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Paper No. 29

By Andrew Green

THE NEW ASIAN AUDIENCES

Are the Media Fulfilling their Needs?

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

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MEDIA CONSUMPTION

Hong Kong

TOTAL MEDIA TIME:
4.2 hours per day



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HOW DO WE MEASURE "FULFILLMENT"?

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

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WHAT PEOPLE ARE ABLE TO WATCH ON TV The Evidence

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STATION CHOICES

Number of TV Stations Available to View

- Station choices
- Reception capabilities
- Programme choice
- Regulatory constraints

Country	1990	1996
China	400	1,580
Hong Kong	4	19
Indonesia	3	7
Malaysia	3	4
Philippines	5	10
Singapore	3	5
S. Korea	3	31
Taiwan	3	143
Thailand	5	8
Regional Channels	0	25

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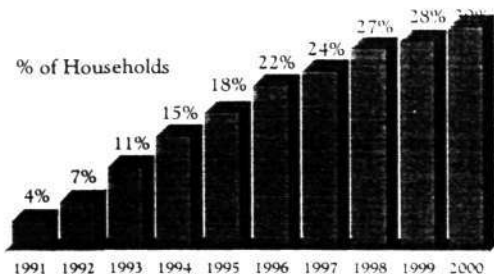
RECEPTION CAPABILITIES

- 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 Singapores!
- Both Singapore and Hong Kong plan to have almost every household wired for cable by 2000

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RECEPTION CAPABILITIES

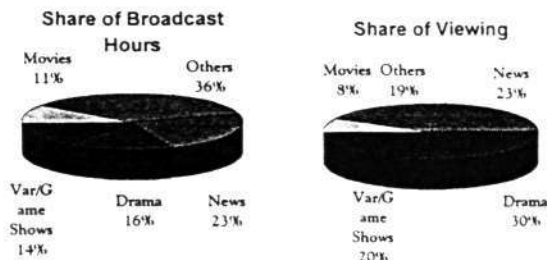
Asia/Pacific Multi-Channel Homes



SAATCHI & SAATCHI ADVERTISING Source: Saatchi & Saatchi Adv

PROGRAMME CHOICE

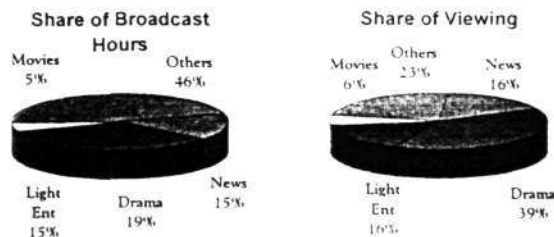
Taiwan: By Genre



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PROGRAMME CHOICE

Thailand: By Genre



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PROGRAMME CHOICE

Programme Production in China 1994

Total Production: 280,841 hours



Source: China Statistics Yearbook 1995

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PROGRAMME CHOICE

"Balanced" Schedules

- 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

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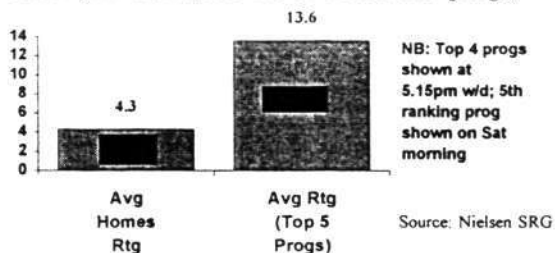
PROGRAMME CHOICE Thailand 1995

- 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?)

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PROGRAMME CHOICE Thailand (Cont'd)

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



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REGULATORY CONSTRAINTS

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

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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

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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

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WHAT PEOPLE WATCH, READ AND LISTEN TO

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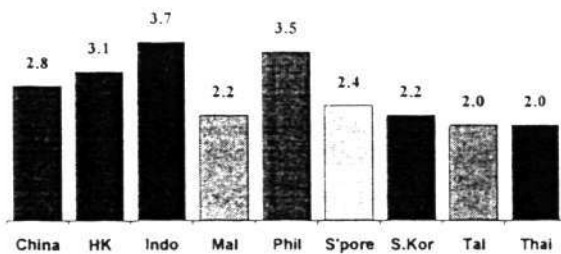
RESEARCH INFRASTRUCTURE

Country	TV Ratings	Readership	Radio Ratings
China	✓	✓	✗
Hong Kong	✓	✓	✓
Indonesia	✓	✓	✗
Malaysia	✓	✓	✓
Philippines	✓	✓	✗
Singapore	✓	✓	✓
S. Korea	✓	✓	✗
Taiwan	✓	✓	✗
Thailand	✓	✓	✗

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TV VIEWING LEVELS IN ASIA

Average Daily Hours of Viewing

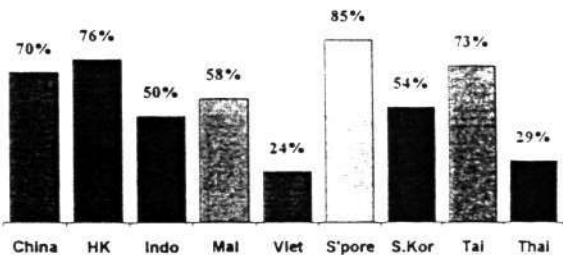


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Source: Nielsen SRG/CVSC

READERSHIP LEVELS IN ASIA

Newspapers: Any title read Yesterday

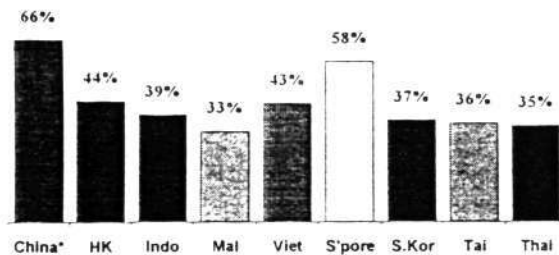


SAATCHI & SAATCHI ADVERTISING

Source: Nielsen SRG

READERSHIP LEVELS IN ASIA

Magazines: Any title read last issue period



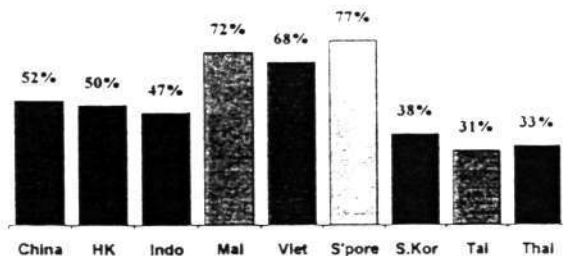
*Weekly titles only

SAATCHI & SAATCHI ADVERTISING

Source: Nielsen SRG

RADIO LISTENING IN ASIA

Any Listening Yesterday

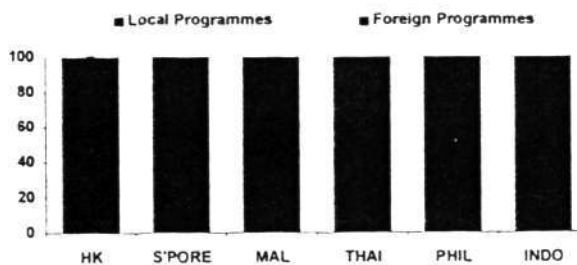


SAATCHI & SAATCHI ADVERTISING

Source: Nielsen SRG

APPEAL OF LOCAL PROGRAMMES

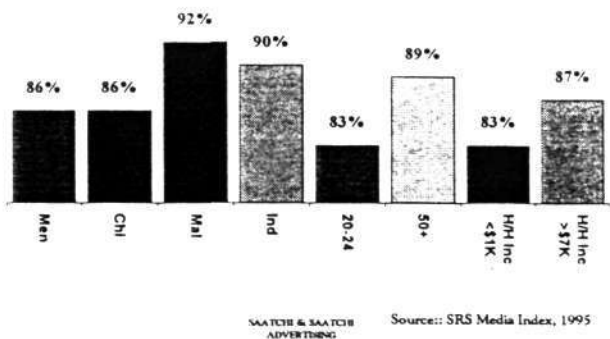
Top 100 Programmes



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Source: Nielsen SRG, April 1995

TV APPEAL BY DEMOGRAPHIC People Watching TV "Yesterday": Singapore



OBSERVATIONS

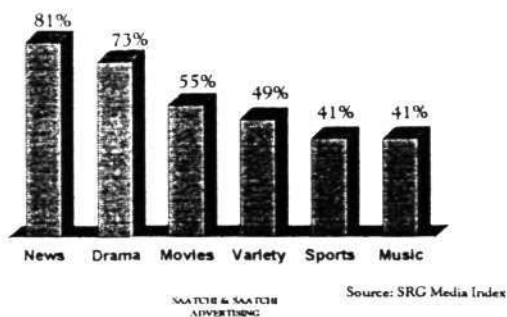
- Media consumption levels are high across all media, especially for television
- But there is little evidence that this is an indication of viewer/reader "fulfillment"; in several European countries where channel and programme choice expanded in the 1980s, no increase in total viewing levels was recorded
- 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

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