survey questionnaire consisted of a total of 33 questions organized around three main themes: information-related activities, such as watching television and using the Internet; evaluations and perceptions of public service broadcasting, such as how necessary respondents think it is and how satisfied they are with it; and the correlation between public service broadcasting viewership and people's everyday communication, including what kind of public service broadcasting programs are topical and to what extent.⁶ In the wording of the questions the term “public service broadcasting” was avoided in favor of the name of the main public service broadcaster in the relevant country (i.e., NHK, KBS, or the BBC).

THE BROADCASTING AND MEDIA CLIMATE

Before considering the survey results, let us briefly sketch the overall circumstances of media, broadcasting, and public service broadcasting in the three target countries.⁷

United Kingdom

Alongside the BBC three commercial broadcasters operate in the UK terrestrial broadcasting field: Independent Television (ITV), Channel 5 Broadcasting Limited (Five), and the nonprofit broadcaster Channel Four Television Corporation (Channel 4). There are five analog TV channels providing nationwide coverage, two operated by the BBC and one each by ITV, Five, and Channel 4. Terrestrial digital broadcasting is received by some 9.5

⁵ The ROK's Munhwa Broadcasting Corporation is a joint-stock corporation operated by income from commercial advertising and is legally classified as a commercial broadcaster, but because it is owned by a government-funded foundation it is widely regarded as effectively a public-service (publicly operated) broadcaster. Another public broadcaster in the ROK is the education-oriented Educational Broadcasting System. The United Kingdom, furthermore, has a nonprofit broadcaster, Channel Four Television Corporation.

⁶ For the simple tabulation of survey results, see pp. 144–165.

⁷ For details on broadcasting affairs and the media environment in each country, see NHK Broadcasting Culture Research Institute, ed., *NHK deta bukku: Sekai no hoso 2009* [NHK Data Book: World Broadcasting 2009], Nippon Hoso Shuppan Kyokai (NHK Shuppan), 2009.

million households, or 40 percent of all TV-viewing households (as of December 2008), and comprises around 40 channels (including 8 TV and 16 radio channels operated by the BBC).

In addition, the digital satellite service Sky, operated by British Sky Broadcasting (BSkyB), transmits around 600 channels to some 8.9 million households (as of December 2008), and some 3.3 million households subscribe to cable TV services. Satellite and cable TV services also carry out simultaneous retransmission of digital terrestrial broadcasts of the BBC and other broadcasters.

The BBC holds the leading share of TV viewing with 29.6 percent (combined share for the two channels BBC1 and BBC2), followed by ITV (18.4%), Channel 4 (8.2%), and Five (5%), with satellite, cable, and other channels collectively accounting for the remaining 38.8 percent.⁸ A feature of broadcasting in the UK is thus that, despite the shrinking of terrestrial TV's share of viewing amid the growth of multichannel broadcasting, public service broadcaster BBC still enjoys a relatively large share of the viewing pie.⁹

The BBC's main source of funding is its TV license fee (£139.50 per year per household for color TV reception in financial year 2008), and it is prohibited from airing commercial advertisements. In financial year 2007 the BBC recorded just over £5 billion in income and had around 23,000 employees.

Republic of Korea

In terrestrial broadcasting in the ROK, nationwide coverage is provided by public service broadcasters KBS and Educational Broadcasting System (EBS) as well as by Munhwa Broadcasting Corporation (MBC), a commercial broadcaster with a strong public-service character. Seoul Broadcasting System (SBS), one of the country's ten regional commercial broadcasters, in effect also carries out nationwide broadcasting through partnerships with local broadcasters. Terrestrial TV service, in both analog and digital formats, is provided on two KBS channels (KBS1 and KBS2) and on one channel each by EBS, MBC, and SBS. For radio broadcasting, KBS operates on seven channels and MBC, SBS, and EBS on three, two, and one, respectively.

Cable TV is widespread in the ROK, with the number of subscribing households at around 15.81 million (as of August 2008), a penetration rate of about

⁸ From data available on the Broadcasters' Audience Research Board (BARB) website at http://www.barb.co.uk/facts/annualShareOfViewing?_s=4.

⁹ According to the BARB data cited in footnote 8, the BBC's share of viewing has fallen by about 20 percentage points over the last 20 years, from 49 percent in 1988 to 29.6 percent in 2008.

86 percent. The satellite broadcasting service SkyLife has some 2.31 million subscribers (as of September 2008). The cable and satellite services retransmit terrestrial channels' broadcasts and also broadcast the drama, sports, and other genre-specific channels of KBS, MBC, and SBS.

In the breakdown of TV viewing shares for 2008, the terrestrial channels KBS1, KBS2, MBC, and SBS secured shares of 14.4 percent, 14 percent, 15.7 percent, and 15.2 percent, respectively (satellite, cable, and other channels collectively accounting for the other 40.7 percent).¹⁰ With the combined share for its two channels at 28.4 percent, KBS, like the BBC in the UK, thus has a relatively large presence in South Korean TV broadcasting.

KBS operates with two sources of funding: license fees and income from advertising. The license fee has remained fixed at W2,500 per month since 1981. In financial year 2007 KBS recorded an income of just over W1.33 trillion and had 5,257 employees (as of October 2007).

Japan

Unlike in the UK and ROK, in Japan terrestrial broadcasting retains a large share of TV viewing despite the spread of satellite and cable services. Public service broadcaster NHK's share, however, is comparatively small, at just 17.3 percent. The five major commercial channels collectively hold a 75.5-percent share, while satellite, cable, and other channels together account for 7.5 percent.¹¹ In this respect the situation in Japan differs markedly from that in the UK and ROK, where the main public service broadcasters (BBC and KBS) have large viewing shares (see Figure 1).

Japan also differs from other countries in that its satellite broadcasting includes both broadcasting satellite (BS) and communication satellite (CS) services. The fee-charging multichannel satellite TV services SKY PerfecTV! and SKY PerfecTV!e2 together have around 4.16 million subscribers (as of September 2008). Meanwhile, some 21.96 million households (as of March 2008) subscribe to cable TV services.

Public service broadcaster NHK operates two digital and two analog terrestrial TV channels, three satellite TV channels, and three radio channels. NHK is funded by a "receiving fee" (license fee) system and is prohibited from carrying commercial advertisements. In financial year 2008 the receiving fee was ¥1,345 per household per month (for terrestrial broadcasting, payable by bank

¹⁰ From a survey conducted by TNS Media Korea from January to November 2008.

¹¹ From data compiled by Video Research on households in the Kanto region (around Tokyo) in 2008.

Figure 1. Share of TV Viewing in Each Country (2008)

	Terrestrial		Satellite/cable/etc.
	Public	Commercial	
Japan	17.3	75.5	7.5
ROK	28.4	30.9	40.7
UK	29.6	31.6	38.8

(%)

Note: Compiled from data from different research bodies for each country.

transfer), NHK employed 10,842 people, and it had an annual budget of approximately ¥672.8 billion.

SURVEY RESULTS

Keeping in mind the foregoing features of the media and broadcasting climate in each of the three target countries, as well as the differences among them, let us now analyze and consider the main findings of the survey.

Viewing Trends

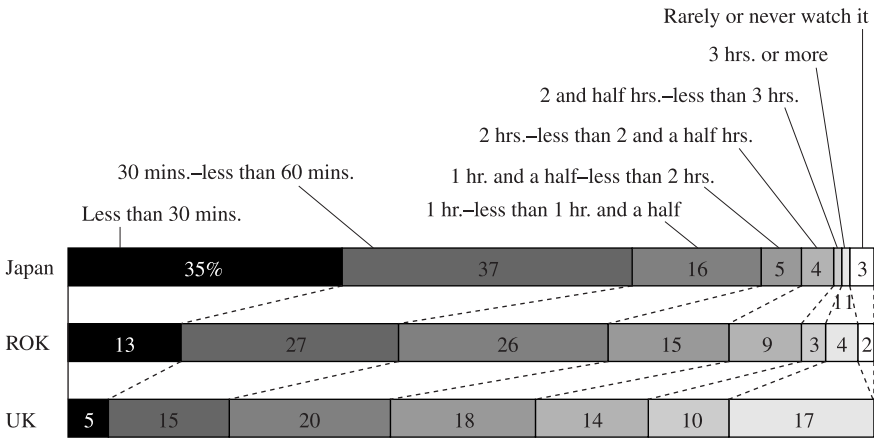
We begin by considering the state of viewership of the main public service broadcaster in each target country (NHK, KBS, BBC), focusing on how much time people spend watching them and on their viewing trends by program genre.

Time Spent Watching Public Service Broadcasting TV

Figure 2 shows the results for the question of how long respondents spend watching public service broadcasting TV on normal (i.e., non-holiday) weekdays. As mentioned above, all respondents had watched at least five minutes of public service broadcasting TV in the week prior to their completing the questionnaire, but in respondents' specific viewing trends there were considerable differences among the three countries. The combined ratio of Japanese respondents who watch public service broadcasting TV for less than 30 minutes a day (35%) and for between 30 minutes and 60 minutes a day (37%) suggests that a high proportion of Japanese viewers—roughly seven out of ten—watch very little public service broadcasting TV (less than an hour each weekday). A separate nationwide random-sample survey of Japanese found that the average time each person spends watching NHK was 1 hour and 6 minutes per day.¹² In the UK, by contrast, a total of 59 percent of respon-

¹² See Ida et al., "Terebi rajio shicho no genkyo."

Figure 2. Time Spent Viewing Public Service Broadcasting TV



dents—roughly six out of ten people—watch at least an hour and a half of public service broadcasting TV on a normal weekday. Korean respondents also indicated comparatively long periods spent watching public service broadcasting TV, with about one in three (31%) watching it for at least an hour and a half per normal weekday.

To some extent, these figures naturally reflect the different viewing shares that public service broadcasting TV enjoys in each of the target countries, as mentioned above (around 17%, 28%, and 30%, respectively, for NHK, KBS, and the BBC). In the UK and ROK, public service broadcasting TV enjoys a larger share of viewing than it does in Japan, so it is only natural that average time spent watching it is also longer in such countries than it is in Japan.

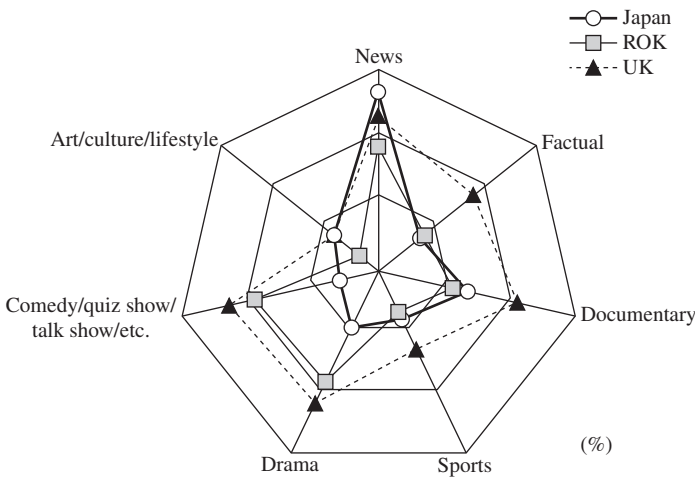
Viewing Trends by Program Genre

Significantly, however, marked differences can be seen among the three countries not only in viewing time but also in the breakdown of viewing trends by program genre. Figure 3 shows the results for the question of what kinds of public service broadcasting programs respondents “usually” watch.

The ratio of respondents who watch news programs is high in all three countries and highest in Japan, at 80 percent. On the other hand, the results for Japan are characterized by low scores in most of the other program categories. In the three-way comparison, the gap between the figures for Japan and those for the other two countries is particularly marked in the categories “comedy/quiz show/talk show/etc.” and “drama.” Overall, the UK figures show the greatest balance of viewing across all genres, while those for Japan show the least such balance.

Figure 3. Viewing of Public Service Broadcasting TV by Program Genre

	Japan	ROK	UK
News	80	57	70
Factual	24	26	53
Documentary	41	34	64
Sports	24	20	39
Drama	29	54	65
Comedy/quiz show/talk show/etc.	18	58	71
Art/culture/lifestyle	26	11	26



Viewing Trends by Program Genre (Public Service Broadcasting and Commercial Broadcasting)

In the breakdown of viewing trends by program genre, correlations with either public service broadcasting or commercial broadcasting also vary among the three countries. Figures 4 and 5 show the relevant results for Japan and the UK. In Japan’s case, NHK scores higher than commercial broadcasting for only two genres (“news” and “art/culture/lifestyle”); NHK and commercial broadcasting are roughly equal in the “documentary” genre; and in each of the remaining four genres the scores for commercial broadcasting are higher. The gap between NHK and commercial broadcasting is particularly wide in the entertainment genres, that is, “comedy/quiz show/talk show/etc.” and “drama.” This contrasts with the results for the UK, where we see the BBC with a slight edge over commercial broadcasting in “news” but little differ-

Figure 4. TV Viewing by Program Genre (Japan: NHK and Commercial Broadcasting)

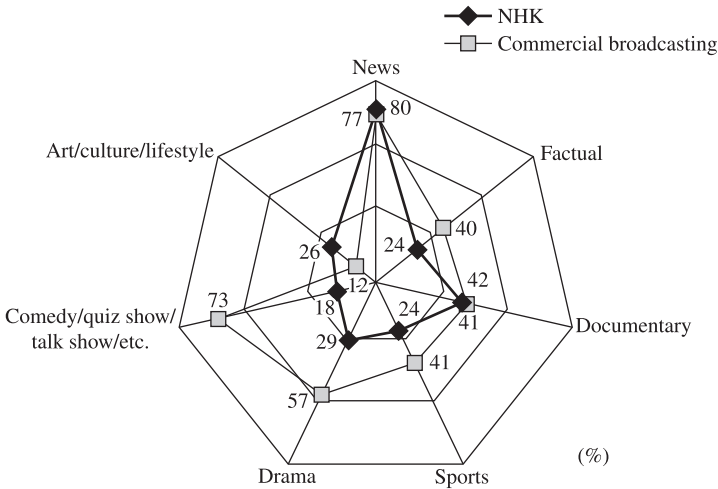
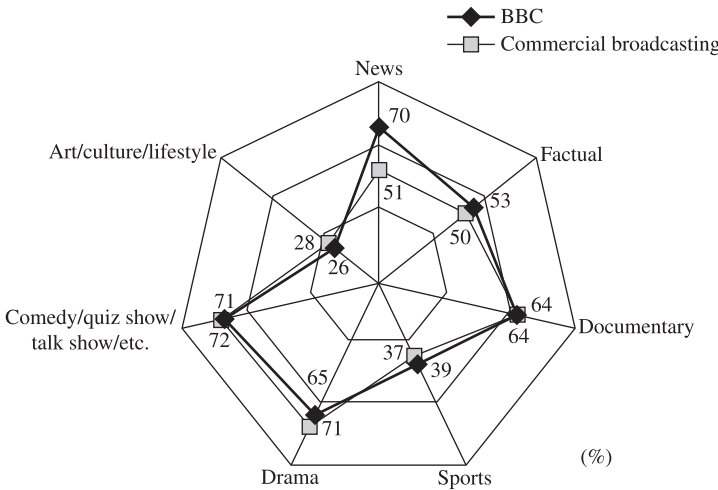
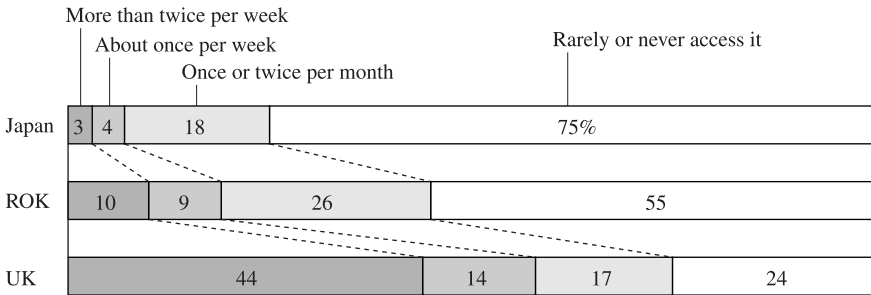


Figure 5. TV Viewing by Program Genre (UK: BBC and Commercial Broadcasting)



ence between the two in any other program category. Although not shown in the accompanying figures, the corresponding results for the ROK were similar to those for the UK, with little difference between public service broadcaster KBS and commercial broadcasting.

Figure 6. Use of Public Service Broadcasters' Websites

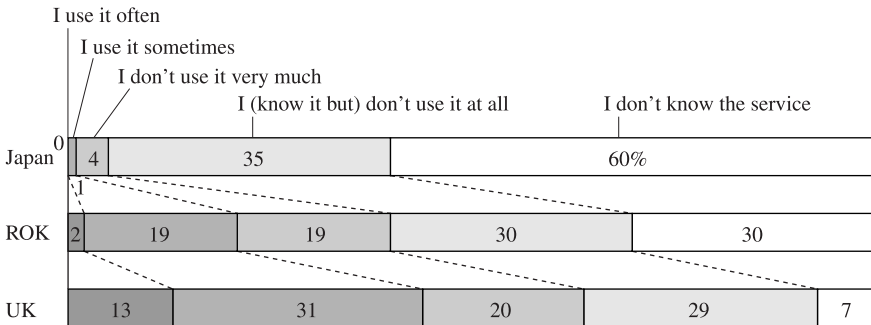
Thus, although all three countries are alike in having a dual system of public service versus commercial broadcasting, as well as a long history of large-scale public service broadcasting, we find considerable differences among them in terms of the correlation of viewing trends to either public service broadcasting or commercial broadcasting. Whereas in the UK and ROK public service broadcasting and commercial broadcasting are in balanced competition in almost all program genres, in Japan the relationship between public service and commercial broadcasting seems to be one not of competition but rather of segregation into separate niches according to program genre.

Trends in Use of Internet Services

Now let us look at the trends in use of Internet services, an area in which the public service broadcasters in all three countries have been devoting increasing effort in recent years.

Figure 6 shows the results for the question of how often respondents access their main public service broadcaster's website. Among the three target countries, while rates of Internet penetration are similar as mentioned above, we find considerable differences in terms of frequency of access to public service broadcasters' websites. Whereas the ratio of respondents who access their main public service broadcaster's website two or more times per week is only 3 percent in Japan, it is 10 percent in the ROK and 44 percent in the UK. With roughly 60 percent of UK respondents indicating a "once per week" or higher frequency, it appears that many people in that country access the BBC website on a regular basis. In Japan, conversely, some 75 percent of respondents "rarely or never access" the NHK website.

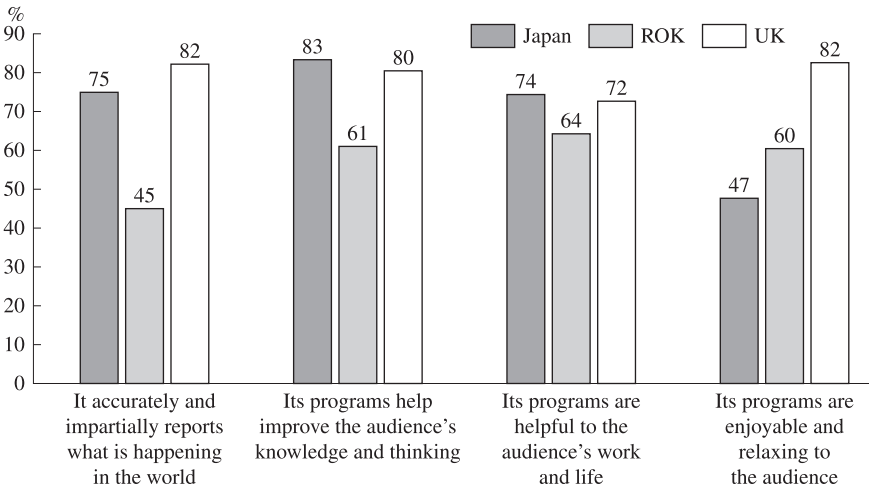
Each country's main public service broadcaster also operates a video-on-demand (VOD) service allowing viewers to watch previously aired programs via the Internet. Here again, however, we find considerable differences among

Figure 7. Use and Awareness of Public Broadcasters' VOD Services

the countries in terms of VOD utilization. The ratio of respondents who said they use their public service broadcaster's VOD services either "often" or "sometimes" was just 1 percent in Japan but 21 percent in the ROK and 44 percent in the UK (see Figure 7). Similarly, the ratio of respondents who did not even know such services existed was 60 percent in Japan but 30 percent in the ROK and only 7 percent in the UK.

From the perspective of promoting the spread of Internet services, these findings indicate that there is much left to be done in Japan in terms of increasing both awareness and use of such services. At the same time, these results must be weighed against a number of relevant factors. In Japan's case, NHK's Internet services are defined under the Broadcast Law (*Hoso Ho*) merely as part of its "additional business," and have thus been limited in terms of scale and content, and in other respects. NHK was not able to provide any VOD service until a revised law came into effect in April 2008, and its actual (fee-charging) service was not launched until December the same year. At the time the survey was conducted, therefore, the service had been available for only a few months.

The BBC, by contrast, has regarded the Internet as an important transmission medium since the early days of Internet use, developing various services on its website and launching a free VOD service called *iPlayer* in December 2007. In the ROK, too, where there have been no special restrictions on broadcasters' activities in the Internet arena, KBS provides a program delivery service via its website, and among others KBS Internet (KBSi), jointly owned by KBS and KT Corporation (formerly Korea Telecom), provides a dynamic VOD service free of charge (with fees charged for some content). These circumstances must therefore be taken into account when considering the sharp disparity in the results for use of public service broadcasters' websites and for awareness and use of their VOD services.

Figure 8. Evaluations of Content of Public Service Broadcasting

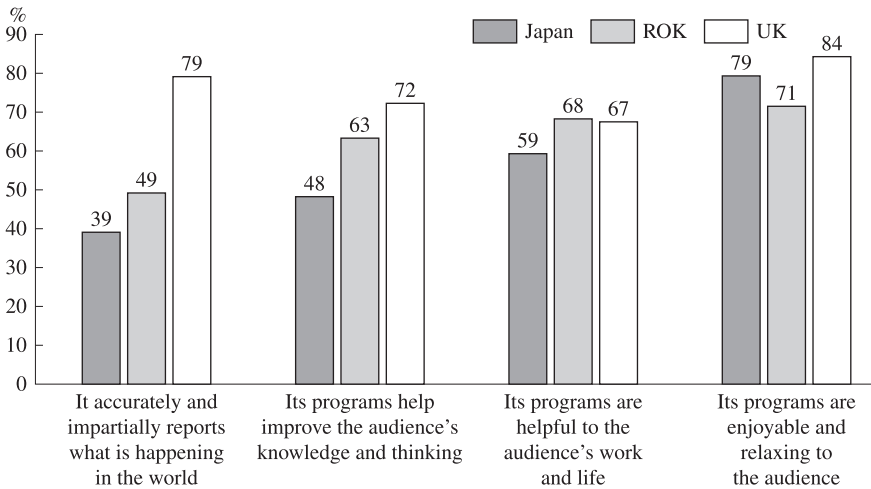
Evaluations and Perceptions of Public Service Broadcasting

The questionnaire also asked respondents to rate the content of public service and commercial broadcasting, assess the need for public service broadcasting, indicate their degree of satisfaction with it, and assess the importance of paying license fees to sustain public service broadcasting. The following examines the results of these questions, with a focus on respondents' evaluations of the content of broadcasting.

Evaluations of Content

Figure 8 presents the results for questions about four aspects of the content of public service broadcasting: (a) accuracy and impartiality of information (the public service broadcaster "accurately and impartially reports what is happening in the world"); (b) promotion of knowledge and thought (the public service broadcaster's programs "help improve the audience's knowledge and thinking"); (c) benefit to work and life (the public service broadcaster's programs "are helpful to the audience's work and life"); and (d) enjoyment and relaxation (the public service broadcaster's programs "are enjoyable and relaxing to the audience").

On the question of accuracy and impartiality, the proportion of positive responses (either "I agree" or "I somewhat agree") was high in the UK and Japan, at 82 percent and 75 percent, respectively, but low in the ROK, at just 45 percent. A similar trend is evident regarding promotion of knowledge and thought, positive responses for which scored high in the UK and Japan but

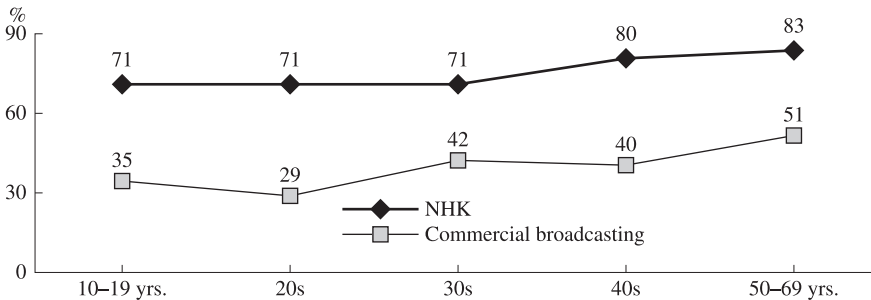
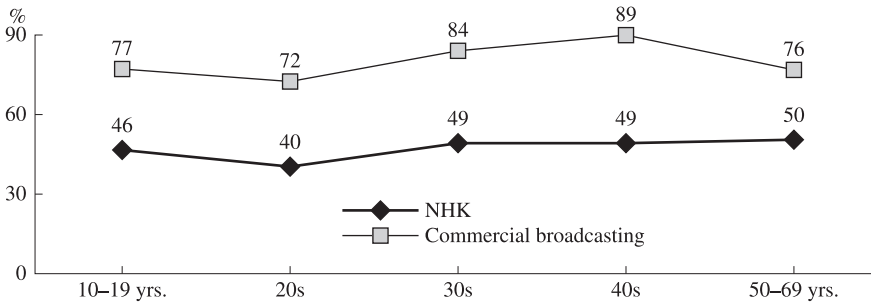
Figure 9. Evaluations of Content of Commercial Broadcasting

somewhat lower in the ROK. On whether or not the programs are enjoyable and relaxing, the BBC is rated highly, with positive responses at 82 percent, while the corresponding total for NHK is only 47 percent.

Figure 9 shows the results for the same questions about commercial broadcasting. For accuracy and impartiality of information, the ratios of positive responses in the UK and ROK, at 79 percent and 49 percent, respectively, are roughly the same as for those countries' public service broadcasters, but in Japan the ratio of positive responses totals only 39 percent, considerably less than for NHK. Similarly for both promotion of knowledge and thought and benefit to work and life, whereas in the UK and ROK the ratios of positive responses vary little between public service and commercial broadcasting, in Japan the corresponding scores are markedly lower for commercial broadcasting than for NHK. Regarding enjoyment and relaxation, in the UK the positive responses for commercial broadcasting are roughly the same as for the BBC, but in Japan and the ROK commercial broadcasting is rated higher than public service broadcasting. This gap is particularly wide in Japan, where the proportion of positive responses on this question is 79 percent for commercial broadcasting but only 47 percent for NHK.

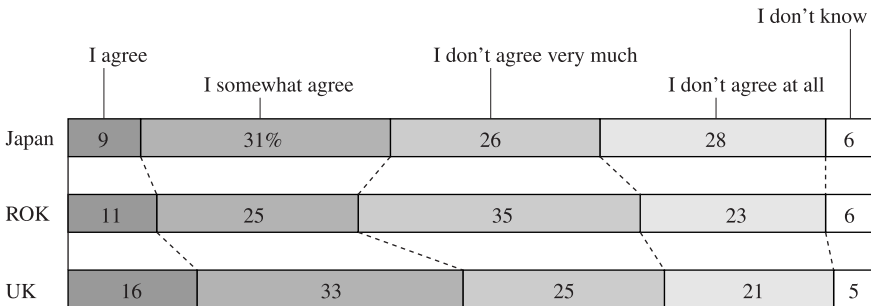
Young People Give Lower Marks for Content (Japan)

A noteworthy feature of the results for Japan is that young people tended to give lower evaluations of the content of both public service and commercial broadcasting. Figures 10 and 11 show, for accuracy/impartiality and

Figure 10. Respondents Satisfied with Accuracy/Impartiality, by Age (Japan)**Figure 11. Respondents Satisfied with Enjoyment/Relaxation, by Age (Japan)**

enjoyment/relaxation, respectively, the distribution by age of the Japanese respondents who answered those questions positively (with either “I agree” or “I somewhat agree”). In the results for accuracy and impartiality, NHK, while scoring higher than commercial broadcasting in all age brackets, received somewhat lower evaluations among young people than among older people, with positive responses at only 71 percent among people aged between 10 and 39 but at 80 percent among those in their 40s and 83 percent among those in their 50s and 60s. This trend is even more evident in the accuracy/impartiality results for commercial broadcasting, where the scores are notably low among people in their teens and 20s, at 35 percent and 29 percent, respectively, compared with 40 percent and 51 percent, respectively, for those in their 40s and in the 50-69 age bracket.

Regarding enjoyment and relaxation, NHK scored considerably lower than commercial broadcasting in all age brackets but especially poorly among people in their 20s, only 40 percent of whom gave positive responses. The results for how enjoyable and relaxing they think commercial programs are show a

Figure 12. Views on “It Is Important to Pay for Public Service Broadcasting”

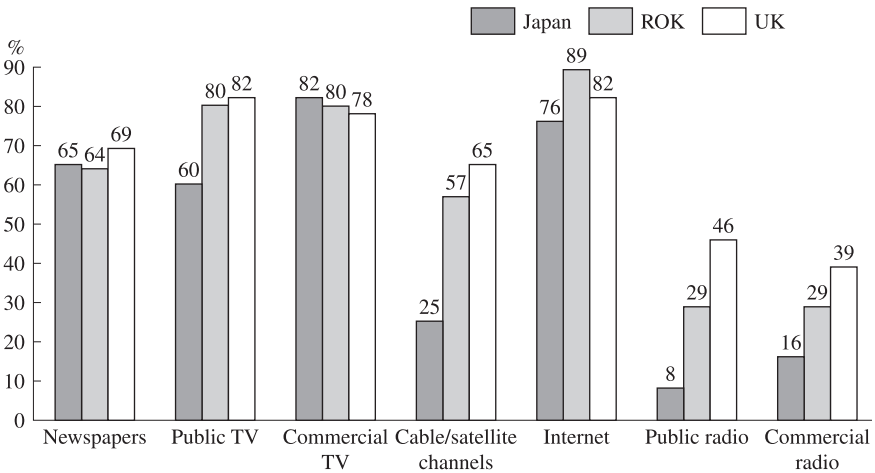
similar pattern, with significantly fewer positive responses among people in their teens (77%) and 20s (72%) than among those in their 30s (84%) and 40s (89%). Amid general indications that young people are watching less television in recent years, these results show that evaluations of the entertainment value of television, whether public or commercial, tend to be lower in the lower age brackets.

Although the figures do not show corresponding results for the UK and ROK, in the present survey the abovementioned trends among young people were apparent only in Japan. In the UK the responses for accuracy/impartiality and enjoyment/relaxation were roughly even across all age brackets for both public service and commercial broadcasting. In the ROK the scores for accuracy/impartiality were, as in Japan, slightly lower in younger age brackets, but those for enjoyment/relaxation were, conversely, slightly higher among the young.

Views on Importance of Paying for Public Service Broadcasting

The survey also asked respondents “What do you think about the opinion that it is important to pay for public service broadcasting in order to sustain its services?” The ratio of respondents who answered this question positively (with either “I agree” or “I somewhat agree”) was less than half in each country, at 40 percent in Japan, 36 percent in the ROK, and 49 percent in the UK (see Figure 12). This suggests that the majority of Internet users—even those like the respondents in the present survey, who had all watched at least five minutes of public service broadcasting TV prior to completing the questionnaire—do not have a favorable attitude toward paying TV license fees.

However, the fact that the present survey was limited to respondents who were Internet users may have led to a slightly lower ratio of favorable responses to this question than if the same question had been posed in a public-opinion

Figure 13. Media with Topical Content

survey conducted by normal random sampling. For example, in a 2006 survey (random-digit-dialing telephone opinion poll) conducted by the NHK Broadcasting Culture Research Institute in seven countries including Japan, the ROK, and the UK, the ratio of positive responses (either “I agree” or “I somewhat agree”) to the same question was over 60 percent in each of those three countries, at 66 percent, 61 percent, and 64 percent, respectively.¹³

Public Service Broadcasting and Topicality

As touched on at the beginning of this article, in terms of public service broadcasting’s role of creating a public forum within the broad arena of communication, it is important to consider not only whether or not its programs are watched but also whether or not people talk about the programs they watch. Accordingly, the survey asked respondents a number of questions about the topicality of media content, such as the extent to which they talk about the information they receive via various media, including public service broadcasting, and what kind of public service and commercial TV programs they tend to talk about.

Topicality of Public Service Broadcasting

Figure 13 shows, for each of a number of media, the ratios of respondents in

¹³ See Yokoyama Shigeru, “Shichosha kara mita sekai no kokyo hoso” [People’s Attitudes towards Public-service Broadcasting in Seven Countries], *Hoso kenkyu to chosa* 56:9, September 2006.

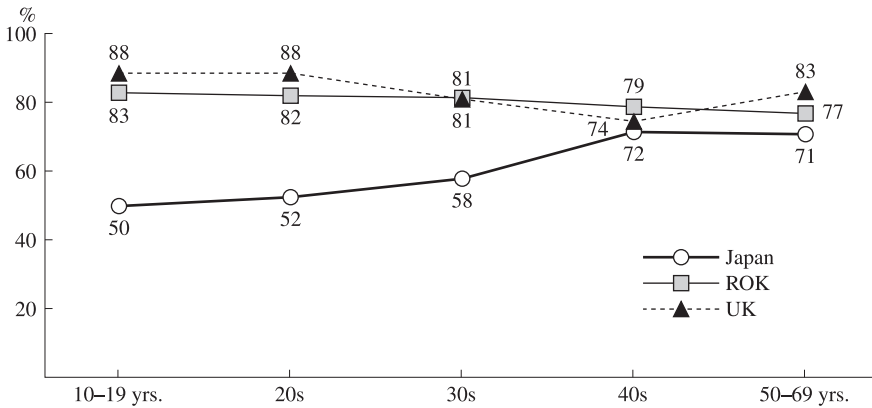
Figure 14. Revised Topicality of Public Service and Commercial TV

		(%)		
		A: Talked about	B: Share of viewing	C: Gain (A-B)
Japan	NHK TV	60	17.3	42.7
	Commercial TV	82	75.5	6.5
ROK	KBS TV	80	28.4	51.6
	Commercial TV	80	30.9	49.1
UK	BBC TV	82	29.6	52.4
	Commercial TV	78	31.6	46.4

each country who said they “very often” or “sometimes” talk with family members, friends, or acquaintances about what they learned through those media. While the Internet, public service broadcasting TV, and commercial broadcasting TV enjoy high ratios in every country, in Japan the order of the most talked-about media types is commercial broadcasting TV (82%), the Internet (76%), newspapers (65%), and public service broadcasting TV (60%). In the United Kingdom the Internet and public service broadcasting TV share the top spot with 82 percent each, followed by commercial broadcasting TV (78%) and newspapers (69%), and the category “cable and/or satellite channels” also scores highly with 65 percent. In the Republic of Korea the order is the Internet (89%), public service broadcasting TV and commercial broadcasting TV (80% each), and newspapers (64%).

Taken together with the previously mentioned data about which media are used the most, these results suggest the simple correlation that media with high rates of user (audience) contact also enjoy high rates of topicality. From this viewpoint, it seems only natural that NHK, for example, which has only a small share of viewing, would also have a lower rate of topicality than either Japanese commercial broadcasting, the BBC, or KBS, each of which outscores NHK in viewing share.

This argument proves untenable, however, when we compare public service and commercial broadcasting in terms of the disparity between their viewing shares and topicality rates (see Figure 14). Whereas NHK shows a gain of 42.7 percent between its viewing share (17.3%) and its topicality rate (60%), commercial broadcasting in Japan shows a gain of only 6.5 percent. This implies that, despite being viewed less than commercial broadcasting, in relative terms NHK has greater effect in arousing discussion. Meanwhile, the topicality rates for the BBC (82%) and KBS (80%) are as high as that for Japanese commercial broadcasting (82%), and the gain between their viewing shares and topicality rates—52.4 percent for the BBC and 51.6 percent for KBS—is also greater than NHK’s (42.7%). This indicates that, in addition to

Figure 15. Respondents Who Talk about Public Service Broadcasting, by Age

enjoying larger shares of viewing than NHK, the BBC and KBS also surpass it in terms of prompting discussion and comment in people’s everyday communication.

Breakdown by Age of People Who Talk about Public Service Broadcasting

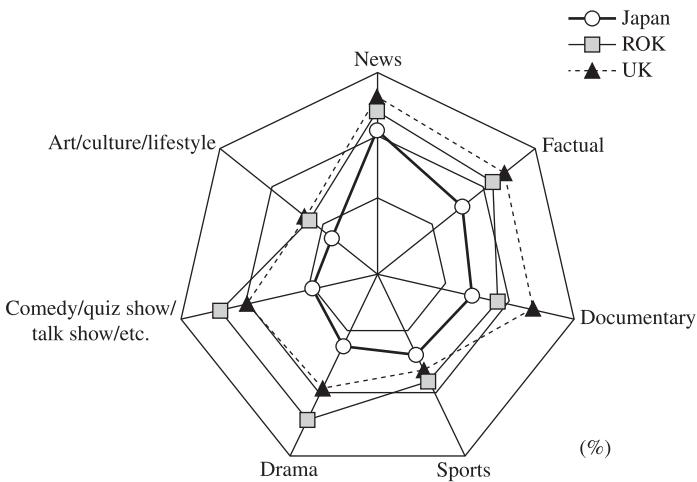
What types of people tend to talk about the content of public service broadcasting with family members, friends, or acquaintances? Figure 15 shows the distribution by age of the ratios of respondents who said they “very often” or “sometimes” do so. In the ROK and UK we find little difference among the age brackets except for slightly higher ratios among people in their teens and 20s. In Japan, however, the ratio of respondents who talk about public service broadcasting programs rises with age, from 50 percent of teenagers, 52 percent of people in their 20s, and 58 percent of those in their 30s to 72 percent in the 40s age bracket and 71 percent in the 50–69 bracket. In other words, NHK’s topicality rate is on a par with those of KBS and the BBC among people 40 and older but is considerably lower than KBS’s and the BBC’s among people between the ages of 10 and 39.

Topicality by Program Genre

On the question of topicality, the distribution by viewer age may be linked to the topicality of specific kinds of programs. Figure 16 shows the breakdown of talked-about program genres of public service broadcasting TV in each country. “News” scores highest in all three countries (79% for the BBC, 73% for KBS, and 64% for NHK), but for the other program genres the pattern varies from country to country. Among BBC viewers the topicality rates are

Figure 16. Talked-about TV Genres

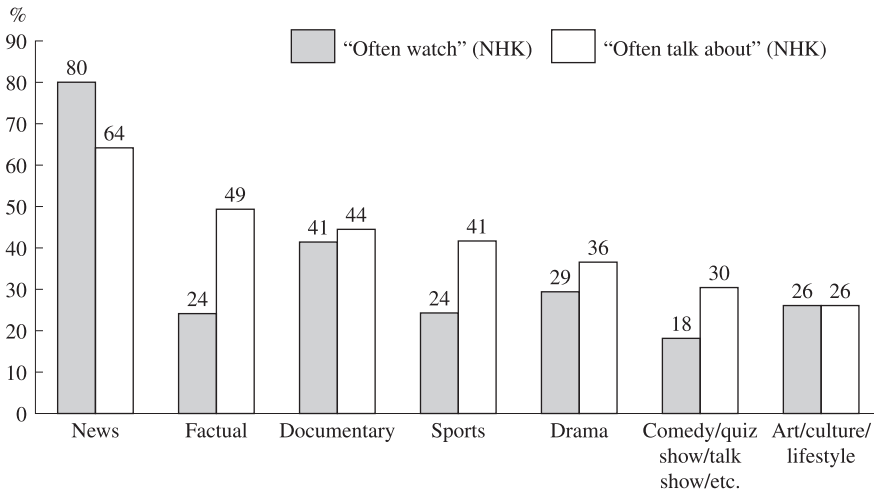
	Japan	ROK	UK
News	64	73	79
Factual	49	67	73
Documentary	44	56	73
Sports	41	53	48
Drama	36	72	57
Comedy/quiz show/talk show/etc.	30	72	61
Art/culture/lifestyle	26	39	41



high for the “factual” (73%), “documentary” (73%), and “comedy/quiz/talk/etc.” (61%) genres; and among KBS viewers the rates for entertainment-type genres such as “drama” (72%) and “comedy/quiz/talk/etc.” (72%) are just as high as for “news.” Japan’s NHK, meanwhile, has low topicality rates for “drama” (36%) and “comedy/quiz/talk/etc.” (30%) and somewhat higher rates for the “factual” (49%) and “documentary” (44%) genres.

No Simple Link between Viewing and Talking about Programs

Noteworthy here is the lack of a straightforward correlation in any genre category between frequent viewing and a high rate of topicality. Figure 17 shows a comparison by program genre of NHK topicality rates (percentage of respondents who say they talk about NHK content either “sometimes” or “very often”) with the ratios of respondents who watch those NHK genres “very often.” Although for “news” the topicality rate (64%) is lower than the

Figure 17. Comparison of Frequent Viewing with Topicality, by Genre (NHK)

“view very often” ratio (80%), topicality surpasses frequent viewing in all other program categories except “art/culture/lifestyle,” where the scores are equal. The gap in favor of topicality is particularly conspicuous in the “factual” and “sports” genres. In other words, it would appear that (a) there is no simple correlation between how much a certain type of program is watched and how much it is talked about; and (b) topicality is markedly higher than the frequent-viewing ratio in some program genres but markedly lower than it in others. Although it is impossible to draw firm conclusions from the present results alone, these are intriguing findings worth bearing in mind for further study and consideration of the relationship between public service broadcasting and everyday communication.

CONCLUSION

The foregoing overview of the survey’s main findings shows that, while Japan, the ROK and the UK have certain features in common in terms of the media/broadcasting environment and the position of public service broadcasting within that environment, they differ from one another in terms of public service broadcasting’s actual presence and role in everyday communication.

One difference is evident not only in overall viewing time but also in trends of viewing by program genre. Put simply, whereas viewing rates for the BBC are relatively balanced across various program genres, KBS tends to be watched mostly for its entertainment-type programs (“drama,”

“comedy/quiz/talk/etc.”), while NHK is widely watched for “news” but gets notably poor viewing rates for all other genres.

Another difference concerns the relationship between public service broadcasting and commercial broadcasting. In the ROK and UK the two sides of the industry are in balanced competition, but in Japan they have a more complementary relationship resembling niche segregation—that is, with NHK attracting comparatively more viewers in the “news,” “art/culture/lifestyle,” and “factual” genres while commercial broadcasting enjoys bigger audiences in the other program categories.

A further difference is that NHK lags far behind both KBS and the BBC in terms of viewers’ utilization and awareness of its Internet-based services. To some extent this can be attributed to the different social contexts among the three countries, such as concerning the legal status of online broadcasting services. Nonetheless, this disparity with respect to the Internet presence of public service broadcasting has reached proportions that cannot be accounted for by country-to-country differences in public service broadcasting’s presence in regular broadcasting (e.g., share of viewing).

A fourth area of difference concerns the fact that the abovementioned disparities in terms of public service broadcasting’s presence in the industry and on the Internet seem not to be directly related to viewers’ evaluations of or attitudes toward public service broadcasting, such as their levels of confidence in or satisfaction with it. NHK, for example, scored no worse than KBS or the BBC in respondents’ evaluations of program content, attitudes to license fees, satisfaction with and sense of the need for public service broadcasting, and so on, while Japan’s commercial broadcasting, conversely, did not score especially well in evaluations of content, viewer satisfaction, and so on, despite enjoying a high viewing rate. Further study is needed to elucidate the causes, structure, and other features of this apparent “skew” between viewing and evaluation.

A fifth difference relates to the survey’s indications that, though one might expect a program to be more talked-about the higher the ratio of viewers who watch it, in fact no such simple correlation between viewing and topicality can be found. Topicality rates are seen to vary according to program genre, type of broadcasting (public service or commercial), and also country. What types of people talk about which kinds of programs? In precisely what ways do public service broadcasting programs become topical in everyday communication? More detailed investigation from various perspectives is needed to clarify these and related questions.

(Translated by Dean Robson)