

**Perceptions of Public Broadcasting:  
Findings of an International Comparative Survey<sup>1</sup>**

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[http://www.nhk.or.jp/bunken/summary/research/report/2011\\_10/20111001.pdf](http://www.nhk.or.jp/bunken/summary/research/report/2011_10/20111001.pdf)

The nature of public broadcasting varies from country to country according to historical and cultural circumstances and the institutional framework under which each country's broadcasting services operate. At the same time, within a common context of ongoing technological advance, deregulation, and media globalization, public broadcasting as a whole faces a range of challenges that transcend national borders.

## **I. PURPOSE AND OVERVIEW OF SURVEY**

In 2006, the NHK Broadcasting Culture Research Institute conducted a survey of broadcasting comparing attitudes toward public broadcasting in seven countries (hereafter, the 2006 survey) while taking into account the different conditions of public broadcasting in each of the countries surveyed. By delineating the current state of public broadcasting through the lens of an international comparison, that survey aimed to inform considerations of how best to assess and understand the circumstances surrounding public broadcasting as a whole and what roles it should play as the digital age gets into full swing worldwide (Yokoyama 2006; Nakamura and Yonekura 2007).

### **Purpose of Survey**

Five years have elapsed since the 2006 survey. In that time, the rate of Internet use in the industrially advanced world has risen to over 70 percent of the population, and digitization in the field of communications, including broadcasting, has progressed significantly. In the area of digital terrestrial broadcasting, countries such as Germany and the United States, where few households receive terrestrial broadcasting only, have already phased out analog terrestrial broadcasting services and completed the transition to digital. Along with these changes, we have seen the emergence of various kinds of digital devices and in recent years an explosive spread in the use of social networking services and video-sharing websites. These developments are fueling a shift from the conventional situation, in which people acquired a sense of commonality and unity passively through their television sets, to one in which they themselves now actively participate in generating such an ethos. In response to

these changes, in their online activities public broadcasters have begun to move beyond simply posting noninteractive information to providing actual programs, either simulcast with the televised versions or made available sometime thereafter, such as through catch-up services that allow viewers to watch programs at their own convenience.

Other changes impacting on public broadcasting are rooted in the political shifts of recent years and in the global economic slump that ensued from the Lehman Brothers bankruptcy of late 2008. In France, for example, President Nicolas Sarkozy, elected in 2007, has been pushing to reform funding and organization of the country's public broadcasting system (Nitta 2011). French public broadcasting has so far operated on funds generated through a combination of commercial advertising and a license fee (tax for public broadcasting), but President Sarkozy has put forward a plan to abolish commercial advertising in public broadcasting and cover the shortfall in license-fee revenue with a new tax on telecommunications enterprises. The proposed reform is thought to be aimed partly at enabling the government to control the scale of funding for public broadcasting, keep public-broadcasting revenue sources to a minimum, and improve efficiency. In the United Kingdom, the Conservative–Liberal Democrat coalition government that emerged from the May 2010 general election included the BBC in a list of public agencies to be reviewed for government spending cuts and, while shelving plans for a thoroughgoing debate on the *raison d'être* of public broadcasting, formally resolved to freeze the license fee and use some license-fee revenue for media enterprises other than the BBC.

An examination of these and other circumstances surrounding public broadcasting and the changes taking place therein suggest that public broadcasting is still in a period of crisis. One of our objectives in continuing the present series of international comparative surveys after a five-year interval was to ascertain how audiences perceive public broadcasting in that evolving context.

### **Target Countries and Composition of Questionnaire**

The 2011 survey covers public broadcasters in six countries: Japan (Japan Broadcasting Corporation; NHK), the United Kingdom (British Broadcasting Corporation; BBC), France

(France Télévisions), Germany (ARD), the Republic of Korea (Korean Broadcasting System; KBS), and the United States (Public Broadcasting Service: PBS). In the 2006 survey, a broadcasting enterprise was deemed to match the definition of public broadcasting if it met both of two criteria: having institutionally guaranteed editorial independence from the government; and operating with some form of public funding (whether from a tax or a license fee or through some other system). The 2011 survey applies the same criteria. However, whereas Italy's Radiotelevisione Italiana (RAI) was included in the 2006 survey, the similarities of the Italian case with that of the French—such as that national broadcasting, consisting mainly of public broadcasting, coexists with broadcasting by numerous regional channels, and that public broadcasting operates on funds from multiple sources (commercial advertising and a license fee)—Italy was left out of the 2011 survey to reduce costs.

The survey questionnaire was organized into the following four topics:

- I. Circumstances of media use
- II. Viewing and appraisal of public broadcasting
- III. Need for and funding of public broadcasting
- IV. Roles of public broadcasting

To facilitate comparison with the 2006 survey, as far as possible within the limited total number of questions the questionnaire included the same questions as were asked in 2006. New to the present survey are questions on respondents' awareness and use of online catch-up services, and questions based on the hypothesis that public broadcasting has new roles in the age of full digitization that it did not have in the age of analog broadcasting.

America's PBS differs from the other five countries' public broadcasters in terms of its organization and the scope of its mandate, and these differences are reflected in the survey results. Out of concern that inclusion of the PBS results in our analysis would therefore be disruptive to the overall thrust of this general report, we have decided to omit them from the report and include them only in the simple tabulation of results provided in the appendix.

## Overview of Survey

The survey was conducted from late February to early March 2011 in six countries: Japan, the United Kingdom, France, Germany, the Republic of Korea (ROK), and the United States. In each country, approximately 1,000 people aged 20 and over were surveyed by telephone. The samples were obtained through random selection of households with landline telephones, using mainly the random direct-dialing (RDD) method; and respondents within each household were chosen using either the quota method or the last-birthday method. For each country, the timing of the survey and the survey methods were the same as for the 2006 survey. An overview of the survey periods and methods is provided on page 49.<sup>2</sup>

The survey questionnaire was written in Japanese, translated into English, and then translated from English into French, German, and Korean. Each of the translated versions was then translated back into Japanese to ensure that the nuances of the questions and response options were consistent with the original, that the mode of expression was consistent for all countries, that questions carried over from the 2006 survey were expressed in the same way as in 2006, and so on, and where necessary the translations were adjusted accordingly. The English-language questions and response options and a simple tabulation of results are provided in the appendix beginning on page 39. In the simple tabulation of results, for the five countries other than Japan, the results were weighted, to ensure the data for attributes such as gender and age would conform to the actual composition of the population of each of those countries.<sup>3</sup> The results for Japan have not been weighted, because the Japanese sample was configured to match the composition of Japan's population at the survey stage.

Given the 2011 survey's international comparative nature and the use of different languages and sampling methods among the target countries, we have focused on describing the overall trends of the survey results rather than conduct a comparative analysis of significant differences. In place of such an analysis, in direct numerical comparisons descriptive expedients such as "many/more" and "few/fewer" are used to describe numerical

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<sup>2</sup> The survey in fact addressed respondents aged 16 and over in the United Kingdom and Germany and 18 and over in the United States and France, but the under-20 portions of the sample were excluded at the tabulation stage. In the Korean component of the survey, the quota for respondents aged 70 and over was arbitrarily reduced due to difficulties in interviewing elderly respondents by telephone. For the U.S. component, the sample included a quota of 200 respondents who had no landline telephone and used only a mobile phone.

<sup>3</sup> The same adjustment was made for the data of the 2006 survey referred to throughout the present report.

differences of over 10 percent between countries and those of over 5 percent between the present survey and the 2006 survey.

## **II. BACKGROUND TO ANALYSIS:**

### **MEDIA ENVIRONMENT AND PUBLIC BROADCASTING IN EACH COUNTRY**

Before presenting the survey results, let us fill in some of background to public broadcasting in the five target countries—Japan (NHK), the United Kingdom (BBC), France (France Télévisions), Germany (ARD), and the Republic of Korea (KBS)—and outline the basic circumstances informing our interpretation of the data from this international comparative survey. In the German component of the survey, although two public broadcasters operate in Germany—ARD and Zweites Deutsches Fernsehen (ZDF)—the questions primarily concerned ARD. A consortium of nine regional broadcasters, ARD conducts national TV broadcasts, while its constituent regional broadcasters conduct regional broadcasts on both TV and radio. Viewers regard ARD1 as a national channel and ARD3 as a local channel. Meanwhile, Germany's other public broadcaster, ZDF, which was launched later than ARD, carries out national but not regional broadcasts. Accordingly, ARD, which operates both national and regional services, was chosen for the German component of the survey, with some questions concerning both ARD and ZDF.

Each of the five public broadcasters covered in this report is the oldest broadcaster in its country, and each is required to provide comprehensive programming spanning a range of genres, including education, news (information), and entertainment. Each is also required to provide its programs via a national network so as to make them available to viewers in any part of the country.

It is through TV programs that public broadcasters and their viewers are directly connected, but the classification of TV programs by genre varies from country to country. Even at the stage of compiling the questionnaire for the 2006 survey, the most difficult task was that of drafting questions related to viewership by program genre, since many viewers would presumably struggle to decide whether a particular program they watched should be

classified, for example, as educational or as entertainment. The same problem arises in comparing the actual program content provided by different public broadcasters. In response to this problem, we analyzed public broadcasters' programming for fiscal 2009 into just two genres: news programs and general programs. Whereas the breakdown for NHK General TV was 49 percent news and 51 percent general, for BBC One, the BBC's main channel, it was 31 percent news and 69 percent general; for F2, the main channel of France Télévisions, it was 22 percent news and 78 percent general; for ARD1, ARD's national channel, it was 30.8 percent news and 69.2 percent general; and for the KBS channel KBS1 it was 32 percent news and 68 percent general.<sup>4</sup> We can surmise from this perspective that NHK General has the highest proportion of news programs of any of the world's main public-broadcasting channels.

Let us now look at the situation in the target countries in terms of two external factors thought to influence their respective audience's viewing and perceptions of public broadcasting: TV channel competition and the spread of Internet use.

## **TV Channel Competition**

### *Proliferation of Digital Multichannel Services*

With the advance of digitization across all main platforms (terrestrial, satellite, and cable TV), hundreds of TV channels are now available in each of the target countries. In France, use of Internet protocol TV (IPTV) has reached 37 percent of households, outstripping cable TV in the breakdown of reception by platform. Germany ended analog terrestrial broadcasting in November 2008, and the transition to full digital broadcasting is scheduled to be completed in Japan by July 2011,<sup>5</sup> in France by November 2011, in the United Kingdom by sometime between April and June 2012 (just before the London Olympic Games), and in the Republic of Korea by the end of December 2012.

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<sup>4</sup> These breakdown ratios for NHK are taken from Murakami Seiichi, "Bangumi chowa gensoku: Ho kaisei de toinaosareru kino" [Principle of Program Harmony: Rethinking Program Functions amid Revision of the Broadcast Law], in the February 2011 issue of *Hoso kenkyu to chosa*, the monthly journal of the NHK Broadcasting Culture Research Institute. Those for the BBC and ARD are from their respective annual reports for fiscal 2009; those for France Televisions are from the fiscal 2009 annual report of its regulatory body, the Conseil supérieur de l'audiovisuel; and those for KBS are from a report on the broadcasting industry in 2009 by KBS's regulatory body, the Korean Communications Commission.

<sup>5</sup> For three prefectures in the Tohoku region that were seriously affected by the earthquake and tsunami disaster of March 2011, analog broadcasting is scheduled to be discontinued by the end of March 2012.

As shown in Figure 1, the European public broadcasters operate multichannel services even as part of their digital terrestrial broadcasting, providing all such channels to all license-fee payers whatever the platform. In contrast, their Japanese and Korean counterparts each conducts digital terrestrial broadcasting on only two channels, the same number as for their analog services. On the satellite and cable platforms, however, Japan’s NHK operates the channels BS1 and BS Premium, and ROK’s KBS has four theme-based pay channels: KBS Drama, KBS N Sports, KBS Prime, and KBS Joy.<sup>6</sup>

**Figure 1. Overview of Digital TV Services**

	No. channels (Terrestrial TV)		Satellite TV diffusion	Cable TV diffusion	IPTV diffusion
	Public	Commercial			
Japan	2	5	30%(NHK BS)	50%	
UK	9	30+	36.8%	13.1%	
France	6	29	46%	14%	37%
Germany	9~14	4~5	43%	49.6%	
ROK	2	2	10%	80%	

Source: NHK Hoso Bunka Kenkyujo, ed., *NHK deta bukku: Sekai no hoso 2011*.  
 Note: The figure for satellite TV prevalence in Japan is the ratio of households subscribing to the NHK BS service.

*Declining Share of Viewership*

The European public broadcasters have seen their share of viewership decline in recent years (Figure 2), while that of Japan’s NHK has remained virtually unchanged for the past five years. The three European broadcasters have attempted to stop the erosion of their share of viewership by offering multichannel TV services, with each channel targeting specific age groups or offering content on specific themes. Although it is too soon to determine whether or not such measures have been successful, this situation nonetheless underscores the intensity of multichannel competition in Europe.

<sup>6</sup> These KBS channels are operated by KBS N, a KBS subsidiary, and carry reruns and new programs.



**Figure 2. Share of Viewership**

	Public TV		Commercial TV
	2005	2009	2009
UK: BBC	36.6%	28.4%	71.5%
France: FT	41.4%	33.6%	66.4%
Germany: ARD/ZDF	40.6%	38.7%	61.3%
ROK: KBS	—	27.5%	72.5%

Note: The figures for “Commercial TV” are aggregates of the shares accounted for by terrestrial commercial channels and channels on platforms such as satellite and cable TV. All shares shown are taken from the *NHK deta bukku: Sekai no hoso* series published [annually?] by the NHK Hoso Bunka Kenkyujo.

Like other countries, Japan is seeing a proliferation of channels and platforms. As Figure 3 indicates, however, terrestrial channels collectively enjoy a more than 90 percent share of TV viewership in Japan. NHK thus has the same rivals in channel competition as it did in the analog age, namely, the five main commercial terrestrial broadcasters.

**Figure 3. Share of Viewership in Japan, by Broadcaster**

(According to research by Video Research Ltd. of viewing from 6 A.M. to midnight in households in the Kanto region)

	NHK General	NTV	TBS	Fuji	TV Asahi	TV Tokyo	Others
2005	14.6%	18.2%	16.1%	19.4%	16.2%	7.7%	5.4%
2010	14.8%	18.2%	14.5%	18.6%	16.2%	6.4%	8.9%

Note: The figures for “Others” are aggregates of the shares accounted for by satellite (BS and CS) and cable TV channels and prefecture-wide UHF broadcasters.

Note also that, whereas NHK’s share of viewership changed little in the five years up to 2010, that of the “Others” category, consisting of specialized channels on satellite and cable platforms, grew significantly.

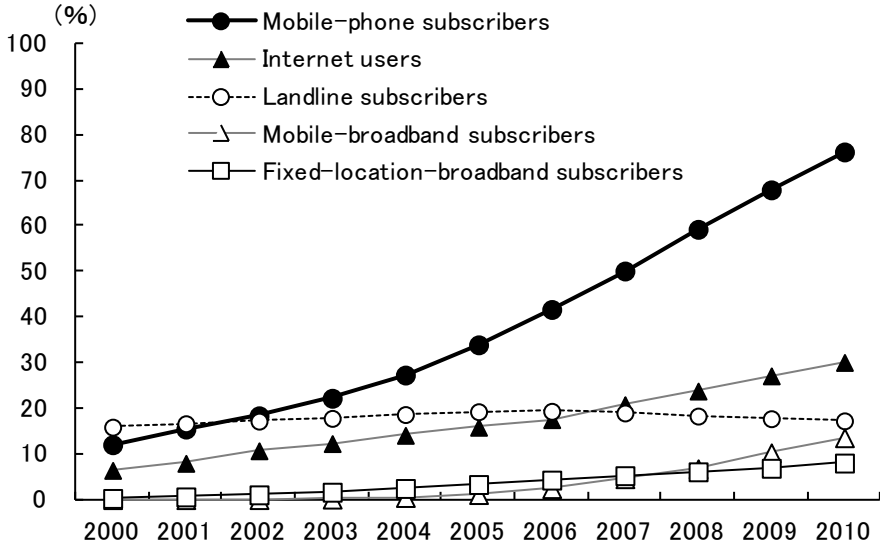
## Growing Internet and Broadband Use

### *Global Spread of Communications Technology*

The key change in the media environment over the last five or so years has been the spread of

Internet use and mobile communications the world over. According to data compiled by the International Telecommunications Union (ITU), the number of mobile-phone subscribers outstripped that of landline subscribers in 2002 and has been increasing sharply since around 2004 (Figure 4). Note also that while the overall number of Internet users has risen steadily, the number of mobile-broadband users overtook that of fixed-location-broadband users in 2008. These trends in the spread of information and communications technology show that an infrastructure allowing users to access information and programs whenever and wherever they wish is taking shape.

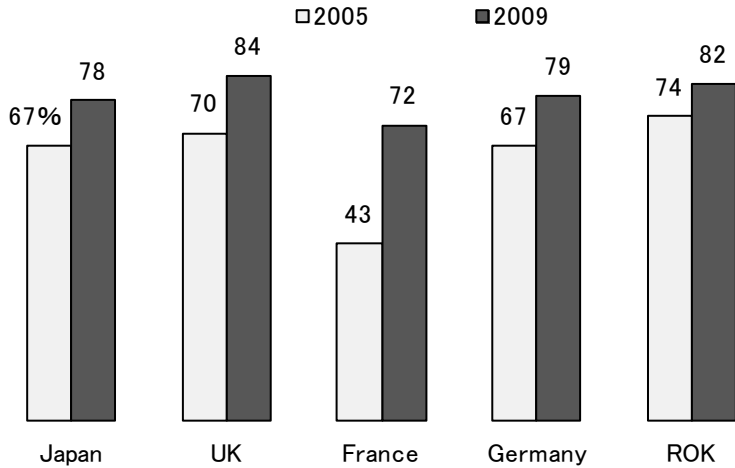
**Figure 4. Worldwide Diffusion of Information and Communications Technology**



Source: ITC World Telecommunication/ICT Indicators Database

The ITU data also allows us to compare the ratios of fixed-location-Internet users in the five countries, shown as a percentage of the population in each case (Figure 5). France recorded a striking increase from 43 percent to 72 percent between 2005 and 2009, while the United Kingdom showed the highest proportion of all five countries in 2009, with well over 80 percent of its population enjoying fixed-location-Internet service.

**Figure 5. Fixed-location-Internet Subscribers**



Source: ITC World Telecommunication/ICT Indicators Database

*Launch of Catch-up Services*

Also characterizing the past five years is the trend of public broadcasters establishing online catch-up services for TV programs. France saw the launch of the France TVOD service in November 2005, the United Kingdom the BBC iPlayer service in December 2007, Germany the ARD Mediathek service in May 2008,<sup>7</sup> and the Republic of Korea the trial service Dasibogi (meaning “watch again”) in November 1999. In each case, each program is provided free of charge to license-fee payers for seven days after the date of its TV broadcast.<sup>8</sup> In Japan, the service NHK on Demand began in December 2008 and is provided as a fee-charging catch-up service.

While catch-up services generally provide access to more or less all broadcast TV programs, in terms of the period of each program’s availability the German service goes beyond the general seven-day rule by setting different periods for different genres, such as 12 months for specials and documentaries, five years for educational programs, and permanent availability for programs of particular historical or cultural importance. Use of these catch-up services varies considerably. BBC iPlayer, the most popular of the services mentioned above, reportedly enjoys an average use rate of over 100 million views a month, with a total of some 1.6 billion TV program views during fiscal 2010 (BBC 2011).

<sup>7</sup> Germany’s other main public broadcaster, ZDF, launched a similar service, ZDF Mediathek, in September 2007.

<sup>8</sup> The KBS and France Televisions catch-up services began as fee-charging services but switched to a free-of-charge basis.

### III. VIEWING AND APPRAISAL OF PUBLIC BROADCASTING

Keeping in mind the context outlined above, we are now ready to examine the results of the 2011 survey.

#### Viewing of Public Broadcasting

##### *Around Three Hours of TV Viewing Daily*

The survey began by asking respondents how many hours of TV they usually watch on an ordinary week day. The following shows the average length of daily viewing in each country based on the responses to this question (with 2006 averages in parenthesis).

UK	3 hours, 29 minutes	(3 hours, 36 minutes)
Japan	3 hours, 10 minutes	(3 hours, 17 minutes)
France	2 hours, 54 minutes	(2 hours, 41 minutes)
ROK	2 hours, 53 minutes	(3 hours, 2 minutes)
Germany	2 hours, 36 minutes	(3 hours, 25 minutes)

Average daily TV viewing time in all surveyed countries is thus around three hours, though somewhat more than that in the United Kingdom and somewhat less in Germany. With the exception of Germany, furthermore, the 2011 results show little change from those of 2006.<sup>9</sup> The breakdown by age group shows viewing time increasing with age in all surveyed countries, a trend that was also seen in the 2006 survey.

##### *Public Broadcasting Popular in the ROK and the U.K.*

Respondents were asked about their viewing of public broadcasting in two ways: how often they watched programs on the relevant public broadcaster in their country, and whether they watched the public broadcaster more or less than they watched commercial TV. The latter

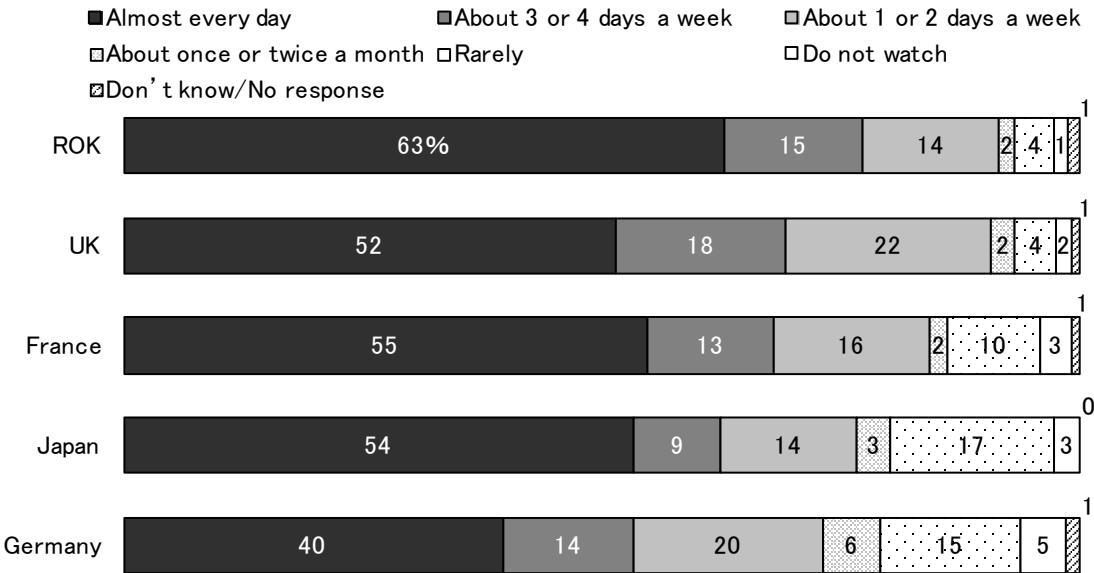
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<sup>9</sup> Research conducted by AGF/GfK shows that average daily TV viewing time in Germany (people aged 3 and over) changed little between 2006 (3 hours, 32 minutes) and 2010 (3 hours, 43 minutes). See the March 2011 issue of *Media Perspektiven*.

question was asked in the 2006 survey.

Let us look first at the frequency of watching public broadcasting (Figure 6). This is highest in the Republic of Korea, with more than 60 percent of respondents saying they watched it “almost every day.” In the United Kingdom, roughly half the sample answered “almost every day.” The sum of respondents who said either “almost every day,” “about 3 or 4 days a week,” or “about 1 or 2 days a week” accounts for some 90 percent in both the Republic of Korea and the United Kingdom. In France and Japan too, more than half said “almost every day.” In Japan’s case, however, the ratio who said they “rarely” watched public broadcasting is significantly larger than in either the Republic of Korea or the United Kingdom, the Japanese sample thus showing a general split between high-frequency and low-frequency viewers.

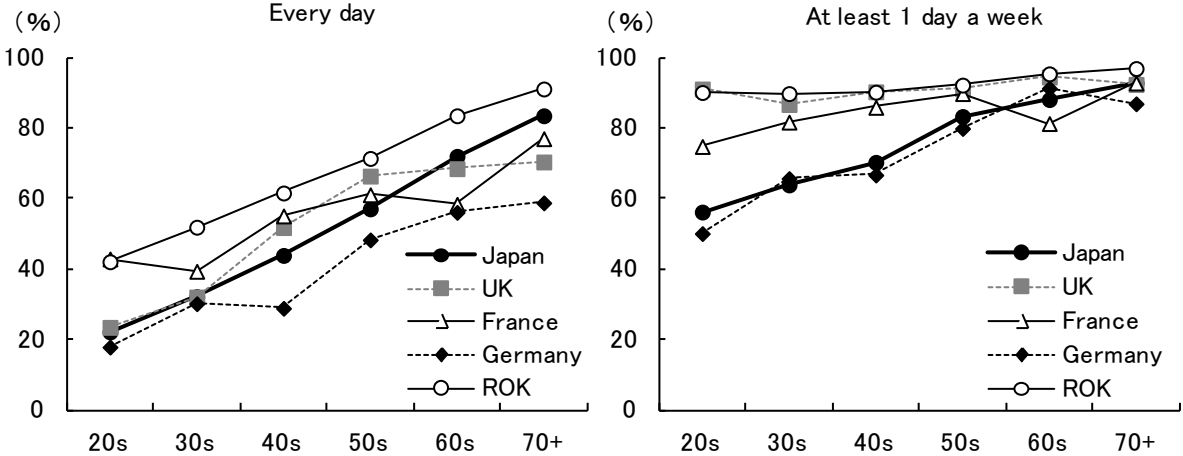
**Figure 6. Frequency of Watching Public Broadcasting**



In the breakdown by age group, the frequency of viewing is seen to increase with age in all six countries. This indicates a common structure whereby viewership of public broadcasting is sustained mainly by older age groups, whose members watch more TV than do younger groups (Figure 7). This trend is the same when the figures for “about 3 or 4 days a week” are added to those for “almost every day.” However, when the result selection is

broadened to include the response “about 1 or 2 days a week,” in the Republic of Korea and the United Kingdom there is almost no difference based on age, with some 90 percent of respondents in even the 20s and 30s age brackets watching public broadcasting at least one day a week in those countries. In Japan and Germany, by contrast, there is considerable difference among different age groups. In this respect the results for France fall in between, with some difference according to age but not as much as in Japan and Germany.

**Figure 7. Frequency of Watching Public Broadcasting, by Age**



In other words, while all surveyed countries show a trend of increased viewing of public broadcasting with increased age, whereas even the younger age groups in the Republic of Korea and the United Kingdom include many people who watch public broadcasting about one day a week, the younger groups in Japan and Germany include more who watch it less than one day a week (i.e., who answered “about once or twice a month,” “rarely,” or “do not watch” the public broadcaster). We can surmise that this difference also relates to the differences in overall viewing frequency.

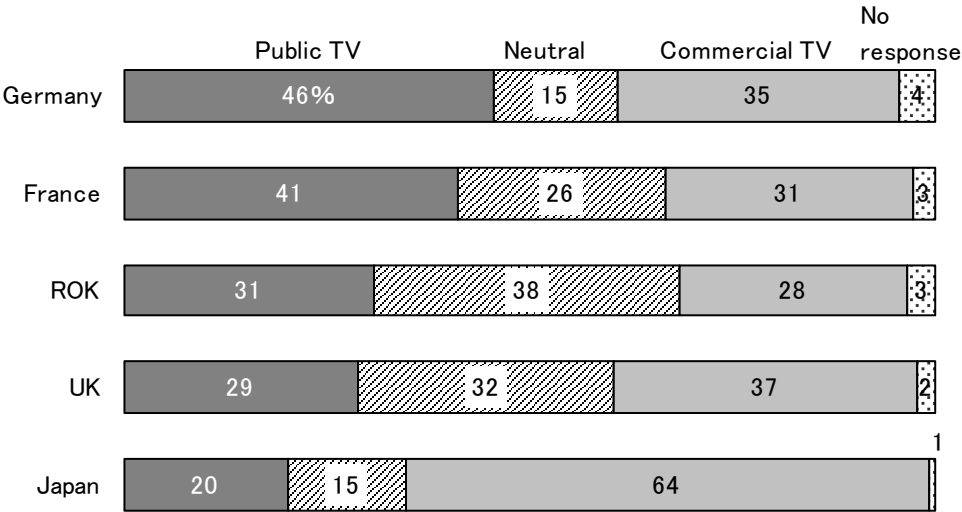
*Preference for public broadcasting in Germany and France*

For the question on whether they watched public broadcasting or commercial broadcasting more often, the respondents were analyzed into three groups. Those who answered that they watched their public broadcaster more often or slightly more often were classed as the public-TV group; those who said they watched both equally as often formed the neutral

group; and those who answered that they watched commercial TV more often or slightly more often were deemed the commercial-TV group.

Among the five countries, Germany and France have comparatively large public-TV factions, at nearly half (46 percent) and around 40 percent, respectively (Figure 8). In both the Republic of Korea and the United Kingdom, the public-TV group accounts for around 30 percent, and in both cases the neutral group is also quite large, at about the same size as the public-TV group. In all four of those countries, the commercial-TV group accounts for roughly 30 to 40 percent. Japan is distinguished by an overwhelming preference for commercial TV, with the public-TV faction at just 20 percent.

**Figure 8. Preference for Public or Commercial TV (2011)**



The 2006 results for this question (Figure 9) show the same overall pattern for the public-TV groups, with those in Germany and France being the largest, followed by those in the Republic of Korea and the United Kingdom, and Japan’s being quite small. However, the 2011 results show that whereas Germany’s public-TV group grew significantly, in France that group shrank and the commercial-TV faction expanded significantly. In Japan, the public-TV group remained virtually unchanged, but the ratio of commercial-TV watchers rose from an already high 57 percent to 64 percent.

**Figure 9. Preference for Public or Commercial TV (2006)**

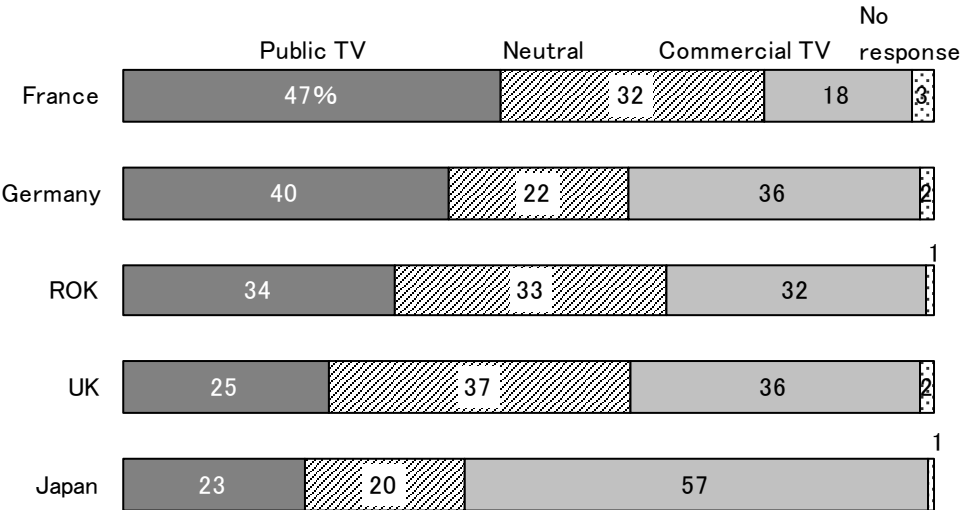
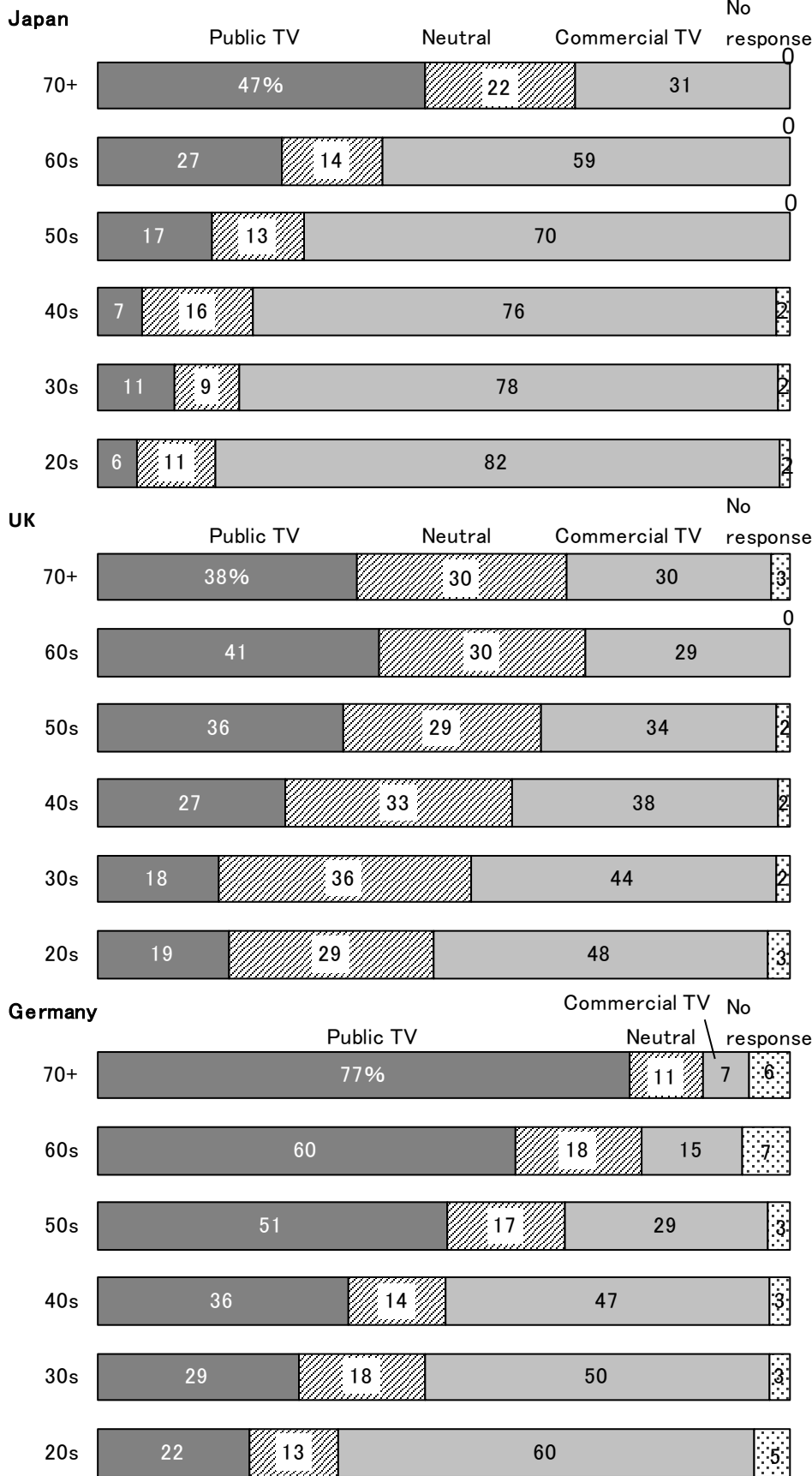


Figure 10 shows the breakdown by age group of the 2011 responses to the same question for three countries: Japan, where the commercial-TV faction prevails; the United Kingdom, where, with a comparatively large neutral group, the public-TV, neutral, and commercial-TV groups are roughly equal in size; and Germany, where the public-TV faction predominates. Despite some differences among the three countries, the overall trend is that the ratio of viewers who prefer public TV increases with age.



**Figure 10. Preference for Public or Commercial TV, by Age (2011)**

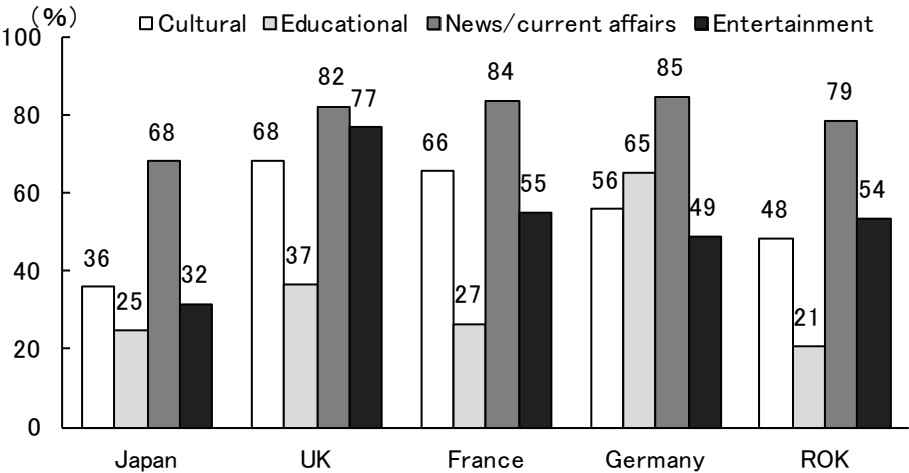


In Japan’s case, while the 2006 results also show considerable variation by age, the 2011 results reveal that, among people in their 50s and 60s, the public-TV and neutral groups diminished while the commercial-TV group grew. Consequently, the 70-and-over age bracket is the only one in which the public-TV and neutral groups collectively account for more than half of the Japanese respondents in 2011. The results for the United Kingdom show comparatively little variation by age, the public-TV and commercial-TV factions being more or less balanced in almost all age brackets. In Germany, whereas overall there is a large proportion of respondents who prefer public TV, the breakdown by age reveals a majority of commercial-TV viewers in the 20s age bracket and a trend toward a clear predominance of the public-TV group among people aged 50 and over.

*Little change in genre preferences*

Respondents were also asked to indicate whether or not they usually watched the public broadcaster’s programs in each of four genres. The respective public broadcasters’ news and current affairs programs are watched a lot in all countries; and in the United Kingdom, the public broadcaster’s entertainment programs are watched to almost the same extent as its news and current affairs programs (Figure 11). These results correspond closely to those of the 2006 survey.

**Figure 11. Program Genres Frequently Watched on Public TV**



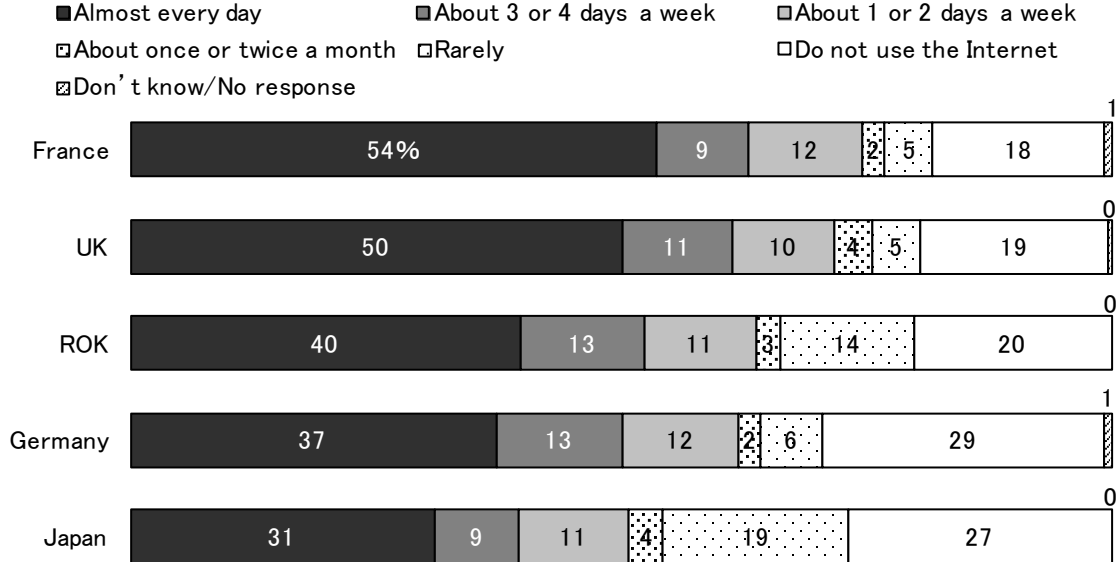
**Use of Internet and Catch-up Services**

Let us now look at the use of online catch-up services provided by the public broadcaster in each country. The survey first asked respondents how often they used the Internet other than for work or study, then asked the Internet users (respondents who used it at least one or two days a week) about their use of their respective public broadcaster’s catch-up services, such as the NHK On Demand service in Japan.

*High rate of Internet use in France and the U.K.*

Figure 12 shows the frequency of Internet use in each country. In France and the United Kingdom, around half of the respondents said they used the Internet “almost every day” for purposes other than work or study. In the breakdown by age, the trend of more frequent Internet use the younger the age bracket is common to all countries. Although Japan shows the lowest frequency of such Internet use of all five countries, some 50 percent of Japanese respondents in their 40s or younger answered “almost every day.”

**Figure 12. Frequency of Internet Use**



In regard to Internet use, differences between the 2006 and 2011 surveys—such as in the definition of Internet use (in 2006 it was limited to use from a home computer) and in the response options—preclude any simple comparison between the two surveys. Nonetheless,

the aggregates for Internet use of at least one day a week show that Internet use increased overall in that five-year period, reaching 75 percent in France (46 percent in 2006), 72 percent in the United Kingdom (50 percent in 2006), 64 percent in the Republic of Korea (64 percent in 2006), 62 percent in Germany (47 percent in 2006), and 51 percent in Japan (40 percent in 2006).

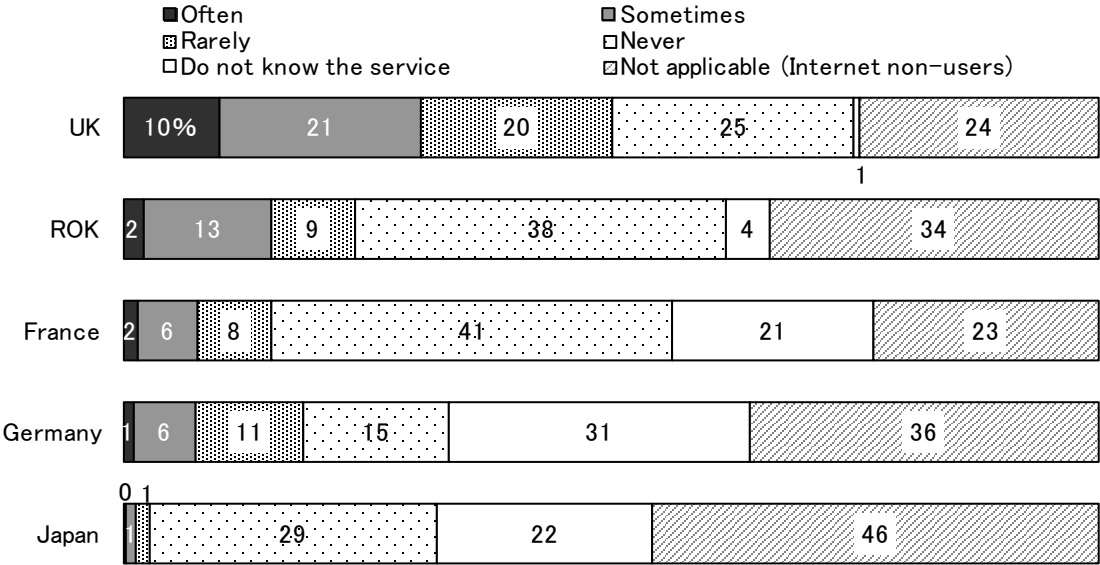
*One third of U.K. respondents using BBC iPlayer*

In the results for the follow-up question on use of catch-up services, the United Kingdom shows the largest proportion of catch-up service users, with 31 percent saying they used the BBC iPlayer service either “often” or “sometimes” (Figure 13). That is the ratio among all U.K. respondents, including those who were not classed as Internet users; among Internet users in the United Kingdom, 41 percent said they used the BBC iPlayer service either “often” or “sometimes.” The Republic of Korea has the second-highest ratio of catch-up service users, with 15 percent of respondents saying they used KBS’s Dasibogi service either “often” or “sometimes.” Thus, in the United Kingdom and the Republic of Korea, both of which show high frequency of public-TV viewing, the use of catch-up services is also comparatively prevalent. In France, Germany, and Japan, meanwhile, the ratio of respondents who use catch-up services either “often” or “sometimes” is less than 10 percent.<sup>10</sup> Furthermore, whereas in the United Kingdom and the Republic of Korea there are very few Internet users who know of their respective public broadcasters’ catch-up services, the French, German, and Japanese Internet users who did not know of such services account for over 20 percent in each case, suggesting that even public awareness of catch-up services is limited in those three countries.

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<sup>10</sup> In the German component of the survey, respondents were asked about the ARD Mediathek and ZDF Mediathek catch-up services separately. Figure 13 shows the responses regarding ARD Mediathek.

**Figure 13. Frequency of Use of Catch-up Services**



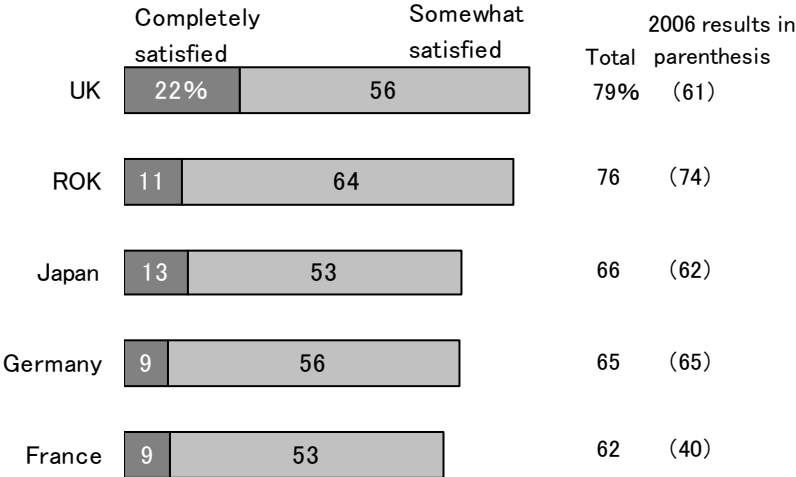
Note: The German results are for use of the ARD catch-up service.

Overall, use of catch-up services is seen to increase the younger the age group. Among Internet users, however, there is little variation by age, with middle-aged and elderly respondents using such services about as much as younger respondents do.

**Level of Satisfaction with Public Broadcasting**

Figure 14 shows the positive responses to the question of how satisfied respondents were in general with their public broadcaster’s programs and services.

**Figure 14. Satisfaction with Public Broadcasters’ Programs and Services**



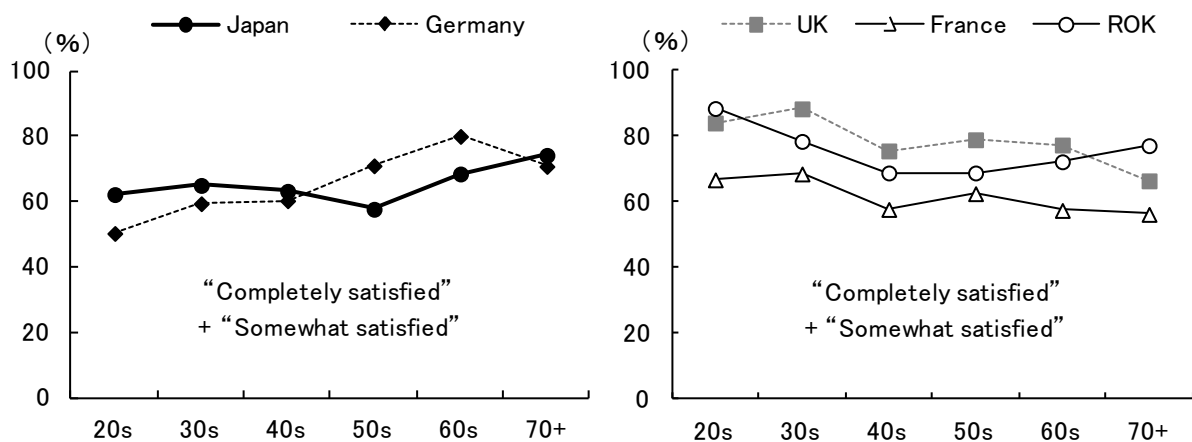
*In all countries, over 60 percent satisfied*

Respondents who said they were “completely satisfied” account for some 20 percent in the United Kingdom and around 10 percent in each of the other countries. However, the aggregates for both “completely satisfied” and “somewhat satisfied” respondents are over 60 percent in every country, indicating an overall prevalence of satisfied viewers.

The level of satisfaction was especially high in the United Kingdom and the Republic of Korea. Compared with that seen in the 2006 survey, the satisfaction level has changed little in Japan but has risen markedly in the United Kingdom and France.

Among “satisfied” respondents—that is, those who answered either “completely satisfied” and “somewhat satisfied”—the countries show different trends when the responses are broken down by age. In Japan and Germany, the level of satisfaction is generally higher in older age brackets, while in the United Kingdom, France, and the Republic of Korea, the tendency is for the younger age brackets to have more satisfied viewers (Figure 15). Nonetheless, even in the age brackets with the lowest ratios of “satisfied” respondents, the “satisfied” faction accounts for around 50 percent. In Japan’s case, even the 20s and 30s age groups show about 60 percent of respondents expressing satisfaction with their public broadcaster’s programs and services.

**Figure 15. Satisfaction with Public Broadcasters’ Programs and Services, by Age**



## **Viewing and Appraisal of Public Broadcasting: Summary**

The general state of public-broadcaster viewing in the surveyed countries can be summarized as follows.

### *High frequency of viewing and satisfaction in the U.K. and the ROK*

In the United Kingdom and the Republic of Korea, public broadcasting is watched a lot, use of online catch-up services is prevalent, and viewer satisfaction with public broadcasting is higher than in the other countries. On the other hand, even these two countries have a considerable proportion of viewers who watch commercial broadcasting more often than public broadcasting. In Japan, the frequency with which viewers watch the public broadcaster is quite high, and satisfaction with the public broadcaster, while not as high as in the United Kingdom or the Republic of Korea, is at almost 70 percent. Nonetheless, only a small proportion of Japanese viewers show a preference for public over commercial TV, a clear majority preferring the latter. In Germany and France, whereas the frequency of viewing public broadcasting is low and satisfaction with public broadcasting is at about the same level as in Japan, people who prefer public broadcasting outnumber those who prefer commercial broadcasting.

### *Viewing varies significantly by age in Japan and Germany*

The breakdown by age shows that a trend of more frequent viewing of public broadcasting the higher the age bracket is common to all of the surveyed countries. Nonetheless, the countries can be divided into two distinct groups in this regard: Japan and Germany, where that age-based trend is particularly marked; and United Kingdom, France, and the Republic of Korea, where there is comparatively little variation according to age. In Japan and Germany, the frequency of viewing public broadcasting and the ratio of viewers who prefer it to commercial broadcasting vary considerably by age, and a significant number of people in young age brackets watch little public broadcasting. Japan and Germany also show a different trend from the other three countries in terms of satisfaction with public broadcasting, namely, that younger Japanese and Germans tend to be less satisfied.

## IV. NEED FOR AND FUNDING OF PUBLIC BROADCASTING

Now let's look at respondents' views regarding the need for public broadcasting and the way in which it is funded.

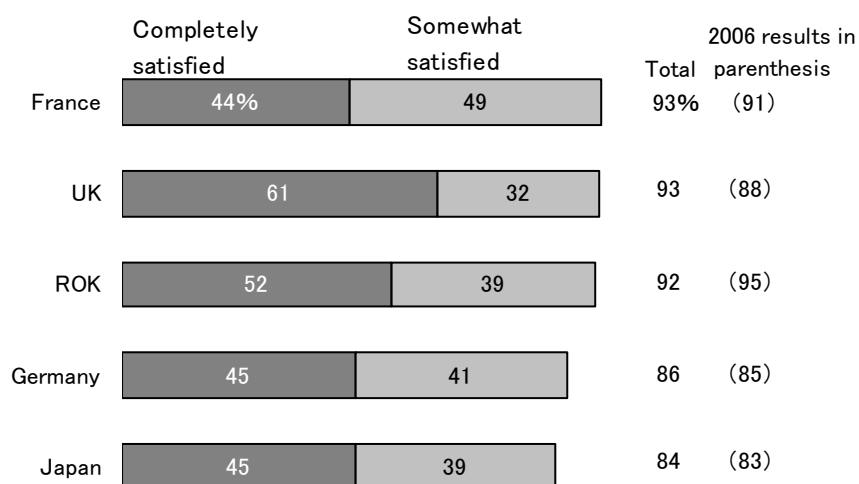
### Need for Public Broadcasting

*In every country, large majority sees need for public broadcasting*

We saw above that, albeit to varying degrees, the general trend common to all of the surveyed countries is that the frequency of watching public broadcasting increases the higher the age bracket and decreases the lower the age bracket. Does this mean that young people regard public broadcasting as no longer necessary? Where do older people stand on this question?

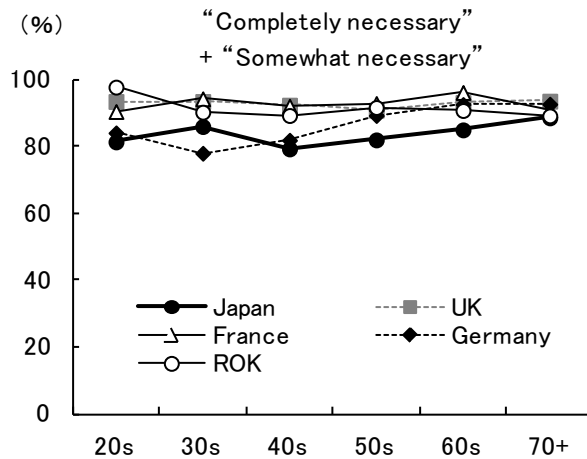
When asked how necessary they thought their public broadcaster was, over 80 percent of respondents in each of the surveyed countries affirmed its necessity by choosing either “completely necessary” or “somewhat necessary” as their response (Figure 16). On this question, the results for each country show little change from those of the 2006 survey. This indicates that, even in the present age of widespread Internet use, the general public clearly regards public broadcasting as a necessity.

**Figure 16. Positive Responses on Necessity of Public Broadcasting**





**Figure 17. Positive Responses on Necessity of Public Broadcasting, by Age**



Even in the breakdown by age, the perception of the need for public broadcasting is at a high level across the board, with no country showing any significant age-based variations in the necessity-affirming group (Figure 17). Though younger age groups tend to watch public broadcasting less frequently, and include few people who prefer it to commercial broadcasting, they are far from regarding public broadcasting as unnecessary.

### Views on Funding

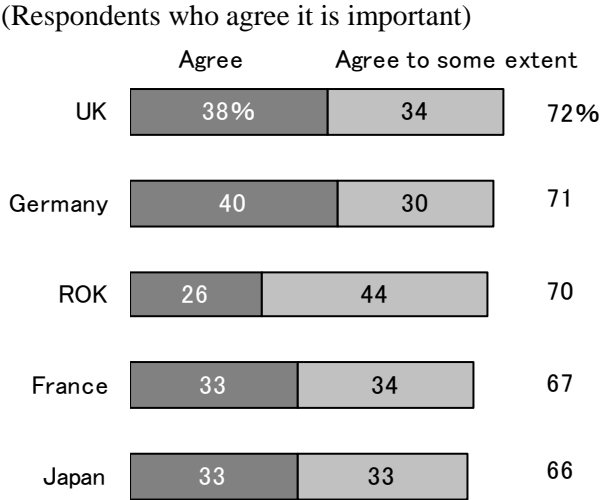
#### *Rising perception of importance of paying license fee: U.K., ROK, France*

This brings us to perceptions about paying to fund public broadcasting. Many people may regard public broadcasting as necessary, but what do they think about actually providing it with financial support?

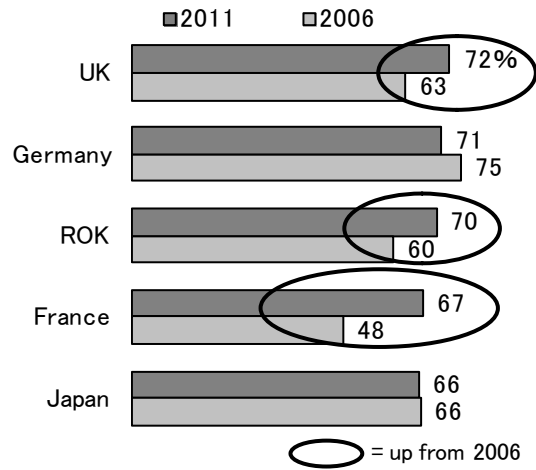
To gauge such perceptions, respondents were asked to what extent they agree with the statement, “It is important to pay a TV license fee in order to maintain public broadcasting.” The United Kingdom, Germany, and the Republic of Korea had the highest ratios of respondents who thought it was important—that is, those who chose either “agree” or “agree to some degree” as their response (Figure 18). Comparison with the 2006 results for the same question shows that, while the size of this importance-affirming group remained unchanged in Japan, it grew significantly in the United Kingdom, the Republic of Korea, and France (Figure 19). All three of the countries where this increase was seen are also countries where

both the frequency of watching public broadcasting and the use of online catch-up services are relatively high.

**Figure 18. Positive Responses on Importance of Paying License Fees**

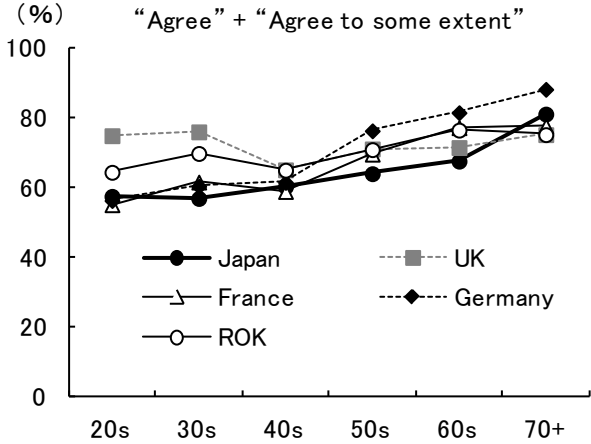


**Figure 19. Positive Responses on Importance of Paying License Fees (2006-2011 Comparison)**



In the breakdown of the importance-affirming respondents by age, some difference can be seen among the countries. In Japan, France, Germany, and the Republic of Korea, the ratio of such respondents is especially high in the older age brackets, while in the United Kingdom it remains more or less the same in all age brackets (Figure 20).

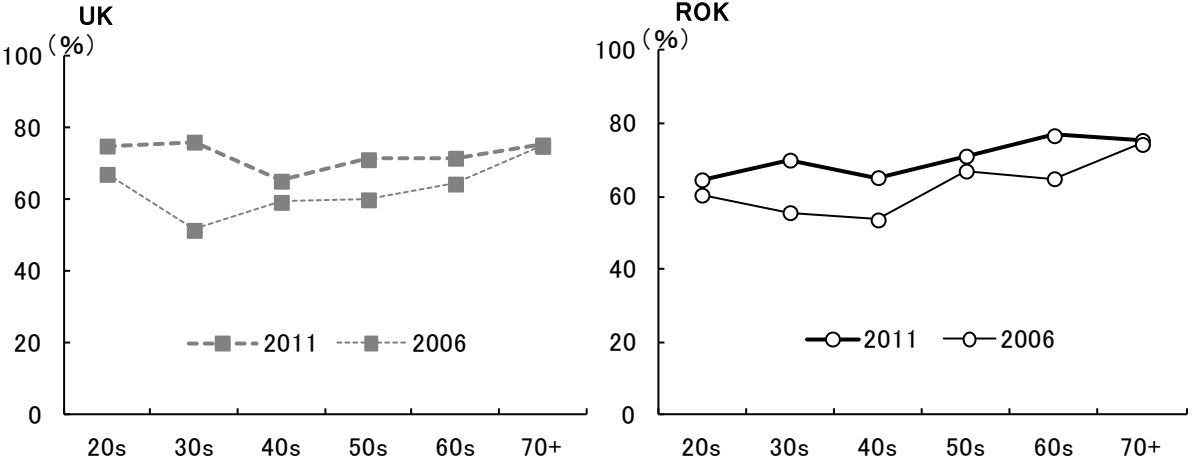
**Figure 20. Positive Responses on Importance of Paying License Fees, by Age**  
(Respondents who agree it is important)

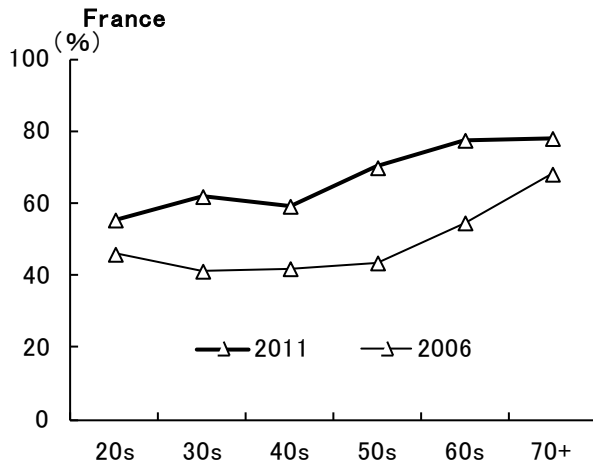


Furthermore, for the countries that saw an increase in the ratio of importance-affirming respondents since 2006—namely, the United Kingdom, the Republic of Korea, and France—we also compared the 2006 and 2011 breakdowns by age (Figure 21). This comparison reveals significant increases among respondents in their 30s and 50s in the United Kingdom, among those in their 30s, 40s, and 60s in the Republic of Korea, and among those in all age brackets in France.

The factors involved in these increases are unclear from the present survey’s results but present a compelling subject for future research.

**Figure 21. Positive Responses on Importance of Paying License Fees, by Age (2006-2011 Comparison)**





## V. ROLES OF PUBLIC BROADCASTING

On July 24, 2011, Japan joined the ranks of countries with fully digitized TV broadcasting systems (except in three prefectures in the Tohoku region). Is there a widespread perception that the roles expected of public broadcasting in the analog era have continued to be just as crucial in the digital era? Have new roles for public broadcasting begun to emerge in the digital era?

Figure 22 shows various roles that public broadcasting can be expected to fulfill. Items A through G are drawn from the 2006 survey as roles that researchers and public broadcasters themselves, primarily in Japan and Europe, have ascribed to public broadcasting since the analog era. Items H through J have been added for the purposes of the present survey as new roles public broadcasting should perhaps fulfill in the digital era. Let us briefly consider these three new roles.

**Figure 22. Public Broadcasting’s Roles**

A. Universality	To provide news and other programs to everyone, wherever he or she lives
B. Editorial independence	To be free from any editorial interference from government, political parties, or commercial businesses.
C. Citizenship	To keep the public well informed to make their own decisions on important issues
D. High-quality programs	To create and broadcast high-quality programs
E. Minority-oriented services	To broadcast programs reflecting different communities, interests and traditions, even if few people watch them
F. Localized content	To broadcast programs dealing with local events and issues as well as national ones
G. Comprehensive programming	To broadcast information, education, entertainment, and other programs in a balanced manner
H. Digital universality	To offer news and other programs not only on television but also on a variety of other media so that they can be viewed at any time as needed
I. Public forums	To provide the public with opportunities to state and exchange views through programs and services
J. Release of audiovisual archives	To store and widely release programs and other video footage

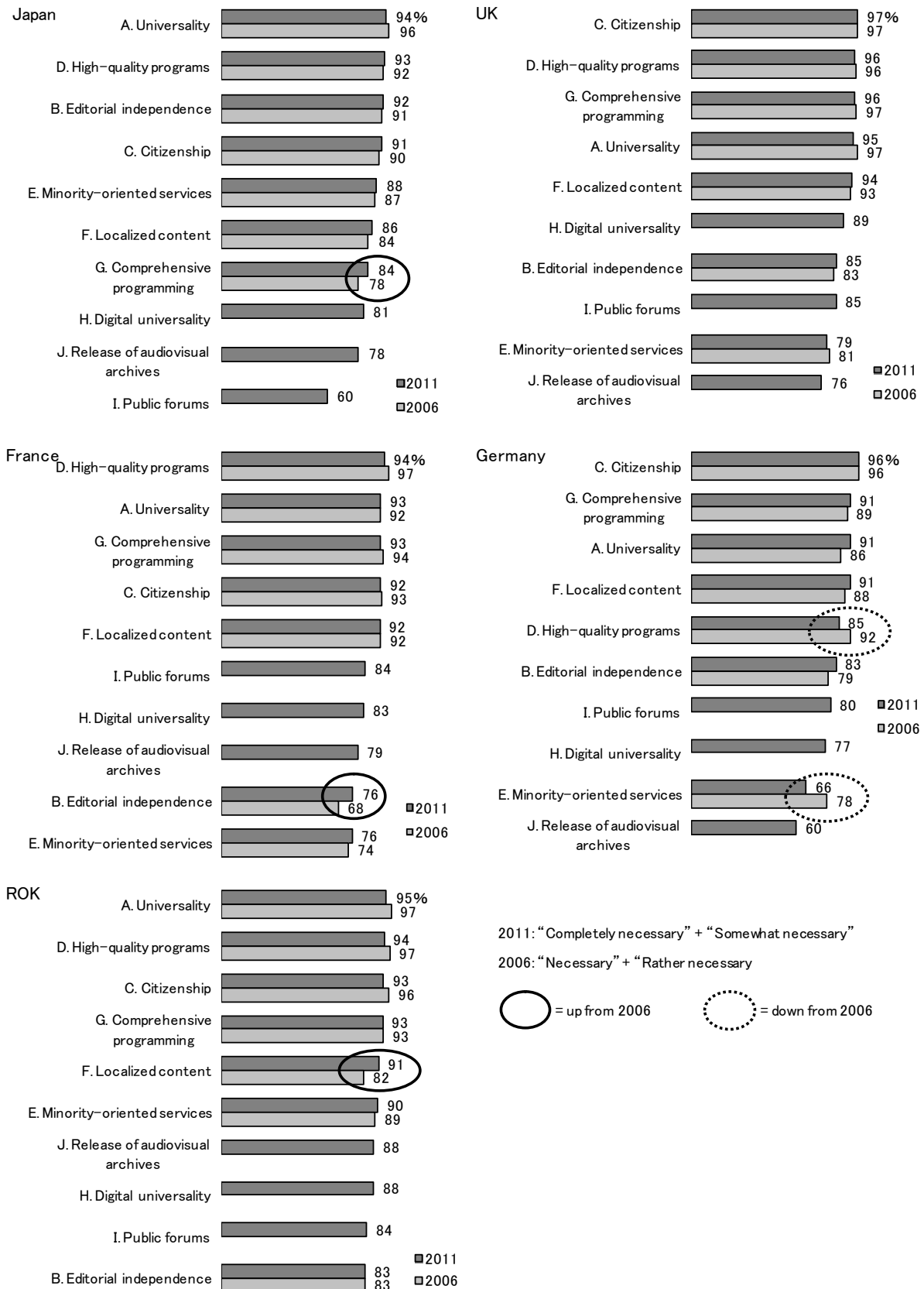
*Digital universality (H):* With the advent of diverse digital devices such as smartphones and tablet computers, the distinction between broadcasting and telecommunications has blurred, and viewers/users are now able to receive information and media content whenever they need it. We propose that public broadcasters are likewise being called on to provide new, “universal” services that ensure access to programs and other content whenever and wherever viewers wish to see them.

*Public forums (I):* The impact of the spread of online search capabilities and related information technology is expected to include the negative effects of narrowing people’s interests and concerns and spurring excessive compartmentalization of communications. We propose that a new role for public broadcasting should therefore be to actively provide various kinds of public forums to promote links and mutual understanding among different groups of people.

*Release of audiovisual archives (J):* Recognizing that TV programs, like films and books, are cultural assets, we propose that public broadcasters should strive to archive and preserve the programs they produce and make them available to the general public as public property.

**Figure 23. Perception of Necessity of Public Broadcasting's Roles**

(in decreasing order of shares of 2011 sample)



These three new roles can be said to have existed in the era of analog broadcasting as well, but we believe digitization has significantly increased the feasibility of fulfilling them.

### **All Roles Deemed Necessary in All Countries**

With a few exceptions, all ten roles (A–J) were deemed either “completely necessary” or “somewhat necessary” by a very large proportion of respondents in all of the surveyed countries (Figure 23).

The largest shares accounted for by these positive responses were for the roles “Universality,” “Citizenship,” and “High-quality programs.” With little variation in those shares among the surveyed countries, it is fair to say these are the roles most universally expected of public broadcasting. Meanwhile, the positive (necessity-affirming) scores for the roles “Editorial independence” and “Minority-oriented services” vary considerably from country to country. In Japan, “Editorial independence” is third-ranked among the roles deemed necessary, but in the other countries it ranks in the middle or near the bottom. And whereas “Minority-oriented services” ranks in the middle in Japan and the Republic of Korea, in the other countries it is at or near the bottom.

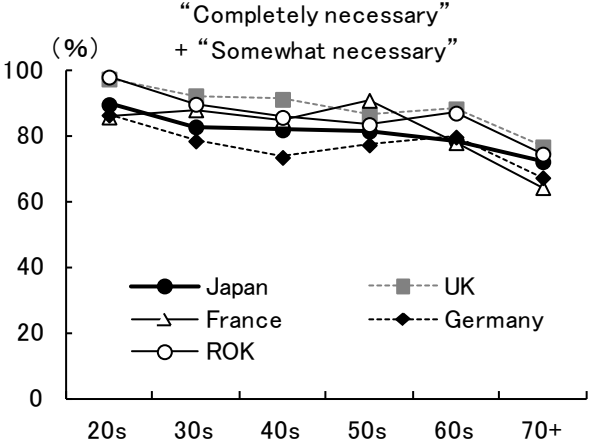
With a few exceptions, the 2011 scores for roles A through G show little change from those of 2006. We can surmise from these results that the roles expected of broadcasting have not altered significantly in the past five years, that expectations remain at a high level, and that analog-era roles continue to be widely deemed necessary.

### **Demand for “Digital Universality” Higher among the Young**

Now let’s look at the breakdown by age of the positive responses regarding the newly proposed roles H through J.

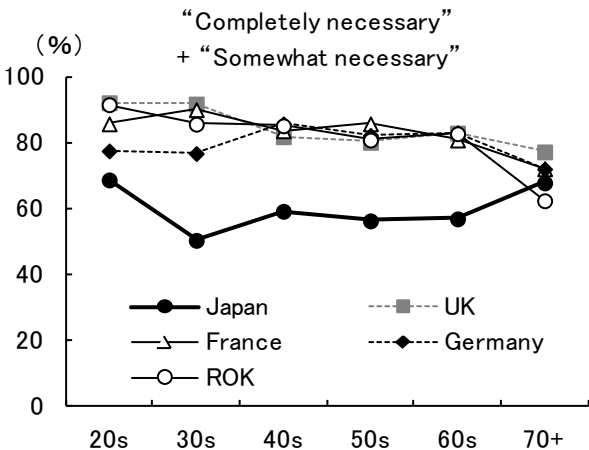
Role H is that of “Digital universality,” or offering news and other programs not only on TV but also on various other devices so that they can be viewed whenever needed. Regarding this role, the trend common to all of the surveyed countries is that the ratio of positive responses tends to rise the younger the age bracket (Figure 24).

**Figure 24. Positive Responses for “Digital Universality,” by Age**



We find a somewhat different story in the positive responses regarding the “Public forums” role, whereby public broadcasters are to provide opportunities for people to voice and exchange opinions through programs and services. Here the trend in Japan is distinguished from the others by low scores in all age brackets, despite comparatively high scores in the 20s and 70s-and-over age brackets (Figure 25).

**Figure 25. Positive Responses for “Public forums,” by Age**

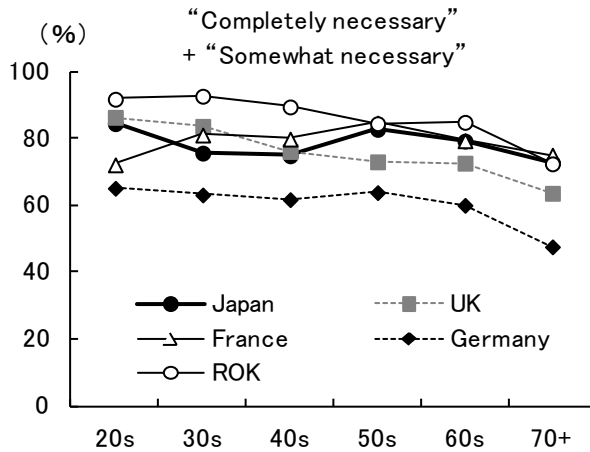


Role J, “Release of audiovisual archives,” is that of storing programs and other video footage and making them available to the public. On this question, the pattern of positive responses by age varies from country to country. In the Republic of Korea and the United Kingdom the ratio of respondents who deem this role necessary is higher among younger age brackets; in Japan and France it is more or less equally high in all age brackets; and in



Germany it is rather low across the board (Figure 26).

**Figure 26. Positive Responses for “Release of Audiovisual Archives,” by Age**



## VI. DISCUSSION AND CHALLENGES

It was noted at the beginning of this report that public broadcasting appears to be in a period of crisis in light of both the political climate and the broader media environment surrounding it. In terms of the relationship between the media environment and viewers, underlying that crisis is the fact that young people are turning away from public broadcasting as more and more other media become available, and that trend has been identified as a problem to overcome.

### Gap between Perception and Viewing of Public Broadcasting

The present survey found that in all of the surveyed countries both the frequency of watching public broadcasting and the preference for it over commercial broadcasting tend to increase with age. We can say, in other words, that the survey confirmed the younger generation’s drift away from public broadcasting at the level of actual viewing behavior.

But that is not the whole story. Recall that the tendency for older age groups to watch public broadcasting was seen to be especially strong in Germany and Japan. A further focus in our analysis of the present survey’s results to the specific case of Japan reveals a clear gap between people’s actual behavior in watching public broadcasting and their perception in

assessing its value. In Japan, whereas the frequency of watching public TV regularly (at least one day a week) was 77 percent overall (Figure 6), 84 percent of respondents said public broadcasting was necessary (Figure 16). This gap between behavior and perception is particularly wide among Japan's younger generation: whereas less than 60 percent of Japanese in their 20s watch public broadcasting at least one day a week (Figure 7), more than 80 percent in the same age bracket regard public broadcasting as necessary (Figure 17).

The results of the present international survey thus reveal prominent features in the Japanese case, namely, that the frequency of watching public broadcasting falls well short of the perception of its necessity, and that this gap grows bigger the younger the age bracket. In Japan's case, weathering the crisis in public broadcasting will require measures to close this gap.

### **Diversification of Services**

What measures are being taken in the surveyed countries in response to the younger generation's drift away from public broadcasting amid ongoing media diversification? As we have seen, one new offering that public broadcasters in all of the surveyed countries have introduced over the past five years is the online catch-up service.

There have also been institutional changes. In the European countries, around the same time that catch-up services were introduced, the scope of public broadcasting's mission was reassessed and extended beyond the conventional definition of broadcasting. In the United Kingdom, for example, the 2006 review of the BBC Charter occasioned new measures institutionally ensuring that the BBC pursue its public-service goals through output in the areas of information, education, and entertainment and make its programs and services available by all possible transmission routes by providing such output via not only the existing media of TV, radio, and online services but also any future technologies or means that may be introduced (Nakamura 2007).

In France, March 2007 amendments to the broadcasting law incorporated distribution of TV programs by online transmission into the definition of television service; and an agreement on objectives and means concluded between the national government and France

Televisions the same year stipulated the goal of stepping up development of services using the Internet and other means in order to boost the broadcaster's contact with the younger population, among other viewers (Nagai 2008). And in Germany, a December 2008 multistate accord on public broadcasting clarified the previously ambiguous scope of public broadcasting's online services as well as the goals and nature of its specialized digital channels, and deemed all such activities to be public-broadcasting services (Sugiuchi 2009).

There was, to be sure, another factor behind these redefinitions of the scope of public broadcasting's mandate in Europe, namely, that television services were brought under the competition laws of the Treaties of the European Union, which required that public broadcasting's roles and funding methods be clarified so as not to hinder competition (Nakamura 2007). Nonetheless, the moves also represent public broadcasting's efforts to keep pace with its changing viewership by diversifying its services through use of multiple media. Although the effectiveness of this diversification of transmission routes and services is impossible to determine from the present survey, we can surmise that such diversification is gradually becoming a necessary condition for fulfilling the roles of public broadcasting in today's multimedia environment.

### **Providing Entertainment**

In remedying declines or demographic biases in viewership, diversification of transmission routes and services may be a necessary condition, but it is not a sufficient one. Naturally, achieving such goals requires having the kind of content that attracts viewers. Although the present survey reveals little about content, one question that could be raised in that regard is that of the function served by providing entertainment programs, a matter that was touched on in the analysis of the 2006 survey as well (Nakamura and Yonekura 2007).

As in 2006, the present survey shows that in the United Kingdom and the Republic of Korea, each of which had a fairly balanced pattern of viewership across all age groups, "entertainment" was second only to "news and current affairs" in the rankings of most-watched public-TV genres. It may be significant to compare that result with the finding that in Japan, where viewing of public TV tilts toward older age groups, only "news and

current affairs” stands out as a frequently watched genre. The goal of entertaining people has been an explicit part of the BBC’s mission since its inception, and both the government and the people of the United Kingdom regard entertainment as one of the key services that public broadcasting provides. The situation is somewhat different in the Republic of Korea, where we must take into account the fact that KBS-2, regarded as a family-oriented culture-and-entertainment channel, originated in a buyout of a commercial broadcaster and, since it carries commercial advertising, operates in a climate of competition with commercial broadcasters. Nonetheless, in terms of connecting with audiences, it is fair to say that the entertainment genre underpins public broadcaster KBS<sup>11</sup>. Although the British and Korean cases cannot be treated on the same footing in terms of how entertainment is provided or what its effects are, in both cases entertainment remains a key factor in attracting viewers.

All six countries covered in the present survey will have completed their respective transitions to full digital terrestrial broadcasting by the end of 2012. Will public broadcasting come to adopt very different roles in the emerging digital era?

It is unlikely that either the roles public broadcasting ought to play or the roles society expects of it will drastically change. The more crucial question is how it can fulfill those roles amid rapidly evolving technological and social conditions, astutely applying the transmission capabilities of new technological tools to bring appealing and high-quality content to all sectors of the population. In the early days of television in Japan, media scholar Yamamoto Akira wrote: “In the dynamic relationship between broadcasting and society, the process by which broadcasting strives to fulfill its social responsibilities can be said to constitute the public-service character of broadcasting. Publicness is not a fixed idea; it is nothing other than a process” (Yamamoto 1966). In the same vein, we may say that the system by which public broadcasting carries out its roles is variable and dynamic, arising out of constant effort.

In closing, let us posit a task for future research. The present survey elucidated the gap that has arisen in Japan between people’s perception of public broadcasting and how much they actually watch it. If this gap indicates that programs on public TV have some kind of

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<sup>11</sup> KBS-2 accounts for 15.5 percentage points of the 27.5 percent KBS share of viewership shown in Figure 2.

positive effect on people beyond simply determining how much they watch them, and serve as a major factor behind people's support of public broadcasting, then elucidating the nature of that effect may be crucial in enabling public broadcasting to fulfill its roles. To that end, there is a need for ethnographic research on the younger generation of viewers, who accept the need for public broadcasting and yet largely refrain from watching it.

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## Six-country Comparative Survey on Perceptions of Public Broadcasting (2011)

### SIMPLE TABULATION OF RESULTS

Note: Except in the Composition of Sample (p. 50) and where otherwise indicated, all figures are percentages. For each question, the “Don’t know/No response/None of these” options were not read out during the interview.

#### *Time Spent Watching TV*

Question 1. How many hours a day do you usually watch television on Monday to Friday?

	Japan	UK	France	Germany	ROK	USA
1. About 1 hour	14.6	10.4	16.1	19.6	24.2	16.3
2. About 2 hours	24.0	24.9	30.0	33.2	24.4	23.0
3. About 3 hours	26.4	20.7	23.7	21.0	19.1	16.1
4. About 4 hours	10.4	15.2	11.1	10.6	9.3	11.3
5. About 5 hours	10.7	8.1	6.7	4.7	8.2	7.2
6. About 6 hours	4.4	5.0	2.9	2.3	3.1	4.2
7. About 7 hours	1.7	1.5	0.7	0.7	1.2	1.2
8. About 8 hours	1.8	1.7	1.4	0.6	1.3	2.8
9. More than 9 hours	3.1	7.7	3.4	2.2	4.7	7.9
10. Rarely watch TV/Do not watch TV	2.9	4.1	3.4	4.0	4.3	7.8
11. Don't know/No response	0.0	0.8	0.5	1.3	0.2	2.1

#### *Frequency of Watching Public Broadcasting*

Question 2. How often do you watch NHK programs? Would you say that you watch NHK programs:

Note: In the corresponding question in each of the questionnaires for the other countries, “NHK” was replaced with the name of the relevant public broadcaster. The same applies to all references to the NHK hereunder.

	Japan	UK	France	Germany	ROK	USA
1. almost every day	53.5	51.6	54.9	39.7	62.8	38.1
2. about 3 or 4 days a week	9.0	17.7	13.2	13.8	14.6	13.6
3. about 1 or 2 days a week	14.3	21.5	16.3	19.7	14.2	17.2
4. about once or twice a month	3.4	2.4	1.9	6.0	1.6	7.7
5. rarely	17.3	4.4	9.6	14.7	4.2	12.6
6. Do not watch the NHK	2.5	1.5	3.3	4.8	1.3	9.3
7. Don't know/No response	0.0	0.8	0.8	1.3	1.2	1.4

*Preference for Public or Commercial TV*

Question 3. Which do you watch more often, NHK channels or commercial television? Would you say:

	Japan	UK	France	Germany	ROK	USA
1. I watch NHK television more often.	13.4	22.6	27.5	33.9	14.1	8.5
2. I watch NHK television slightly more often.	6.9	6.4	13.7	11.8	16.9	4.1
3. I watch NHK and commercial television equally.	14.5	31.5	25.5	15.1	37.6	11.2
4. I watch commercial television slightly more often.	20.9	11.2	12.2	14.4	20.0	10.4
5. I watch commercial television more often.	43.5	26.1	18.4	20.4	8.0	59.8
6. Don't know/No response	0.8	2.1	2.8	4.4	3.4	6.0

*Frequency of Internet Use*

Question 4. How often do you use the Internet other than for work or studies or sending and checking e-mail?

Would you say you use the Internet:

	Japan	UK	France	Germany	ROK	USA
1. almost every day	31.0	50.2	53.7	37.3	39.8	48.4
2. about 3 or 4 days a week	8.6	11.2	9.3	12.9	12.7	9.6
3. about 1 or 2 days a week	11.3	10.4	11.6	11.9	11.3	10.0
4. about once or twice a month	3.5	3.8	2.4	2.1	2.5	3.4
5. rarely	18.9	5.0	4.9	6.4	13.7	16.6
6. Do not use the Internet	26.7	19.2	17.5	28.8	20.0	11.0
7. Don't know/No response	0.0	0.2	0.6	0.6	0.0	1.0

*Purposes of Internet Use*

(To respondents who chose responses 1, 2, 3, or 4 at Question 4)

Questions 5–7. Do you usually use the Internet to do any of the following? Please answer yes or no for each of the following.

*Purposes of Internet Use A: News/information*

Question 5. Viewing, searching, and gathering news and other information

	Japan	UK	France	Germany	ROK	USA
1. Yes	76.3	87.5	83.4	84.8	82.8	87.8
2. No	23.7	12.5	16.6	15.0	17.1	12.2
3. Don't know/No response	0.0	0.0	0.0	0.2	0.1	0.0
N=	544	696	744	609	679	664



*Purposes of Internet Use B: Music, video, e-books*

Question 6. Enjoying music, video, and e-books

	Japan	UK	France	Germany	ROK	USA
1. Yes	45.0	46.3	46.4	38.6	58.6	48.6
2. No	55.0	53.7	53.6	61.1	41.4	51.4
3. Don't know/No response	0.0	0.0	0.0	0.2	0.0	0.0
N=	544	696	744	609	679	664

*Purposes of Internet Use C: BBS, SNS*

Question 7. Posting and reading entries on bulletin boards and social networking sites

	Japan	UK	France	Germany	ROK	USA
1. Yes	31.6	49.7	37.9	33.7	48.3	37.4
2. No	68.4	50.3	62.0	65.5	51.7	62.1
3. Don't know/No response	0.0	0.0	0.1	0.8	0.0	0.5
N=	544	696	744	609	679	664

*Use of Public Broadcasters' Online Catch-up Services*

(To respondents who chose responses 1, 2, 3, or 4 at Question 4)

Question 8. Do you use the NHK On Demand, which allows NHK programs to be viewed at any time via the Internet? Would you say you use the service:

Note: In the corresponding question in each of the questionnaires for the other countries, "NHK On Demand" was replaced with the name of the relevant public broadcaster's catch-up service (BBC iPlayer, France TVOD, and so on). In Germany, respondents were asked about the ARD and ZDF catch-up services separately.

	Japan	UK	France	Germany		ROK	USA
				ARD	ZDF		
1. Often	0.7	13.2	2.1	1.8	2.7	3.2	0.6
2. Sometimes	1.8	27.3	8.0	9.9	9.6	19.7	3.3
3. Rarely	2.4	25.9	9.8	17.0	15.6	13.0	8.4
4. Never	54.0	32.9	53.2	23.3	24.1	57.5	39.1
5. Do not know the service	40.8	0.7	26.8	47.9	47.6	6.6	48.6
6. Don't know/No response	0.2	0.0	0.1	0.2	0.4	0.0	0.0
N=	544	696	744	609	609	679	664

*Media Used for Staying Informed*

Question 9. Which of the following media do you use most often to keep up with current affairs? Would you say that you rely mostly on:

	Japan	UK	France	Germany	ROK	USA
1. Television	54.6	46.1	45.5	32.8	51.7	42.8
2. Radio	2.9	16.3	21.6	20.6	2.7	11.4
3. Internet	13.4	14.1	13.6	14.0	33.1	22.9
4. Newspapers	26.4	17.9	13.9	28.6	10.0	16.2
5. Magazines	0.7	0.7	2.2	1.4	0.1	1.8
6. Books	0.5	0.6	0.5	0.4	0.5	0.2
7. Word of mouth	1.4	3.0	2.2	1.2	1.1	4.1
8. Don't know/No response	0.1	1.3	0.5	1.0	0.7	0.5

*Satisfaction with Public Broadcasters' Programs and Services*

Question 10. In general, how satisfied are you with the NHK's current programs and services? Would you say that you are:

	Japan	UK	France	Germany	ROK	USA
1. Completely satisfied	12.6	22.4	9.2	8.7	11.3	33.0
2. Somewhat satisfied	52.9	56.3	52.8	56.4	64.3	38.4
3. Somewhat dissatisfied	19.4	14.2	23.4	19.6	10.6	5.4
4. Completely dissatisfied	7.0	4.3	10.3	4.0	3.5	3.2
5. Don't know/No response	8.1	2.8	4.3	11.3	10.3	20.0

*Program Genres Frequently Watched on Public TV*

Questions 11–14. Which of the following types of NHK programs do you usually watch? Please answer yes or no for each of the following types of programs.

*Program Genres Frequently Watched on Public TV A: Cultural*

Question 11. Cultural programs

	Japan	UK	France	Germany	ROK	USA
1. Yes	35.9	68.4	65.6	55.9	48.3	44.9
2. No	63.0	31.1	33.7	42.4	49.9	53.2
3. Don't know/No response	1.1	0.5	0.7	1.7	1.7	1.9

*Program Genres Frequently Watched on Public TV B: Educational*

Question 12. Educational and children's programs

	Japan	UK	France	Germany	ROK	USA
1. Yes	24.7	36.6	26.5	65.4	20.8	49.2
2. No	74.1	63.2	73.0	33.0	77.1	48.8
3. Don't know/No response	1.2	0.2	0.5	1.6	2.0	2.0

*Program Genres Frequently Watched on Public TV C: News/current affairs*

Question 13. News and current affairs programs

	Japan	UK	France	Germany	ROK	USA
1. Yes	68.1	82.4	83.7	84.9	78.8	43.9
2. No	31.2	17.4	15.7	14.3	19.8	53.8
3. Don't know/No response	0.7	0.2	0.6	0.8	1.3	2.4

*Program Genres Frequently Watched on Public TV D: Entertainment*

Question 14. Entertainment programs

	Japan	UK	France	Germany	ROK	USA
1. Yes	31.6	77.0	55.1	49.0	53.6	55.4
2. No	67.6	22.5	44.2	49.6	44.9	43.0
3. Don't know/No response	0.8	0.5	0.7	1.3	1.6	1.5

*Demand for Public-broadcasting Programs, by Genre*

Questions 15–18. What kind of programs do you think the NHK should provide as a public broadcaster? Please answer yes or no for each of the following types of programs.

*Demand for Public-broadcasting Programs, by Genre A: Cultural*

Question 15. Cultural programs

	Japan	UK	France	Germany	ROK	USA
1. Yes	86.7	91.9	94.5	84.7	88.2	82.8
2. No	8.8	6.7	4.5	11.9	5.5	13.5
3. Don't know/No response	4.5	1.4	1.0	3.4	6.3	3.7

*Demand for Public-broadcasting Programs, by Genre B: Educational*

Question 16. Educational and children's programs

	Japan	UK	France	Germany	ROK	USA
1. Yes	85.3	92.6	90.7	87.3	82.9	89.8
2. No	10.5	6.8	8.0	10.2	11.1	7.8
3. Don't know/No response	4.2	0.6	1.3	2.5	6.0	2.4

*Demand for Public-broadcasting Programs, by Genre C: News/current affairs*

Question 17. News and current affairs programs

	Japan	UK	France	Germany	ROK	USA
1. Yes	93.4	94.8	97.4	95.4	95.3	77.8
2. No	5.0	4.7	2.0	2.4	2.4	19.3
3. Don't know/No response	1.6	0.5	0.7	2.2	2.3	3.0

*Demand for Public-broadcasting Programs, by Genre D: Entertainment*

Question 18. Entertainment programs

	Japan	UK	France	Germany	ROK	USA
1. Yes	61.9	91.8	88.7	77.6	71.9	77.6
2. No	33.8	7.5	10.2	18.4	22.9	18.2
3. Don't know/No response	4.3	0.7	1.1	4.0	5.2	4.2

*Necessity of Public Broadcasting's Roles*

Questions 19–28. I am going to read a short list of roles that public broadcasting should play. For each role, please tell me whether you think it is completely necessary, somewhat necessary, somewhat unnecessary, or completely unnecessary.

*Necessity of Public Broadcasting's Roles A: Universality*

Question 19. To provide news and other programs to everyone, wherever he or she lives

	Japan	UK	France	Germany	ROK	USA
1. Completely necessary	71.8	72.6	56.2	61.6	66.1	53.1
2. Somewhat necessary	22.2	21.9	36.3	29.8	28.8	32.7
3. Somewhat unnecessary	4.6	2.7	3.0	3.7	2.9	5.5
4. Completely unnecessary	0.8	1.8	2.3	0.8	0.4	6.6
5. Don't know/No response	0.6	1.0	2.1	4.2	1.8	2.1

*Necessity of Public Broadcasting's Roles B: Editorial independence*

Question 20. To be free from any editorial interference from government, political parties, or commercial businesses

	Japan	UK	France	Germany	ROK	USA
1. Completely necessary	73.0	61.5	56.9	64.1	57.5	57.9
2. Somewhat necessary	19.0	23.3	19.4	18.9	25.2	22.5
3. Somewhat unnecessary	5.1	6.7	10.7	8.2	7.3	7.8
4. Completely unnecessary	1.6	6.3	10.7	5.5	2.9	8.9
5. Don't know/No response	1.3	2.2	2.2	3.3	7.1	2.9

*Necessity of Public Broadcasting's Roles C: Citizenship*

Question 21. To keep the public well informed to make their own decisions on important issues

	Japan	UK	France	Germany	ROK	USA
1. Completely necessary	62.8	80.2	53.9	77.1	68.1	67.2
2. Somewhat necessary	28.4	16.8	38.5	18.7	25.2	23.2
3. Somewhat unnecessary	5.8	1.4	3.1	2.1	2.7	2.9
4. Completely unnecessary	1.7	1.0	2.7	0.4	0.4	5.0
5. Don't know/No response	1.3	0.6	1.8	1.7	3.6	1.7

*Necessity of Public Broadcasting's Roles D: High-quality programs*

Question 22. To create and broadcast high-quality programs

	Japan	UK	France	Germany	ROK	USA
1. Completely necessary	69.3	76.2	61.0	46.2	75.2	59.8
2. Somewhat necessary	23.5	19.5	33.4	38.5	18.3	28.1
3. Somewhat unnecessary	4.7	1.6	2.0	8.6	1.9	3.5
4. Completely unnecessary	1.2	1.6	2.0	2.7	0.4	6.1
5. Don't know/No response	1.3	1.1	1.7	4.1	4.2	2.5

*Necessity of Public Broadcasting's Roles E: Minority-oriented services*

Question 23. To broadcast programs reflecting different communities, interests and traditions, even if few people watch them

	Japan	UK	France	Germany	ROK	USA
1. Completely necessary	56.1	30.4	29.9	24.2	60.1	30.6
2. Somewhat necessary	32.1	48.7	45.7	41.8	29.8	42.7
3. Somewhat unnecessary	8.3	12.8	14.1	24.0	4.7	13.1
4. Completely unnecessary	2.2	7.4	8.4	6.3	0.6	11.0
5. Don't know/No response	1.3	0.7	1.8	3.7	4.7	2.7

*Necessity of Public Broadcasting's Roles F: Localized content*

Question 24. To broadcast programs dealing with local events and issues as well as national ones

	Japan	UK	France	Germany	ROK	USA
1. Completely necessary	50.3	56.3	50.2	52.2	48.7	52.7
2. Somewhat necessary	35.2	37.9	41.7	38.8	41.8	33.9
3. Somewhat unnecessary	12.4	3.9	4.5	4.6	5.6	5.8
4. Completely unnecessary	1.5	1.5	2.0	1.6	0.8	5.6
5. Don't know/No response	0.6	0.5	1.6	2.8	3.1	1.9

*Necessity of Public Broadcasting's Roles G: Comprehensive programming*

Question 25. To broadcast information, education, entertainment, and other programs in a balanced manner

	Japan	UK	France	Germany	ROK	USA
1. Completely necessary	44.9	69.8	48.3	52.9	60.7	61.1
2. Somewhat necessary	38.6	25.9	44.1	38.5	31.9	28.2
3. Somewhat unnecessary	13.7	1.5	3.9	5.2	4.2	4.0
4. Completely unnecessary	2.2	1.9	1.6	1.5	0.3	4.4
5. Don't know/No response	0.6	0.8	2.0	1.9	2.9	2.3

*Necessity of Public Broadcasting's Roles H: Digital universality*

Question 26. To offer news and other programs not only on television but also on a variety of other media so that they can be viewed at any time as needed

	Japan	UK	France	Germany	ROK	USA
1. Completely necessary	45.9	49.3	41.2	39.9	52.4	42.9
2. Somewhat necessary	34.7	39.6	41.3	36.8	35.2	39.6
3. Somewhat unnecessary	15.2	6.3	8.6	15.3	7.4	7.8
4. Completely unnecessary	2.3	3.4	5.7	5.0	0.8	7.2
5. Don't know/No response	1.9	1.4	3.2	3.0	4.2	2.5

*Necessity of Public Broadcasting's Roles I: Public forums*

Question 27. To provide the public with opportunities to state and exchange views through programs and services

	Japan	UK	France	Germany	ROK	USA
1. Completely necessary	20.7	36.7	39.5	36.3	38.0	37.6
2. Somewhat necessary	39.2	47.8	44.1	43.7	45.6	39.3
3. Somewhat unnecessary	29.1	10.5	9.2	14.5	8.3	11.4
4. Completely unnecessary	8.7	4.1	5.4	2.3	1.9	8.1
5. Don't know/No response	2.3	0.9	1.8	3.2	6.2	3.5

*Necessity of Public Broadcasting's Roles J: Release of audiovisual archives*

Question 28. To store and widely release programs and other video footage

	Japan	UK	France	Germany	ROK	USA
1. Completely necessary	38.3	26.7	34.8	23.0	44.2	24.4
2. Somewhat necessary	39.6	49.5	44.1	37.2	43.5	45.4
3. Somewhat unnecessary	16.1	14.5	12.5	26.2	4.7	14.6
4. Completely unnecessary	3.1	5.8	5.7	7.7	0.5	9.9
5. Don't know/No response	2.9	3.5	2.9	5.9	7.2	5.7

*Necessity of Public Broadcasting*

Question 29. Generally speaking, how necessary do you think the NHK is? Would you say:

	Japan	UK	France	Germany	ROK	USA
1. Completely necessary	45.4	61.2	44.4	45.3	52.4	52.2
2. Somewhat necessary	38.7	31.6	48.6	41.0	39.4	35.2
3. Somewhat unnecessary	11.3	3.8	3.9	7.3	4.7	5.6
4. Completely unnecessary	3.6	2.7	3.1	2.6	1.2	4.9
5. Don't know/No response	1.0	0.8	0.1	3.7	2.5	2.1

*Importance of Paying License Fees/Making Donations*

Question 30. Do you agree or disagree with the statement, "It is important to pay a TV license fee in order to maintain public broadcasting"? Please choose from among the following four answers.

	Japan	UK	France	Germany	ROK	USA
1. Agree	32.5	38.4	32.8	40.4	25.8	33.9
2. Agree to some degree	33.0	34.1	33.8	30.3	43.7	32.7
3. Disagree to some degree	22.7	11.6	15.0	13.2	18.2	10.8
4. Disagree	10.7	15.1	17.2	14.8	7.1	20.6
5. Don't know/No response	1.1	0.9	1.2	1.3	5.2	1.9

*Social Class*

Question 31. Which social class would you say you belong to? Would you say:

	Japan	UK	France	Germany	ROK	USA
1. High class	1.9	0.3	2.1	1.2	1.2	1.4
2. Upper middle class	13.5	4.7	13.9	16.6	14.2	12.7
3. Middle class	52.0	56.7	61.4	64.2	49.9	54.1
4. Lower middle class	21.7	24.2	16.8	9.5	18.3	20.6
5. Lower class	9.4	8.3	5.0	2.7	13.6	8.0
6. Don't know/No response	1.5	5.8	0.8	5.8	2.7	3.3

*Sense of Political Influence*

Question 32. Do you agree or disagree with the statement, “An ordinary citizen like me does not have the power to influence politicians”? Please choose from among the following four answers.

	Japan	UK	France	Germany	ROK	USA
1. Agree	28.2	28.8	43.9	38.4	30.8	22.5
2. Agree to some degree	30.9	24.6	24.8	22.7	32.4	18.7
3. Disagree to some degree	24.4	16.9	14.9	17.7	20.2	16.8
4. Disagree	13.9	28.6	14.4	19.2	8.7	40.7
5. Don't know/No response	2.6	1.1	1.9	1.9	7.9	1.3

*The Public Good over the Individual's Rights*

Question 33. Do you agree or disagree with the statement, “Individual rights have to be restricted to a certain extent for the benefit of the public”? Please choose from among the following four answers.

	Japan	UK	France	Germany	ROK	USA
1. Agree	17.9	28.9	32.7	16.4	23.4	20.2
2. Agree to some degree	33.3	37.9	37.3	20.6	43.8	27.2
3. Disagree to some degree	27.8	13.4	12.1	18.9	16.9	14.7
4. Disagree	14.9	18.4	12.2	37.1	8.2	35.3
5. Don't know/No response	6.1	1.5	5.7	7.0	7.6	2.5

*Level of Education*

Question 34. What is your highest level of education? Please choose from among the following four answers.

	Japan	UK	France	Germany	ROK	USA
1. GCSE or equivalent	11.0	25.0	11.0	54.3	15.8	7.8
2. A-level or equivalent	43.3	14.0	28.4	21.0	29.8	47.0
3. College certificate /diploma (sub-degree)	19.2	20.6	24.1	0.0	8.9	11.9
4. Degree (undergraduate or postgraduate)	25.9	28.1	36.0	20.6	42.4	29.1
5. Don't know/No response	0.6	12.3	0.5	4.0	3.0	4.2



### Survey Profile

	Japan	UK	France	Germany	ROK	USA
Period	Wednesday, February 23 to Tuesday, March 1, 2011	Friday, February 25 to Sunday, February 27, 2011	Wednesday, February 23 to Thursday, February 24, 2011	Monday, February 21 to Sunday, February 27, 2011	Monday, February 21 to Sunday, February 27, 2011	Wednesday, February 23 to Tuesday, March 1, 2011
Population and sample	National population aged 20 and over, 1,000 people	National population aged 20 and over (excluding Northern Ireland), 962 people	National population aged 20 and over, 968 people	National population aged 20 and over, 967 people	National population aged 20 and over, 1,024 people	National population aged 20 and over, 969 people
Method	Telephone interview	Telephone interview	Telephone interview	Telephone interview	Telephone interview	Telephone interview
Household sampling	RDD	RDD	Random sampling from phone number database	RDD	Random sampling from phone number database	RDD
Individual sampling	Quota method	Quota method	Quota method	Last-birthday method	Quota method	Last-birthday method

### Composition of Sample

Upper cell: No. people

Lower cell: %

		Japan	UK	France	Germany	ROK	USA	
Overall		1,000	962	968	976	1,024	969	
		100.0	100.0	100.0	100.0	100.0	100.0	
Gender	Male	482	445	455	418	512	473	
		48.2	46.3	47.0	42.8	50.0	48.8	
	Female	518	517	513	558	512	496	
		51.8	53.7	53.0	57.2	50.0	51.2	
Age	20s	135	89	147	57	193	85	
		13.5	9.3	15.2	5.8	18.8	8.8	
	30s	180	126	193	89	206	103	
		18.0	13.1	19.9	9.1	20.1	10.6	
	40s	155	190	176	222	245	137	
		15.5	19.8	18.2	22.7	23.9	14.1	
	50s	168	171	157	204	206	204	
		16.8	17.8	16.2	20.9	20.1	21.1	
	60s	168	169	148	182	101	191	
		16.8	17.6	15.3	18.6	9.9	19.7	
	70+	194	189	147	222	73	220	
		19.4	19.6	15.2	22.7	7.1	22.7	
	Age not given	—	28	—	—	—	29	
		—	2.9	—	—	—	3.0	
	Males	20s	69	46	64	30	102	41
			6.9	4.8	6.6	3.1	10.0	4.2
30s		91	61	77	37	95	54	
		9.1	6.3	8.0	3.8	9.3	5.6	
40s		78	82	76	93	125	73	
		7.8	8.5	7.9	9.5	12.2	7.5	
50s		84	88	73	91	106	96	
		8.4	9.1	7.5	9.3	10.4	9.9	
60s		81	74	86	75	44	106	
		8.1	7.7	8.9	7.7	4.3	10.9	
70+		79	90	79	92	40	95	
		7.9	9.4	8.2	9.4	3.9	9.8	
Age not given		—	4	—	—	—	8	
		—	0.4	—	—	—	0.8	
Females		20s	66	43	83	27	91	44
			6.6	4.5	8.6	2.8	8.9	4.5
	30s	89	65	116	52	111	49	
		8.9	6.8	12.0	5.3	10.8	5.1	
	40s	77	108	100	129	120	64	
		7.7	11.2	10.3	13.2	11.7	6.6	
	50s	84	83	84	113	100	108	
		8.4	8.6	8.7	11.6	9.8	11.1	
	60s	87	95	62	107	57	85	
		8.7	9.9	6.4	11.0	5.6	8.8	
	70+	115	99	68	130	33	125	
		11.5	10.3	7.0	13.3	3.2	12.9	
	Age not given	—	24	—	—	—	21	
		—	2.5	—	—	—	2.2	