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<thead>
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<th>Title</th>
<th>The new asian audiences : are the media fulfilling their needs?</th>
</tr>
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<tbody>
<tr>
<td>Author(s)</td>
<td>Green, Andrew</td>
</tr>
<tr>
<td>Date</td>
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THE NEW ASIAN AUDIENCES

Are the Media Fulfilling their Needs?

A Presentation by Andrew Green
Saatchi & Saatchi Advertising
3rd June 1996

HOW DO WE MEASURE “FULFILLMENT”? 

- What can people watch or read?
- What do people watch or read?
- What do people say they like?

WHAT PEOPLE ARE ABLE TO WATCH ON TV

The Evidence

Station choices
- Reception capabilities
- Programme choice
- Regulatory constraints

MEDIA CONSUMPTION
Hong Kong
TOTAL MEDIA TIME: 4.2 hours per day
TV 75%
Radio 12%
Newspapers 13%

STATION CHOICES
Number of TV Stations Available to View

<table>
<thead>
<tr>
<th>Country</th>
<th>1990</th>
<th>1996</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>400</td>
<td>1,580</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>4</td>
<td>19</td>
</tr>
<tr>
<td>Indonesia</td>
<td>3</td>
<td>7</td>
</tr>
<tr>
<td>Malaysia</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Philippines</td>
<td>5</td>
<td>10</td>
</tr>
<tr>
<td>Singapore</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>S. Korea</td>
<td>3</td>
<td>31</td>
</tr>
<tr>
<td>Taiwan</td>
<td>3</td>
<td>143</td>
</tr>
<tr>
<td>Thailand</td>
<td>5</td>
<td>8</td>
</tr>
<tr>
<td>Regional Channels</td>
<td>0</td>
<td>25</td>
</tr>
</tbody>
</table>
RECEPTION CAPABILITIES

- In Taiwan cable grew from 19% h/h penetration in 1991 to 74% last year - and it only recently became legal.
- In China 10 million new households are connecting to cable each year - equivalent to 12 Singapore!
- Both Singapore and Hong Kong plan to have almost every household wired for cable by 2000.

PROGRAMME CHOICE

Taiwan: By Genre

<table>
<thead>
<tr>
<th>Share of Broadcast</th>
<th>Share of Viewing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Movie</td>
<td>Drama</td>
</tr>
<tr>
<td>Others 64%</td>
<td>Others 23%</td>
</tr>
</tbody>
</table>

Thailand: By Genre

<table>
<thead>
<tr>
<th>Share of Broadcast</th>
<th>Share of Viewing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Movie</td>
<td>Drama</td>
</tr>
<tr>
<td>Others 30%</td>
<td>Others 19%</td>
</tr>
</tbody>
</table>

PROGRAMME CHOICE

Programme Production in China 1994

Total Production: 280,941 hours

- Educational (9.2%)
- Drama (9.0%)
- Feature Films (0.2%)
- News (81.6%)

Programme Production in China 1994

- A balanced overall schedule is unlikely to appeal to all of the people all of the time.
- Not everybody wants to watch drama and news at the same time on every channel.
PROGRAMME CHOICE
Thailand 1995

- 5 national networks
- “Balanced” schedule overall of different programme types
- BUT: 80% of weekday prime-time programming consists of local drama and news
- 30% of sports programming shown on weekday afternoons (target audience at work?)
- 45% of cartoons shown on weekday mornings (when target audience at school?)

PROGRAMME CHOICE
Thailand (Cont’d)

Base: Jan-Mar (600 hrs of children’s progs)

REGULATORY CONSTRAINTS

- Station ownership
- Programme content
- Programme origin
- Broadcast language
- Schedule content

REGULATORY CONSTRAINTS

Examples

- All governments put restrictions of some sort on programme content
- Most Asian authorities place restrictions on station ownership
- China and other markets restrict the broadcasting of foreign programming
- Singapore, in addition to the above also regulates the use of dialects

OBSERVATIONS

- The rapid growth of cable and satellite in most markets, whether or not encouraged by the government, suggests a strong desire for more variety and choice in television programming than exists today
- But this may not necessarily mean viewers are “unfulfilled” with what they can currently view - any more than the addition of a new brand of breakfast cereal to the 280 already on offer implies consumer dissatisfaction with breakfast cereal

WHAT PEOPLE WATCH, READ AND LISTEN TO
RESEARCH INFRASTRUCTURE

<table>
<thead>
<tr>
<th>Country</th>
<th>TV Ratings</th>
<th>Readership</th>
<th>Radio Ratings</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Hong Kong</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
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<td>✓</td>
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<td>✓</td>
<td></td>
</tr>
</tbody>
</table>

TV VIEWING LEVELS IN ASIA
Average Daily Hours of Viewing

READERSHIP LEVELS IN ASIA
Newspapers: Any title read Yesterday

READERSHIP LEVELS IN ASIA
Magazines: Any title read last issue period

RADIO LISTENING IN ASIA
Any Listening Yesterday

APPEAL OF LOCAL PROGRAMMES
Top 100 Programmes
TV APPEAL BY DEMOGRAPHIC
People Watching TV “Yesterday”: Singapore

OBSERVATIONS
- Media consumption levels are high across all media, especially for television
- But there is little evidence that this is an indication of viewer/reader “fulfillment”; in several European countries where channel and programme choice expanded in the 1980s, no increase in total viewing levels was recorded
- Substantial growth in the number of newspapers in the UK had minimal effects on total readership levels

OBSERVATIONS (Cont’d)
- Even the types of programmes people tend to watch are influenced in large part by scheduling - what is on when they are available to view
- What people watch is conditioned by what is available to choose from in a limited choice environment - the viewer doesn’t yet control the schedule

WHAT PEOPLE SAY THEY WANT TO WATCH

PROGRAMME PREFERENCE
China (June 1995)

TV VIEWING & PREFERENCE STUDY IN CHINA
- Covered six cities via focus groups
- Asked people about their favourite programmes and what they watched
- Strong preference expressed for TV drama and general entertainment programming
- Local programmes preferred over foreign
CONCLUSIONS

• Media vehicles are proliferating in Asia, giving consumers more choice and variety in what they can watch, listen to and read.

• The growth of technologies such as cable and satellite will bring substantially greater media choice to more and more people.

• People will read less and watch more.

• Asking people whether they like what they watch is not the same as asking whether they are satisfied with what they have...

• However they already devote perhaps 25-30% of their waking hours to the media.