

KCC announces results of Broadcasting Media User Behaviors Survey 2010

- TV recognized as the most important medium indispensable in everyday life
 - Differences in hours of use and watching methods between generations and classes expanded
- Media consumption gap forecasted to widen further due to distribution of personal digital media

On the 25th, Korea Communications Commission (KCC) announced the results of the Broadcasting Media User Behaviors Survey 2010 to illustrate the states of broadcasting media use.

Broadcasting Media User Behaviors Survey is conducted annually in order to secure basic statistics on viewers' recognition and changes in user behavior patterns for diverse broadcasting media including terrestrial broadcasting and paid TV services. In 2010, the survey was carried out by Korea Information Society Development Institute (KISDI) from May 3 to June 25 as an interview survey on 6,409 males and females aged 13 or higher residing in 3,438 households nationwide.

The survey questions consist of ▲ media holding and usage ratios, ▲ terrestrial TV and radio user behaviors, ▲ paid TV (cable TV, satellite TV, IPTV) user behaviors, ▲ analysis of media use per time slot (media diary), ▲ overseas broadcasting program user behaviors, ▲ DMB user behaviors, ▲ smart phone user behaviors, ▲ Internet broadcasting user behaviors and ▲ children's broadcasting media user behaviors.

The results of survey indicated that 6 out of 10 Korean people recognized TV as the most important medium indispensable in everyday life. In addition, 34.0%, 3.0% and 2.0% of the members of households chose the Internet, newspaper and radio as an essential medium respectively. A larger number of women selected TV as an essential medium than men. In addition, the

percentage of recognizing TV as an essential medium was higher among people of higher age and lower income as well as people who were production workers and housewives. On the other hand, a contrasting result was indicated with the Internet, Men, people of lower age, people of higher income and people who were students and office workers selected the Internet as an essential medium.

In terms of medium holding ratio, TV (98%) was found to be the most universally distributed medium in households together with desktop computer (73.3%). With the distribution of mobile phones (91.9%) and DMB phones (43.7%), media usage displayed the characteristics of being 'personalized' and 'mobile'. In areas of higher income and urban regions, the count of digital medium (PMP and DVD, etc.) holding was higher indicating a 'digital divide' between social classes.

There was a difference in terms of the hours of media use between regions (urban and rural regions). In case of TV, the hours of use were lower in urban regions in comparison to radio and newspaper. While the hours of use during weekdays were higher among people of lower income and higher age, the gap displayed a tendency to decrease during weekends. In particular, the hours of using most of the media including TV were the longest among people in their 60s or higher.

As for the method of watching TV, 82.4% of respondents used the method of real-time viewing. As such, real-time viewing still represents the absolutely highest percentage. However, it was found that 17.6% of respondents watched programs in the methods of real-time viewing or file download using DMB, Internet and PMP rather than a TV set.

27%, 18.1% and 21.8% of respondents said that the hours of using terrestrial broadcasting, radio and pay TV decreased respectively due to the use of new media including the Internet, DMB and IPTV. This result

indicated the effect of the Internet, DMB and IPTV replacing the conventional broadcasting media. Among users in urban regions with high income levels, those in their 20s or less and those who are students and office workers, changes in the hours of use due to the advent of new media were relatively larger.

Paid TV users expressed high intention to keep the current service (cable TV by 97.4%, satellite TV by 96.8%). In terms of the intention for conversion in the future, the highest percentage of respondents said they had the intention to change to IPTV (1.2% of cable TV subscribers and 1.7% of satellite TV subscribers) indicating a high level of interest in new services.

As for preferences of TV programs, male respondents preferred news and sports programs and female respondents preferred soap operas and news. This indicated no difference from the results of surveys conducted over the last 3 years. In particular, pay TV subscribers were found to prefer terrestrial broadcasting programs, indicating a high dependence on terrestrial broadcasting contents.

3.8% of respondents were smart phone users. The smart phone possession rates were higher among men, those in their 20s ~ 30s, office workers and people who have college level or higher education. The most frequently used application programs were music playback (24.8%) and game (23.8%) followed by news/ broadcast viewing (19.6%), video playback (13.9%). When smart phone distribution is popularized in the future, it is forecasted to significantly affect the existing patterns of media use.

For personal portable digital media including smart phone, the speed of distribution is expected to vary according to age groups, occupations and household formations. Accordingly, individual patterns of media use will be diversely segmented and the divide is forecasted to widen even further.

This survey was carried out on all members of households aged 13 or higher. Questionnaire surveys were separately conducted on households and individuals. It was intended to enhance accuracy of the survey and representativeness of samples by applying enumeration district selection methods based on the results of the Statistics Korea Census.

'Broadcasting Media User Behaviors Survey' is a nationally authorized statistics survey conducted annually since 2000. The results are available at the KCC website (www.kcc.go.kr). KCC anticipates that the survey results will contribute not only to the viewer-centered policy establishment, establishment of management strategies by private enterprises and research activities of academic and research sectors, but also to satisfying viewers' information needs.