

# TRANSNATIONAL SATELLITES IN ASIA & THE GLOBALISATION OF TELEVISION

Volume Two

AMOS OWEN THOMAS

BA, MBA (National University of Singapore)

DipCS, MTS (Regent College, Vancouver)



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## Chapter Seven

### CHINESE TELEVISION MARKET

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This case-study of the Chinese television market incorporates Hong Kong, Taiwan (also known as Republic of China, ROC, or sometimes as nationalist China), and the Peoples' Republic of China (PRC, also known as mainland China, communist China, or more often simply as China) for a number of pragmatic reasons. The research concentrated on Hong Kong as the broadcast source of StarTV since it is the location of its headquarters and uplinking facilities for the whole of Asia. While there is a minuscule market in that territory for StarTV, the broadcaster was attracting significant audiences in the PRC and Taiwan. Any discussion of transnational satellite television in Asia cannot ignore one of its major target markets, namely Greater China of 1.2 billion ethnic Chinese of which the Hong Kong, Taiwan and PRC populations are inextricable and significant parts, discounting the sizeable diasporic markets in South East Asia and worldwide totalling another 30 million [Overseas Chinese Affairs Committee, 1991]. Though the concept of a 'Greater China' dates from the 1930s, it has gained increasing currency with the growth of the transborder economy among the three territories, 'globalisation' of Chinese culture via electronic media, and expectations of a reunified state [Harding, 1993].

#### 7.1 PUBLIC TELEVISION & POLICY

In the early to mid-1990s, Hong Kong was still a British colony, but even then many decisions about licensing of satellite television broadcasters were being made with its eventual hand-over to the PRC in mind, if not actual consultations with the rulers-to-be. In 1997 Hong Kong became a special administrative region (SAR) of China, modelling the concept of 'one country, two systems'. This concept was designed to maintain global business confidence in Hong Kong, and meant also to allay the fears of Taiwan over the consequences of political reunification in the future. There are historical reasons, beyond the scope of this dissertation, for the on-going political rivalry between the nationalists in Taiwan and the communists in mainland China which continues in the form of military posturing and diplomatic propaganda. Yet in recent years there have been considerable cultural and economic links between these two countries, sometimes even encouraged by both governments. This extends also into the television industry and contributes to its globalisation as well as this chapter will demonstrate.

##### 7.1.1 Hong Kong

*Historical-political background:* Being mountainous and lacking in fertile land Hong Kong was relatively unpopulated when the British recognised the value of its sheltered deep-water anchorage to their trade with China and founded a settlement in 1840. Following the First Opium War, the island was ceded by

China under duress to Britain as a trading base in January 1841 in lieu of a commercial treaty over British access to Chinese ports. Further hostilities ended with the Peking Convention in 1860 which ceded Kowloon to the British, while another treaty in 1898 leased the New Territories and 235 islands to Britain for 99 years [Speake, 1993]. The population of Hong Kong grew rapidly from then, fuelled periodically by refugees from unrest on or invasions of the Chinese mainland, and it began its role as a major trading port with the PRC and with Chinese communities in Asia and worldwide. The re-opening of China to the world in the late 1970s saw Hong Kong return to its role as a base for international trade with China, especially its southern provinces, and therefore for marketing and advertising to this emerging market. On 1st July 1997 the British colony was returned to the PRC's sovereignty though it remained semi-autonomous as a Special Administrative Region, the practical implementation of which has implications for the transnational satellite channels based there.

*Development of television:* Television began in 1957 as a commercial service when Redifusion Hong Kong was licensed to provide a wired television service comprising two subscription channels. Then in 1967 Television Broadcasters Ltd (TVB) began operating a wireless television service under an exclusive licence, and has since dominated the market, going to colour transmission in 1972. When the government offered two more wireless licences after a broadcast policy review, Redifusion decided to terminate its wired services and take up wireless broadcasting in 1973. This station subsequently changed owners and was renamed Asia Television (ATV) as it is called to this day. The second licence was granted to Commercial Television (CTV) which began transmissions in 1975 but ceased operations in 1978 having failed to cope with stiff competition from TVB and ATV. This caused the government to decide that the Hong Kong market could support only two domestic television stations and not offer further licenses. Television licenses are granted for a period of 12 years subject to reviews, and the licenses for TVB and ATV were renewed in December 1988 for a period of 12 years. It is a requirement of their licences that both TVB and ATV broadcast a Chinese-language and a English-language channel each and carry specific news, current affairs, children's and educational programming [Hong Kong Government, 1994c].

The public broadcasting service, Radio and Television Hong Kong (RTHK) produces television programmes, such as current affairs, documentaries, drama and civic education, which TVB and ATV are obligated by law to carry on all four channels. Viewership of these programmes on prime-time TVB and ATV were estimated at 1,273,000 and 330,000 respectively. RTHK also broadcasts seven English and Chinese radio stations, for a total of 1,148 hours per week, one of the stations being the 24-hour BBC World Service, but no public television channel as such. The only other public broadcaster, Educational Television (ETV) also utilises the transmission facilities of the commercial stations to provide curriculum-based educational programmes to schools for about 8 hours per weekday [Hong Kong Government, 1994b]. However doubts have been cast on the future of RTHK ever since there was a stalemate between British and Chinese (PRC) officials on the former's plans to corporatise it and grant it editorial independence. The fear expressed was that unless it was adequately financed alternatively, perhaps through an alliance with Wharf Cable and thus able to attract good creative talent, RTHK could otherwise become a propaganda mouthpiece for the post-1997 administration [Bale, 1995].



*Broadcast regulation/deregulation:* Despite Hong Kong's reputation as a free-market economy, its broadcasting industry was highly regulated in the early 1990s and its authorities have moved with great caution in deregulating the licensing of terrestrial, satellite and cable television. It is somewhat strange that Hong Kong should have quite bureaucratic controls on television even prior to its incorporation into the PRC, but perhaps that was done in anticipation of that eventuality. The control of radio and television broadcasting in Hong Kong rests with the Broadcasting Authority, a statutory body which uses the Television and Entertainment Licensing Authority (TELA) as its executive arm. Domestic terrestrial stations are granted licenses for 12 years, subject to mid-term reviews during which multiple public hearings are held. At the hearings the stations have an opportunity to make a presentation on their performance, and individuals and lobby groups were able to express opinions on programming, advertising, violence, censorship and other related issues. Domestic terrestrial stations are subject to programming and advertising codes of practice, and virtually identical codes apply to domestic cable and transnational satellite stations. The TELA research department reviews policy issues at the mid-point of all its 12-year TV licenses, by having public hearings before a panel of the Broadcasting Authority and community leadership. TELA also commissions research biennially on viewership, in addition to monthly meetings of its television advisory groups in each of the 19 districts of the territory and quarterly meetings of its five major panels, three drawn from the districts, one on English services and one on children/youth programming [Interview Chn04.02].

In 1990 the Hong Kong Broadcasting Authority granted a non-exclusive license to StarTV to broadcast five satellite television channels across Asia, taking care to protect its domestic television licensees by restricting StarTV from broadcasting in Cantonese or broadcasting news programmes. The 12-year license was amended in October 1991 to allow StarTV to carry the BBC World Service Television, which must have been seen as logical enough for a British colony. In June 1993 a 12-year cable TV exclusive license was granted to Wharf Cable giving it a monopoly in Hong Kong during its first three years of operation on the condition that it did not accept advertising. This was the largest single-license franchise in the world and the first in the world to offer a 24-hour Chinese-language news service. From October 1993, StarTV was allowed to operate a Asia-wide regional pay-TV service on condition that the sole distributor of such channels within Hong Kong be the exclusive cable TV licensee, Wharf Cable [Hong Kong Government, 1993].

When Hutchinson Whampoa applied in 1991 for ITU approval to utilise a Tonga orbital slot it claimed vaguely to be launching a 'communication' satellite. Through AsiaSat1 and StarTV a precedent was set unwittingly for permitting transnational satellite television in Asia [Interview Chn03.02]. While ITU regulations require that transnational broadcasters 'respect' the broadcast laws of the countries in which the signal is available, the inter-governmental organisation is not able to enforce this. An unwritten international convention regarding transnational television requires that programme content be acceptable to countries under the satellite footprint. This has led to an Asia-Pacific Broadcasting Union (ABU) move to have uniform standards agreed to by regional broadcasters [Interview Chn04.01]. The secretary of the Hong Kong government's Recreation and Culture Branch was said by officials to be in favour of an 'open skies' policy in order to attract broadcasters to uplink from the territory [Interview Chn04.01]. Still, some executives believe

that StarTV may move eventually to Singapore because of its political stability and telecommunications superiority [Interview Chn01.03]. Already HBO, ESPN, ABN and MTV Asia had selected Singapore over Hong Kong as their production and uplinking base for the Asia region.

Since TELA governs cable, satellite, up-links, and terrestrial television broadcasting, it attempts to balance its favours across channels [Interview Chn03.01]. Its commissioner is principal executive of the Broadcasting Authority which ensures community representation on policy. At present terrestrial and cable television come under the Television Ordinance, video shops come under the Obscene Articles Ordinance, while StarTV was granted an uplink license in 1990 under the Telecommunications Act. Any transnational broadcaster which uplinked its signal from its own facilities in Hong Kong, came directly under TELA's control [TELA, 1994a & b]. But if it was uplinked by Hong Kong Telecom, it would be controlled indirectly, as this government-owned corporation has identical regulations regarding advertising and broadcasting. TVB had sought a license for full uplinking from Hong Kong for broadcasts to China, Taiwan and South East Asia as it would give it more flexibility than uplinking through Hong Kong Telecom. Though TVB was granted in-principle approval for this by TELA in 1994, it was only formally issued in mid-1995 after the PRC had granted its assent [Interview Chn04.01]. In 1994 PanAmSat, a US satellite firm, signed an agreement with Hong Kong Telecommunications Ltd. which allowed its broadcasting and telecommunications customers to beam their signals into and out of Hong Kong [AWSJ, 1994]. Hong Kong did not require licensing of satellite dish-antennae but the Office of Telecom Authority (OFTA) controlled Single Master Antennae Television (SMATV) operators/installers, and monitored StarTV operations. SMATV operators were permitted to collect fees for installation of satellite television access but not for the programming provided, at least till the 1996 broadcasting review [Interview Chn04.01].

A comprehensive broadcasting act which incorporated all television media was still being worked on in 1995 [Interview Chn04.01]. The regulatory body has been criticised for vacillating on the matter, resorting to repetitious consultancies on the implications of transnational satellite broadcasting and subscription television [Davies, 1995]. By March 1996 the Hong Kong government shelved plans to introduce a unified bill to cover the satellite, cable, terrestrial and other forms of television. Instead it decided draft regulations specifically for pay-TV and video-on-demand (VoD), in the context of Wharf Cable's pay-TV monopoly expiry and HK Telecoms plans to offer VoD services. Naturally as it was just over a year to the hand-over of Hong Kong the real reason for the shelving of the bill was alleged to be to please the PRC [Television Asia, 1996d]. What would happen in the post-1997 era was uncertain because the Basic Law, or future constitution of Hong Kong, was vague on the application of mass communication laws [Interview Chn03.02]. Yet even before the hand-over the government announced that the broadcast laws governing new technologies such as satellite television, VoD and pay-TV would be overhauled over a 12-month period while the existing terrestrial broadcasting laws would not come under review [Asian A&M, 1997f].

### 7.1.2 Taiwan

*Historical-political background:* After 50 years of Japanese colonisation Taiwan was surrendered to the nationalist government in China only at the end of World War II in Asia in August 1945. When the

nationalist or Kuomintang [sometimes referred to as Guomindang] government of Chiang Kai-shek was progressively defeated on mainland China by the communists under Mao Zedong, about 2 million nationalist forces, dependents and sympathisers fled to the province of Taiwan between 1947 and 1949. Much to the resentment of the 8 million native Taiwanese, the nationalists established a government in exile for the whole of China and maintained large armed forces in the hope of reconquering the mainland [Speake, 1993: 556]. Supported politically in their claim of sovereignty over the whole of China by the virulently anti-communist US governments of the time, the Republic of China (ROC) represented the country in international fora such as the United Nations. It was ousted from the UN and replaced by the Peoples' Republic of China (PRC) only in 1971, following détente between the US and the latter. Though the US gave full diplomatic recognition in 1979 to PRC, it still supports ROC economically and despite the lapse of their defence pact in 1984, the US has continued to arm Taiwan. Since then Taiwan has enjoyed diplomatic ties with only a few other non-communist nations, though many others have used pseudo-cultural and trade missions to maintain economic ties unofficially. Thus independent data on Taiwan has been difficult to locate since the 1980s because it tends not to be listed at all or occasionally subsumed under the PRC in international sources of information, and little communication research on Taiwan was funded externally.

Upon the death of Chiang Kai-shek, he was succeeded by his son Chiang Ching-kuo who had the political legitimacy to carry out a programme of progressive democratisation and 'Taiwanisation' of the state. This saw opposition political parties condoned so long as they forswore communism, and native Taiwanese allowed into positions of influence in the party, government and military. The process of liberalisation was accelerated on Chiang Ching-kuo's demise in 1984 by the US-educated economist Lee Teng-hui, the first Taiwanese-born president, who soon retired off 'old guard' nationalist politicians in favour of locals, and in 1987 repealed the 40-year martial law, which has had implications for the development of the domestic television industry as will be explained. In 1991 Lee ended the state of civil war with the PRC and accepted the legitimacy the communist government in Beijing, abandoning ROC hopes of regaining control of the mainland. However calls for full Taiwanese independence promoted by the new opposition Democratic Party were rejected by the wider population which feared punitive invasion by PRC upon such a declaration [Speake, 1993: 557]. During Taiwanese national elections in 1995, for instance, PRC was not averse to flexing its military muscle in the Formosa Strait in an attempt to sway voting behaviour against the independence movement, prompting reciprocal flag-flying by the US navy in support of Taiwan's sovereignty.

*Development of television:* The introduction of television to Taiwan in 1952 as a commercial medium was a political decision because the nationalists wanted to demonstrate their commitment to free enterprise in contrast to their communist rivals on the mainland. But the truth was that the government, the dominant political party and the military were banding together with private business to form an oligopoly in the television industry, a model not uncommon elsewhere in Asia in recent years of ostensible privatisation. The resultant three commercial networks which controlled the Taiwanese television scene, namely TTV (provincial government), CTV (Kuomintang political party) and CTS (military), will be discussed in the next section on domestic commercial television. All three networks are partly and privately owned by those

organisations named in the brackets, and partly by public shares [Interview Chn04.05], but there is no public television broadcaster as such. The Taiwanese public television law had still not been passed by government by the time of research fieldwork in 1995 and so there was no public broadcast system, nor one likely because it was becoming increasingly difficult to fund such a system through the government. The Broadcast Development Fund (BDF), a pilot scheme that had lasted since 1985, is involved in programme planning and promotions. It also trains staff for the three domestic networks, from media graduates to school-leavers. BDF programmes are on air in same time-slot of 9:00-9:30pm Monday-Friday on all three networks, though three different programmes were aired to avoid direct competition, requiring 15 hours of programming per week to be supplied. The 9:00-9:30pm time-slot was required by the Government Information Office (GIO) via the broadcast law for 'propaganda', as were also the 5:30-6:00pm and 11:00-11:30pm slots which were just before and after general broadcasting hours. Programme production by BDF was funded by government through the GIO annual budget, but its library was funded by the three commercial broadcast networks [Interview Chn04.05].

*Broadcast regulation/deregulation:* The Taiwanese government had been concerned about satellite television from Japan when NHK began experimenting with that mode of transmission in 1986. After some deliberation the Government Information Office legalised satellite dish-antennae in 1988, though growth took place only after 1991 when StarTV was launched. That event did cause unwarranted consternation in the government about the possible use of AsiaSat1 by its one-third owner the PRC to saturate Taiwan with political propaganda via its CCTV [Peng, 1994]. The Taiwanese government soon found itself confronted with three forms of illegal media: opposition party channels, cable operations and reception of transnational satellite channels. Thus its liberalisation of all three was a reaction to the *fait accompli* of rapid change in the television market rather than a proactive policy response. Cable operators and individuals in Taiwan did not need licenses to down-link TV signals from satellites. By late 1995 there were over 60 cable channels catering to Taiwan, 90 percent of them broadcasting via satellites such as Apstar and Superbird.

After the rescinding of martial law and with the proliferation of channels, the GIO claimed to no longer monitor programming. Since there were no restrictions on transnational channels apart from the limit of 20 percent of the total number of cable channels, about 10 cable channels were sourced from abroad as of 1995, including Australia Television and French TV5, with more to come [Interview Chn04.04]. However cable operators were required to carry the three terrestrial stations (plus another commercial network then in the planning stage), Taiwan's own open university and the public broadcaster whenever it is established [Interview Chn04.05]. There was also no longer any political sensitivity regarding television spill-over between PRC and Taiwan, in part because the former uses the PAL colour system while the latter uses NTSC, given its historical links with the US. However, the PRC deliberately transmits its television signals using NTSC via Apstar in order to reach Taiwan. In any case over the past eight years, over eight million visitors from Taiwan had been to the PRC, and so there could be no realistic restriction on information flows between the two countries [Interview Chn04.04].

The Cable Television Law was passed in 1993 and enforcement was delegated to the GIO. Prior to then, all cable systems were illegal but as of late 1995 none had met the technical requirements required under

the law passed. In order to meet these requirements which cost NT\$250 million in capital cable operators have begun to merge. If any did, the government would issue a construction permit, valid for three years for the cable licensees to construct studios, uplink facilities, cable-laying (in-ground), and so on. The cable operators would then have to file for examination and qualify for a license for an additional nine years [Interview Chn04.04]. The law divided the country into 48 service areas plus three off-shore islands and according to the law only five operators were permitted per area. That represents 255 operators nationwide, though only 209 had applied for licences and were being processed in 1995. The law also prohibited foreign share-holdings in cable operations and cross-media ownership by existing print and broadcast media [Peng, 1994]. But there is some overlap of ownership and function between production houses, channels and cable operators in the Taiwan market. Furthermore, by law one-third of the channels provided by each cable operator must not be by the operator itself, that is, up to 40 out of its 60 channels had to be from other sources [Interview Chn04.04].

On the issue of media ownership, Taiwan's laws are somewhat vague. Its Broadcasting and Television Law which governs terrestrial broadcasts omits to address the issue except obliquely. Although the conventional wisdom is that foreign ownership is not allowed, about 20 percent of TTV for instance is owned by the Japanese multinational corporations Hitachi, Toshiba and NEC. As for the Cable Law, it prohibits foreign ownership totally, but the GIO has exercised its powers of enforcement to allow up to 20 percent foreign ownership as was stated in the early drafts of the law. Of greater concern was domestic control of cable television and the law allows no one shareholder to own more than 10 percent. However a move by some opposition members to restrict political party investment in cable networks was out-voted by the KMT government which had planned investments in a multi-service operator in conjunction with foreign interests. The draft satellite television law first restricted foreign ownership to 30 percent, then raised it to 49 percent and finally removed any restrictions altogether [Winkler, 1996h].

### 7.1.3 PRChina

*Historical-political background:* The ancient history of China was characterised by a series of dynasties, the last of which was the Manchu dynasty who were actually non-Chinese nomads from an area north-east of China. During the 19th century, the latter part of their rule which was weak and corrupt, the country experienced famines and political unrest. These were capitalised on by imperialist powers such as Britain, Germany and the US who used their success in the Opium Wars to carve out spheres of political influence in China and control all its international trade through their treaty ports along the coast and major rivers. Peasant uprisings, the Boxer rebellion against Western imperialism and the defeat in the Sino-Japanese War contributed to disintegration of imperial China, the abdication of the infant emperor, and establishment of the republic under Sun Yat-sen, although that degenerated into warlordism by rival generals and provincial governors. Two political parties surfaced offering differing solutions, the nationalists or Kuomintang (KMT), under Sun Yat-sen, and the communists or Chinese Communist Party (CCP) under Mao Zedung. They cooperated initially to unite China and were galvanised by a common enemy in Japan which invaded the north in the 1930s to set up a puppet state of Manchuria headed by the deposed last emperor of China. But

the defeat of Japan at the end of World War II saw civil war break out resulting in the communists conquering the mainland to set up the Peoples' Republic of China (PRC) and the nationalists retreating to Taiwan [Rayner, 1992: 114-115].

The communists imposed a Soviet-style constitution, nationalised industry, instituted land reform, and practised economic central planning. When the programme of agricultural and industrial collectivisation in the 'Great Leap Forward' spearheaded by Mao in the late 1950s resulted in poverty and famine, a recovery programme was instituted by moderates which reversed partially the earlier collectivisation. But Mao fought back in the late 1960s with the Cultural Revolution against perceived creeping capitalism and encouraged the student-led Red Guard movement which removed moderates. The ensuing chaos was rectified in 1970 with the help of prime minister Zhou Enlai, which led to Deng Xiaoping, among others, being rehabilitated. A new constitution was ratified which led to an economic plan called the 'Four Modernisations' to bring agriculture, industry, the armed forces and science up to par with the West by the year 2000. However, the deaths of both Zhou and Mao in 1976 resulted in a succession struggle between leftists or 'Gang of Four' and moderates headed by Deng. When his protégés were finally installed as party chair and prime minister, Deng (a 'king-maker' and 'paramount chief' without any significant official title) was able to push his agenda of modernisation through government streamlining, army downsizing, local autonomy, market incentives, and foreign investment, all of which have had implications for the television and advertising industries in the PRC. Student demonstrations in the mid-1980s which ended in the 1989 Tiananmen massacre undermined Deng's reforms and resulted in the rise of conservatives in government [Speake, 1993: 123-127]. Although officially retired in 1987, Deng maintained political influence as a king-maker till his demise in 1996.

*Development of television:* Experiments with television began in 1956 with the technical assistance of the USSR and the PRC commenced broadcasting in May 1958 in the capital with its first station, Beijing Television. In support of Mao's Great Leap Forward a nationwide network was planned to be established within the impossible duration of four years, especially when the ideological break with the USSR in 1960 stopped their assistance and supplies. By 1960 there were less than a dozen urban stations which, though not networked, circulated films and tapes among themselves. Television faced another setback during the Cultural Revolution of the 1960s when media policy was confused, many broadcast staff were dismissed, programming was extremely limited and equipment not maintained. As of 1970 there were some 30 stations but only the four largest, Beijing, Tianjin, Shanghai and Guangzhou were networked by microwave links. In 1972 virtually all 29 provinces and autonomous regions had a television station each and Beijing Television acted as headquarters to the nationwide network, till it was formally split into a national China Central Television Service (CCTV) and a local Beijing Television service in 1978. Only in the late 1970s did television become a major part of the lives of the Chinese population. While the number of television stations had doubled to 47 by 1975, serving all provinces and regions except Tibet because of its remoteness, by 1983 it grew to 105 programme-production stations, with 411 microwave stations and rebroadcasting 7,475 rebroadcasting stations for rural and remote areas [Won, 1989: 212-213].

Characteristic of the post-Mao reforms by Deng, the television structure had begun to decentralise once provincial and municipal governments began to lobby for the ability to run their own stations. This

finally resulted in the 11th National Broadcasting Conference in 1983 which granted a 'four-level' management and coverage of television, the levels referred to being those of government which were allowed to invest their own funds and reap the profits. Though decentralised, television in the PRC was to be coordinated by CCTV as to spectrum and requirements to relay national network programming, although the latter formed a smaller proportion of local station fare as time progressed. Under the new policy era, television in China grew rapidly from 93 stations and 9,708 transmitters in 1984, to 509 stations and over 22,139 transmitters by 1990. In keeping with new political policy of making market-profit and not being dependent on state-funding, revenue came increasingly from advertising and other marketing activities and ranged from 40 to 70 percent among the television stations. In total advertising revenue grew from a paltry 3.25 million yuan (US\$390,00) in 1979 when advertising was first introduced to 2.05 billion yuan (US\$245 million) in 1992. This was accompanied by increased use of imported programming, largely from the US, invariably in barter for advertising time. However Huang [1994] cautions that this seeming economic liberalisation is not progressive and has periods of repression of media freedom, because the PRC government has not made a concurrent commitment to political reform.

Broadcasting in Mandarin, CCTV was the primary channel nationwide and the provincial service in a local dialect was the second channel. Colour television had begun with CCTV and Beijing Television in 1973 and spread to the other stations by 1980, China adopting the PAL standard developed and used in Western Europe rather than SECAM used by the USSR and the Eastern Bloc countries. Most of the cameras, film, videotape, sound and lighting and other studio equipment was locally-made, though Canon lenses, Ampex editing equipment and Sony video-cassettes were imported even prior to economic liberalisation [Howkins, 1989: 29-31]. By 1982 there were over 50 television production factories, including three assembling imported colour sets, to protect which imports of television sets were ceased [Won, 1989: 217]. Between 1980 and 1985 the number of television sets grew from 630,000 to over 12 million, though mainly in urban areas, despite the fact that black-and-white sets cost US\$280 or five times the average monthly income, and colour sets cost US\$1,000. By the late 1980s there were 38 programme-producing stations, 238 rebroadcasting stations and about 2,000 low-power translators nation-wide [Bishop, 1989: 109]. In the arena of educational television, the PRC government has set up the Central TV University as well as 28 other universities at state and municipal levels, and the China Education Television Station which has four channels providing 30 hours of transmission each week [Huang and Zhong, 1993].

All Chinese television was public or rather owned by the sole political party, though there were four tiers: national, provincial, municipal and prefectural. CCTV offers a mix of news, sports, educational, arts and documentary programmes, news being the most important. Domestic news was gathered by CCTV reporters or those of the provincial and municipal stations, while international news was adapted from footage delivered via satellite from foreign news agencies or provided by the PRC's own Xinhua News Agency. In its early years CCTV adopted the Soviet model of newscasting with simply an anchor reading items. Then during the Cultural Revolution truthfulness was overtaken by the need to exaggerate positive developments in China and to portray the West in a poor light. But in the post-Mao or Deng era, the Ministry of Radio and Television began subscribing to Western news agencies and showing about 10 minutes of international news,

remarkably, relatively unedited [Won, 1989: 221-223]. Also in the late 1970s sanctioned by the Communist Party, CCTV executives began to purchase cheap Western programming which became very popular with viewers.

Economic reforms during the 1980s triggered unprecedented growth in Chinese television, such that by 1992 there was a four-tier network of one national broadcaster, 30 provincial, 295 municipal and 350 prefectural stations reaching 80 percent of the population. The national or central broadcaster CCTV had four channels, two of which were nation-wide, one local to the capital Beijing and one transnational via satellite and targeted at Taiwan, Hong Kong and Macao. CCTV-1 has a nation-wide audience of 300-400 million viewers and transmits the national news through 11 news bulletins per day. Also nation-wide CCTV-2 provides economic information and English-language programmes to an estimated 100 million viewers. CCTV-3 broadcasts to 5 million viewers in the Beijing area during the evenings only and its programming comprises repeated feature films, drama and educational programmes. CCTV-4 is transmitted by satellite and so may be seen nation-wide as well in much of Asia [Australian Film Commission, 1994a: 21-24]. Of the major regional stations Beijing Television surpasses CCTV in the capital city region with its three channels, considerable imported programming and an audience of 10 million. One of China's earliest stations, Shanghai Television has two channels and an audience of 70 million, the largest of the regionals. Guangdong Television with two channels caters to South East China where it competes also with Hong Kong channels available by spill-over. Oriental Television, launched in 1993 and catering to the Yangtse Delta and having ambitions on Taiwan, broadcasts considerable sports programming, some of it obtained from ESPN [Australian Film Commission, 1994a: 27-30]. So by the mid-1990s, China had a diversified television market even if the ownership was still in government or party hands.

Most programming was created in-house, commissioned or co-produced by the television stations, although increasingly these were being sourced from domestic movie studios and independent production houses, even imported from other Asian countries such as Taiwan and Japan, as well as from the US [Asia, Inc., 1994]. The Ministry of Radio and Television sets limits on the number of hours of different programming genres which may be imported and broadcasters have considerable freedom of choice within those constraints. It is noteworthy that Chinese broadcasters seem to prefer Western programming rather than other Asian productions [Television Asia, 1994b]. Chinese television officials justified permitting the broadcast of foreign programming on domestic channels by saying that it helps retain the audiences, perhaps against competition transnational television, attract multinational advertisers and fill broadcasting hours. By official accounts CCTV was able to produce only one-third of its programming needs in 1990, while provincial and city level stations were able to produce less than two hours of their daily programming. Imported programming was also much cheaper, about 10 percent the cost of producing similar programming in the PRC. But there was the major constraint of foreign currency exchange and therefore the Ministry of Radio, Film and Television (MRFT) ran a quota system, and balanced the programmes imported by genre and country of origin. It also censored them, though some provincial and city stations were granted some autonomy in this regard. Foreign currency exchange difficulties were also by-passed by Chinese television stations offering to swap advertising time and part of that revenue for the right to broadcast foreign



programmes for free. Thus in practice the quota system was not fixed and Chinese domestic broadcasters were allowed to show as much as they could obtain, with due political clearance [Chan, 1994b].

From the mid-1990s many of the PRC's provincial stations were beginning to broadcast nationwide through satellite, much to the displeasure of CCTV. Local provincial and municipal television stations in China achieved higher coverage among them than the national CCTV, with the exception of Beijing [Interview Chn01.02]. This meant competition for advertising revenue from both domestic business and MNC sources on which all Chinese broadcasters were semi-dependent, though the central government was committed to bailing out CCTV financially if necessary. It was expected that the provincial television stations would eventually broadcast Asia-wide to overseas Chinese [Interview Chn04.03]. In 1995 CCTV contracted with PanAmSat to utilise their Pas-2 and Pas-3 to reach up to 40 million overseas Chinese with its broadcasts. At the same time CCTV was also concentrating its programming sales on overseas Chinese and other Asian markets. It also announced the launch of its own encrypted sports and movie channels within the PRC, allowing CCTV to produce duly censored channel packages for local cable networks [Simons, 1995]. By early 1996 CCTV had also announced that it would launch six digital channels worldwide, through a 10-year distribution agreement with PanAmSat which would take its coverage from Asia alone to North America, Europe, and Africa. It also began with extending the reach of CCTV-4, the channel tailored to Overseas Chinese, and added a music channel in July and an English-language channel in October. In keeping with the expressed aims to promote understanding of the PRC generally and to reach an Overseas Chinese audience of 60 million, all of the international channels were to be free-to-air and subsidised by its domestic channels [Masters, 1996: IV].

Table 1A: Television audience market shares in Beijing, April 1995

Source	CCTV1	CCTV2	CCTV3	BJTV1	BJTV2	Others
CVSC	27%	9%	11%	26%	10%	17%
SCMR	22%	6%	14%	40%	14%	4%
BJTV	13%	7%	9%	21%	9%	41%

Source: Barlow [1996]. Legend: CVSC = Central Viewer Survey & Consulting Center (CCTV affiliate), SCMR = South China Market Research (Nielson SRG affiliate), BJTV = Beijing Television

*Broadcast regulation/deregulation:* Television was seen by the Chinese Communist Party as a major means of propaganda, communicating the benefits of communism and persuading its population to support their policies. Its role was to disseminate news and government decrees, to provide education and to enrich the population's cultural life [Won, 1989: 217]. As such all television was state-owned and controlled at the national, provincial and municipal levels. The Propaganda Committee of the Chinese Communist Party's Central Committee holds ultimate control of broadcasting through the Ministry of Radio and Television and controlled directly national broadcasters such as CCTV. The second television channels and local radio are governed by the Communist Party's committees at the provincial, autonomous regional and municipal levels. In keeping with its ideology all broadcasting was financed by direct government grants and there are no license fees for viewers and listeners, although advertising had been increasingly used to subsidise

operating expenses [Bishop, 1989: 113-114]. Acting within the directives of the Central Propaganda Department and the Ministry of Radio and Television, CCTV has its own Office of the Party Committee and Office of Directors which set specific policy on broadcasting [Won, 1989: 218]. Similarly the administrative structures of provincial and municipal broadcasters replicated in miniature the structure of the national broadcasting system.

The commercialisation of the PRC's television bureaucracy was fuelled in part by the competition from spill-over television from Hong Kong from the late 1970s and the arrival of transnational satellite television such as StarTV in the 1990s. In a push to reduce spending in the 1980s, all government sectors were required to supplement state funding with their own revenues, and television broadcasting was considered particularly well placed to do this as the economy was increasingly marketised. As noted earlier in 1983 the Chinese central government gave governments at provincial level and below the right to build and manage their own broadcasting stations, while CCTV was separated from the direct management of the Ministry of Radio, Film and Television. While foreign investment was still not permitted, broadcasters found ways to circumvent this restriction through joint-ventures in cable networks and programme production. Domestic public broadcasters thus became semi-autonomous corporations free to pursue financial prosperity, though still subject to the government's political strictures. Thus, paradoxically, the commercialisation of the PRC's television took place without any major loss of political control over television [Hao and Huang, 1996].

In 1996 the Chinese government limited the broadcast of foreign movies to no more than 40 minutes during prime-time on its domestic channels, arguing that this was to preserve cultural values and protect the local film and production industry which is largely state-owned. This was despite an agreement with the US to protect copyright, and remove import restrictions on US films. However the agreement to allow co-productions with foreign television producers was followed up by a multimillion deal between CCTV and the US-based Stonebridge International to co-produce the 90-minute International Sports Show which would be broadcast nation-wide via satellite on the CCTV2 channel [Asian A&M, 1995c]. Nonetheless in 1996 China Central Television (CCTV) entered into a commercial agreement with Associated Press TV (APTV) for the use of the latter's 24-hour global video news service which, remarkably, it re-transmits uncensored. In turn the agreement granted APTV access material from the former's international channel CCTV-4 [AMCB, 1996c]. CCTV also signed agreements with the US-based Encore Media Corporation and Australia's Channel Nine for the supply and exchange of sports, children's, drama and movie programming [Television Asia, 1996c]. However by late 1996, at the bidding of President Jiang, the MRFT was rescinding the relative autonomy of Chinese television stations via a new censorship system, centralised programming purchasing and evaluation of their performance in relaying CCTV broadcasts [Television Asia, 1996e]. Perhaps the earlier moves towards liberalisation of the programming represented a response to competition from transnational satellite television services, rather than any commitment to the political emancipation of CCTV.

It is evident from this summary of television development that despite being historically interrelated, geographically proximate and culturally similar, Hong Kong, Taiwan and PRC bring vastly different political-economic contexts to their media. There is another but much smaller Chinese market in nearby Macau, a Portuguese colony due to revert to Chinese control in 1999. Though an attempt was made to obtain data there, little was said by research respondents to be publicly available and presumably was in Portuguese in any case. Where there is incidental data on Macau, which has adopted a conciliatory stance towards the PRC ahead of its merger, it will be classified with neighbouring Hong Kong since both territories will soon be special administrative regions (SAR) of China. Still, rather than treat them as totally separate cases, the broadcasting industries of the three territories of Hong Kong, Taiwan and PRC will be analysed further as constituents of a Greater China region.

## 7.2 DOMESTIC COMMERCIAL TELEVISION

As with their political and economic contexts, the development of television in Hong Kong, Taiwan and the PRC are studies in contrasts and so will be treated separately in this section. All the same there has long been some overlap in viewership, programming and advertising between these territories, due to television signal spill-over and programme sales. This process has been intensified by the growth of satellite and cable television with their consequent greater need for programming, audiences and advertisers, and with the consequent greater consumer access to television viewing alternatives on a transnational basis. The subsequent responses of domestic public and commercial broadcasters in all three territories of Greater China to this transnational television onslaught were somewhat varied given their differing domestic television environments and policies, developments will be charted in this section.

### 7.2.1 Hong Kong

*Geographical coverage:* With a population of over six million Hong Kong is one of the most densely populated and urbanised areas in the world, necessitating most of its food, water and raw materials be shipped in from abroad, most notably from mainland China. Hong Kong is located along the tropical south coast of China near the mouth of the Pearl River, adjacent to the Guangdong Province, into which its television signals spillover the border. It is located 130 km south-east of Quangzhou (Canton), capital of the Guangdong province, and 65 km east of the Macau, the Portuguese colony due also to revert to the PRC. The total land area of 1071 sq km comprises the Hong Kong island, the Kowloon peninsula, the hinterland bordering China known as the New Territories, and 235 islands, the major ones being Lantau, Lamma and Cheung Chau. By contrast neighbouring Macau has an area of 16 sq km and a population of just 479,000 [Rayner, 1992: 116-117]. Despite the arrival of transnational satellite television, Hong Kong's two domestic networks dominate the territory and southern PRC market, largely because both are Cantonese-speaking, in contrast to Taiwan and the rest of the PRC market.

*Television Broadcasters Ltd. (TVB)*: The commercial station TVB began broadcasting as the first wireless television broadcaster in Hong Kong in November 1967, and was one of the few stations worldwide then to offer all-colour transmission. Commencing with 200 staff, it broadcast a few local productions along with imported programming. Over the years it increased local production such that by 1994 it was producing an average of 5,000 hours of programmes annually or 85 percent of the programmes it broadcast and employing 2,600 staff [TVB, 1994a]. Programmes produced entirely in-house by TVB are news, variety, drama, and music for its two Hong Kong channels, the Chinese channel broadcasting 23 hours per day, and the English one for 16 hours per day [Interview Chn02.04]. In part its production output was due to the lack of alternative sources for Cantonese-dialect programming for its Hong Kong and southern China spill-over audiences.

As far back as 1991 TVB introduced NICAM (Near Instantaneously Compounded Audio Multiplex), its own engineering development which provides viewers with digital stereo and more significantly multi-lingual sound tracks which transnational satellite broadcasters have since emulated [TVB, 1994a]. It has astutely used the technology to provide trilingual programming in Cantonese, English and Mandarin in the post-1997 era under China's rule [Asian A&M, 1997a]. More recently a programme-distribution deal was signed with the transnational Asian Business News for ABN programming featuring business and financial news, and information would be carried by terrestrially by TVB. Likewise, the American CBS Evening News received via satellite is broadcast on TVB each morning. Finally, TVB teamed up with CNN, HBO, ESPN and Australia Television to form a consortium which took up 16 transponders on ApStar1 [Fung and Lee, 1994]. In 1995 the UK media group Pearsons which has investments in publishing, computer software, multimedia, production houses and television stations, was able to purchase a 10 percent stake in TVB for US\$168 billion from its chairman Sir Run Run Shaw, succeeding where Time Warner had failed earlier [Taylor, 1995]. Understandably TVB was perceived by at least one advertising executive of a multinational agency as a dark horse in the Asian television market, yet of no direct threat to StarTV since it would be a case of one-to-one competition between specific satellite, cable and terrestrial channels [Interview Chn01.09].

*Asia Television Limited (ATV)*: This first television service in Hong Kong was previously owned by a businessman with close links to the Chinese government, serving on one of their consultative bodies. Thus he enjoyed the strong support of the Xinhua News Agency, the unofficial Chinese embassy in Hong Kong, in his purchase of ATV in the mid-1980s. ATV is currently owned largely by a major property developer in Hong Kong, the Lai Sun Group [Fung and Lee, 1994]. ATV has long been a loss-making operation due to its poor programming, despite receiving twice the advertising revenue of StarTV, but this was expected to change with further competition. By the 1990s ATV was a poor runner-up to TVB which had an 80 percent market share, though they had been head-to-head competitors in the early 1980s. Ever since the third domestic station CTV closed down within two years of its start, the conventional wisdom has been that the Hong Kong market can only support two broadcasters [Interview Chn03.02]. ATV was said to be traditionally preferred by older audiences, though investments in the early 1990s led to an increase from 10 percent of prime time audiences to an average of 25 to 30 percent by 1994 [Rap, 1994].

Table 7B: Top five rating programmes on Hong Kong channels, September 1995

<i>Programme</i>	<i>Genre</i>	<i>Rating</i>	<i>Programme</i>	<i>Genre</i>	<i>Rating</i>
<u>TVB Jade (Cantonese)</u>			<u>ATV Home (Cantonese)</u>		
Show by Shobal	Leisure	30	N. Legend of Shaolin	Movie	19
Shobal Challenge	Light Ent.	29	Man of Times	Movie	17
Shrimp	Light Ent.	28	HK Today	Light Ent.	16
Condor heroes 95	Drama	26	Romance of 3 Kingdoms	Drama	15
Stepping Stone	Drama	26	Fist of Fury	Drama	15
<u>TVB Pearl (English)</u>			<u>ATV World (English)</u>		
Thunderball	Movie	6	Mrs Doubtfire	Movie	4
Batman	Movie	5	Racing Night Live	Sports	3
Lethal Weapon 3	Movie	4	Kindergarten Cop	Movie	3
King Kong	Movie	4	Mac & Me	Movie	3
Yesteryou, yesterme	Movie	4	Gotcha	Movie	3

Source: ASI Acom [1995a], citing Nielsen SRG

Having failed through its earlier attempt to increase market share by imitating TVB programming, ATV adopted a strategy of providing alternatives such as 'tabloid' television. By giving Hong Kong audiences for the first time controversial stories, such as interviews with crime victims and anti-China politicians, ATV succeeded in occasional market shares of almost 50 percent [Interview Chn02.02]. ATV broadcast about 3 hours of drama programming every night, producing one hour of it in-house and importing the rest from Taiwan, Japan and increasingly from the PRC. Of the 23 hours daily on ATV Home (Cantonese), 70 percent were produced in-house but half of that was repeats. More than 40 percent of ATV World's (English) programming was imported mostly from the US though increasingly from Japan and Korea. ATV markets its programming overseas, has produced special programmes for CCTV and contracted to supply 400 hours and 12 specials to StarTV's Chinese channel [APTC, 1995].

*Programme production/export:* Hong Kong is one of the key centre of film and television production not only for those of Greater China but overseas Chinese in Southeast Asia as well as worldwide. With an output of 200 films per year it is reputedly the third largest producer of films and the second largest exporter. Firms such as TVB, and Golden Harvest which are prodigious producers have also world-class libraries comprising Chinese drama, *kung fu* epics, police thrillers, music, and comedy programming. Given their unique political, cultural and geographical situation Hong Kong distributors have also served as intermediaries between television stations in the PRC and programme producers overseas, whether Western or from other Chinese societies [Australian Film Commission, 1994a].

TVBI, the international arm of Television Broadcasters Ltd, was established in 1976 to meet the worldwide demand for Chinese-language programming. Each year TVB produces 5,000 hours of programming for its two channels which broadcast in Chinese for 23 hours per day, and in English for 16

hours per day. Programmes produced entirely in-house by TVB were news, variety shows, drama, and music [Interview Chn02.04]. These are then available for export by TVBI's three marketing divisions: Overseas Chinese Communities, National Markets in South East Asia, and Western Markets. TVBI is the largest single operator in the Chinese video-rental industry with its involvement ranging from production of video programmes to operating video shops. In 1994 a TVB affiliate company set up The Chinese Channel, a cable pay-TV channel in Europe, catering to about 800,000 overseas Chinese resident there [Kohli, 1994]. Presently TVB is not only exporting programmes but management expertise, such as to Indonesia where it is assisting the Indosiar commercial channel, and to India where it is collaborating with a British firm to consult with domestic commercial broadcasters using satellite [Interview Chn04.03]. The other Hong Kong broadcaster, ATV, seeks to emulate TVB in programme production and export but on a smaller scale. For its Mandarin language channels StarTV has purchased programming from various Taiwanese producers as well as from ATV which was not a direct competitor in the transnational market, though not from TVB which certainly was.

### 7.2.2 Taiwan

*Geographical coverage.* The Republic of China (ROC) comprises the main island province of Taiwan, due north of the Philippines and south-west of Japan, as well as a few small and highly fortified islands very close to the central coast of mainland China. In fact it is adjacent to the PRC province of Fuchien from which much of its population comes and therefore they share a common linguistic market. High mountain ranges densely forested with camphor, oak, pine and cedar dominate the centre and east of the main island, allowing only 25 percent of its land area to be settled and cultivated. Its warm and moist climate supports agriculture such as sugar cane, teas, bananas as well as rice crops, largely for local consumption. Although at 36,000 sq km Taiwan is less than half the size of Tasmania, it supports a population eighty times that of the latter [Rayner, 1992: 117]. Fairly densely populated at 20 million, Taiwan represents a sizeable market for commercial television services.

*Domestic networks:* The reasons why the three domestic broadcast networks, TTV, CTV and CTS, are owned by government and party organisations have been discussed in the previous chapter section. Founded in 1952 as the first station, Taiwan Television Company (TTV) had the Taiwan Provincial Government as its principal shareholder owning 49 percent, in conjunction with four Japanese television companies owning 20 percent between them and the rest held by local business. Apparently its monopoly profits were so attractive that other similar players began to enter the television broadcasting industry. Thus in 1969 the China Television Company (CTV) was formed with the KMT as the majority shareholder at 60 percent, with some radio stations owning the rest. Then in 1972, a small educational television service was expanded quietly into a thoroughly commercial station called Chinese Television Service, owned 72 percent by the Ministry of Defence [Lo *et al.*, 1994].

Under martial law from 1949-87 media content was under the strict censorship of three authorities: the Government Information Office (GIO), the KMT Cultural Work Committee and the Taiwan Garrison Command. The government periodically enacted laws to further control television broadcasting, for instance

one to restrict the expression of Taiwanese cultural localisms on television [Lee, 1990]. Furthermore, through their controlling interests the nationalist government places directors on the boards of the three broadcasters who are ministers, generals, party officials or leading businessmen. Almost half the general managers in the stations were ex-military officers and former aides to the President. Even lower-level personnel appointments were influenced such that the vast majority of the television journalists were KMT party members and mostly mainlanders or their descendants, even though these groups comprise less than a fifth in the general population [Lo *et al*, 1994]. Typical of such an identification of media executives with the regime in political power, ideological dissent went unreported, sensitive issues were assiduously avoided, and self-censorship took care of grey areas even before the official censors would have.

Ratings for these broadcast networks have been dropping over the 1990s, especially since the transnational channel TVBS entered the market and became very profitable. TVBS achieved popularity through a programming strategy of having political forums and Hong Kong soap-operas. Lacking long-term strategy other satellite providers were said to lose NT 5-6 million per month and go out of business. However the advertising income of networks has not been significantly lower since advertising pie was getting bigger, even though Taiwan was in middle of a recession in the mid-1990s [Interview Chn03.08]. Also a fourth terrestrial broadcaster, was due to start up in late 1996 and the government was seeking to license a fifth network as well as 11 new local television stations. These moves were linked to the government's plans to liberalise the media and position Taiwan as a regional centre of Mandarin-language television, but industry executives were afraid of further loss of audiences and advertising revenue by CTV, CTS and TTV which had already lost much to the cable networks [Asian A&M, 1995b]. Unlike the other stations, the fourth broadcaster, People Broadcasting Corporation, was owned by former opposition politicians in conjunction with the US cosmetic firm Estee Lauder which had experience in running its own stations in Europe [Westbrook, 1996].

Table 7C: Taiwan television audience share, 1994

<i>Channel</i>	<i>Share of viewing</i>	<i>Channel</i>	<i>Share of viewing</i>
TTV	25%	CTS	22%
CTV	23%	Cable (misc.)	30%

Source: APT-C [1995: 216]

By 1995 there were three major Taiwan-owned media groups operating as multi-service operators which were: United Communications Group (UCG), Rebar Telecommunications Co. and Po-Hsin (PH) Entertainment. While these newer groups are not directly party-controlled, their owners astutely are card-carrying KMT members. There were also two Hong Kong media groups active in Taiwan: first, TVBS which is run from Hong Kong and supplies programmes from there, and second, the Taiwan-based but Hong Kong-financed CTN which runs two channels for news and entertainment [Interview Chn02.10]. Distributed via satellite, CTN channels targeted at Chinese speaking populations in mainland China, South East Asia, the South Pacific and the US as well where it was carried by cable networks [Television Asia,

1995c: 33]. Among a number of Taiwanese firms, including the Po-Hsin group, were reported to be interested in a stake in CTN but the latter feared that this would damage its chances of penetrating the PRC market, yet a bid from the Pearson's Group of the UK was also unsuccessful [Hughes, 1996b].

*Cable television.* The factors which led to the growth of cable in Taiwan were the poor programming previously on the three broadcast channels, and difficulties with their reception due to mountainous terrain and tall buildings. Some 20 years ago local cable operators began as a mass antennae system for domestic television, subsequently putting on video channels and later satellite channels. These services provided by small-scale neighbourhood operators came to be known collectively and colloquially by the term 'fourth channel'. Since the government and Kuomintang party owned or controlled the broadcast channels, members of opposition parties or people sympathetic to their causes started cable channels in the late 1980s, long before the channels were officially made legal in 1991, in order to provide a means of communicating with voters especially at the frequent election times in Taiwan. Interviewees testified that these 'democracy networks' enjoyed popular support whilst they provided alternative political viewpoints, before a combination of systematic government repression and their own ideological bias which came through in their programmes caused their viewership to stagnate.

The opposition Democratic Progressive Party owned up to 20 cable operations though via different factions, allowing for some independence of operation [Interview Chn03.08].

Cable operations were clamped down upon by the government but not eliminated, thus driving them 'underground' and allegedly into the control of criminal elements [Interview Chn02.09].

Some political parties had also invested in production houses though the programmes they produced tended to be apolitical [Interview Chn04.04].

The so-called 'Democracy networks' were at one stage estimated to have 40 channels island-wide, but the politically-biased views expressed led to a decline in their popularity [Interview Chn03.06].

In 1995 the Taiwanese government entered the cable industry itself by introducing a VoD service to some 2,000 subscribers which was backed financially by over 13 organisations and companies. These included foreign and local multinationals such as Hewlett Packard, Philips, Acer, Tatung and Chinatrust which contributed US\$1.5 million, an amount that was matched by Taiwan's National Science Council [Westbrook, 1995]. This coincided with moves by the government to legalise and regulate the cable television industry and permit competition to its oligopoly of the broadcast television industry.

*Programme production/export.* The International Media Company, a subsidiary of the three Taiwanese commercial networks, TTV, CTV and CTS, has been responsible for selling their programmes to North America. However because its managing director position has been rotated regularly through the three networks, each appointee has not remained in the job long enough to build the business. Meanwhile the government-run Broadcasting Development Fund (BDF) promotes its programmes at international television fairs and some BDF programmes are used without charge by a Chinese satellite channel in North America. Because of its anti-communist agenda, BDF finds it difficult to sell its programmes in television markets elsewhere. However, Wharf Cable and the video-on-demand service in Hong Kong buy from BDF and dub into Cantonese, while Macao and Singapore broadcasters also buy from its programmes [Interview Chn04.05]. There is understandably a limited market worldwide for Taiwanese productions because the



PRC, the largest market for Mandarin-language programmes, is closed to Taiwanese programmes; most overseas Chinese markets are Cantonese-language dominant and well-served by Hong Kong broadcasters.

### 7.2.3 PRC

*Geographical coverage:* The largest country in North East Asia and third largest in the world at 9.6 million sq km, China (PRC) is bounded to the north by Mongolia, Russia and North Korea, to the west by the Central Asian nations of Kazakhstan, Kirghizia, Tajikistan and Afghanistan, and to the south by India, Nepal, Bhutan, Burma, Laos, and Vietnam. Given its geographical size, the landscape and climate of China is a study of contrasts. It comprises two major intersecting mountain chains through the centre, grasslands in Manchuria in the north, the high plateau around Tibet in the west, desert in the north-west, and large fertile river plains towards the east [Rayner, 1992: 113-114]. It supports a population of over 1 billion, which by any estimation makes an irresistible market for television broadcasters, domestic, regional or global.

*Domestic networks:* As discussed in the earlier section on the PRC, all domestic television networks in the PRC are government-owned, though dependent on advertising revenue in addition to government subsidy. For instance Oriental Television of Shanghai established in 1993 is owned by the city of Shanghai and contributes half of its advertising revenue to the government [Interview Chn02.11]. It was said by some in the broadcasting industry that there has not been any domestic commercial television station in PRC largely due to a lack of local expertise to match Hong Kong and Taiwan, rather than lack of funding. But it may also be the political risks and dire legal and financial consequences for a domestically-based television station and its managers of offending the communist Chinese government. Perhaps in response to competition by transnational satellite channels there has been some attempt at privatising the television media in the PRC, though in reality the owners of such so-called non-government stations are either local governments, communist party branches or entrepreneurs with good political patronage.

Industrial community television (ICTs), owned or associated with factories and other economic institutions and narrowcast to their housing areas have been a generally unacknowledged part of the Chinese media scene. Originally utilising microwave from domestic television relay stations, it has given way to cable following the growth of the latter and the liberalisation of regulations. While the ICT's facilities and equipment belonged to the industrial organisation, it came under the direction of CCTV or the local television station for technology and programme production, the MRFT local bureaux for policy implementation, even the Propaganda Department of the Chinese Communist Party. All of these relationships have been considerably eroded in recent years, as the ICTs shift from being primarily informational-educational organs of the state to being leisure-entertainment conduits of domestic and transnational channels in a competitive environment which includes multiple local cable networks [Shoesmith, 1995]. The development of cable television in China has been characterised by Chinese officials as having undergone four stages: community antenna TV, closed circuit TV, large and medium enterprise cable system (or the ICTs above) and administrative region cable network [Jiang, 1995]. The stage was thus set for the controlled introduction of subscription cable or pay-TV networks in China.

The Chinese government seemed to be keen on encouraging subscription cable television networks in order to counter the threat of transnational television, and again the provincial and municipal level broadcasters were major players. Utilising MMDS technology, Shanghai Cable TV and Beijing Cable TV were the largest such networks, claiming 3.5 million viewers between them. By the year 2000 there were expected to be 3,000 such stations covering the rural areas as well where eighty percent of China's population lived. For the longer term cable was being laid, particularly in the cities by terrestrial television stations in cooperation with municipal authorities. In early 1996 the PRC was estimated to have 1,200 cable stations with a further 2,000 awaiting approval, each expecting to provide between 10 to 24 channels. To avoid the strains that this proliferation of channels would put on domestic film production and perhaps imports, the central government decided shrewdly that CCTV would be responsible for their programming. Already the 300 largest cable systems with a viewership of 12 million households between them were re-broadcasting CCTV encrypted channels: Channel 5 Sports, Channel 6 Movies, Channel 7 Children's/Farmers, and Channel 8 Variety [Simons, 1996].

Although foreign investment in them was prohibited, there were exceptions such as Wuhan Cable Television Enterprise, the joint-venture since 1992 between the Foreign Relations Department of Wuhan city and the transnational broadcaster CTN of Hong Kong which provided start-up capital, equipment and technical consultancy [Shoesmith, 1995]. Another example was United International Holdings (UIH) of the UK which was in a 49 percent/51 percent joint-venture with the Broadcast Bureau of Hunan Province in the Hunan International TV Communications Company, which delivers one channel to cable networks in 14 cities in the province. In this case it was able to circumvent Chinese broadcast laws because the microwave relay used was classified as a communications system and not cable television. It was set to expand its operations and upgrade to digital technology with the assistance of UIH. Finally, Time Warner of the US had a contract to supply Beijing Cable Television with equipment and assistance in expanding a MMDS system, while Singapore Technologies and Singa Infrastructure Investment of Singapore were said to be working with BCTV to build a pilot fibre/coaxial cable system [Flynn, 1995: 68]. The latter case may not be seen entirely as a foreign investment because of Singapore's dominant Chinese culture and commitment to compatible cultural and political values.

*Programme production/export:* The television stations in the PRC, especially CCTV based in Beijing, and the provincial and municipal stations of Shanghai, Guangzhou and Sichuan sell their programming to overseas markets either directly or via China Television United (CTU). Television festivals are organised in these metropolitan cities to promote PRC programmes, and have attracted other stations as well which had programmes to sell for export. However PRC television programmes were not saleable to the other Greater China markets of Taiwan and Hong Kong. Taiwan restricts the utilisation of PRC programming though there are loop-holes for repackaging them in Hong Kong or for transmission by illegal cable operators. While Hong Kong has no such restriction, its audiences have found PRC programmes of poor quality and too ideological, and so the commercial stations tend not to feature them. Instead, PRC programmes have found a more receptive market among the ethnic channels and video shops in North America as well as other regions with sizeable numbers of diasporic Chinese. Although the PRC has agreed

to swaps of programming of an educational nature as with Discovery Channel, it has not permitted direct broadcast into its market in return [AMCB, 1995a]. Another way that PRC is exporting its domestic programming is via extending its transnational satellite broadcasts, such as CCTV-4 for Hong Kong and Taiwan, to diasporic Chinese in the US in 1993, in South East Asia by 1996 and worldwide by 2000 [Chan, 1996].

Although the production of television drama in the PRC is still partly funded through an annual state subsidy of the production houses, this has been increasingly supplemented by other sources. These include personal connections in other parts of government and the army who could provide further subsidies, but also enterprises which could enjoy up to 30 percent return on their investment, as well as marketers wishing to sponsor the production in return for association of their product with the programme. It is alleged that often the production houses have had to modify context to satisfy their benefactors or investors while not offending the censors, thus compromising artistic autonomy and production quality [Keane, 1996]. The alternative process of raising funds from banks and investment firms and selling the programmes to broadcasters who then raise revenue from advertising, has not reduced the compromise of creative integrity in China, as the more recent and popular soap operas and situation comedies indicate. Under the pretext of safeguarding cultural values and perhaps to protect the state-owned television production facilities, the MRFT has ruled that imported movies may not exceed 40 minutes on prime-time television defined as 6pm to 10pm daily [AMCB, 1996d].

Chinese-language television and movie production in Greater China in 1993 was valued at US\$2.8 billion. Of this Taiwan had the highest share at 47 percent or US\$1.3 billion, followed by Hong Kong at 28 percent or US\$0.8 billion and PRC at 25 percent or US\$0.7 billion. Assuming growth of media markets at five percent annually, cable penetration exceeding 60 percent, and a slight increase in movie and television share of consumer purchasing power, the value of Chinese-language programme production in Greater China could be as high as US\$14 billion or five times its 1993 value, not counting subsidiary services [Hu, 1995]. The US was the largest source of funding for original Chinese television production through such media firms as Disney and Discovery, while Taiwan firms simply transferred labour-intensive animation contracts for films exported to the US [Weinstock, 1996]. By late 1996 the PRC Ministry of Radio, Film and Television (MRFT) had announced stricter regulations on the use of Chinese personnel in films and co-productions. To combat what it describes as the pernicious social influences of fake domestic films and co-production, the MRFT required that most of the film cast and crew should be native Chinese [Garland, 1997]. But such regulatory efforts of the Chinese government might be a case of 'too little, too late', and somewhat ineffectual in the highly competitive, global business of convergent media.

Given the social and cultural affinities between Hong Kong, Taiwan and the PRC, there is much synergy in their domestic television industries, despite their ostensible political and economic differences. Now that they share competition from transnational satellite television and compete among themselves as subregional broadcasters in Northeast Asia, the strategies of TVB, CCTV and various Taiwanese broadcasters in such a business environment might be instructive for other subregional markets in Asia with socio-cultural affinities.

Furthermore the extent to which the satellite and cable television medium has promoted homogenisation of cultural preferences and markets across Asia and especially in Greater China via programme production and export is worthy of further investigation. The next section of this chapter will look at the entry into the Chinese market of StarTV as the pioneering transnational satellite television, especially the differing responses of governments, broadcasters and audiences in its constituent territories.

### 7.3 TRANSNATIONAL COMMERCIAL TELEVISION

The largest number of StarTV-capable homes in Asia is in Greater China and naturally the development of transnational satellite television broadcasting is of critical interest to governments, broadcasters and advertisers alike in the subregion. Although the overall growth of this market has been steady, the experience in its constituent territories has been varied, with rapid growth in some states and provinces but decline in others. Soon after its launch StarTV achieved significant penetration in Taiwan, while virtually minimal penetration in Hong Kong, with the PRC somewhere in between, a situation that has generally persisted over the years since. These varying patterns of access to transnational satellite television in the Greater China subregion, and the reasons for them will be examined closely in this section.

#### 7.3.1 Hong Kong

*Economic & market potential:* The Hong Kong economy has gained a worldwide reputation for being the closest approximation to free-market capitalism, because it is relatively free of government intervention. The UN embargo on trade with communist China in the 1950s caused a economic slump and forced the rapid industrialisation of Hong Kong particularly in textiles and clothing, but also in electronic, clocks, plastics and other light industries. The export orientation of the economy is illustrated by the fact that total visible trade in 1993 was HK\$2.2 billion [US\$283,000 million] or 250 percent of its GDP, ranking it 10th among the world's economies [Hong Kong Government, 1994a: 51]. This phenomenal performance in visible trade has also been accompanied by growth in the services sector, resulting in Hong Kong being a major Asian as well as international centre for financial and business services. Britain's agreement to hand over the territory was conditioned on the PRC's assurance that Hong Kong's economic freedom and capitalist lifestyle would be maintained for at least 50 years, to their mutual benefit [Speake, 1992: 272]. This has been reassuring to the businesses operating out of Hong Kong having part or the whole of Greater China as their market, including the transnational satellite broadcasters and their advertisers.

*StarTV:* Although Hong Kong was the headquarters and satellite uplink location for StarTV, the media reported that it commanded a penetration rate of just 5 percent during 1993, with 253,000 people watching the network over a 24-hour period [Television Asia, 1994a]. Government estimates were that about 13 percent of television households in Hong Kong had StarTV access, and only 2 percent subscribed to cable-TV by 1994 [Interview Chn04.02]. However, StarTV claimed its penetration in Hong Kong had grown steadily since it was introduced in 1991, seeing an almost four-fold increase within the first four years,

namely from 116,925 households in January 1992 to 418,305 households in early 1995. Available by then in over 25 percent of all TV households in the colony and in 99 percent of satellite/cable-capable households StarTV was the leading such network. Viewership within those homes is 75 percent for 'watched StarTV in the past 7 days' and 30 percent for 'watched yesterday' [StarTV, 1995a]. The vast majority or, to be precise, 96 percent of StarTV households received the network through Single Master Antennae Television (SMATV) systems according to figures from January 1994 [StarTV, 1994b]. It was reportedly the leading network in homes able to receive satellite television, despite the burgeoning choice available. Domestic channels continued to have the largest share of viewership, though these were being eroded. Figures for Macao though were not available, but may be assumed to be not dissimilar to Hong Kong given the fact that Cantonese is the dominant dialect and much television watched is by spill-over from Hong Kong.

Prior to substantial cabling of Hong Kong, satellite television viewers received the service either via Microwave Multipoint Delivery System (MMDS) or Single Master Antennae Television (SMATV) which are appropriate technologies given the high urbanisation of the territory. Hong Kong is the leading SMATV market in Asia, and not Taiwan as is commonly thought [Interview Chn03.01]. In the past the company which owned the largest SMATV dish installation service also owned StarTV and thus helped increase its penetration in Hong Kong. It is said that Li Ka-Shing, the initial owner of StarTV had satellite dish-antennae installed liberally on all his real-estate holdings as a way of boosting penetration and viewership [Interview Chn01.05]. The initial rivalry over television between Hutchinson Whampoa and Wharf Holdings extended to their property developments, such that residents of a property development by Hutchinson were often not able to have access to Wharf Cable, while residents of a development of Wharf were usually not able to have access to StarTV [Interview Chn01.06]. However the dish-antennae installation company was subsequently purchased by Wharf Holdings, owners also of the rival Wharf Cable [Saatchi & Saatchi, 1994].

Research commissioned in 1995 by the Hong Kong Broadcasting Authority using the same market research firm as StarTV did, found that all 1,958 satellite TV-capable households were able to receive StarTV but only 47 percent could receive other satellite channels. Of the latter households, 43 percent received China Central Television (CCTV), 29 percent Canal France Internationale (CFI), 6 percent Asian Business News (ABN), 4 percent Australia Television, and 3 percent Guizhou TV, a southern China provincial channel [SRH, 1996]. There does not seem to be much difference in the age and sex profile of StarTV versus all-TV households in Hong Kong, but a significant difference in income distribution. StarTV overtook all TV households in the proportion of households having monthly incomes above HK\$20,000 (US\$2,600) and in the ownership of luxury products such as compact disk players, computers and cars. The principal breadwinner in StarTV households was also found to have a higher education and occupational status than all-TV households [StarTV, 1994b].

The most popular StarTV programmes in Hong Kong appeared to be the Star Chinese channel, Prime Sports and the music channel, Channel V. But even then they were no comparison for domestic television channels, a phenomenon attributed to higher production values of programmes of, newer programming on and the use of Cantonese on those channels. Specific comments in this regard made by interviewees were:

StarTV and Wharf Cable programmes are not as popular as Hong Kong domestic channels because they are perceived to be of poorer quality. Whether they are sourced from Taiwan and Singapore, produced in-house or re-runs of ATV's programmes, these programmes are seen as old-fashioned, even as a different culture to Hong Kong's [Interview Chr01.05].

StarTV regularly buys ATV dramas after having them dubbed into Mandarin [Interview Chr02.02].

Afternoon programmes on the StarTV Chinese channel are usually old B&W serials in Cantonese dubbed into Mandarin and one reason it is not in the same league as the local channels is because it is in Mandarin [Interview Chr03.01].

Due to the strong loyalty towards locally-produced programmes such as Cantonese soap operas, it is rumoured that cable subscribers were cancelling after one or two months [Interview Chr03.02].

Of all the StarTV channels, Channel V was singled out for special mention by several interviewees. This was for its exceptional ability, in their view, to attract audiences and advertisers through cultural contextualisation of its programming, seemingly without much loss of its MTV-type ethos.

Channel V has created programs for prime-time in each market thus making it more attractive to advertisers for it certainly got better audiences, for example the Taiwan audience was said to have grown six times because of the introduction of Chinese pop songs, plus popular video jockeys (VJs) previously on MTV Asia [Interview Chr01.03].

MTV has affected the style of advertising to youth and retained its international identity while Channel V had catered to local tastes [Interview Chr03.04].

Channel V has done programmes for prime-time in each national or ethnic market under its footprint because that makes it more attractive to advertisers because it had larger audiences [Interview Chr03.04].

Prior to 1995 StarTV had not been allowed to use the Cantonese dialect on its non-entertainment channels which were practically all of its channels, and instead it utilised Mandarin which was relevant to Taiwan and the PRC but not Hong Kong where it is scarcely spoken, at least prior to the 1997 hand-over to the PRC. Though that restriction was removed by the Hong Kong authorities after the mid-term review that year, StarTV had chosen not to do so immediately. With its eventual broadcasting in Cantonese, StarTV viewership in Hong Kong, Macao and southern China especially Guangdong province, was expected to rise subsequently.

*Wharf Cable:* By 1994 satellite television was offered in Hong Kong by cable as well as by MMDS, but viewership was not growing as well as expected. The cable subscriptions were aimed at those living at government housing estates, seemingly a mass audience to be tapped for satellite television but they seem quite satisfied with programming on the domestic terrestrial stations. There have also been problems with wiring Hong Kong with optic fibre cable, which have led to the process being behind schedule. The 'mid-levels' residential area in Hong Kong which comprises the upper-middle class and expatriate populations had yet to be wired by the 1994, nor was it close to MMDS transmitters [Davies, 1994a]. For reasons mentioned earlier, satellite dish-antennae have not been prevalent in Hong Kong except in apartment blocks owned or developed by Li Ka-Shing. By later acquiring Fortress from Li's Hutchinson Whampoa, Wharf Cable gained access to a customer base of 300,000 households and hotel rooms already wired to receive StarTV [Goll, 1995]. If it had acquired the rights to distribute three of StarTV's better-known channels, Wharf Cable would have acquired their established audiences as well as an added inducement for would-be subscribers but the negotiations soured. There were 60-80,000 Wharf Cable subscribers by early 1994, while

penetration rate was 61 percent of TV households and at 95 percent of cable households it is the most popular satellite channel in Taiwan. About 57 percent of all StarTV households 'watched yesterday' and this figure rose with household income [StarTV, 1995a]. Interviewees in the sub-region were mixed in their assessment of the progress, some thinking it represented remarkable growth, others pointing to the failure of the pan-Asian strategy.

This reflects remarkable growth from figures in 1993 that it was available in just 11 percent of all TV households, or 1.6 million cable homes, when movie-based cable channels had 59 percent penetration of all cable homes in Taiwan [Interview Chn02.01].

StarTV used to have good penetration rates in Taiwan and PRC, but this declined over time as domestic television improved the quality of their programming [Interview Chn01.01].

Initially, StarTV expected the upper classes of Asia to purchase satellite dishes in order to watch their channels and were not concerned about mass appeal. Since then it has made Greater China, India and Indonesia its prime markets and is planning over a hundred channels in multiple languages targeted at them. The original StarTV channels may remain as free-to-air showcases of its programming offerings [Interview Chn01.09].

When StarTV switched its Taiwanese distributor, cable operators blacked-out its channels to protest against the new distributor's plan to reduce the existing discounts which allowed cable operators to pay for only 20 percent of subscribers [Asian A&M, 1995a]. While this situation eased soon after, StarTV continued to be dependent on carriage of both its free-to-air and pay-TV channels on Taiwan's ubiquitous cable operators who had a wide range of alternative channels to retransmit to their subscribers. There were said to be about 160 to 180 channels available in Taiwan in 1995 but each cable operator had a re-transmission capacity to homes of only 50 to 70 channels. Government regulation stipulated that six channels had to be reserved for the military and that the three terrestrial broadcast stations must be carried, thus strictly leaving only 45 channels per cable operator for the satellite and cable channels to compete for [Interview Chn02.10].

*TVBS:* In 1993 TVB entered the Taiwan market with its SuperChannel or TVBS, a Mandarin-language cable channel delivered by satellite. It did not succeed as well as expected because it used Hong Kong programmes initially but subsequently realised that local programmes were needed. So unsuccessful was TVBS with its programming in Taiwan that it achieved only 5 percent penetration then [Interview Chn 03.01]. Soon TVB began producing Mandarin-language programmes, achieving an output of 1,000 hours a year and a penetration of 2.5 million homes representing almost 90 percent of cable households and 50 percent of all television households in Taiwan [TVB, 1994a]. Having become the most popular cable channel in Taiwan, TVBS expanded elsewhere in the region by being available to subscribers in the Philippines via SkyCable, in Singapore via Singapore Cable Vision and in Thailand via Universal Cable TV. TVBS diversified its offerings into TVBS Golden and TVBS Newsnet channels. TVBS Golden featured in-house productions of dramas, made-for-TV movies and music specials broadcasting from 10:00-04:00 hours. While TVBS Newsnet featured international and financial news in the morning and evenings, and lifestyle and entertainment for women and children in the afternoon [TVBS, 1995b].

*Cable networks:* The cable industry in Taiwan comprised local cable system operators, satellite-transmitted cable channels and programme suppliers, generally separate entities but not without some blurring of boundaries between them. The cable operators were segmented geographically and so sold

advertising time to very localised clients, while the cable channels were segmented by lifestyle. Most of them relay channels from other sources, domestic or transnational. However they were reputed to exaggerate their subscriber numbers to advertisers while down-playing the numbers to their programme and channel providers seeking royalties. This situation was expected to improve with regulation and licensing taking effect in the late 1990s.

Few channels are run by cable operators, since most of the latter re-transmit others' channels [Interview Chn03.07].

Each cable operator chooses which satellite and cable channels to re-broadcast, a decision influenced by the royalties charged by the channels [only new channels offered no-royalties deals to attract them initially] and on the demand by subscribers or their willingness to pay the subscription fee [Interview Chn01.08].

Cable operators have not been honest with satellite channels about their subscriber numbers, often stating that they had only 3,000 household when they actually might have 10,000 or more. However when approaching advertisers, cable operators exaggerate the number of subscribers in the opposite direction [Interview Chn02.10].

One of the recent entrants in the domestic television market, Po-Hsin Entertainment began in 1995 as a programme provider, television channel operator and multiple-system operator (MSO) owning nine cable operators around Taiwan. Like CTV (China TV), Po-Hsin's PHTV station was KMT-financed. Po-Hsin had leased one transponder from ApStar1 on which through digital compression it could broadcast six channels, three of them run by Po-Hsin itself while the other three were sub-leased to others. PHTV1 or Information Channel featured political, economic and international news as well as lifestyle information, for which it had its own studios which produce 95 percent of their own programmes. PHTV Toei was a 24-hour Japanese movie channel, the films for which were produced by a leading film studio in Japan but subtitled in Taiwan. PHTV Drama was a channel planned to feature soap operas, movies and film-idol programmes. Of the remaining three channels, two were sub-leased to Taiwanese firms San-Lih and Tai-Chi for popular entertainment channels featuring their own variety shows and soap operas. The third was utilised by Disney channel for which Po-Hsin was sole agent in Taiwan. It was uplinked from Singapore through ApStar1 and so Po-Hsin also does Disney's distribution and promotion among cable operators in Taiwan [PHTV, 1995]. Like 90 percent of the channels in Taiwan all Po-Hsin channels were encrypted for subscription television.

Rebar, a subsidiary of one of the top ten conglomerates in Taiwan, claimed 1.5 million subscribers in 1995 for its fifteen channels of B-grade Mandarin and foreign movies, educational television, MTV-style music programming, TV-shopping and a Taiwanese dialect channel. Currently supplying some 200 cable operations around the country, Rebar was in the process of acquiring 15 systems of its own by 1997. United Communications Group owned by the China Trust Bank, was another multiple system operator (MSO) which had exclusive distribution in Taiwan of StarTV channels. However this was a Chinese business family-to-family deal between the Koo family who owned UCG through their China Trust Bank and Li Ka-shing who previously owned StarTV through Hutchinson Whampoa, and thus fell through when News Corporation purchased StarTV [Davies, 1994b]. Yet another player in the Taiwan market was the smaller ERA International of unknown political affiliation, which distributed both HBO Asia and TVB International channels. The opposition political parties were also players in the domestic television market by running



broadcast channels, producing programmes and owning cable operations. The Democratic Progressive Party (DPP) owns the CBT channel which includes a news service and 25 cable television operations while The New Party (NP) owns Truth network which also offers news.

The mix of transnational and domestic satellite channels available to Taiwanese viewers changes rapidly on a monthly basis. As of December 1995 there were 181 channels altogether, and on average each household received 53 channels. Of these 10 channels were from PRC, even though Taiwan channels were not permitted there reciprocally. These comprised the CCTV 1-3 channels, plus provincial Mongolia, Szechuan, Yunkuei, Chejiang, Shandong, Xinjian channels. The Japanese public broadcaster's NHK1 & NHK2 channels were available in Taiwan as well as its HDTV channel. A further 12 commercial Japanese channels were transmitted from Japan, in addition to the fact that numerous Taiwanese channels broadcast Japanese programmes such as movies, variety and news. The US channels re-transmitted were the CBS Hour with programmes two years out of date, and Las Vegas which was mainly gambling shows interspersed with some entertainment. Indonesian, Malaysian, French and Singapore channels were also readily available in Taiwan [Interview Chn03.09]. Further comments on the state of the industry by interviewees included:

There are no fixed channels in the package of each cable operator due in part to legal problems, for example between StarTV and local cable operators over royalties at one stage in 1995, or due to competition, for example between HBO and Time-Warner [Interview Chn02.09].

Some satellite channels from Japan and the US are sourced legally or illegally, and are recognisable as such among Taiwan cable channels since they are not subtitled [Interview Chn01.08].

Subtitling is usually done by local cable operators on videotaped programmes which have been purchased by ahead of their re-transmission, although Home Box Office and ESPN have their programmes already subtitled into Mandarin and there is increasing provision of alternative

Mandarin soundtracks [Interview Chn03.07].

With over 160 cable channels available in 1995, the average home in Taiwan had access to at least thirty. Of the 5.5 million TV households in Taiwan, 3.5 million were cabled, representing a penetration rate of 67 percent. Apart from the dull programming over the past three decades on the three dominant terrestrial networks, other explanations for this high penetration might be the human crowding at recreational areas which made staying at home for leisure preferable, and growing affluence which has increased demand for video-on-demand and pay-per-view services [Interview Chn02.10]. StarTV was available in 11 percent of all TV households, or 1.6 million cable homes, while movie channels had 59 percent penetration of all cable homes in Taiwan [Interview Chn02.01]. A monthly fee of NT600 (US\$22) provided the subscriber the basic 65 channel package, although some channels cost more like the Playboy channel at NT200 (US\$7). The two income streams of advertising and subscription via cable operators had to be balanced by the satellite and cable channels. In other words, the more advertising they accepted, the less attractive these channels were to audiences and therefore the less they could charge for subscription [Interview Chn02.10].

Since many Taiwanese legislators were owners of cable operations and had endured police harassment such as the cutting of cable wires, they were keen to have cable television legalised for their own benefit [Interview Chn02.10]. As the new cable law takes effect, a shake-out in the cable industry was

expected. A minimum of NT200 million [US\$7 million] was required for the necessary infrastructure to comply with the law, and consequently between mid-1993 and end-1995 the number of cable operators dropped from over 600 to about 180. The largest cable operators were believed to have 100,000 subscribers, most about 20,000 and some as few as 3,000 subscribers. According to one academic researcher, cable television would eventually supersede the three broadcast networks because the non-establishment ownership of cable television gave them credibility with audiences. Furthermore, the advertising income of the networks would decline, while the cable operators would merge or cooperate with each other under the new Cable TV law passed in 1993 [Interview Chn03.08]. Most of the domestic cable channels were said to be losing NT 5-6 million (US\$180,000-220,000) per month each and lacking a long-term strategy were expected to go out of business [Interview Chn03.08].

### 7.3.3 PRC

*Economic & market potential:* As explained in the history section, China's economy since the communist take-over has seen much upheaval in the implementation of Stalinist planning. Since the return of Deng to power in the late 1970s there had been a pragmatic commitment to market liberalisation within the bounds of communism, but not without periodic political setbacks. Dismantling the system of farm communes resulted in better agricultural productivity, privatisation has seen foreign investment in the economy, and technology transfer through foreign investment has modernised the PRC's industries. China's gross national product had been growing at the rate of 8.7 percent over the 1980s [Qin Shi, 1992: 33] and was US\$354.73 billion in 1989 which worked out to US\$351 per capita [Goonasekara and Holaday, 1993: 168]. The establishment of special economic zones bordering Hong Kong and Macau were further radical experiments in capitalist development promoted by Deng which have generally proved successful. The Tiananmen massacre left the PRC temporarily isolated politically and economically, but the lure of its massive market has seen normalisation of ties soon after. Its management of the economy of Hong Kong following the handover in 1997 is the next litmus test of the PRC's ability to carry out its resolve to combine economic capitalism and liberalism with political communism and control. This will be watched assiduously by foreign governments and multinational corporations, not least the transnational media-owners, marketers and advertising agencies operating out of Hong Kong and from elsewhere into the PRC.

Prior to the advent of transnational satellite television it was estimated that there was one television set for every five citizens and a prime-time viewership of 75 percent of the entire population or 850 million, one third of them from urban areas [Chan, 1996: 133-134]. A few satellite dish-antennae appeared from the 1980s onwards, but their growth mushroomed only in the early 1990s when a PRC-owned rocket was used to launch the AsiaSat1 satellite which carried both CCTV and StarTV's five channels. Only upon the purchase of StarTV by Rupert Murdoch's News Corporation in 1993 did the PRC reimpose bans of unlicensed dish-antennae, out of concern that their management would be less sensitive to political and cultural issues than Li Ka-shing's Hutchinson Whampoa, the previous Hong Kong owner [Asia Inc., 1994]. Severin [1994] dubbed it a new cultural revolution, one in which China's population tended to point their satellite dish-antennae in the direction of satellite bearing NHK (Japan), BBC, CNNi or Taiwanese news

sources for news of their own country which had been censored. Statistics quoted by a government official claimed that by the end of 1995, there were 835 TV stations, 1200 cable TV stations with 40 million subscribers and 1000 educational TV stations, and 280 million TV sets in the country [Ma, 1996].

*StarTV*: This transnational broadcaster has had a chequered history in the PRC, one of its key markets, ever since it was first beamed into the country from AsiaSat1 in late 1991. It shared its AsiaSat1 satellite platform with some of China's provincial stations and benefited by the growth of satellite dish sales in the early 1990s which gave an estimated 30-70 million Chinese access to transnational satellite television. This growth was believed to be in large part due to StarTV programming, even though the popularity of the channels varied considerably. Interviewees stressed the critical importance of relevance of music and sports to attracting audiences, a lesson which StarTV seemed to learn early.

In fact StarTV split with MTV over the former's decision to go national with the India, China and Philippines markets [Interview Chn03.04].

When the late-coming competitor ESPN generally did better in attracting audiences, StarTV's Prime Sport channel fought back using local sports, for instance, cricket for South Asia and swimming for China, using split beams for both sound and visuals [Interview Chn01.09].

StarTV bought the rights to the popular China football league in 1994 [Interview Chn03.01].

The bi-lingual StarTV Movie pay-TV channel was put in place instead of the BBC World Service News for northern beam, while the latter was retained on the southern beam [Interview Chn01.03].

A further way in which StarTV segmented its markets was by using the NTSC colour system for China and Taiwan on the northern beam, and PAL for India and Indonesia on the southern beam [Interview Chn01.03].

In PRC alone StarTV claimed 30.5 million households in 1994 or a penetration rate of 13 percent of all TV households and of the StarTV households 37 percent 'watched yesterday'. The household monthly income of a StarTV home was found to be Rmb 1,319 (US\$160) while that of all TV homes is Rmb 1,044 (US\$125), and demonstrated also in higher ownership of luxury goods such as VCRs, compact disc players and personal computers [StarTV, 1994d]. The impact of StarTV on southern China such as in Guangdong province was low, compared to and because of the spill-over from Hong Kong terrestrials and where in fact both ATV and TVB have almost equal market shares there. The penetration of StarTV in southern China was believed to be as much as 20 to 30 percent of all households, while the domestic PRC channels' penetration was 95 to 100 percent, because the former concentrated only on Mandarin and English programming then [Interview Chn02.02].

Speculation has it that, spurred by Murdoch's speech in early 1994 claiming that transnational television would be a challenge to totalitarian governments, the Chinese government moved to restrict satellite dish ownership to public institutions, tourist hotels, and apartments for foreigners [AWSJ, 1994a]. Murdoch made amends by removing the BBC World channel which the Chinese government found the most controversial for its news bulletins and documentaries, including an unflattering one on Mao Zedong. Concerned over StarTV being shut out of the PRC market, News Corporation began talks with officials of the MRFT and Rupert Murdoch made a personal visit to Beijing. Among the ideas floated was a system by which Chinese authorities could downlink, censor and then re-broadcast StarTV programming through local

cable networks. StarTV was also in talks over continued acquisition, co-production, joint telecasts and other cooperative ventures [Business Times 1994c].

The culmination of these efforts was the announcement two years later of the establishment of Phoenix Television in which StarTV would take 45 percent, a Hong Kong firm named Today's Asia would take another 45 percent, and the remaining 10 percent would be held critically by China Wise International, a sales and advertising agent for national and provincial television stations in mainland China. It was believed that CCTV was to have been a party to this investment, since new legislation permitted it to launch cable services, but it withdrew either due to objections from MRFT officials or because it did not wish to yield to pressure from News Corporation. All the same, CCTV contracted to supply programmes through its China Television Programme Agency to the Phoenix Chinese Channel which replaced the existing Star Chinese channel [Hughes, 1996f]. By early 1997 StarTV claimed that its research in 33 major cities indicated the Phoenix channel had a penetration of 36.2 million households in the PRC or 13 percent of all TV households. This represented a potential viewership of 140 million people, largely under 36 years old, more affluent and educated than the average Chinese viewer [Asian A&M, 1997d].

*CNNi*: On the surface there seemed much potential in the PRC for the all-news transnational broadcaster, given the economic growth, technological change and deregulation trends in the early 1990s there. However Hong [1994] recognised that its use of satellite platforms which necessitated separate, larger and more expensive dish-antennae, cost of subscription and language of broadcast would be significant hurdles. This was especially so because its competition had platforms more familiar to the China subregion, and the free-to-air availability of news in the Mandarin language on domestic and transnational channels. In 1995 CNNi signed an agreement with the China International Television Corporation for distribution of its channel into 43 new hotels in Beijing [CNNi, 1995]. Only in early 1997 did CNNi launch localised programming: a 15-minute regional news programme sponsored by Cathay Pacific, the Hong Kong airline, and targeted at business travellers [Asian A&M, 1997k]. But despite its international reputation and regional marketing effort CNNi remained a relatively small player in Chinese subscription television households.

*CETV*: China Entertainment Television (CETV) commenced broadcasting from Hong Kong but via a single satellite channel to mainland China in March 1995. It maintained that its programming policy of 'no sex, no violence, no news' would go down well with East Asian audiences where Confucian ideals of government control and family values were dominant [Interview Chn02.06]. Since CETV was totally entertainment-oriented, politically inoffensive and not 'foreign-owned' [though founder Chua was himself a Singaporean Chinese], it was more readily condoned by the Chinese government, and better accepted by the broader Chinese populace in contrast to Channel V, for instance [Interview Chn04.03a]. Having simply requested cable operators offering CETV to write in stating how many subscribers they had, it claimed a higher viewership than StarTV in the PRC [CETV, 1995k]. But the lack of sophisticated market research to back its claim, meant advertiser scepticism [Interview Chn01.06b]. Less than a year later in early 1996 CETV received a US\$29 million investment boost when the Hong Kong-based Lippo Group, the Malaysian-Chinese MUI group and the US-based International Media Corporation took equal shares in the

firm leaving the founder and his wife with 20 percent. Chua claimed then that CETV was the most popular transnational broadcaster in the PRC, having penetrated 28 million households there [Hughes, 1996a].

*Cable networks.* In China, early cable networks were owned by municipal and provincial governments, as well as large state-run firms for their workers. Originally municipal governments were allowed to carry StarTV since they was lower in the political structure and further from central government policy to cause embarrassment. But provincial governments have chosen to follow suit in offering StarTV on their cable systems due to competitive pressures, resulting in a situation of 'suppressive openness' [Chan, 1994a]. It was believed that some Beijing officials responsible for regulation of cable television were bought off by junkets to the South of China [Interview Chn04.03]. Thus corruption resulted in StarTV being readily available in the country in defiance of official edicts. An estimated 10,000 cable operators were said to exist in the PRC, ranging from large ones which control half a city to small ones which control a street or even one side of a street. StarTV had researched the incidence of cable access to its channels in the PRC but would not release its data. In 1992 two sets of statistics surfaced about the situation in the PRC, the official statistic claiming 3 million viewers of StarTV, while another from cable operators suggesting a figure of 14 million [Interview Chn01.06].

From the mid-1980s satellite dish-antennae were scarcely used but the launch of AsiaSat1 in the early 1990s created phenomenal growth with sales said to be about 20,000 dish-antennae per month. By end-1993 up to 70 million Chinese were estimated to be watching programmes from transnational satellites such as AsiaSat1, Palapa, Thaicom and others with broadcast footprints which covered China (PRC), either directly or via cable systems. In 1994 the State Council Proclamation No.129 signed by the Chinese premier Li Peng, came into force, banning unlicensed ownership of satellite dish-antennae on the grounds of preserving Chinese culture and socialism. But it might have come too late for by early 1994 there were estimated to be between 600,000 and 1 million satellite dish-antennae already in use. Furthermore the People's Liberation Army (PLA) had been actively manufacturing satellite dish-antennae as a means of supplementing its falling budget grants from the central government of the PRC [Ciotti, 1994]. Although domestic television stations were not allowed to rebroadcast satellite television, thousands of illegal cable operators had been relaying transnational programming or pirated videos to neighbourhoods. Thus cable television had become a large-scale industry in the PRC (Table 7D) attracting foreign investment including from Hong Kong and Taiwan, as well as domestic investment including local governments [Stine, 1994: 30-33].

Table 7D: Cable television in major cities of PRC, 1996

<i>City</i>	<i>Subscribers</i>	<i>City</i>	<i>Subscribers</i>
Shanghai	1,520,000	Qingdao	260,000
Beijing	1,000,000	Hangzhou	250,000
Wuhan	350,000	Nanjing	240,000
Guangzhou	300,000	Taiyuan	190,000

Source: Bulloch [1997] quoting Shenzhen Broadcasting Institute

Interviewees for this research were rightly cynical of the PRC government's attempt to maintain a typically socialist approach to media in the face of opposing political, social and economic forces from within its ranks. There were many ironies of the situation, such as the Peoples Liberation Army's business interests in manufacturing satellite dish-antennae and in cable networks while the central government was seeking to discourage, if not prohibit, access to transnational satellite television. Some of the pertinent observations were:

While Chinese government officials continue holding to the communist line on media officially, they privately admit to lacking conviction about it. As an indication of the Chinese government's concern for control, in recent years journalism education has been made the joint responsibility of the government's propaganda department and education department and no longer of only the latter [Interview Chn04.03a].

A veneer of political-military control is considered important by the Communist Party and the Peoples Liberation Army to the growth of the economy in which they have vested interests [Interview Chn01.02a].

The PLA is a major investor in Chinese industry and, for instance, raises part of its military operating funds through running cable television operations. These relay StarTV channels along with CCTV channels, especially into urban apartments comprising higher income households [Interview Chn01.03].

The PLA is involved in the production of satellite dishes ostensibly for the reception of CCTV, though often used for transnational broadcasts as well [Interview Chn01.09].

The success of transnational satellite channels was dependent in part on the varying government regulations in Greater China, but more so by the extent of symbiosis they achieved with domestic cable operators in each of the constituent territories of Hong Kong, Taiwan and PRC. Each of these markets were getting increasingly competitive because as we have seen their domestic broadcasters, public and commercial, had sought to maintain their hold on viewership through expanded channels or better programming. Meanwhile new entrants such as transnational broadcasters or even domestic broadcasters gone transnational, as well as multi-service operators running channels of their own were growing the market and fighting for share of the audience. The next section of this chapter will look at the viewership of transnational satellite and domestic terrestrial and cable television in the Greater China market.

#### 7.4 TELEVISION CONSUMPTION

The television scene in Hong Kong, Taiwan and the PRC has seen radical change in recent years, precipitated by the advent of transnational satellite television whose growth in turn benefited from some on-going developments in the domestic television industries. Due to the cumbersomeness of describing and comparing three territories within the Greater China region, this section will confined itself to the consumption for transnational satellite television (with a particular focus on StarTV) and its usual carrier, domestic cable networks. As such it will not discuss the consumption also of domestic commercial or public television, whether long existent or newly arrived, as was done with the single-country case-studies of previous chapters, except where it is critical to understanding viewership of transnational satellite television and domestic cable television.

#### 7.4.1 Hong Kong

*Population demographics:* The population of Hong Kong was stated as 6,019,000 at the end of 1993, 59 percent of them male. The 1991 census estimated that 60 percent of the population was born in Hong Kong and 34 percent in the PRC. Unrest following the Chinese revolution in 1911, the Japanese invasion of China 1938, and defeat of the Nationalists by the Communists in 1949 saw successive waves of refugees into Hong Kong, and illegal immigration continues to be a problem. The age distribution of the territory changed over the period 1983-1993, with the population under 25 years falling from 24.1 percent to 20.0 percent, while those 65 and above rose from 7.0 percent to 9.2 percent [Hong Kong Government, 1994a: 411]. An overwhelming 97 percent of the population was ethnically Chinese, predominantly Cantonese-speaking and Buddhist, and only 3 percent European and Asian expatriate populations, including sizeable Filipino, British and Indian communities [Johnstone, 1993: 265].

*Market research:* Research commissioned by StarTV in 1995 found 30 percent of individuals aged 9 years and above in StarTV homes in Hong Kong had watched it the previous day and 75 percent watched it in the previous week. StarTV also might be more popular among younger viewers with 34 percent of individuals aged 15-34 claiming to have watched it yesterday as compared to 25 percent of those aged 35 and above [StarTV, 1995a]. But research commissioned by the Broadcasting Authority in 1993/94 of all TV households found minimal involvement with satellite television. Those who had access to StarTV watched it 2.3 hours per week (or 0.3 hours per day) as compared with average viewing per day by all TV households of 2.5 hours on TVB Jade, 1.7 hours on TVB Pearl, 0.8 hours on ATV Home, 0.5 hours on ATV World, totalling 5.5 hours per day. As might be expected, of all the domestic-terrestrial, cable and transnational-satellite channels available in 1993-94, TVB was watched most often by 91 percent of the households surveyed. However, there was a slight drop in viewing hours of domestic channels from 6.6 hours in 1990, prior to StarTV, to 5.5 hours in 1994. This might be explained by the one-third of StarTV viewers who stated that they watched less commercial television, presumably referring to the domestic broadcasters, subsequent to their installation of satellite-access [Broadcast Asia, 1994c].

*Social research:* TELA, which does regular research on terrestrial and satellite broadcasting, estimated that in 1994 about 300,000 Hong Kong households had access to satellite television, in contrast to 1.6 million TV households altogether. However audience surveys on hours watched, channels, and so on were conducted mainly on terrestrial television because satellite television viewership was low and cable television was introduced only in 1994. StarTV households claimed to watch 2.5 hours of the stations' channels per day, and the most popular channels were the Star Plus, the Prime Sports and the Mandarin channels [MDR, 1994].

Research commissioned later by the government specifically on transnational satellite television viewership and conducted in 1995, found quite a different situation from that described by StarTV. Interviewing only households with satellite-access, it found that on average viewers spent 1.3 hours per week on StarTV programmes overall and 1.4 hours per week on CCTV-1, though a far larger base of 1,560 viewers watched StarTV compared to the 195 viewers of CCTV-1. The prime-time for StarTV viewing

seemed to be 6:00-9:00pm when 65 percent of its audience was watching, while 43 percent watched from 6:00-9:00pm and 23 percent from 2:00-6:00pm. As these were self-reports to interviewers, with accompanying risks of bias, and not proper ratings using people-meters or diaries, the figures need to be treated with some care. In this later research on satellite television households, of those watching StarTV in the previous week, the actual channels watched were in descending order: Star Mandarin (52 percent), Prime Sports (49 percent), Channel V (44 percent), and Star Plus (24 percent), indicating that language is a significant factor in viewership since the first three are either entirely or partially in Mandarin. Of the non-StarTV channels watched over the previous week, CCTV-1 headed the list at 10 percent followed a distant second by Asian Business News and Guizhou TV at 1 percent each [SRH, 1996].

*Ratings:* Television ratings for StarTV in Hong Kong could not be released publicly or to this researcher because they were proprietary information paid for by the domestic TV stations and not StarTV itself. It would be expensive for StarTV itself to gain access since the Survey Research Group (SRG) which did the ratings had a long-standing business relationship with TVB and the Hong Kong 4As (Association of Accredited Advertising Agencies). StarTV had done its own research but was not considered authoritative by interviewees in the industry.

The Hong Kong 4As has paid HK\$4 million [US\$510,000] for a 10 percent share of the [ratings] data [Interview Chn02.07].

Ratings were done independently by StarTV but they were a minimalist attempt [Interview Chn01.03].

In the early 1990s StarTV and Wharf Cable had negotiated to collaborate on increasing their penetration in Hong Kong but the negotiations failed. This is because competition between their owners Hutchinson-Whampoa and Wharf Holdings respectively.. [Interview Chn01.07].

Table 7E: Top ten television programmes in Hong Kong, 1996

<i>Programme</i>	<i>Channel</i>	<i>Rating</i>	<i>Viewers '000</i>
Wars of Bribery	TVB Jade	30	1,718
State of Divinity	TVB Jade	30	1,710
Movie Buff Championship	TVB Jade	30	1,709
Night Journey	TVB Jade	29	1,676
Price to Pay	TVB Jade	29	1,674
Gala Spectacular '96	TVB Jade	29	1,643
News Headlines	TVB Jade	29	1,624
Nothing to Declare	TVB Jade	28	1,600
MBC: Final Mission	TVB Jade	28	1,581
Once upon a time in Shanghai	TVB Jade	28	1,578

Source: SRG Research Services (HK), quoted in *Asian A&M* [1997a]

Even in the mid-1990s the viewership of StarTV remained very limited in Hong Kong in comparison to the terrestrial channels, as indicated by the ratings (Table 7E) where StarTV programmes do not feature. The Television Broadcasters Limited's Chinese channel, TVB Jade, commanded the largest share of the Hong Kong television audiences, regularly 80 percent at prime-time. In contrast to StarTV and



even ATV, TVB was said to be more mass-audience oriented, though it still needed an up-market segment to appeal to advertisers. Generally it has achieved a 25-30 percent market share, though sometimes up to 50 percent as when its most popular programming genre of drama is featured [Interview Chn02.02]. The English-language channels of TVB and ATV had minuscule audiences but they could not cease operations because the Hong Kong license required each station to have one channel per language. By the time of the 1993/94 survey, nearly 40 percent of all TV households in Hong Kong had NICAM decoders [Broadcast Asia, 1994a]. The introduction of these decoders for the reception of multi-channel sound tracks from television broadcasts paved the way for greater flexibility in programming and market segmentation in the future.

There was believed to be a decline in terrestrial audiences because audiences tended to watch terrestrial broadcasts during prime-time and satellite and cable broadcasts afterwards, but no research was available to verify this. Since it was a narrowcast medium, a Wharf Cable executive explained that it did not monitor ratings on programmes, preferring to depend on subscription data or knowing what channel-packages people buy to what they watch. He also claimed to research what its Hong Kong consumers wanted through some undisclosed method and sourced such programming worldwide. Since Wharf Cable was interested only in the Hong Kong cable market, it professed to not be concerned whether there was a pan-Asian market for its offerings [Interview Chn02.05].

#### 7.4.2 Taiwan

*Population demographics:* The Taiwanese population has comprised one of the more successful markets for StarTV from its very beginning. Of the 20.3 million population, local-born Taiwanese represent 84 percent of the population, mainland Chinese 14 percent, while about 2 percent is comprised of Malayo-Polynesian tribal indigenes in the mountain regions. There are also sizeable communities of expatriate Westerners, Filipinos and Japanese, working in its thriving economy. Adult literacy stands at 91 percent and Mandarin is the national language, though Taiwan uses an older more complex script than that adopted in PRC and does not use a romanised form. Many of the older generation educated during the Japanese colonial era can speak Japanese, while southern Hokkein/Fuchien and Hakka dialects are widely spoken as they are on neighbouring provinces on mainland China or PRC [Johnstone, 1993: 170].

*Ratings:* Due to the proliferation of television channels in Taiwan, both transnational and sub-regional, via satellite and cable, the audience market was highly fragmented. Popularity of each such channel was also said to fluctuate depending on programming and occasion, such as elections or selective soap operas. But in no case has any one transnational broadcaster been able to match the ratings of the domestic terrestrial broadcasters, though collectively all the cable networks could.

The ratings for each cable channel were fractional, often no more than 5 percent, because they were so numerous. Since localising via subtitling and voice-overs, HBO has achieved ratings of two to three percent across the channels [Interview Chn03.09].

By comparison the ratings of domestic [terrestrial] networks were much higher except during call-in programmes on cable channels and that especially at election time [Interview Chn03.07].

Ratings for the domestic networks had been declining since the advent of cable television, especially since TVBS entered the market in 1993 with a programming mix which included political forums and Cantonese 'soaps' [Interview Chn03.08].

The Japanese soap-opera 'Oshin' on ATV was especially popular in Taiwan where it was the top rating programme recently, even though it was shown previously on TVB [Interview Chn02.02].

With the audience fragmented among the numerous satellite and cable channels operating in Taiwan, StarTV claims to have the highest share of viewing among them, the Star Chinese/Mandarin channel being its best performer. There were six StarTV channels in late 1995 plus another planned specifically for Taiwan, but the pioneering transnational broadcaster was not without significant competition, not the least of which from TVB of Hong Kong.

Similarly another major player in Taiwan, TVBS, the cable channel run by TVB of Hong Kong did not succeed as well as expected because it utilised Hong Kong programmes initially till it realised local programmes were needed to satisfy viewer preferences [Interview Chn01.04].

StarTV Mandarin used to be the premier channel in Taiwan but TVB's Superchannel via cable overtook it, because it was tailor-made to Taiwanese tastes, while Star had a pan-Asian regional focus [Interview Chn01.07].

There were two TVB channels available in Taiwan by end 1995 plus another planned [Interview Chn03.09].

Despite the popularity and growth of the satellite and cable channels in Taiwan, the domestic terrestrial broadcasters continued to dominate the ratings as their counterparts do in Indonesia and India. The range of the latter's TV Ratings (TVR) in 1994 was in the 20s, while those of the former were not only in single digits but insignificantly between one and zero (Table 7F). However, collectively, the various satellite and cable channels command a sizeable audience and a TVR of 32, comparable to each of the terrestrial broadcasters and thus representing a significant threat and a promising trend.

Table 7F : Taiwan weekly television ratings, 1994

<i>Channel</i>	<i>Type</i>	<i>Audience</i>	<i>TVR</i>	<i>Channel</i>	<i>Type</i>	<i>Audience</i>	<i>TVR</i>
CCS	Cable	8,000	1	Wowow	Satellite	1,000	0
CNN	Satellite	1,000	0	StarChinese	Satellite	14,000	1
CTS	Terrestri	280,000	20	StarMTV	Satellite	3,000	0
CTV	Terrestri	274,000	20	StarBBC	Satellite	2,000	0
NHK1	Satellite	2,000	0	StarPlus	Satellite	1,000	0
NHK2	Satellite	2,000	0	StarSport	Satellite	6,000	0
TTV	Terrestri	371,000	27	Other	Std. & Cbl	402,000	29
TVBS	Satellite	11,000	1	<i>Total</i>		<i>1,378,000</i>	<i>100</i>

Source: SRT [1994] *Weekly Audience Report*.

#### 7.4.3 PRC

*Population demographics.* No discussion of television audiences can ignore the fact that with 1.2 billion citizens, the PRC is the most populous nation on earth and comprises 21 per cent of the world's population. Despite stringent family planning laws, the population has continued to grow and 59.1 percent of the population is less than 30 years of age, 40.8 percent under 20 years [Goonasekara and Holaday, 1993: 167] Han Chinese comprise 92 percent of the population, although they share eight major languages and 600

dialects among them. However the PRC uses only one written language in a modernised, simplified script and well as in a romanised form called 'Hanyu Pinyin'. The official language, Mandarin or Putunghua, is spoken by over 744 million, while some of the other eight languages such as Wu by 78 million, Cantonese by 53 million, Hunanese by 45 million, and Hakka by another 45 million. Statistics on religion are not kept as atheism is actively propagated but it is estimated that only 59 percent are atheist, with 30 percent traditional Chinese religionists and Buddhists, 6 percent Christian and 2 percent Muslim. Only 55 ethnic minorities are officially-recognised though the linguistic diversity is in reality closer to 150, and includes Tibeto-Burman, Mongolian, Turkic, Mon-Khmer and Korean groups [Johnstone, 1993: 163]. The PRC's concerns over transnational satellite television must surely encompass not just the latter's political influence on its general population but their cultural appeal to its volatile ethnic-linguistic minorities even though they comprise only eight percent of the total population.

Table 7G: PRC domestic television audience growth

<i>Year</i>	<i>TV stations</i>	<i>Audience</i>	<i>Year</i>	<i>TV stations</i>	<i>Audience</i>
1978	32	47 million	1986	292	580 million
1980	38	120 million	1987	386	590 million
1982	118	210 million	1992	812	806 million
1984	167	470 million	1994	1108	852 million

Source: Adapted from CCTV and government surveys, quoted in Hao and Huang [1996]

*Ratings:* There were no China-wide ratings at the time of the fieldwork and the only data available from government sources was that of television audience growth (Table 7G). Similar data was available from the transnational broadcaster, StarTV which had utilised an independent market research firm to obtain them. This was compared, where feasible, with data obtained from other television broadcasters, notably the Hong Kong terrestrials which spilled-over into southern China (PRC). Most such data on the PRC highlighted three metropolitan cities, namely Beijing, Shanghai and Guangzhou and sought to compare them as representative of the more populous north, central and south regions of the eastern coast of the country.

According to StarTV research in May 1994, StarTV was in 55 percent of Guangzhou TV households, but in only 13 percent of Beijing and 2 percent of Shanghai households. However StarTV was 'seen yesterday' in 10 percent of Guangzhou, 8 percent of Beijing, and 1 percent of Shanghai TV households, a situation of less variation. When only StarTV households are considered, the channel was 'seen yesterday' in 61 percent of Beijing, 50 percent of Shanghai and 18 percent of Guangzhou, an almost reversed situation. As to share of viewing, all StarTV channels were found to comprise 10 percent though only Star Chinese and Star Movies averaged about 4 percent while the rest were less than 1 percent, as compared with TVBS channels at about 3 percent and 1 percent respectively [StarTV, 1994f]. These figures indicate that the transnational broadcasters have a minuscule share of the viewing market and accorded with responses of interviewees, who may have used the term 'ratings' loosely.

Although the highest rating television station in Quanzhou (capital of Guangdong province in the south) is a local commercial station, in the rest of the province television reception is 90-95 percent via cable and largely of non-local programming [Interview Chn02.02].

CCTV, is not popular in southern China while StarTV's popularity is minimal and confined largely to Beijing. TVB broadcasts spill-over into Guangzhou, resulting in an additional 15 million viewers and doing better than China's domestic TV channels there [Interview Chn01.04].

The situation seemed unchanged a year later when the top rating programmes of 1995 in all three metropolitan cities did not include any StarTV or for that matter any transnational satellite channel, with the possible exception of Guangzhou, although that was spill-over Hong Kong terrestrial television retransmitted by the local Guangdong Cable TV network (Table 7H). Notably some of the top rating programming were either imported from the other territories or joint productions between PRC and them. There was some rivalry between two multinational research firms, Nielsen SRG and the French research firm Sofres, to produce definitive ratings for the China market by late 1996 using differing measurement devices. Early leaks revealed nothing new, such that CCTV-1 had about a 30 percent share of Beijing audiences but only 3 percent of Guanzhou, losing out there to Hong Kong spill-over channels and provincial stations [Cable & Satellite Asia, 1996d].

Table 7H: Top rating programmes in three metropolitan cities in the PRC, 1995

<i>Programme</i>	<i>Type</i>	<i>Channel</i>	<i>TV rating</i>	<i>Viewers '000</i>
<u>Beijing:</u>				
Beijing News/Weather	News	BJTV1	29	1,834
CCTV News [Relayed]	News	BJTV1	27	1,694
CCTV News/Weather	News	CCTV1	25	1,554
All For You	Variety	CCTV1	25	1,549
Reporter's Time	Informath	CCTV1	24	1,525
<u>Shanghai:</u>				
Qixia Wuyi/Zhenming T.	Drama	Oriental TV	25	2,070
News Report	News	Shanghai TV1	20	1,606
News in Focus	News	Shanghai TV1	19	1,591
Oriental 110	News	Oriental TV	19	1,552
Bai Jia Xin	Drama	Oriental TV	19	1,550
<u>Guangzhou:</u>				
Just Magistrate Bao	Drama	TVB Jade	17	689
Reporter's Time	News	TVB Jade	17	676
News/Weather	News	TVB Jade	14	553
Sunday Local Movie	Movie	ATV Home	12	489
Dao Ma Dan	Movie	TVB Jade	12	475

Source: SRG China TV Audience Measurement, quoted in Asian A&M [1997b]

However survey research conducted in late 1996 by a PRC market research company affiliated to the State Statistics Bureau found that StarTV was available in 19.1 percent of homes in the coastal regions and 17.2 percent in the northern regions [Asian A&M, 1997d]. But as part of the trend explained earlier it was only in 5.7 percent of homes in the southern regions, while in the north-west the corresponding figure was slightly higher at 9.5 percent. The audience for Phoenix Channel on which the research focussed was relatively young with 54 percent aged 21 to 40 years old, was better educated than that of all TV households, and had a 30 percent higher income. The channel highlighted the fact that 57 percent of respondents said that they liked Phoenix programming while 28 percent remained neutral, leaving only 15 percent with dislikes. The reasons most cited for watching Phoenix channel were defined by the vague categories of 'Rich content', 'Highly entertaining' and 'Quite refreshing', while a subsidiary reason for watching was that of gaining knowledge about Hong Kong and Taiwan. On the basis of its research Phoenix estimated that 80 million viewers liked the Phoenix channel and reported that a total of 13 million households claimed to have 'watched yesterday'. Even discounting the channel's selective reporting, one has to recognise that the revamped and better targeted programming seemed to be making inroads into the the PRC television market, doing better than other transnational satellite television channels which had preceded it.

The responses of audiences to transnational satellite television in the three territories of Greater China reflect their respective television histories, regulatory environments and subcultural identities. In Hong Kong transnational satellite television was not able to shake the strong loyalty to domestic terrestrial television, and thus the cable access enterprise was virtually a still-born despite all the government's effort to protect it. In Taiwan it was the political control of terrestrial broadcasting which led to the proliferation of cable operators to provide an alternative viewpoint and liberalised entertainment to a ready audience, which received a boost with the growth of global and subregional channels. In the PRC the need for satellite television to reach the whole country across mountainous terrain was coupled with the need to maintain control of content from transnational and subregional satellite broadcasters. This has seen the growth of officially sanctioned cable networks, joint-ventures in programme production as well as diversification of the domestic public broadcasting system. The continued growth of transnational satellite broadcasters, not just in Greater China but the whole Asia region, would depend on the response of advertisers. The perception of advertising agencies and multinational and domestic marketers of the importance of the new commercial medium and their consequent strategic decisions about account management, media buying and creative execution for the region or subregion is what the next chapter will address.

## Chapter Eight

### SATELLITE TELEVISION ADVERTISING

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With the advent of the transnational medium of satellite television in Asia the long-debated issue of globalising advertising has been revisited in the region, along with concerns about the consolidation of strategy, media-buying and creativity, and market domination by international advertising agencies. This chapter explores the views of advertising agencies, domestic broadcasters, market researchers and media regulators towards transnational satellite television in the three key markets of Indonesia, India as well as Hong Kong, serving as the regional hub for advertising and broadcasting in Greater China and much of East Asia. Trends in ratings, media costs and advertising expenditure in Asia following the advent of transnational satellite television are analysed utilising secondary data judiciously. The aim of this exercise is to examine the different ways in which StarTV in particular was utilised as an advertising medium by some marketers or why it was largely ignored in other cases in Asia.

#### 8.1 ADVERTISING ON STARTV

As seen in previous chapters, the pioneer broadcaster StarTV was initially pan-Asian in its programming and sought to convince international marketers and their advertising agencies of this unique advantage. However speculation in its early years that there was little response from Asian television audiences proved to be true and prompted a belated admission and shift by StarTV to a strategy of subregional programming. This shift had much to do with gaining sufficient advertising revenue for the largely free-to-air service to stay financially viable. In this section we will look at the advertising and sponsorship strategy of StarTV under its two ownership eras, the actual products attracted to the medium, and the revenue thus raised over the first few years of the transnational satellite television service.

##### 8.1.1 Advertisers and sponsors

*Hutchinson Whampoa era:* In these early years StarTV did not disclose advertising earnings probably in large part because they had been lower than expected since advertisers were sceptical about penetration and viewership figures. Undergirding StarTV in its initial years were a number of Hong Kong firms which signed two-year contracts as 'foundation advertisers'. Many of them had little need to advertise on a pan-Asian medium but were believed to be personal business associates of Li Ka-Shing, head of the family which owned StarTV then. However the founding managing director and son Richard Li claimed later that such advertisers comprised only US\$40 million of the estimated US\$360 million advertising revenue earned by 1994 and that the rest came from multinational corporate sponsors such as Coca-Cola,

McDonalds and Sony which had legitimate business rationales for advertising on StarTV [Straits Times, 1994a].

Operating costs in the first year were estimated at US\$80 million and the business was not expected to breakeven till the end of 1994 [Asia-Pacific Broadcasting, 1993]. One cost-cutting business strategy which Richard Li adopted was to pay minimal royalties to channel programme providers such as BBC and MTV, instead offering them a share of the profits and the opportunity of being showcased on the first commercial satellite station in Asia. For the StarPlus entertainment channel he purchased inexpensive re-runs of *Santa Barbara* and *Hill Street Blues*, popular in the US a decade earlier but not seen before in most of Asia [Straits Times, 1994a]. Another practice developed by Star TV was to offer co-financing to independent programme producers through an associate company which handled such acquisitions, namely Media Assets Ltd which was incorporated in March 1992 with a capitalisation US\$300 million [Asia-Pacific Broadcasting, 1993]. None of these efforts seem to have made much of an impact on the financial fortunes of StarTV and Hutchinson Whampoa was soon looking for a new business partner which it found in News Corporation.

*News Corporation era:* Once ownership of StarTV passed fully into the hands of News Corporation, it was abandoned as an advertising medium by former owner Li Ka-Shing's business associates in Hong Kong. Attempts by the new 'Western' management to enforce contractual obligations on these Chinese businessmen were unsuccessful. At the same time, the growth in the number of transnational broadcasters available on the rival satellite platform Apstar undermined StarTV's ability to attract audiences. Its inability to provide local content in Hong Kong due to government restrictions, the prohibition of private ownership of satellite dish-antennae in China and Singapore particularly and preference given to controlled cable-based access to transnational broadcasts by governments severely restricted StarTV's marketability to advertisers. Furthermore, StarTV's change of strategy towards pay-TV and subregionalised services was pre-empted by newer pay-TV rivals such as HBO Asia and ESPN Asia.

#### 8.1.2 Product categories advertised

By the second full year of its operation, the largest number of advertisers on StarTV by product category were hotel, leisure and travel, and their choice of the transnational satellite television medium was understandable since by the very nature of the service their target markets are primarily transnational. Banking and financial services followed closely behind with fashion and boutiques, cars and accessories, and alcoholic beverages. Somewhat surprisingly, StarTV did not attract significant number of advertisers in the categories of audio and visual equipment, or watches and clocks, often global in production and marketing. Over the years, the category of 'food and confectionary' attracted the largest number of advertisers on the medium, followed by 'corporate image' and 'fashion and boutiques'. While corporate advertising was a natural use of the transnational television medium, the other two categories reflect both the growing affluence of Asian consumer markets and the aggressive involvement of marketers, both regional and global.

Table 8A: Top product categories advertised on StarTV

<i>Product category</i>	<i>1993</i>	<i>1994</i>	<i>1995</i>	<i>1996</i>
Albums & cassettes (music)	13	15	36	61
Alcoholic drinks	34	47	52	55
Automobiles & accessories	34	42	68	65
Beverages	20	27	34	45
Construction & real-estate	15	22	15	25
Corporate image	40	50	68	89
Electrical appliances	41	52	48	54
Fashions & boutiques	33	43	60	73
Food, confectionery	26	32	61	101
Medicines & eye-care	15	15	11	20
Telecommunications	11	14	26	21
Toiletries, personal care & cosmetics	21	37	36	75
Travel, hotel, leisure & airlines	49	64	42	49
<i>Total</i>	<i>385</i>	<i>493</i>	<i>577</i>	<i>762</i>

Source: StarTV [1993b], [1994c], [1995b] & [1996] *Media packs*.

It is worth reiterating that these rankings by number of advertisers may have little correlation with actual expenditure by product category or brand/corporate name, the latter being considered proprietary information by StarTV under both ownerships and not available for analysis. Nor does the data provided by StarTV give clear indication of which advertisers may have withdrawn from further advertising or increased their advertising spending, of what their countries of origin are, of what their target markets (domestic or transnational) were. There was evidence that there had been changes in how the products were categorised such as by the creation of new product categories such as health foods in addition to food and confectionary, and airlines in addition to travel, hotel and leisure, thus making comparison across the years difficult. It was also not clear how, for instance, the category 'corporate image' was differentiated from clients in the banking and telecommunications industry who tend to use such advertising liberally, especially as some corporate names seem to fall under different categories in different years. Certainly in the data provided there were no clues as to what specific brands, products or services of each client were advertised, and of what type of persuasive appeal was used. There were also some indications from the more detailed newer lists of advertisers that often advertising of the same global brand or firm is placed by its subsidiaries in different countries, perhaps somewhat independently of each other. Nonetheless increasing number of advertisers in most categories does provide a measure of the relative success of this particular broadcaster, StarTV, in attracting certain products and services as advertisers.



### 8.1.3 Advertising revenue

Soon after its inauguration, StarTV offered an advertising package for 'pioneer' clients which included 4,000 television spots of 30 seconds each for US\$2 million. The deal also made these clients automatically stake-holders in StarTV and allowed them to take up to two years to utilise the advertising time so purchased. Alternatively, an advertiser could purchase a 30-second spot on StarTV for US\$1,500 which compared favourably with the CCTV rate set at US\$8,000 and the TTV rate of US\$3,500 approximately. StarTV advertising revenue was estimated by an academic researcher to have been around US\$100 million in 1992 and to have doubled the following year, boosted by liquor and cigarette advertising banned on many terrestrial broadcasters [Wang, 1993]. But a few years later StarTV reported to the television industry media that its advertising revenues rose from US\$13 million in 1992 to US\$37 million in 1993 and to an undisclosed amount over US\$100 million in 1994 [APT-C, 1995: 40]. Another industry source placed StarTV's 1994 revenues at US\$112 million and its 1995 revenues at US\$88 million, a significant 21.5 percent decline [Bailes and Hollister, 1996: 133]. At the same time News Corporation stated that its losses in StarTV were estimated at US\$30 million in the year ending June 1995 and it was forecasting losses of up to US\$100 million in the year to June 1996 [APT-C, 1995: 40]. However in early 1997 StarTV claimed to have earned US\$17 million of advertising from China alone in November-December 1996 for its Phoenix Chinese Channel [StarTV, 1997], which, if true and sustained, would augur well for the transnational satellite broadcaster. Given StarTV's reluctance to declare its financial situation, there are considerable gaps and discrepancies between estimates and self-claims (Table 8B).

Table 8B: StarTV advertising revenue, 1992-95

<i>Year</i>	<i>1992</i>	<i>1993</i>	<i>1994</i>	<i>1995</i>
Claimed	US\$13m	US\$37m	>US\$100m	
Estimated		US\$100m	US\$112m	US\$88m

Sources: Wang [1993]; APT-C [1995: 40] and Bailes and Hollister [1996: 133].

As mentioned earlier in this thesis, StarTV aimed initially to tap into the burgeoning advertising expenditures in Asia by targeting the cosmopolitan, English-speaking urban elite across region. But it failed to make a dent in the fortunes of domestic commercial broadcasters who provided tailor-made programming to local audiences, and so StarTV was forced to switch from a pan-Asian to a sub-regional strategy including alliances with domestic cable networks and the use of pay-TV. Up until the Star Movies pay-TV channel was introduced in 1994, the broadcaster had only one income stream, namely advertising. But subscriptions and carriage fees was expected to increase and become a significant income source in the future as it was already in India where it accounted for 30 percent of StarTV revenues [APT-C, 1995: 40]. Insufficient revenue, whether from advertising and subscription, is believed to have precipitated the failures of smaller transnational satellite broadcasters in the region such as Singapore's Channel KTV, and is said to be threatening others such as Hong Kong's CETV and CTN, and Thailand's UTV, IBC and Thai Sky. While

the financial break-even point for StarTV was not expected till the late 1990s, its ownership by the media conglomerate News Corporation has allayed any concerns about financial viability in the short-term.

Table 8C: Products and brands of television commercials on StarTV in 1992

<i>Product category</i>	<i>No. of TVCs</i>	<i>Pct. of TVCs</i>	<i>No. of brands</i>	<i>Examples of global/regional brands</i>
1. Corporate image	23	13.7%	11	Pioneer, Coca-Cola, Yaohan, CIBC, Citibank, Shell, Merrill Lynch, NEC Sumitomo, Mitsubishi, Lippo
2. Fashion/ Accessories	20	11.9%	15	Nike, Wrangler, Benetton, Omega, Lotto, Levi's, Rolex, Citizen, Baume & Mercier
3. Food/ Beverages	17	10.1%	14	Ferrero, Kraft, Lipton, Cadbury, Complan
4. Consumer electronics	15	8.9%	10	Panasonic, Phillips, Pioneer, Toshiba, Sony
5. Vehicles/ Car-care	12	7.1%	8	Ford, Nissan, Audi, Honda, Jaguar Castrol, Mobil.
6. Banks/ Financial	12	7.1%	7	Mastercard, Hongkong Bank, Chase, Commerzbank, Deutsche Bank.
7. Airlines/ Travel	12	7.1%	9	SIA, MAS, Holiday Inn, Thai Int'l Hilton, Philippines Airlines
8. Magazines/ Print	11	6.5%	5	Businessweek, Far East Economic Review, Time, Int'l Herald Tribune
9. Soft-drinks	11	6.5%	6	Pepsi, Coke
10. Alcohol/ Liquor	10	6.0%	10	Otard, Budweiser, Hennessey, Martell, Remy Martin, Chivas Regal, Miller
11. Toiletries/ Cosmetics	6	3.6%	5	[Nil - all local brands]
12. Cameras/ Film	5	3.0%	4	Ricoh, Polaroid, Fujicolor, Kodak, Pioneer, Canon
13. Telecoms	5	3.0%	2	Motorola phones, Hutchinson Paging
14. Miscellaneous	9	5.4%	7	Dulux, Toys R' Us
<i>Total</i>	<i>168</i>	<i>100.0%</i>	<i>113</i>	

Source: StarTV [1992a] *Showreel of television commercials*.

#### 8.1.4 Commercials' content

Content analysis was carried out on a showreel or videotape sampler of 168 television commercials (TVCs) that had appeared on StarTV in 1992, in its first full year of broadcasting when it was still operating solely as a pan-Asian satellite television service. When StarTV was approached by this researcher for such a showreel it denied that one had been put together previously, but this videotape provided by an advertising agency in Hong Kong was said to have been supplied by StarTV originally. While the basis for the selection

of these television commercials is neither known nor knowable, it does seem to have been a random sample either of those shown over the whole year or of those in a typical month because the videotape is dated December 1992. Naturally the videotape sampler provides no indication of how often each commercial might have run or how much might have been invested in advertising time over a set period by each of the marketers represented. Still it does demonstrate the range of representative products advertised on this transnational medium, and allows reasonable inferences about countries of TVC production and about the markets targeted by the advertisers.

The food products advertised on StarTV were not staples such as bread, rice or noodles but seemed to be largely indulgent snack-foods such as chocolates and potato crisps, as reinforced by the fact that the upmarket Ferrero chocolates alone had three different commercials on the sampler. Both Coca-Cola and Pepsi, the leaders by far in global soft-drinks, were well-represented on the medium via multiple TVCs and sponsorship programme trailers. Although there are only nine TVCs from alcohol manufacturers in the sample, this must be seen in the context of allegations by interviewees that liquor has been a mainstay of StarTV's advertising and the fact that most domestic television stations in the region either ban or have severe restrictions on liquor advertising. The brands advertised represented are mostly the more expensive imported European cognacs and whiskies, and may in fact have been targeted at the Greater China market where for instance Hong Kong has a reputation for having one of the highest rates of consumption per capita worldwide. For India, where liquor advertising is banned, StarTV represented one of the first means of advertising via television to that market and was represented in the sample by the local brand of whisky with a pseudo-Western brand-name, McDowell.

The fashion category listed some of the leading upmarket global brands such as Levi's jeans, Benetton high fashions, Nike shoes and Rolex watches, and very few local or regional brands. Rather surprisingly the opposite was true of toiletries and cosmetics advertised on StarTV in 1993-94, though it might be that those unrecognisable brands are in fact manufactured by multinational corporations or their joint-ventures/licensees but marketed using a multi-domestic strategy. Consumer electronics such as stereos, television sets, VCRs and the like formed a significant proportion of the TVCs in the sample, and was represented by all the leading brands such as Panasonic, Sony, Toshiba, Canon, Phillips, and the like. Although most of them were Japanese, the TVCs were often produced in other countries of Asia or were global TVCs adapted by their agents in national markets. Camera and video hardware and software may be considered a specialised subset of consumer electronics and once again listed a number of global brand-names. The telecommunications products such as mobile telephones and pagers seemed to be directed primarily at the Greater China market and especially Hong Kong where there is very high use of them. It is also worth noting that Hutchinson Paging was part of the conglomerate that owned StarTV then and was probably supporting the struggling broadcaster through its advertising or enjoying privileged advertising rates, or both.

The vehicle category of products contained a mix of upmarket cars such as Audi and Jaguar as well the more mass-market car manufacturers Nissan and Ford though in the latter cases only their more upmarket models were featured on StarTV. Also included in the category were a motorcycle brand, Kinetic Honda, a

joint-venture product in India, as well as the more mundane products, tyres and motor oils. Leading regional Asian airlines and international hotel chains dominated the airline and travel services advertised on StarTV, which as mentioned earlier makes much sense since their target markets are transnational by the very nature of their services. Oddly, no American and European airlines seem to have availed themselves of the medium, at least to any significant extent in 1992 or later. Even though they were relative competitors, the use of transnational television to promote transnational print media such as *Time* and the *Far East Economic Review* made much sense since their target readers are the same upscale business and government leaders which watched StarTV.

Banks and financial institutions were another major category of advertisers on StarTV, partly because the broadcaster was then targeting the socio-economic elite of Asia and partly because some countries in the region had restrictions on financial services advertising. There was considerable overlap between this category and the next of corporate advertising where again leading banks and financial institutions such as the Canadian Imperial Bank of Commerce (CIBC), Citibank and Merrill Lynch were represented alongside softdrink maker Coca-Cola, as well as a number of Japanese MNCs such as consumer electronics manufacturer NEC, industrial marketer Sumitomo and retailer Yaohan. Corporate advertising was possibly the best use of StarTV then when it was positioning itself as a pan-Asian elite medium. The ability of StarTV to transcend national regulations on the advertising of certain products such as liquor and financial services in countries that it beams to has been a boon to its revenue, given its inability otherwise to attract significant advertising away from domestic media. However this has been a source of friction with governments in the region and contributed to their attempts to restrict access by their citizens to transnational satellite television. This curtailment of audiences in turn has implications for marketers of other products which have a viable alternative of advertising in domestic television media without restriction.

Although StarTV has varied its broadcasting and advertising strategy from a pan-Asian to a regional or even quasi-domestic one and attracted greater interest by advertisers, it still seems to be having difficulty achieving financial viability of its free-to-air services. Having evaluated the strategy of StarTV for attracting advertising in this section, the issues of advertising on this transnational medium will now be looked at from the perspective of industry executives its three key target markets. The next section will report and summarise the viewpoints of decision-makers in Indonesia, India and China on whether transnational satellite television was utilised for advertising in the early 1990s, and if so how. It will naturally examine also why the medium was considered unsuitable in some cases or of limited value in others, by ad agencies, domestic broadcasters, market researchers and broadcast regulators.

## 8.2 ADVERTISING MANAGEMENT

As seen in the review of the academic literature on advertising globalisation, the advent of transnational satellite television was believed to undermine government regulation of domestic broadcasting and advertising. Domination of domestic advertising industries by international advertising agencies serving multinational marketer clients would continue to escalate, with the transnational medium prompting the realignment of advertising accounts to take advantage of the economies of scale of global or regional campaigns. Thus the experience of Europe and the Americas was thought to be likely to replicate itself in Asia. Therefore this section examines the impact of the advent of StarTV on strategic advertising decisions made by ad agencies and their marketer clients, and the responses of media-owners and governments in Indonesia, India and China.

### 8.2.1 Indonesia

*Government regulations:* As a public broadcaster TVRI does not accept advertising except of a community and public interest nature [Grafik McCann-Erickson, 1994]. However 12 percent of the advertising revenue of the domestic commercial channels was remitted to TVRI as their licensor [Interview Ids04.01] and as a means of financing the latter's operations as nation-wide public broadcaster. Thus the commercial stations were upset with TVRI for accepting sponsorships directly, such as that by Dunhill of the 1994 World Cup soccer broadcasts for Rp 1 billion (US\$450,000) [Interview Ids03.08]. By law all advertising in Indonesia has to be placed via a local advertising agency with a domestic medium, which therefore precludes multinational marketers from buying transnational media time through their Indonesian operations. At least this was one reason cited by domestic advertising agencies for their lack of interest in transnational satellite television.

According to the government Decree 111 of May 1989 all commercials on Indonesian television had to be produced locally, though full exemption was granted for airlines. But since there was a lack of production houses, some multinationals such as Coca-Cola and Marlboro use international versions of their television commercials with the Board of Censors' permission. Regulations in future were expected to allow 20 percent local content in television commercials [Interview Ids01.01]. Advertising agencies in Indonesia were also self-regulated by a code of ethics which specified adherence to national laws and ideology, sensitivity to local culture and religion, restrictions on promotion of certain products and so on [PPPI, 1996: 167]. On the surface it would seem difficult, though not impossible, for Indonesian advertising agencies to participate in the creation, production and utilisation of regional advertising, via transnational television or otherwise.

*Agency-marketer re-alignment:* There had been a shift of marketer client accounts in Indonesia to international ad agencies with the reintroduction of television advertising years earlier, motivated by a search for skills in producing commercials. But there had not been any corresponding multinational client-agency re-alignment in the country prompted by transnational satellite television. Industry opinion held it unlikely that there would be a sizeable shift to pan-Asian television advertising as marketing strategies and positioning

of multinational products were quite different even between culturally similar countries such as Malaysia and Indonesia.

When television advertising was reintroduced in Indonesia there was a shift of some accounts to international agencies for their professionalism and expertise but none have moved since the arrival of StarTV and other transnational satellite channels [Interview Ids03.05].

Creative 'hot-shops' specialising in television commercial production as well as local agencies able to undercut by price have competed with international agencies for multinational marketer accounts. Even these smaller agencies are beginning to network on a regional basis [Interview Ids01.07].

Advertisers are not switching their advertising spending from domestic to transnational television. In any case the law states that all Indonesian advertising have to be booked via a local agency and with local media [Interview Ids04.01].

Regional advertising was believed by respondents not to work in Indonesia because of language and cultural barriers. This was said to be reflected in the fact that local programming in Indonesia, however badly produced, enjoyed higher ratings than any imported programming. Foreign programming similar to that available on the transnational satellite channels were available on the domestic commercial channels either dubbed or subtitled, and therefore more popular. Furthermore it was relatively expensive to purchase a satellite dish-antenna and so the approximately 600,000 viewers of transnational satellite television in Indonesia were believed to be mainly the wealthier ethnic-Chinese, expatriate executives or English-educated Indonesians. Since domestic broadcasters offered mass markets for cheaper, these small up-market segments held little interest to interview respondents from the advertising industry, as their comments imply.

Even if they were English-speaking, audiences prefer programmes to be dubbed because it makes them easier to understand and otherwise the wider family may not be able to appreciate them [Interview Ids01.08].

Dubbing of imported programming leads to higher ratings than simply subtitling them [Interview Ids01.02].

Transnational television would have great impact once costs of parabolas are lowered through local manufacture and there is greater cable-sharing of them [Interview Ids01.07].

*Domestic target markets:* It was believed that consumption habits had changed as consumers had become more sophisticated and brand conscious through the influence of domestic commercial television even prior to the advent of transnational satellite television. Yet the effect on consumption behaviour by commercial television since its introduction in the late 1980s was said by the interviewees to be less than that of TVRI's advertising when it first started in 1960s. This was because at the later time there were multiple influences via other media, greater geographical mobility, better communications, higher income, and so on. Only anecdotal evidence was proffered for the view that the reintroduction of domestic television advertising in 1987 had been responsible for greater consumer awareness, more so than transnational satellite television.

Consumers are now more aware of brand alternatives through domestic television which has greater coverage of the country than print [Interview Ids01.06].

Anecdotes we hear suggest that the reintroduction of television advertising has been responsible for greater consumer sophistication and brand consciousness [Interview Ids01.05].

Language barrier, promotions of commercial stations, better time-of-day appeal to audience give domestic stations the edge (over transnational ones) [Ids01.06].

As we saw earlier in the case-study on Indonesia, the government seems to have anticipated the arrival of transnational satellite television by deregulating its domestic television industry. The attractiveness of this alternative was compounded by the language barrier to watching transnational television and cost of owning private satellite dish antennae, which has changed only slightly with the introduction of cable television. The result has been considerable loyalty to domestic commercial channels which are available nation-wide and free-to-air, though the relative popularity of each channel varies from one sub-national region to another. Therefore, Indonesia was not a target of transnational advertising via satellite television, nor was the medium used much by multinational marketers operating in the country for domestic advertising targeted at its elite.

### 8.2.2 India

*Government regulation:* Advertising in India is governed by the advertising association's code of ethics. As to regulation of television advertising, agencies adhere to the Doordarshan (DD) policy regarding no liquor or tobacco advertising, while in the press there are some laws governing the advertisement of certain products, for example health warnings on tobacco [Interview Ind04.03]. The DD commercial code incorporates social objectives such as not offending moral, racial or religious susceptibilities, protecting the consumer against false claims, and not promoting money lenders, private lotteries, betting, fortune telling and matrimonial agencies. Another of its guidelines is also the non-promotion of foreign goods and foreign banks [DD-ARU, 1994a: 84-86]. These regulations were a reflection of India's earlier, if only partial, commitment to a socialist economic model which bred a bureaucratic public system inimical to capitalist production and marketing.

Indian law states that advertising should not be more than 10 percent of broadcast time, but this is not on a clock-hour basis but on a per-day basis. Advertisers may even carry-over credits from the previous day - this means a record number of commercials on some programmes [Interview Ind02.04].

In the past India had a controlled economy and so there were scarcely any imports. Government approval was needed for manufacture and so each product (category) had only 6-8 producers. [Interview Ind03.07].

It is not just an issue of advertising but distribution of product. In India till recently it was impossible to do business efficiently because of the government bureaucracy [Interview Chin01.01].

With the advent of transnational satellite television, notably StarTV, the Indian government attempted to thwart its growth in India by enforcing its existing foreign exchange rules. These required a marketer to earn over Rs 1 million in export earnings before it would be permitted by the Reserve Bank of India (RBI) to utilise part of that to purchase advertising time on a foreign medium via licensed agents, ostensibly to further promote export sales.

But government clamped down on this and its foreign exchange rules were applied [Interview Ind02.07].

In order to advertise on StarTV, an Indian marketer has to be a qualified exporter, approved by the Reserve Bank [Interview Ind01.10].

Only if an Indian marketer earns more than Rs 10 lakhs of foreign exchange in the previous two years from exports is it eligible for advertising on overseas media. Advertising agents (only three or four of them in the country approved by RBI) get paid in Rupees, deduct their commission and then claim for forex [Interview Ind04.01].

The finance ministry's directive to RBI, banning release of foreign exchange specifically for advertisements on foreign television channels, particularly StarTV, was withdrawn after representatives from foreign channels held meetings with ministry officials and threatened to take the government to court for flouting a basic constitutional clause [Nag, 1993]. Thus the Indian government's attempts at control of transnational or domestic commercial satellite television within the framework of existing laws did not work. Almost all of the prohibited advertising practices discussed above are commonplace on StarTV and ZeeTV, since their broadcast signals were uplinked in Hong Kong did not come under the jurisdiction of India.

*Agency-marketer re-alignment:* In the mid-1990s there was some re-alignment of the Indian advertising accounts of multinational marketers with their worldwide advertising agencies. But this was generally attributed to the liberalisation of India's regulatory environment which fortuitously coincided with the arrival of transnational television, and not to the impact of the latter. Thus the response of interviewees to the question of whether StarTV in particular or transnational satellite television in general had prompted re-alignment of advertising accounts was equivocal.

There is some evidence of movement of global advertising accounts to MNC agencies [Interview Ind01.01].

There are new corporate tie-ups between MNC agencies and local ones such as Y&R with Redifusion, rumours of other MNC agencies planning to set up operations and some exchange of creative personnel between India and overseas markets [Interview Ind01.04].

Even global brands need a regional basis for communication, and so there may be a need for advertising strategy and creative input from around the Asian region [Interview Ind03.07].

Even the transnational satellite television executives admitted that there was little pan-Asian advertising because the multinational marketers used different agencies around the region, their marketing programmes had differing impact, and the medium had different prime-times in different national markets. Most of Indian television advertising campaigns were domestic because there were very few global products in India. Even global brands available in the country had different positioning, packaging, and brand equity - problems which had to be solved at the marketing end before advertising. Selected illustrations of the phenomenon provided by respondents were:

Some products advertised on StarTV and ZeeTV are from MNCs, especially the Japanese such as Sony and Panasonic, but also others like Colgate-Palmolive's Lux, and P&G's Pampers [Interview Ind02.01].

There is little coordination of advertising as each national subsidiary or its ad agency buys advertising time from its local Zee office, because of budgets and power [Interview Ind03.07].

Markets are different across Asia, more so than Europe [Interview Ind02.01].

There has been some movement of national brands from national media down to sub-national/local media to avoid MNC competition through their (the latter's) domination of the national/global media in seeming confirmation of Levitt's globalisation thesis [Interview Ind01.10].



*Domestic target markets:* From observation the products from India that were advertised on transnational satellite television tended to be high-value consumer durables. The major advantage of transnational satellite television has been that it allowed Indian advertising agencies for the first time to target brands at market segments. Advertising of luxury goods on transnational satellite television were believed to bring about a positive predisposition to these global brands when they were encountered overseas by Indians. Corporate advertising was another use of transnational satellite television, though even then it was identical to commercials used on domestic television. As the interviewees explained:

The reason there are no transnational campaigns is because prime-times are not in common across the footprint, and products not available throughout the region yet [Interview Ind01.08].

The products that are advertised on transnational satellite television tend to be those which are extremely expensive eg. cars such as Maruti 1000, male-oriented products eg. Standard car battery and liquor, or lifestyle products eg. credit cards [Interview Ind01.03].

Of the StarTV channels only StarPlus and BBC have significant audiences among and impact on up-market segments in India [Interview Ind01.07].

Therefore Star TV should not go back on its original strategy of targeting the pan-Asian elite since it will never strictly be a medium catering to the masses [Interview Ind02.04].

The availability of the medium did not result in a rush of multinational product advertising directed at India, because as the interviewees pointed out such products were either unavailable in India or not well distributed in that market. Instead transnational television was used to advertise domestic brands to the Indian market thus stimulating consumer demand and as a consequence its pull, expanding their distribution. Unintentionally this domestic advertising on a transnational medium had resulted in some export orders from other national markets, elsewhere in South Asia or in West Asia, where the same advertisements were seen.

Television has been the great equaliser prompting considerable improvement in distribution: whereas the largest distributor had 2,000 outlets in 1984, by 1994 it had 50,000 outlets. [Interview Ind 02.01].

MNC products were not available in India till recently, but were available elsewhere and sought after by Indians abroad. Some Indian products may grow markets worldwide, especially with the 'greening' of markets. [Interview Ind01.07].

Some Indian ads have resulted in export orders and pickles from Pakistan are advertised out of Dubai to its major market in Middle East [Interview Ind02.02].

*Transnational target markets:* ZeeTV, the Indian-language affiliate channel of StarTV, might be said to have become a transnational broadcaster as it had an audience in the Persian Gulf region of both Arabs and Indians, who were seen as consumers of Indian food exports. Pakistan advertisers also used ZeeTV and StarTV because they faced no foreign exchange restrictions on funds-transfer to pay for the advertising, unlike Indian advertisers. The popularity of both StarTV and ZeeTV in other countries of South and West Asia was explained by the expert interviewees thus:

ZeeTV programmes are mainly film-based, so they are popular even in Egypt, and similarly the Pakistani plays on Zee broadcasts are popular in India [Interview Ind01.02].

Pakistan television audiences watch ZeeTV because their Urdu language is similar to Hindi unlike Bangladesh due to its populace lacking facility with Hindi [Interview Ind01.04].

The Pakistan government is worried about the socio-cultural impact because English is still in use in the country, whereas Hindi and Urdu have 90 percent words in common [Interview Ind04.04].

The use of split beams and programming differentiation by StarTV meant that it was possible for Indian advertisers to target specific markets, and was increasingly done as successive channels were thus split, beginning in 1994 after the takeover by News Corporation. As a result, advertisers were able to target specific geographical and cultural segments of the Asian market, such as expatriate Indians in the Middle East, Pakistanis and Arabs. Although as of the mid-1990s this was done in only a limited fashion since the primary target of Indian advertisers was rather short-sightedly the domestic market in India itself.

Split beams on satellite television means the delivery of specific markets for Indian products. This is available on MTV already, and on Star Plus from October this year [Interview Ind02.02].

ZeeTV is used to reach other markets in the Gulf and Pakistan, for instance some commodity ads are directed at Arabs, though these are only ad hoc [Interview Ind01.05].

Commercials on satellite television channels after 11pm are meant for Pakistan and Dubai prime-time since there is a two and a half hour difference [Interview Ind01.01].

Thus a pan-Asian Indian audience segment may exist to a certain extent, and corporate advertising was directed at these non-resident Indians (NRIs) in the Gulf states, Saudi Arabia and the Far East. StarTV carried corporate advertising to the two million NRIs there to attract investments in Indian firms. As many as 6,000 Indian manufacturers signed up with the trade promotion department created by ZeeTV to offer marketing consultancy on a wide range of growing Asian and international export markets. ZeeTV executives claimed that there was almost a corresponding response from various foreign firms seeking addresses of Indian exporters for specific products ranging from consumer durables to engineering goods [Khar, 1993]. According to the interviewees, ZeeTV had positioned itself as a South Asian channel reaching Indian expatriates and, in a form of reverse globalisation through ethnic identity, was beginning to recognise Indians resident in West Asia, Africa, SE Asia, Fiji, Mauritius, the US and the UK as valuable foreign markets:

It is estimated that 78 percent of Asians in Dubai watch Zee regularly but qualitative research is still being done [Interview Ind02.01].

To reach them (NRIs), Indian ad agencies usually run either the domestic TVC or an international TVC on the satellite television channel as one did with Camay soap [Interview Ind01.03].

StarTV has five channels and its penetration in West Asia is equivalent to ZeeTV. But ZeeTV is far more influential as a Hindi-language channel in catering to Indians/South Asians there, believed to number 5 million by an IMRB estimate in early 1994 [Interview Ind02.07].

Generally, ZeeTV is not used for export markets, though it and SunTV cover Indians in Middle East [Interview Ind01.08].

There are believed to be approximately 16-18 million ethnic Indians resident around the world who are emerging as major investors in India. Repatriation of savings and venture capital by these non-resident Indians (NRIs) during August 1991 and February 1993, placed the group as the fourth largest investors in the country behind the United States, Switzerland and Japan, and invaluable in augmenting India's foreign exchange reserves. Reasons given by NRIs for their investment in India are said to be, in order of importance, emotional ties, prospects of higher return, and familiarity with Indian conditions [Haeems, 1994]. NRIs are also a valuable target market since they are allowed to buy for Indian export products to bring back, exempt

from local excise and luxury taxes. So together StarTV and its affiliate ZeeTV have stumbled into the business of being transnational broadcasters for expatriate and diasporic Indians who were of interest to some domestic advertisers, especially exporters.

### 8.2.3 Hong Kong

*Government regulation:* Regulation of advertising on transnational satellite television channels uplinked from Hong Kong are virtually identical to those governing that on domestic terrestrial channels. These include broad guidelines on good taste, exaggerated claims, disparaging remarks on competitors, advertising to children among others. While tobacco products, gambling, nightclubs and the like are banned totally, liquor is permitted though subject to restrictions on promotion to children or young people. As with many countries in the region and around the world there is qualified approval of advertising by financial institutions, property developers, pharmaceutical manufacturers, educational institutions and so on [Broadcasting Authority, 1993]. Hong Kong's Television and Entertainment Licensing Authority (TELA) stipulated a maximum of 10 minutes of advertising per broadcast hour, but even then StarTV was said to utilise a small fraction of that allowance. The prohibition of advertising on the Wharf Cable and of the use of Cantonese on StarTV ensured that there was no domestic target market for transnational television via satellite or cable. Though transnational television broadcasters to the region were not subject to the broadcasting and advertising regulations of the countries in which their signals were received, they were subject to Hong Kong regulations which while less stringent than many other countries within the region were not totally liberal either.

TELA allows only 10 minutes of advertising per broadcast hour [Interview Chn02.03].

StarTV uses less than 10 percent of its allowance of 240 minutes per day [Interview Chn02.01].

It will be two more years before Hong Kong's sole cable licensee is allowed to carry advertising [Interview Chn02.05].

*Agency-marketer re-alignment:* There was no re-alignment of advertising accounts as a result of the available of transnational satellite television. Executives in Hong Kong saw such moves as a result of international marketers' decisions at corporate headquarters level, as part of a worldwide realignment. Of the criteria for selection of an advertising agency, internationally or in Hong Kong, the ability to handle transnational satellite television was thought to rate quite low.

There has been no revolution in agency-account alignments because of the arrival of satellite television in Asia; it is usually a decision taken at the marketer's international headquarters [Interview Chn01.09].

Some shifts of advertising accounts occurred to align agencies and marketers regionally, though these might have been part of a worldwide trend, rather than because of satellite television [Interview Chn01.07].

The bulk of advertising in Hong Kong is handled by advertising agencies, rather than marketers dealing directly with media-owners [Interview Chn01.06].

The ability to handle satellite television is generally low on the checklist of clients reviewing advertising agencies. A more important criterion is whether each agency has a regional network of agencies for coordinating marketing strategy [Interview Chn01.08].

As explained earlier in this chapter, the first advertisers from Hong Kong on StarTV were charter advertisers who had a form of 'equity' participation in its launch but most did not sign up as long-term advertisers after its sale to News Corporation. This helps explain why some of the advertising of this transnational medium was primarily targeted at the domestic Hong Kong market. In other cases advertisers had utilised the relatively inexpensive new medium to reach up-market target segments in their own domestic markets.

Some early clients were incredibly local, for example, HK construction, Indian soft-drinks [Interview Chn03.01].

Though its actual audiences in each country were actually small, being the first households to be cabled they were certainly of high-income [Interview Chn01.03].

Domestic advertising is still considered important for product sales in Asian countries, even though regional advertising is growing in importance [Interview Chn01.07].

*Transnational target markets:* The consensus opinion among international advertising agencies in Hong Kong was that pan-Asian advertising was not being driven by regional television media but was being achieved via or in conjunction with domestic television in multiple countries. StarTV was recommended in its early years on the basis of what satellite television would deliver in the future through the establishment of an early and strong relationship of the brand with the medium. It claimed to deliver large numbers of viewers at low cost, especially if the advertiser did not mind the wastage since it was a blunt instrument for targeting market segments. The applicability of transnational satellite television to all advertising markets within Asia was questionable since, in general, packaging and distribution were not standardised across the region, but the situation could change with the increasing subregionalisation of channels.

In the interim pan-Asian advertising largely duplicates what is already being done on domestic advertising [Interview Chn01.01].

Transnational satellite television has to be used in conjunction with and never to the exclusion of national terrestrial television [Interview Chn01.09].

Since cable provides choice and some localisation the same situation might arise in Hong Kong where the competition is already keener than in Taiwan. In 1994 TVB got approximately US\$250 million of advertising dollars through targeted programmes for Hong Kong, and by maintaining good relations with advertisers and marketers [Interview Chn03.01].

We (transnational satellite providers) are confident that regional advertising is growing rapidly especially for travel and tourism, and for corporate advertising as evidenced by the number of TVCs on-air during 7:00-9:00am and 7:00-10:00pm, Hong Kong time [Interview Chn02.03].

Realising that marketers and products were seldom pan-Asian or regional, StarTV sought to change likewise into a sub-regional or quasi-national medium, by itself as well as in conjunction with domestic cable networks. But through localising via language the transnational satellite broadcaster ended up focussing on the domestic markets of Taiwan, China and India, which was at odds with many multinational clients' emphases on the Singapore, Malaysia and Hong Kong markets instead. As in the case of India, StarTV was utilised as an advertising medium for products such as liquor which faced restrictions on domestic television in Taiwan.

A number of our (an international ad agency's) clients are on StarTV: United Airlines, Cathay Pacific Airlines, Kelloggs, Proctor & Gamble as part of global media deals [Interview Chn01.09].

We inherited the use of StarTV for Hennessey from its previous agency, Ogilvy & Mather, which was a good idea since the alcohol was being advertised to Taiwan where liquor advertising is banned on domestic television [Interview Chn01.08].

Another multinational client, Philips, segmented its domestic appliances into five markets because it was more cost-effective and so since some products were geared more to India/Middle East, only the southern beam of StarTV was used [Interview Chn01.08].

Our agency bought some time on StarTV for a mobile telephone client, Nokia, but found it not cost-effective. Though as StarTV goes sub-regional or national, we might reconsider using the medium [Interview Chn01.08].

Advertising on StarTV declined despite its switch to broadcasting on separate beams and providing sub-regional programming, following the News Corporation take-over. Perhaps the new sub-regional/ethnic audiences had failed to make up for the pan-Asian expatriate/cosmopolitan audience it had lost in the process of change. One of the objections raised had to do with the fact that the mass audiences now targeted are not prime prospects for the sort of products and services handled by the international ad agencies based in Hong Kong.

Despite broadcasting sub-regional programming on separate beams advertising on StarTV declined in 1993 [Interview Chn04.01].

Cultural imperialism may be said to exist with StarTV claiming to be in 30 million households in China, out of its 40m households Asia-wide. But marketers are not enthused by that statistic since few of them are operating in all China, and especially when 15 million of those households are in remote Sichuan province. They are more keen on Taiwan which has a high incidence of cable TV [Interview Chn01.09].

Product distribution and market share vary considerably across countries under the satellite footprint and so poses a problem for marketers wishing to use the medium [Interview Chn01.08].

Therefore the availability of a new medium like transnational satellite television is no guarantee of its use, at least not in the manner originally intended, namely as a pan-Asian medium. Instead it was used as a medium for reaching upmarket domestic markets and often by advertisers of products restricted on domestic media. In any case the use of a global advertising strategy via transnational satellite television may be limited because factors such as the availability and popularity of domestic television channels, culture and language, literacy and print media preference, affluence and consumer sophistication, non-standardisation of products to be advertised, and relatively high costs of satellite access for consumers. All of these may make media planning and cross-cultural creativity issues for global advertising very complex, as the following sections will demonstrate.

### 8.3 MEDIA BUYING

With increasing media choices, such as offered by StarTV and the other transnational broadcasters, there is naturally greater scope for creativity and sophistication in media buying, perhaps requiring the use of sophisticated computer software to achieve cost-effectiveness without clutter. As seen in the literature review, research in Europe in earlier decades suggested that there might be increasing consolidation of media buying

to achieve greater cost-efficiencies with the coming of transnational satellite television. In this section the choices confronting media planning staff of advertising agencies in Indonesia, India and Hong Kong will be studied. In particular the rationale for their media buying decisions for or against StarTV, and the consequences for transnational and domestic broadcasters will be analysed as well.

### 8.3.1 Indonesia

*Shifts in adspend:* The consensus of opinion among the interviewees in Indonesia was that there has been no known shift of advertising media spending from domestic television to transnational satellite television, nor was any anticipated. The latter was deemed an inappropriate if not also an expensive medium for the vast majority of goods and services advertised to the national market, with the possible exception was the advertising of luxury goods for an up-market segment. The only other situations where advertising on StarTV was recommended was when it might have been important to avoid advertising clutter, or where no other television medium was readily available as was in parts of Southeast Asia.

Advertising on transnational media can be seen as a way of overcoming the growing clutter of advertising on domestic media or its virtual non-existence in certain national markets. For instance, StarTV is being propelled by the Indian and Chinese domestic markets, and by transitional economies such as Vietnam which are experiencing it as their first form of television [Interview Ids01.04].

The general consensus among advertising agencies is that domestic television still has a lower cost per rating point than StarTV [Interview Ids01.06].

Some clients are asking about advertising on other spill-over media from Singapore and Malaysia, but it remains a question of costs per thousand [Interview Ids01.07].

Shifts in advertising spending to transnational television are doubtful except for some luxury goods. Though a trend might emerge of global marketers utilising transnational satellite television as well as domestic marketers also upgrading to it [Interview Ids03.06].

Indonesian advertisers are not unfamiliar with transnational advertising as when they were forced to utilise Malaysian television in the early to mid 1980s to reach border provinces when commercials were banned on domestic public television. But it was only a temporary measure by a limited number of advertisers, and such advertising expenditure returned to Indonesia as soon as commercial television was introduced because of the tremendous popularity they achieved. The lifting of bans on television advertising when commercial channels were introduced led to a significant rise in advertising budgets.

Prior to 1987 because of the ban on television advertising, Indonesian advertisers spent US\$2.5 million on Malaysia's TV3 in order to reach Indonesian consumers via spill-over broadcasts in border areas such as Medan, Pekan Baru and Riau [Interview Ids04.01].

Advertising expenditure had an abnormal increase with the (re-) introduction of commercial television, but it soon stabilised at approximately 43 percent of all media [Interview Ids03.02].

For entertainment, domestic television channels were still preferred by audiences and thus 65 percent of advertising expenditure in Indonesia remains in that medium [Interview Ids02.01].

Even though the growth rate was not sustained with some products returning to the print media, domestic commercial television has been the dominant advertising medium in Indonesia ever since the early 1990s, a trend that is continuing unabated (Table 8D). While spending on the print media over the same

period remained more or less constant, this growth of television advertising seems to be funded from the sales promotion budgets of marketers. Although data on advertising expenditure in Indonesia was readily available, this researcher was cautioned by interviewees that it was not reliable since it did not reflect the discounts repaid.

Table 8D: Indonesian advertising expenditures by media, 1992-95 (Rupiah billion)

<i>Medium</i>	<i>1992</i>		<i>1993</i>		<i>1994</i>		<i>1995</i>	
	<i>Rp b</i>	<i>%</i>	<i>Rp b</i>	<i>%</i>	<i>Rp b</i>	<i>%</i>	<i>Rp b</i>	<i>%</i>
Television	390	38.0	613	44.4	1,062	46.5	1,638	49.1
Newspaper	377	36.7	484	35.0	743	32.5	1,538	32.8
Magazine	95	9.3	108	7.8	155	6.8	211	6.3
Radio	100	9.7	113	8.2	139	6.1	170	5.1
Outdoor	55	5.4	53	3.8	176	7.7	230	6.9
Cinema	10	1.0	10	0.7	11	0.5	12	0.3
<i>Total</i>	<i>1,027</i>	<i>100.0</i>	<i>1,381</i>	<i>100.0</i>	<i>2,286</i>	<i>100.0</i>	<i>3,335</i>	<i>100.0</i>

Source: PPPI [1996]

*Transnational television adspend:* Data on spending on StarTV by Indonesian advertisers in 1994 was virtually non-existent, certainly unavailable, and the amounts were thought to negligible. This was attributed to the fact that such media buying was handled by regional headquarters of multinational corporations which tended to be located in Hong Kong or Singapore. On the one hand, if there were any moves by such regional headquarters to require contributions by domestic marketing branches in Indonesia, they would be resisted strongly on account of the fact that most multinationals were operating as joint-ventures by law.

Figures for Indonesian advertising placed with StarTV or any other transnational channels are not available. But they are believed to be negligible or otherwise consolidated with regional budgets managed out of Singapore or Hong Kong [Interview Ids 03.05].

All advertising expenditure figures are somewhat inaccurate in Indonesia because of the widespread practice of discounting [Interview Ids 03.05].

Regional offices of advertising agencies might seek a contribution from the domestic advertising budgets but their national offices tend to resist such pressures. Since most agencies and their multinational clients are, by Indonesian law, joint-ventures with domestic interests who were committed to the national market, transnational advertising spending is resisted. So there are no cutbacks in domestic media spending to fund regional advertising [Interview Ids 01.06].

On the other hand, StarTV was believed to deliberately not solicit for advertising in Indonesia, for its would invariably mean taking market share from the domestic broadcasters and thus jeopardise its good relations with the government. This astute policy seems to have paid off with its eventual strategic alliance with the country's sole pay-TV franchise, Indovision, owned largely by the same business conglomerates that own the dominant domestic channels. Not only are StarTV channels and most of the other transnational broadcasters' channels on the service, Indovision is also required by the terms of its license to carry the

domestic commercial channels unencrypted. In Indonesia StarTV seems to have succeeded not by competition but cooperation, and gained its revenue from subscriptions rather than advertising.

### 8.3.2 India

*Shifts in adspend:* Though growth in advertising took place in radio and television in the 1970s, it reached only 15 percent of all advertising expenditure in 1980 while the press alone gained 66 percent. By 1986 with the commercialisation of state television, the medium took 16 percent of the total advertising expenditure in India of Rs 6 billion, compared with radio's 3 percent and cinema's 2 percent [Kumar, 1989: 155-157]. Television's share of advertising expenditure rose steadily to 22 percent in 1991 when transnational satellite television first appeared, whilst print declined from 72 percent to 66 percent [Indian MIB, 1994: 244]. The annual expenditure on advertising was estimated to be Rs 15,000 million (US\$500 million) in 1992 and industry leaders were optimistic of three-fold increase in the next few years. This growth would be aided by diversification of the manufacturing sector, expansion of the services sector, increase in advertising media alternatives, liberalisation of the economy and re-orientation to export markets [Saggat, 1993: 32-35]. Indian advertising expenditure or adspend, for short, was growing rapidly in the 1990s while the television advertising growth rate was even faster than overall adspend.

In 1993/94 television adspends is growing at the rate of 22-25 percent per year [Interview Ind01.10]

Today, the Indian advertising industry is estimated to be growing at 25 percent rate per annum over the past 8 years [Interview Ind01.04].

Television adspends are said to be growing at 22-25 percent per year and totalled Rs 6,500-7,000 million [US\$217-233 million] currently, or about 22-23 percent of total advertising expenditure. By year 2000, advertising expenditure is estimated to be around Rs 10,000 million [US\$3,330 million] with television share at about 30-32 percent of that [Interview Ind03.07].

*Transnational television adspend:* Reviewing the television advertising spending for 1993, HTA estimated that Indian brands spent Rs 300 million (US\$10 million) on StarTV and a further Rs 500 million (US\$17 million) on ZeeTV. This was a pittance compared with the Rs 4,500 million (US\$150 million) spent the same year on Doordarshan (DD) which represented a 10 percent increase over 1992 but still its lowest increase since in the past the growth rate had ranged from 19 to 67 percent annually. DD Metro channels had collectively gained advertising market share at the expense of DD1 rather than mitigating the effect of the satellite channels. Part of this 'cannibalisation' may be explained by the popularity of film-based programming which make 44 percent of metro channel programme hours but only 25 percent on the national network and 10 percent on the regional channels.

The initial euphoria over transnational satellite television led to ads being placed on StarTV regardless of rationale [Interview Ind01.04].

About one percent of all Indian marketers are on transnational satellite television but even then for the domestic market [Interview Ind01.05].

With the arrival of ZeeTV at end-1992, there was a switch of advertisers to it and so the growth of ZeeTV income in 1993 was estimated by us [a multinational ad agency] to be Rs 750-800 million (US\$25-27 million), and predicted to reach Rs 1,500 million (US\$50 million) in 1994 [Interview Ind01.04].



Any national advertising campaign today needs DD to reach rural markets and ZeeTV for urban ones. [Interview Ind01.10].

The advertising growth rate of Doordarshan (DD) declined from 88 percent between 1984 to 1990, to 29 percent between 1990 to 1992 with a sizeable amount lost to Star/ZeeTV and for this DD's inertia was to blame [Menon, 1994]. The main Doordarshan channel (DD1) experienced a shrinking of its commercial revenues over 1993, as advertisers displayed a decided preference for the Metro channel (DD2) where the proceeds go to the private programme producer and not to the national broadcaster. In the first half of 1993, the Metro channel got 24 hours of advertising, of which 10 hours was a shift from Doordarshan's main channel, whose share of advertising shrunk from 21 per cent to 17 per cent while that of the regional networks dropped from 79 per cent to 73 per cent [Kang, 1993].

On the basis of the 4As 1993 adspend figures published in Bombay, DD estimated that their advertising revenue loss to StarTV was Rs 200-250 million. [Interview Ind01.03].

As an indication of the media buying pattern on DD vs Zee, [a major multinational joint-venture] spent 20 percent of its total advertising budget on DD, and only 10 percent on Zee [Interview Ind01.11].

By 1996, 30 percent of adspend is expected to be on the television medium [Interview Ind02.07].

But if there are more transnational satellite television channels to come, advertisers will need to spend even more. [Interview Ind01.02].

Table 8E: Indian advertising expenditure estimates for 1993-94 ( Rupees million)

<i>Channel</i>	<i>Everest</i>	<i>CLB</i>	<i>HTA</i>	<i>Times</i>	<i>DD</i>	<i>Ave</i>	<i>US\$</i>	<i>Percent</i>
DD netwk	1775							
DD regnl	1665							
DD metro	1000							
Total DD	4440	4800)	4500	4200	3720	4215	140.5	81.8%
Zee TV	610	)	500	577	500	547	18.2	10.6%
Star TV	500	300	300	473	300	375	12.5	7.3%
<i>Totals</i>	<i>5550</i>	<i>5100</i>	<i>5300</i>	<i>5250</i>	<i>4520</i>	<i>5144</i>	<i>171.4</i>	<i>100.0%</i>

Sources: Compiled from estimates provided by executives of Everest Advertising, Chaitra Leo Burnett (CLB), Hindustan Thompson (HTA), Times of India, and Doordarshan (DD).

The strategic moves by Doordarshan to arrest the decline in its advertising revenues with new advertising rates, scheduling changes, better production values and extension of the metro channel to other key markets, had failed to counter the transnational satellite television threat [HTA, 1994b]. But, while the ten top-rating programmes in multi-channel homes in Bombay in January 1994 were a near-equal mix of DD Metro Channel, DD National Network and ZeeTV, by June that year seven out the top ten programmes were from ZeeTV. The six-monthly trend for Bombay revealed that ZeeTV ratings rose by 15-25 points while for DD Metro Channel this was only 5-12 points, a situation blamed in part on erratic re-scheduling. In a further effort to fend off the competition from StarTV in particular, DD Metro planned the introduction of Hollywood movies, MTV music programmes and CNN news to target the English-educated [HTA, 1994c].

There are no definitive figures on advertising spending in India but most advertising agencies and market research organisations publish working estimates. HTA estimated that nationally advertised brands on DD reached 15 percent less people in 1994 than in pre-satellite days [A&M India, 1994: 40-58]. The figures incorporated in Table 8E attempt to arrive at some consensus of data, based on quite varied original forms. Thus compared to DD and ZeeTV, advertising expenditure on StarTV is minuscule.

*Cable advertising:* Television commercial spots were sold by local cable operators or associations of cable operators because sometimes they substituted their own advertising in the commercial breaks of satellite stations. End-of-video movie advertisements tended to be very local in character, such as for a neighbourhood grocery or restaurant. First-run movies broadcast on cable television had advertisements running throughout on the bottom and top portions of the television screen, occupying about a third of the screen. Called 'crawlies' in the advertising industry, these were superimposed by the film distributor who retained the advertising revenue. Most cable operators paid for the movies on video which they utilised but not for free-to-air broadcast programmes which they re-transmitted. The cable operators had on occasion threatened to black out Hindi movies on ZeeTV unless their legal rights as re-transmitters were guaranteed by the satellite broadcaster against their copyright owners in India [Mitra, 1993a].

*Present media trends:* The complexity of advertising media in India, involving thousands of print publications, has to be acknowledged by any media planner. It is a situation compounded in the 1990s by the growth of television from two national channels initially to almost 50 at the last count with implications for advertising media trends (Table 8F). While the more professional marketers operating in India, often the affiliates of multinational corporations, might seek to utilise gross ratings points in their media planning, the less professional resort to conventional practices, perhaps rules of thumb.

Today media planning is a complicated business due to the number of publications, number of languages, and number of television channels. There are 19,000 publications, 400 of them with circulations over 100,000, while 20 of them were over 300,000. There are 21 languages in use in India, 13 of which are the more popular ones [Interview Ind01.06].

There are over 20 channels, so media choices tend to be simplified by going for the familiar [Interview Ind02.01].

In the early 1980s the advertising budget for a major client was about Rs 10 million (US\$300,000), so there was hard bargaining done by agencies with media-owners, without much concern for GRPs. Only the larger, more professional marketers such as Unilever, P&G, Colgate-Palmolive were interested in GRPs, frequency and reach figures then [Interview Ind01.06].

There was some scepticism in the industry about advertising on StarTV in the face of its minuscule audience in comparison with domestic terrestrial channels for targeting the largely domestic Indian market which ad agencies there were interested in. There was also the restrictiveness of having to generate export earnings in order to be permitted to advertise on the medium. Nonetheless StarTV was acknowledged as the catalyst for transnational advertising by Indian firms.

Using reach figures alone, advertisers ought not to buy advertising on StarTV, but they did so for qualitative reasons such as audience lifestyle [Interview Ind01.10].

Television may become a big spenders' medium with only multinationals like Coca-Cola able to afford it. Lever was the first to advertise on Star but when the numbers did not support the decision, it was the first to opt out [Interview Ind01.11].

Exporters were expected to earn foreign exchange and allowed to retain 25 percent for promotional purposes and then for exports only [Interview Ind04.01].

StarTV inaugurated international advertising expenditure by Indian firms for there was no advertising expenditure going abroad previously [Interview Ind04.01].

Table 8F: Media trends in Indian consumer product advertising

	1990	1991	1992	1993	1994
Television	54 %	56 %	60 %	63 %	68 %
Press	46 %	44 %	40 %	37 %	32 %

Source: Everest Advertising [1994]

*Media budget sources:* The general view among advertising agency executives was that advertising budgets for transnational satellite television were being siphoned from that normally designated other media. Though there was some divergence of opinion on whether those funds were originally meant for domestic television (3 interviewees thought so) or print (5 interviewees), or both (3 interviewees). Despite government regulations which discourage such expenditure, the new medium seems also to have attracted additional funding for advertising, from the discretionary sources of marketers.

Most advertising on StarTV for India is in contradiction of government regulations but the budget for it comes from domestic television: about 5-10 percent of television ad spend is on Star/Zee [Interview Ind01.01].

The general effect on advertising of the introduction of satellite television is that press and radio advertising budgets flow towards TV. But StarTV has grown television adspend budgets by 20 percent since some products have been advertised in the press only in the past, but now in both media [Interview Ind01.03].

The budget comes mostly from additional funds but some came from print though mainly from small players [Interview Ind01.05].

The budget for satellite television advertising has come from both domestic television and regional print [Interview Ind01.08; Ind 01.02; Ind 01.07].

The advertising budget moved to television in 1986-87 when DD began accepting advertising but now it was simply a case of DD's share of television advertising declining. If it has grown it was by liquor, cigarette and financial institution advertising which were not allowed previously on DD [Interview Ind01.11].

There is a new shift from television back to press and especially FM and local radio [Interview Ind03.07].

Consumer non-durables such as toilet soaps, detergent powders and toothpastes reduced their adspend on press and increased it on television dramatically. When domestic television advertising arrived in 1986, consumer non-durables' advertising accounted for nearly 65 per cent of total advertising expenditure but about half of it went to television [A&M India, 1994: 40-47]. In 1985 the press medium had 75 percent of total adspend in India but by 1993 this had dropped to 65 percent though space taken in the press by advertisers had actually grown a measly 16.8 percent in the five years between 1988 and 1993. This may be in part explained by a slow rise in literacy: 36.2 percent of all Indians in 1990-91, compared with 42.8 percent in 1992-93. The general view was that the press will not be affected by the proliferation of channels now in existence, as they had already been forced to respond to the onslaught of domestic television and then satellite

television [A&M India, 1994: 48-58]. With Indians increasingly preferring to get their news and entertainment from television it was thought by some that the domestic Indian press was in danger and that this trend would escalate as consumers began judging even domestic television by the sophistication of transnational alternatives.

Growth in television advertising will be in pan-Asian regional channels and will erode national television budgets [Interview Ind03.07].

Television advertising is not expected to affect print budgets where a trend exists of advertising in sub-national language newspapers rather than in national or regional media [Interview Ind03.10].

Today advertising media is a buyers' market: everything is very negotiable, in contrast to once having to wait in queue for DD spots in the past. DD rate cards are still non-negotiable but deals are possible via programming. One firm alone, Nimbus Communications, sells about US\$25 million in advertising airtime on its programme slots on DD [Interview Ind01.11].

With the fragmentation of audiences comes higher cost to reach the same number as before and so it becomes less an issue of numbers than of quality of audience [Interview Ind01.11].

Although press advertising had been losing its market share, it was gaining in value because of the inflation in media rates and also because a number of newspapers carry more colour ads. The growth trend for television should not detract from the importance of print in the future, for a number of reasons including increasing literacy and the resurgence of subnational ethnic identity. Increasing literacy rate bodes well for the press: in 1990-91, 36.2 percent of all Indians were literate, while by 1992-93, 42.8 percent were [A&M India, 1994:40].

If one uses the literacy yardstick, television has more potential, but if one thinks that the growth market is among the middle-class/educated, then print has more potential [Interview Ind02.01].

There's a trend towards regional language newspapers as ethnic loyalties gain momentum [Interview Ind03.10].

Growth in television advertising will be in regional channels which will erode national television budget, not print budgets [Interview Ind03.07].

Print was still the largest advertising medium, since it attracted 60 percent of adspend while television managed only 30 percent [Interview Ind01.03].

Strategies used by the press media to fight the trend towards television advertising have included targeting small and local advertisers, and advertisers that are banned from using television such as financial services and tobacco [A&M India, 1994: 44-45]. At another level the press media adopt strategies to maintain their 'Indianness' in the face of the foreign invasion. By urging the government not to permit majority ownership of the press in the process of encouraging foreign investment, the press hope to gain technology, expertise and professionalism from the foreign investors without relinquishing editorial sovereignty [Sunday, 1994a]. The general view among industry executives is that the press will not be affected by the proliferation of channels now happening, as they have already been forced to respond to the onslaught of domestic television and then satellite television, and have since stabilised.

Media buying in India could become increasingly psychographics-driven via narrowcasting of audiences made possible by the growth of transnational and domestic television, and the role of cable operators. One advertising agency highlighted audience fragmentation as a consequence of satellite and cable television, claiming that 30 percent of A1/A2 socio-economic class did not watch DD1 while 25 percent of

the same segment watched Star Plus. Among the 30 million TV homes in India it discerned four distinct segments: DD1 only (64 percent), DD1 plus satellite TV (16 percent), DD1 plus Metro channel (15.5 percent) and DD1 plus Metro channel and satellite television (4.5 percent). Although the cost per thousand (CPT) had risen by 22-24 percent in 1992-93, satellite channels were thought unlikely to replace Doordarshan, given the CPT analysis where a 'Santa Barbara' episode on StarTV costs Rs 189, the feature film on ZeeTV costs Rs 39 and popular DD programmes cost between Rs 6 to Rs 30 [HTA, 1993b]. So although ZeeTV had gained a substantial share of the market, it still faced strong price competition from Doordarshan, especially its metro channel (Table 8G).

Table 8G: Ratings & cost comparisons of Indian channels

<i>Channel</i>	<i>Type</i>	<i>Audience</i>	<i>Programme</i>	<i>Rating</i>	<i>Cost US\$</i>
StarTV	Transnational satellite	50 million	Soap opera ( <i>Bold &amp; Bfl.</i> )	3	1,600
ZeeTV	Transnational satellite	50 million	Serial ( <i>Tara</i> )	30	3,482
DD 1	Domestic terrestrial	310 million	Hindi film	50	8,571
DD 2	Domestic terrestrial	50 million	Serial ( <i>Dekh B.D.</i> )	45	5,143
SunTV	Domestic satellite	4 million	Tamil film	50	685
Asianet	Domestic satellite	1 million	Malayalam film	50	514

Source: Chaitra Leo Burnett [1994b]

The growth of television channels, both transnational and domestic, in India has rendered increasingly controversial and obsolete the diary methods of measuring audience viewership used previously by market research companies. This led to the two leading research companies IMRB and MARG launching two different people-meters in conjunction with overseas affiliates, and both claiming to have the more sophisticated technology, extensive coverage and accurate data [Lahiri, 1995g]. Subsequently in 1997 ORG-MARG with its affiliate Taylor Nelson AGB launched another form of people-meter because the previous one was prone to error due to cable operators frequently switching channel frequencies [Asian A&M, 1997i]. To date there does not seem to be a definitive measurement of Indian television audiences, an increasingly persistent need with the number of multinational marketers/advertisers such as Coca-Cola and Kelloggs entering the market and their television media alternatives in the nation, subregion and region increasing.

### 8.3.3 Hong Kong

*Shifts in adspend:* There was no major shift in advertising expenditure to transnational satellite television in Hong Kong, for only a few marketers were innovative and bold enough to try the new medium upon its arrival. Even though the advertisers on StarTV tended to be marketer clients which already had regional business, there were questions raised about wastage when the satellite footprint did not coincide with the countries the firms marketed to. Furthermore, there were the issues of whether there was consistency between positioning of the product in the various markets and the advertising to be done on a regional basis.

Some proactive clients decided to run transnational campaigns using satellite television, for example, Citibank. But most package goods marketers simply reacted to the arrival of the new medium [Interview Chn01.04].

Objections to siphoning advertising budgets from domestic markets were raised especially when the specific market was not reached by transnational satellite television. If the brand positioning and brand-personality were not consistent across the region, then the advertiser would not choose to advertise on StarTV [Interview Chn01.04].

Even sub-regional television channels may not work as well as national channels. Advertisers prefer different regions put together or tailor-made for their media needs. With new transnational satellite television providers entering the market, marketer clients would be able to buy a patchwork quilt of media, that is, buy whichever media is stronger in that geographical area [Interview Chn01.08].

*Transnational television adspend:* Since there were plentiful alternatives, such as print or domestic commercial television, the case for transnational satellite television was harder for Hong Kong-based advertising agencies to make, especially when there is little hard data to make comparisons. As found elsewhere in the region, there was some resistance by local distributors of global products to siphoning of the advertising budgets towards regional campaigns such as on transnational satellite television. Nonetheless Hong Kong agencies, in their capacity often of being regional coordinators of advertising for their multinational clients, have succeeded in persuading some of them by negotiating attractive deals with transnational satellite broadcasters.

The way to reach the pan-Asian elite remains via print, primarily magazines. It is difficult to allocate budgets from domestic markets because of the differential impact of transnational television [Interview Chn01.08].

The lack of television stations, for example, in Taiwan, Thailand and Hong Kong had resulted in a supply-led media market and therefore ad agencies were keen on transnational television [Interview Chn03.01].

These domestic terrestrial stations in Hong Kong have experienced a growth of advertising revenue in the past two years with StarTV seemingly having no adverse effect [Interview Chn02.02].

Naturally some resistance occurred from local distributors over the pooling of advertising budgets regionally because it necessarily leads to their loss of control. Nonetheless ad agencies have endeavoured to cut deals with the transnational media to make them more attractive for their clients [Interview Chn01.09].

*Media budget sources:* The limited advertising on transnational satellite television since the advent of the medium seems to have come from regional print media which has suffered a drop in revenue (Table 8H). Hong Kong advertising agencies must be credited with persuading their regional clients to sample this new medium in the face of minimal hard data. It is said that the budget for these excursions may even be

coming from domestic print and television budgets, though the most likely scenario is that it has involved fresh funding to test the medium.

Some funds for advertising on transnational satellite television came from regional media budget, while other funds came from local budgets depending on the footprint coverage of country. Previously its funds came strictly from regional print budget but because the pool for print advertising was huge there was only minimal impact. In 1992-93 there was a decline in regional print advertising in the Asia Pacific by US\$10 million [Interview Chn01.03].

The pattern in Asia may be similar to that following broadcast de-regulation in Europe where budgets for television advertising increased without a corresponding decline in print budgets. In the case of (ad agency's name) clients, some used new funds, others re-allocated funds though they left print budgets static [Interview Chn01.09].

Satellite television is competing with print - hiving off its budget [Interview Chn01.05].

The budget for transnational satellite television could be coming from domestic television because the former was more cost-effective on a cost-per-thousand basis for just one country, for example, the use of StarTV by de Beers for targeting Taiwan [Interview Chn01.04].

Although regional advertising budgets may be growing in Asia, regional print media are not giving up revenue to transnational satellite television without a fight, and have been demonstrating that it is indeed more flexible in targeting countries and subregions via having multiple editions. Ultimately, advertisers are being persuaded by cost-effectiveness, by the argument put up by both print and television media that the higher costs involved in sub-regionalisation is more than made up for by less wastage.

Regional advertising budgets are growing very slowly, perhaps even plateauing if inflation were considered. In response regional print advertising is marketing itself on the basis of flexibility in targeting sub-regions through sub-regional print editions, since on StarTV previously this was not possible. The result has been complex negotiations on pricing for regional versus sub-regional media [Interview Chn01.07].

While there is cost inflation through sub-regionalisation or in other words cost per thousand is higher thus, there is less wastage though [Interview Chn01.08].

We used to buy time on StarTV for Nokia but found it not cost-effective, and so would only reconsider its use if and when StarTV goes sub-regional [Interview Chn01.01].

Asian ad agencies and MNC marketers in Asia are not into buying low-rating programmes such as on StarTV because they are considered not cost-effective to administer [Interview Chn03.01].

Table 8H: Hong Kong advertising expenditure by media, 1995

Medium	HK\$m	US\$m	Growth
Television	7,432.76	960.61	+19%
Newspapers	4,375.83	565.53	-12%
Magazines	1,795.56	232.06	+9%
Radio	977.66	126.35	+20%
MTR (outdoor)	392.72	50.76	+14%
Cinema	47.46	6.13	-24%
Other	91.22	11.79	+10%

Source: Asian A&M [1996e] citing SRG Adex reports.

*Transnational television adspend:* It was impossible to arrive at definitive advertising revenue figures because StarTV declined to release them, stating that they were commercially-sensitive and proprietary information. Advertising expenditure figures (Table 8H) did not differentiate between transnational and domestic television media, though they seemed to indicate growth of television at the expense of newspapers and cinema. Although most advertising on transnational satellite television was placed by regional offices of advertising agencies based in Hong Kong, this did not preclude domestic offices making bookings as well, in coordination with the former or otherwise. Sponsorships are another form of revenue which distorts the assessment of the income of transnational satellite channels, not to mention their increasing dependence on subscriptions and carriage fees.

It is not possible to provide country of advertiser origin as there might sometimes be conflict or collaboration between national offices of MNC marketers over the media-buying decision [Interview Chn02.01].

Most regional media bookings were made by the ad agency office which handles the advertising account regionally, usually located in Hong Kong or Singapore. In the case of [ad agency's name] a regional office was started in 1994 though previously its Hong Kong branch office acted as the regional coordinator of advertising [Interview Chn01.07].

Another example was Channel V's use of promotion or non-discrete advertising, resulting in it having three streams of income: sponsorships, subscriptions, and carriage fees [Interview Chn03.01].

The increasing complexity of media planning in Asia following the growth of transnational television might have meant that advertising became less marketer-directed and more ad agency-led, with media planning staff rather than account management staff serving the client as the source of marketing communication strategy. Yet in Indonesia where there are ample domestic media alternatives, including commercial television, and little regional marketing ambition, transnational satellite television has been largely ignored. For India, StarTV and the other commercial satellite broadcasters have been utilised primarily as domestic advertising media with regional markets being considered largely incidental, almost accidental. So it does seem that with the possible exception of Hong Kong where ad agencies have at least a *de facto* regional role, marketers have steered clear of buying the new regional medium and have been abetted in this by their domestic ad agencies.

## 8.4 CREATIVE EXECUTION

The most visible expression of the globalisation of advertising, at least to the general public, is the production of transnational commercials. But the decision on whether to standardise or localise advertising creativity rests on a number of factors including consistency across the region of product positioning, consumption purchase and usage patterns, attitudes towards the product and brand, and socio-cultural taboos. This section examines the products and brands advertised on the transnational media such as StarTV, the creative approaches adopted by those which did, as well as the insurmountable difficulties perceived by ad agencies which did not.



#### 8.4.1 Indonesia

*Products and brands advertised:* The only Indonesian products known to have advertised on satellite television were airlines and hotels, the medium was considered ideal for such products given its access to their target markets in many of the countries under the footprint. But Indonesian advertising agencies preferred to place corporate and image advertising for upmarket consumers in domestic print media rather regional television. They could cite only one instance of a regional advertising campaign but volunteered no comment on its effectiveness in creating brand awareness or delivering sales in Indonesia, only that it was a successful collaboration of ad agencies in the region.

Airlines are ideal for regional media, and so are global brands such as Marlboro [Interview Ids01.04].

Corporate/image advertising for upmarket consumers, ad agencies prefer to place in print media, for example, *Tempo* [Interview Ids01.06].

The only example of a successful transnational campaign is that for the Dimension 2-in-1 shampoo where Unilever produced a single commercial for three markets, namely Malaysia, Thailand and Indonesia [Interview Ids01.07].

Batey Advertising in Singapore ran a transnational campaign and got ratings of 1 point or one percent of the audience [Interview Ids01.06].

*Cultural adaptation:* Indonesian ad agency personnel seemed to have reservations about the practicality of devising a regional, let alone global, advertising campaign. They were conscious of the cultural diversity within Asia, even within South East Asia, and the difficulty of transcending this or of attempting to change some aspects of it in relation to consumption behaviour. As one ad agency executive, particularly eloquent on the subject, put it:

It is not a question of whether the advertising of global products has to be integrated with the local culture of Indonesia, but how it is to be done. Indonesian commercials tend to be more entertainment-oriented rather than hard-sell, more like those in Japan than the US [Interview Ids01.02].

Global commercials are sometimes perceived differently by audiences cross-culturally, for example, the SIA 'girl' is seen variously as efficient, family-oriented or beautiful [Interview Ids01.02].

Some cultural preferences are ingrained, such as the colour preferences of ethnic groups. Drinking directly from a bottle, eating on the run or holding a hamburger with both hands, are all considered culturally impolite in Indonesia and a number of other Asian countries [Interview Ids01.02].

It is cheaper for advertising to reflect culture than to attempt to change it. While certain habits can be changed, changing the culture as a whole was not possible [Interview Ids01.02].

Executives in advertising, market research and domestic broadcasting seemed to consider the cultural barriers virtually insurmountable and pointed repeatedly to examples of multinational marketers in Asia who had opted to create multi-domestic advertising campaigns. They implied that cultures were distinctly different within the subregion of South East Asia, not to mention the whole region. Thus they could not envisage a major shift to using pan-Asian television commercials given the significant social and cultural differences they perceived across the region, even within their subregion:

Regional advertising would be inappropriate for Lippobank which positioned itself as 'the bank for Chinese investment' in Hong Kong which would be a (politically) unacceptable message in Indonesia and Malaysia [Interview Ids01.05].

Thus even global advertising campaigns have to allow for cultural adaptations of its theme, as for instance in the different versions of the Marlboro commercial. In the US version there was only a lone cowboy, but in the Malaysian version there were four herdsmen to represent communality, while for materialistic Hong Kong the version features the owner of the ranch arriving via helicopter [Interview Ids01.02].

Even in the neighbouring and culturally-similar Malaysian and Indonesian markets there have to be separate national advertising campaigns for global brands like Toyota, Salem and Dunhill [Interview Ids01.05].

Whether or not the cultural differences are insurmountable objectively speaking, the fact that they are so perceived explains the non-involvement of Indonesian advertising industry in pan-Asian campaigns. But there might be other explanations, including the fact that the cultural issue is used as a publicly espoused rationale for non-consideration of this medium, when the true reason might well be the loss of local revenue and power which accompanies the decision to collaborate in a regional strategy. Regardless of their motivations, the reality is that transnational satellite television exemplified by StarTV acting as a pan-Asian medium in the early 1990s had no impact on the practice of advertising in Indonesia.

#### 8.4.2 India

*Products and brands advertised:* Advertising on transnational satellite television was not legally permitted in India as at 1994-5 since export earnings were needed for the foreign exchange to pay for it. Thus the pioneering broadcaster StarTV had no significant effect on advertising agencies unless their clients were exporting. But there was little pan-Asian advertising originating in India because most products were not exported since the average India businessman was not thinking of marketing his products abroad. StarTV was also used by advertisers of products prohibited from Indian domestic television such financial services and liquor. The situation was explained by interview respondents as follows:

Products advertised on StarTV were those meant for export markets such as whisky, washing machines, white-goods, etc. manufactured in India and exported, and financial products [Interview Ind01.01].

To advertise on StarTV an Indian firm has to be a qualified exporter, approved by RBI [Interview Ind01.10; Ind 01.02].

India has no international consumer products of its own to promote, except some to expatriate Indians [Interview Ind 02.04].

India lacks international consumer products, only those directed to NRIs [Interview Ind01.06].

All the same, StarTV did enjoy some support from Indian marketers, though a number of interview respondents alleged that it was primarily liquor advertising which had no outlet on the domestic television channels due to restrictive Indian laws. Although previously liquor advertising was achieved on domestic television through the ingenious use of brand extensions to innocuous but related products such as ice-cubes, StarTV allowed free expression due to more liberal Hong Kong regulations. How these domestic manufacturers raised the foreign exchange needed for transnational advertising was not elaborated upon by the interviewees.

StarTV is surviving on liquor advertising and is hoping for more advertising income by starting its own Hindi channel [Interview Ind01.11].

StarTV is used by advertisers who are not permitted to advertise their products in India such as whiskey and other liquor, though cigarettes were not accepted by StarTV because of its health-consciousness [Interview Ind01.02].

Previously liquor manufacturers had to use 'surrogate' advertising on DD, for example branded ice-cubes but now they were able to advertise freely on StarTV and ZeeTV [Interview Ind01.07].

There were other advertisers from India on StarTV apart from liquor, and they included a broad range from cosmetics to car tyres. One view was that there was no clear differentiation between types of products advertised on transnational television and on domestic television, with the former was simply utilised to boost frequency among the upper-income, English-speaking target audience [Chaitra Leo Burnett, 1994b]. A different view was that lifestyle products and up-market brands with small budgets used ZeeTV and StarTV almost exclusively because of the lower rates per TV spot offered. As one executive pointed out, the products advertised on StarTV and ZeeTV tended to be high-value items of appeal to upmarket often male segments, such as cars and credit cards.

Clients of (ad agency name) on satellite television are Ponds and Titan watches on StarPlus, TI cycles on Prime Sports, the Hindu Business Line newspaper on BBC [Interview Ind01.08].

Examples of (ad agency name) ads on Star Plus were Denim cologne, Ceat tyres [Interview Ind01.05].

The products that are advertised on satellite television are those which are extremely expensive eg. cars such as the Maruti 1000, or male-oriented products eg. Standard car battery, or liquor, lifestyle eg. credit cards [Interview Ind01.03].

Most advertising from India placed on the transnational medium was directed at the domestic market and the common explanation proffered by industry executives for this was the dearth of global products distributed in the domestic Indian market. Though there may be products manufactured by MNCs in India, StarTV was criticised as not being entirely suitable a medium. Even when there were global products their advertising was not coordinated on a regional basis, at least as far as media-buying on transnational satellite television was concerned.

No transnational campaigns are done because the prime-times are not in common, and products not available throughout the region yet [Interview Ind01.08].

About 95-99 percent of TV campaigns (on satellite channels) are domestic. There are very few global products advertised because of different positioning, packaging, brand equity - matters which have to be solved first at the marketing end before advertising [Interview Ind01.04].

No global advertising because the markets are different and there are no global products. The only Indian advertising on satellite television is by service industries, for example, finance, banking to NRIs and other special services [Interview Ind01.06].

There is little or no pan-Asian advertising now due to different ad agencies, different impact, different prime-times [Interview Ind02.02].

Even where there are global brands eg. Horlicks, there is no coordination between ad agencies. On Star Plus and Zee most ads are liquor, but no polarity otherwise [Interview Ind03.07].

One advantage which StarTV enjoyed over domestic media was the patronage of multinational or rather global corporations which have the same marketing strategy in more than one country and can benefit from the cost benefits of transnational advertising. Still even though an MNC may market globally, across Asia or even a subregion like South Asia or West Asia, it often has to develop separate advertising campaigns

for each national market. This is either because the products or brands are not standardised in the region, or that they are at different stages of their life-cycle in each market and so are positioned differently.

Lever deliberately makes specific advertising for each country, for example Lux uses movie stars from India, Pakistan and Dubai for their respective markets. Brands are often at different points of their product life-cycle. For instance Dove was just launched in India, though other countries were able to see the advertising [Interview Ind01.11].

Unilever soaps are not standardised across the footprint, so Pakistan viewers once thought their products were fakes because the packs in their country were different to those shown on the TVCs on the transnational channel [Interview Ind02.02].

Lifebuoy soap is carbolic only in India and Colgate packaging is 20-30 years old; Coke and some softdrinks are the rare cases [Interview Ind01.04].

Respondents were virtually unanimous that with the possible exception of liquor products no television commercials (TVCs) were created for the transnational medium. Whenever TVCs were created for transnational satellite television, often only English language versions were done for the 'image', even though the audience that can understand the language was relatively small compared to the total audience in India. This was the case of advertising for a luxury car targeted at the upper-up market which was not necessarily cosmopolitan but local businessmen without an English-language education and more comfortable with Hindi-language television [Chaitra Leo Burnett, 1994b].

Except for liquor advertising, no special TVCs were created for the transnational satellite television channels [Interview Ind01.02; Ind01.07].

Sponsorships of programmes by Indian, HK, and Japanese firms are gaining ground. From the advertisers' point of view it doesn't matter where the programmes sponsored originate [Interview Ind01.07].

Most TVCs are not created for satellite television but when they are, only an English language version is done for 'image', because the audience is small eg. Maruti Esteem - target upper-up market which is not English-speaking such as local businessmen with lower education, more comfortable and who tend to watch Zee or (DD) Metro [Interview Ind01.08].

Corporate advertising on StarTV is similar or identical to advertising for local market ie. no special TVCs are made for regional media. 'Think global, act local' as in case of Coca-Cola for even MNCs are rethinking their strategies [Interview Ind01.02].

However the ad agency personnel held out the hope that the situation with regard to the non-production of TVCs for transnational satellite television would change in a few years. They seemed confident that Indian consumers were getting more sophisticated in their advertising tastes and that India's expertise in film production would see it take the lead in creating TVCs for the subregion, despite some reservations about subregional cultural differences.

No ads are created specifically for satellite television; domestic versions are used instead. But the quality of (domestic) TVCs is improving because consumers are becoming sophisticated [Interview Ind01.10].

There is no global advertising at the moment, but there may be in 2-3 years' time. India is almost a continent by itself in terms of its cultural diversity.

While pan-Asian media buying might happen in the future, collaboration on creative strategy would not because of the diversity of culture within Asia, not to mention within India [Interview Ind01.11].

Regional cooperation by India would major on creativity since it led the region in film production, though its post-production facilities were still lacking [Interview Ind01.04].

### 8.4.3 Hong Kong

*Products and brands advertised:* Where professional advertising agencies in Hong Kong were concerned, transnational media such as StarTV were suitable primarily for corporate advertising, and not for consumer goods. Unlike the earlier owners of StarTV who were promoting it as a pan-Asian medium, international ad agencies and their MNC marketer clients were quite sceptical about the applicability of Levitt's (1983) globalisation thesis in the Asian market.

StarTV is unsuitable for packaged goods, but for corporate and services advertising.. (consumer) products need national and sub-national advertising [Interview Chn01.01].

A pan-Asian medium is only suitable for corporate advertising, for product advertising national and sub-national advertising is needed. Star claim to deliver large numbers at small cost especially if one doesn't mind the wastage. It is now still a blunt instrument [Interview Chn02.08].

Levitt's thesis about the globalisation of marketing and advertising will not work for the majority of products [Interview Chn03.04].

Most marketing clients were not prepared for the introduction of StarTV, though some clients, were already using TVCs regionally which had been used previously domestically with local soundtracks [Interview Chn01.09].

[Ad agency name] clients on Star are corporate ones with sales strengths in countries where Star is accessible [Interview Chn02.07].

Believing in the concept of transnational advertising nonetheless, some advertising agencies helped put together a package for media buying on StarTV which was then sub-leased to their marketer clients. However it was primarily clients whose marketing operations were already transnational which were amenable to the idea of utilising StarTV, and it was not StarTV which triggered their commitment to transnational advertising.

It was marketers who were already regional who utilised Star when it came along, not vice-versa. (Ad agency name) spends a fair bit on StarTV for its clients: Coke, Tourist Authority of Thailand, Cathay Pacific, UPS - all of which are global products with a global strategy [Interview Chn01.03].

With loss of the BBC World channel on the northern beam, our agency had to withdraw a major client [which it would not name]. Subsequently the agency's clients on StarTV are corporations with sales strengths in those countries such as Mobil which is interested in India and China [Interview Chn01.07].

Markets do not always align with the satellite footprint for instance while Thailand may be market leader, India may be poor performer, or while Hong Kong and Singapore are more services-driven, China is more into packaged goods [Interview Chn01.04].

Hong Kong itself was not much of a market for StarTV since the latter was prohibited in its early years from broadcasting in Cantonese, the dominant language of the colony, so as to protect the domestic commercial channels. Thus the opinions expressed by interviewees there concerned the viability of StarTV as a pan-Asian medium being of interest and value to them. Their experience has been that StarTV was used by those multinational advertisers which had already been marketing regionally in Asia, but not to the exclusion of domestic advertising media. Transnational satellite television was found to work only for a select group of products and services, and even then the reach of the medium did not quite fit the market priorities of the multinational marketers in the region.

*Creative production:* Agency and media personnel were of the opinion that transnational and domestic advertising were not distinctly different but quite complementary. The commercials that were used on the transnational medium were often one of those used on the domestic television in the country, if not elsewhere in the region, but considered to have wider applicability. In other words, no pan-Asian commercials were created specifically for the new medium.

For regional advertising, advertising agencies often look first at what is available domestically which might be useable regionally. But the result can be mixed: Adidas ran a global commercial in Asia successfully, while a Milo commercial did not work because the boy featured did not have a 'Hong Kong face' [Interview Chn01.07].

Pan-Asian advertising simply duplicates domestic advertising [Interview Chn02.01]

Use it [transnational television] in conjunction with terrestrial, and never to the exclusion of the latter [Interview Chn02.09].

As with their counterparts in Indonesia, Hong Kong industry executives had reservations about whether a regional campaign was feasible or at least not problematic. There were issues of sub-cultural differences even within Greater China, consistency of packaging and lack of coordination of regional advertising with domestic advertising.

Though the language is similar for China and Taiwan, the creative strategy for China needed to be different, due to its different social, cultural and economic environment. Besides, alphabet used in Taiwan was not the simplified form as in China [Interview Chn01.08].

Generally packaging, etc. is not standardised, and not for awhile yet [Interview Chn02.09].

Coordination of regional media is important so as not to be different at different levels such as at present when dealer/local advertising is often unprofessional, national advertising features different benefits in each country, and regional advertising attempts to maintain the brand image. The link for such coordination is mainly via the marketing clients' regional structure [Interview Chn01.03]

Despite its reservations, Hong Kong's advertising industry has been reasonably active in supporting StarTV as an innovative alternative for marketers based there, more so than most other countries in the region. This may be largely due to the fact that Hong Kong is the regional headquarters for a number of multinational marketers operating in Asia. The medium was also utilised not only as an pan-Asian medium but as a more limited subregional one for the 'Greater China' market, increasingly so as transnational satellite broadcasters themselves position themselves as subregional or quasi-domestic. Furthermore StarTV was considered as having a role in conjunction with rather than in opposition to domestic television.

The responses of the advertising industry in the three key Asian markets to StarTV in the early 1990s in one sense are studies in contrast and in another share a number of underlying similarities. While the Indonesian attitude towards this new transnational satellite television medium might be characterised as disinterested rejection, the Indian attitude was one of enthusiastic embrace, and the Hong Kong one was of thoughtful consideration. Indonesia's advertisers saw little response to the transnational medium by audiences satiated with multiple commercial channels domestically and so largely ignored it. Indian advertisers chose to use StarTV and domesticated satellite channels which followed as a means of circumventing some local

restrictions on advertising, as well as reaching expatriate and diasporic Indians elsewhere. Hong Kong domestic advertisers likewise had little use for the medium locally but did see potential for targeting other constituents of Greater China, while its multinational advertisers were keen to dabble in this new regional medium. All of them saw limited scope for globalised advertising across the whole of the StarTV footprint in Asia, except perhaps in the limited cases of corporate advertising and upmarket services.

## Chapter Nine

### COMPARATIVE TELEVISION GLOBALISATION

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Globalisation of television and advertising in Asia has progressed at varying rates, even in distinct ways, as evident in the selected countries and subnational regions researched. The preceding chapters of this thesis have contained not just findings of the research but also discussion on the impact of transnational satellite television in each of them, because it is not possible in case studies to segregate strictly events from causes, problems from solutions, description from analysis. There is a need in the study of transnational satellite television for an overarching framework for analysing systematically the interacting factors of globalisation, as well as to serve as a basis for a critical, even ethical, stance on its development and management. Having analysed the three markets of Indonesia, India and China separately, this chapter will make explicit comparison of their experience of transnational satellite television through an inductively-derived analytical framework. Then it will revisit the research questions raised earlier in seeking to draw together lessons on globalisation that are possibly applicable to other developing countries in the region and beyond, before reflecting on the scope for further research.

#### 9.1 ANALYTICAL FRAMEWORK

A conceptual framework was implicit in the research questions that were the focus of all data collection in all three countries selected as sites of investigation, namely Indonesia, India and Greater China. It is made explicit in the analytical framework (Table 9A) expounded on below which, while not covering all the factors involved in the highly complex impact of transnational satellite television, highlights the most recurrent ones to surface in the interviews, secondary data and content analysis. In other words, it is inductively derived from the results of field research, as the explanation and application of each of the factors will demonstrate. The three-to-five labelled points on the continuum for each factor are by no means exhaustive and are selectively designed for their relevance to the phenomenon of transnational satellite television. In a more traditional model, the business performance of transnational broadcasters might constitute the independent variable, the changes in the media and advertising industries constitute the dependent variables, with the politico-economic and socio-cultural factors constituting the intervening variables. However such a model would be highly deficient given the complexity and multi-directional nature of the relationships between the factors, as indicated by the research data. Therefore in the following sub-sections the incidence of or potential for impact of transnational satellite television in the three major markets in Asia investigated will be elucidated utilising this analytical framework and its inventory of significant factors.



Table 9A: Framework for analysing impact of transnational satellite television

<b>POLITICO-ECONOMIC ENVIRONMENT</b>
<u>World-economy integration:</u> Free-market—Social democratic—Market-socialism—Communist/isolationist <u>Population/market size:</u> Populous/large—Medium/average—Sparse/small <u>Political ideology:</u> Right-wing/elitist—Liberal/democratic—Paternalistic/one-party—Totalitarian/authoritarian <u>Business/investment controls:</u> Laissez-faire—Specific restrictions—Bureaucratic/restrictive—Political patronage <u>Transnational broadcast regulations:</u> Active suppressn—Latent suppressn—Complacent inaction—Prudent inaction—Regulated access—Liberal access
<b>SOCIO-CULTURAL ENVIRONMENT</b>
<u>Language competence:</u> World/regional language—Functionally bilingual—Limited bilingualism—National monolingual <u>Audience sophistication:</u> Urban/affluent cosmopolitans—Urban/affluent locals—Rural/affluent locals <u>Colonial experience:</u> Neo-colonialised—Selective assimilation/positive experience—Violent rejection/negative experience—Uncolonised <u>Cultural policies:</u> Cosmopolitan/liberal—Nationalistic/restrictive—Xenophobic/repressive <u>Diasporic communities:</u> Extensive/worldwide—Regional/subregional—Temporary/expatriate—Limited/non-migratory
<b>MEDIA/BROADCASTING ENVIRONMENT</b>
<u>Terrestrial/spillover television:</u> Limited choice/high information—Moderate choice/mixed programming—Wide choice/high entertainment <u>Cable networks:</u> Extensive/neighbourhood operators—Oligopolistic/multi-service operators (MSOs)—Monopolistic/non-existent <u>Consumer access costs:</u> Low-cost cable—Moderate cost/pay-TV—High-cost/dish-ownership or DTH <u>Local programme production:</u> Highly productive/well-established—Limited production/relatively new—Virtually non-existent <u>Television industry structure:</u> Global/MNCs—Joint-ventures/strategic alliances—Local/private—Government/political party
<b>ADVERTISING/MARKETING ENVIRONMENT</b>
<u>International ad agencies:</u> Direct presence—Via affiliates—Advisory/coordination—Excluded/unrepresented <u>Global/MNC clients:</u> Regional headquarters—Joint-ventures—Via local agents—Not present <u>Product categories:</u> Global/convenience—Global/luxury—Corporate/services—Domestic/luxury <u>Media alternatives:</u> Wide-choice—Moderate availability—Limited choice—Non-existent <u>Creative strategy:</u> Global/standardised—Regional/cooperative—National/adapted—National/customised

9.1.1 Politico-economic environment

*World economic integration:* Despite their earlier socialist, non-aligned, and somewhat isolationist policies, all three countries have sought greater integration into the capitalist world-system in the last decade or so. Certainly they were not coerced, if by that one meant that they were militarily or diplomatically rail-roaded into joining, but there was simply no viable alternative in a capitalist-dominant world especially post-Cold War, unless the consequences for North Korea or Cuba were considered desirable. Whether China will be able to maintain its communist political system while pursuing a market economy, India its socialistic bureaucracy while liberalising, or Indonesia its military-authoritarian government while privatising has yet to be seen. However, one might assume that the erosion of political power evident already in those countries presages greater liberalisation and democratisation in the longer term, be that years or decades from now. Therefore public broadcasters such as TVRI, DD and CCTV were invariably constrained in their exercise of national hegemony over the television medium by the incremental integration of their respective nations, Indonesia, India and China, into a global economic system.

Table 9B: Politico-economic environment of transnational satellite television

<i>Selected factors</i>	<i>Indonesia</i>	<i>India</i>	<i>China</i>
World-economic integration:	Free-market	Social-democratic	Market-socialism
Political ideology:	Paternalistic/one-party	Liberal/democratic	Totalitarian/authoritarian
Business/investm controls:	Political patronage	Specific restrictions	Bureaucratic/restrictive
Transnational broadcast regulations:	Liberal access	Controlled access	Latent suppression
Population size:	Populous/dense	Populous/dense	Populous/dense

*Political ideology:* Simplistically, it would appear that countries which adopt a free-market approach in their economies would be most integrated into the capitalist-dominant world economy, and by implication be the most likely to experience globalisation of its television. However, apart from the few strictly communist-dominated economies which are necessarily isolated from the international mainstream, a government's politico-economic shade has little to do with the country's integration into the capitalist world economy. Regardless of their particular politico-economic shade, all of the nations case-studied in this thesis and most others in the region, have experienced globalisation of their television industries, if not directly via transnational satellite television at least indirectly as their domestic channels faced up to the challenge of global or regional competition. In this process of globalisation, it is evident that domestic television in each country faces a conflict over the control between its more nationalistic political-bureaucratic elite and its more transnationally-oriented capitalist middle and upper classes.

*Business/investment controls:* Almost all countries have controls on foreign investment to some degree, and the media industry in particular attracts attention on the grounds that it is a national cultural resource and involves issues of national security. Perhaps more to the point, control of the media and thus its message content is critical to a particular political power-group or at least a socio-economic elite stratum of society. In Indonesia ownership of all businesses has to be in the hands of locals or be joint-ventures, and the licensing of commercial broadcasters reflects the importance of political patronage. Given its socialist, non-aligned pedigree India still had controls on business and investment, though in recent years of liberalisation it was increasingly bowing to pressure for foreign investment in all industries, conceding minority equity participation by foreign media corporations. China has permitted foreign direct investment but the process was said to be highly bureaucratic, and anything more than strategic alliances was frowned upon though there seemed to be some concessions made to Overseas Chinese entrepreneurs regardless of their citizenship. Thus in one form or another, all three countries studied in this thesis maintained strict controls over investment in the media, especially the television industry, though in reality this is being increasingly eroded.

*Transnational broadcast regulations:* All countries in Asia exercised some form of regulation of access to transnational satellite television on a range from 'active suppression' to 'liberal access' though these may shift over time, as explained extensively in Chapter Four. Indonesia granted its citizens controlled access via the liberal licensing of satellite dish-antennae, perhaps counting on their prohibitive cost and the language barrier against transnational programming to limit the audiences. India, on the other hand, has opted for controlled access after a long period of complacent inaction when it was hamstrung by the legal vacuum created by outdated telecommunications laws. By contrast, China moved from a policy of complacent inaction initially to latent suppression following some unflattering coverage by StarTV, and now may be moving towards prudent inaction' in support of multiservice operations owned by the army, state or party. As a general rule, a policy of allowing access or at least of not overtly restricting is favourable to the growth of transnational television in a particular country, though this needs to be qualified by yet other factors. Regulations alone have not been sufficient to deter access, for they often serve to drive the industry 'underground' and consequently difficult to regulate.

*Population size:* The more populous a country, all things being equal, the more likely that it would be targeted by transnational satellite broadcasters because it represents a sizeable market for audiences to be sold in turn to advertisers. All three countries used as case-studies in this research are populous and that explains in part their interest to broadcasters and advertisers, though the differing levels of interest can be explained by other contributory factors to be discussed later. However transnational satellite television is sometimes a boon to audiences in sparsely populated sub-national regions beyond the reach of terrestrial transmission means. Thus in its early years, StarTV attracted sizeable audiences from the western provinces of the PRC but because they were also the poorer, rural provinces, advertisers were not impressed with the audience size claimed by the transnational broadcaster for the country as a whole. However in India, a sizeable market of wealthy rural landowners has been attributed with causing the growth of satellite commercial channels in subnational ethnic languages. Therefore the role of population size in the potential impact of transnational satellite television needs to be qualified by the relative level of cultural sophistication and economic affluence of the population of each country or geo-linguistic market.

9.12     Socio-cultural environment

*Language competence:* On this dimension of facility with a world or major regional language, it is reasonable to compare only urban metropolitan areas across these three markets. In Indonesia, English was utilised minimally in the capital city of Jakarta and the other major commercial metropolises, usually primarily within multinational corporations and service industries. In terms of an audience for transnational television broadcasts in English there was a very limited market, believed to be virtually confined to expatriates. Bahasa Indonesia is the *lingua franca* and is similar to the Malay spoken in Malaysia and Brunei, making them a sizeable market for subregional language programming by spillover or satellite. The situation in India was somewhat different since there has been a strong tradition of an English-language press and literature in urban areas, and a considerable proportion of domestic public television is in English. Given the tensions over cultural hegemony by the north over the south, English is probably the *de facto* national *lingua franca*, especially as it is the language of the national government and international business. Even though English might be spoken by a small percentage of Indians, given the large population of the country there has always been a sizeable audience for the programmes of transnational television broadcasters. But of the urban metropolises of Greater China, only in Hong Kong was English spoken to any extent, while even in Beijing, Shanghai, Guangzhou and Taipei it was virtually impossible to operate without a knowledge of Mandarin or the local dialect. Therefore the only transnational satellite channels which have been able to attract viable audiences in Greater China are those like Star Chinese, CTN or TVBS which broadcast in Mandarin.

Table 9C: Socio-cultural environment of transnational satellite television

<i>Selected factors</i>	<i>Indonesia</i>	<i>India</i>	<i>China</i>
Language competence:	Limited bilingualism	Functionally bilingual	National monolingual
Audience sophistication:	Urban/local	Urban/cosmopltn	Urban/local
Colonial heritage:	Violent rejection	Selective assimilation	Uncolonised
Cultural policies:	Nationalstc/restrictive	Cosmopltn/liberal	Xenophobic/repressive
Diasporic communities:	Limited/non-migratory	Extensive/worldwide	Extensive/worldwide

*Audience sophistication:* The more affluent and cosmopolitan the urban metropolitan areas of a country, the more likely that it will be a market for transnational satellite television. The prime markets for StarTV would have been those which rank among the NICs of Asia except for the fact that Singapore and Malaysia have government restrictions on access, while in Thailand, Indonesia and to a lesser extent Taiwan there are language barriers to be overcome. But in essence it was the commercial and political capital cities which had driven the demand for transnational television, and so the markets in Asia were largely defined by the greater metropolitan areas of Bombay, Delhi, Taipei, Hong Kong, Shanghai, Jakarta and Medan rather than their respective countries.

In general terms, these urban consumers are cosmopolitan in their outlook and consumption habits, given their exposure to Western culture. While there might have been affluent audiences in other urban or rural regions of the various countries under the satellite footprint they were better described as being local in outlook by contrast. They often represented a secondary market for transnational satellite television, one better catered to by subregional or subnational language programming. Critical as audiences are to the performance of transnational satellite broadcasters, advertisers are less interested in their size *per se* as with their buying power and cultural sophistication.

*Colonial heritage:* Since its sale to Murdoch's News Corporation, there had been concern among nations in the Asia region over cultural imperialism via StarTV, though this attitude was often at odds with their determination to achieve economic development. Given the relatively positive colonial experience and peaceful transition to political independence, the Indian population more receptive to the English-language and Western-gearred programming initially predominant on transnational satellite television. But this was not the case in Indonesia which had rejected the Dutch language and opted for the trade dialect of Malay as its national language or Bahasa Indonesia, following the violent overthrow of the colonial power. In any case, Dutch is not a world-language nor is the Netherlands a major producer of television programming for world markets. China was never colonised by Western powers except for the treaty ports wrested from them, and hence it has had an intermittent history of xenophobia. In one sense the Mandarin language is a colonial language imposed by the Han Chinese on minority ethnic groups within their borders. All three countries studied, namely Indonesia, India and China, have utilised public television enhanced by satellite technology as means of promoting national integration, social development and economic modernisation. But their concern about neo-colonialism via transnational media has been responsible for restrictions on access to transnational television broadcasters their citizens.

*National cultural policies:* The more stringent the cultural policies of a nation in its commitment to national integration, the more likely it is to control domestic television broadcasting. Ironically, the more restricted the domestic programming fare, the more motivated are consumers to gain access to transnational television regardless of governmental controls on access. Public broadcast television in Asia in the past has been paternalistic in reflecting primarily the tastes of the political-bureaucratic elite whose ranks are often dominated by members of a particular ethnic-geographical sub-national group. While accusing transnational satellite broadcasters of cultural imperialism, government leaders often remained blinkered to the same phenomenon within the nation-state by one dominant ethnic group over its minorities, such as the ethnic Javanese in Indonesia, Hindi-speaking northerners in India and Mandarin-speaking northerners in Greater China. Unfortunately as national public television broadcasters worldwide compromise their public service ideal of nation-wide appeal in order to survive in a commercialised broadcasting market, ethnic minorities may have even less hope of gaining a cultural voice within their nation-state. Yet where it may not be economically viable a domestic market basis, there might be a market for such an ethnic channel on a transnational basis as India's commercial satellite channels in Bengali and Tamil seem to have demonstrated.

*Diasporic communities:* There is a tendency to think of population in terms of national size, although for transnational satellite television, the relevant population size is all those conversant in a particular language of broadcast or of similar culture under its footprints. This is the case with India which shares ethnic groups with Pakistan, Bangladesh, Nepal and Sri Lanka. Then there are South Asians expatriates such as in the Middle East, or

immigrants traditionally in Southeast Asia, Fiji, East Africa, and more recently in North America and Europe. A parallel situation exists in Greater China and among Overseas Chinese, predominantly in East Asia such as in the urban areas of Thailand, Philippines, Malaysia and Indonesia, and also practically worldwide. In contrast Indonesia has a national language similar to Malaysia's and Brunei's, namely Malay which is spoken only in a limited fashion in Singapore and southern Thailand. There are few Indonesian migrants outside the South East Asia region, largely confined to the Netherlands and its former colonies of Suriname and South Africa, where the language is in relative disuse. Thus while pan-Asian English-language television did not work well, sub-regional Indian-language and Chinese-language channels have proven very successful. Through the pay-TV services the programming on these channels, if not the channels *in toto*, have been made available to smaller markets for these Asian groups outside the Asian region. There is therefore considerable correlation between the existence of migrant and expatriate markets, and the growth of transnational television in Asia using one of the major languages of the region.

### 9.1.3 Media/broadcasting environment

*Terrestrial/spillover television:* As mentioned earlier, Indonesia developed a multiple commercial and public television channels ahead of the arrival of StarTV, and this, among other factors, helps explain the lack of impact of the transnational medium there. Likewise, Hong Kong had two commercial broadcasters providing four channels, one of which was the market leader by far in the territory as well as in southern China, and because of the restrictions on StarTV broadcasting in Cantonese, TVB's leadership was unchallenged. On the other hand, India and Taiwan had limited and highly-controlled public or pseudo-commercial television, which precipitated the establishment of quasi-legal cable networks utilising videotape programming, which in turn were catalysts for the penetration of transnational satellite television. Markets that are accustomed to spill-over television would normally be primed for reception of transnational television via satellite. However, if the audiences have access to ample choice via both spillover and domestic sources at low cost and in a familiar language, as is the case with southern China and north-western Indonesia, they are unlikely to be keen on transnational satellite television especially if it is in a foreign language or dialect and it is more costly. Thus the more diversified and liberal the domestic television industry and/or greater the access to spillover terrestrial television in a country or subregion, the less of a market for transnational television it is.

*Cable networks:* The success of transnational satellite television in Asia has been highly dependent on the development, even pre-existence of cable networks, whether legal, illegal or quasi-legal. In the first two markets where StarTV took off, namely India and Taiwan, neighbourhood cable networks had preceded the arrival of the new television medium, created by the demand for alternatives to the government-controlled media. In China, ownership of similar cable networks by municipal and state governments or government-owned industry had been instrumental in undermining the central government's directives against access to the transnational satellite television. The cable networks in Asia usually exist in a legal vacuum caused by the regulatory lag over technology change in communications, and the belated attempts to legalise the medium were dictated largely by the status quo of an established cable industry. Indonesia was the only country studied which did not have a cable industry and thus difficulty of access in explains in part why it was the least affected of the

three countries researched. In all three countries researched the governments seized on the opportunity provided by the introduction of new broadcasting legislation to attempt to control the transnational television via the domestic cable networks. Multi-service operators (MSOs), a consequent development, are relatively recent entrants into the transnational satellite television equation, and so it is somewhat premature to ascertain their impact on transnational broadcasters and advertisers.

Table 9D: Media/broadcasting environment of transnational satellite television

<i>Selected factors</i>	<i>Indonesia</i>	<i>India</i>	<i>China</i>
Terrestrial/spillover television :	Moderate/ mixed prog	Limited/ high-info	Limited/ high-info
Cable networks:	Monopolistic/ non-existent	Extensive/ neighbourhd	Oligopolistic MSOs
Consumer access costs:	High-cost/ dish or DTH	Low-cost/ cable	Moderate-cost/ pay-TV
Local programme production:	Limited production	Highly productive	Highly productive
Television industry structure:	Local/ private	Joint-ventures/ strategic alliances	Govt/ party-owned

*Consumer access costs:* A critical factor with the penetration of transnational satellite television in Asia has been the cost of access to the average consumer. In Indonesia, where cable networks have not existed, the cost of access via satellite dish-antennae was high, and given that, StarTV was a medium confined to the upper socio-economic classes. This was especially so in most of the country because the footprint of the AsiaSat1 satellite covered primarily the northern part of Sumatra island, and so large, expensive dish-antennae were required elsewhere in the country. Even in the late 1990s, cable access in both Indonesia and Hong Kong was through pay-TV monopolies which were relatively expensive for the average consumer. Whereas the neighbourhood cable operators in India and Taiwan, and factory or municipal-owned networks in China had brought the cost of access down to a level where even the lower middle-class could afford it. The impending development of these networks into oligopolistic multi-service operators under government regulation is not expected to adversely affect cost of access. Direct-to-home television by the transnational broadcasters could be a threat to the cable industry, but only if and when they are able to lower their hardware and subscription costs to the level that consumers in many Asian markets have become accustomed.

*Local programme production:* The more extensive and productive a domestic film and video production industry in a country, the more likely it is to be able to provide sufficient programming to sustain its own television channels and/or contribute to transnational satellite channels. In the case of India and Hong Kong, the prodigious domestic film and video industry has been a source of programming on domestic channels and have also contributed to the establishment by their countries of regional commercial channels often via satellite or cable. Indonesia, which has a relatively smaller and less productive film and video industry, as well as a small regional market for its productions, has therefore had difficulty sustaining anything more than its domestic cinema and

television channels. In any case while programming for the StarTV channels were sourced worldwide, increasingly they were from the very countries and subregions to which these quasi-domestic channels were broadcast. It might be argued that the more accustomed domestic audiences were to imported programming, the more likely they were to accept transnational television via satellite. However, how one defines imported programming and locally-produced clones is critical, for though Greater China was not very dependent on imports from the West and had locally-produced programme clones, these were not readily transferable between the constituent territories due to minor language and culture variations.

*Television industry structure:* The ownership of transnational satellite channels by global media corporations has been assumed by governments to imply their domination of any regional market they expand into. However, the impact of ownership is far more diffused, as the history of StarTV illustrates. This pioneer of transnational satellite television in Asia was originally not part of a global media corporation owned by Western interests, but owned by an ethnically Chinese business family from the region without any broadcast experience. Even after its complete sale to News Corporation, the license for uplinking StarTV from Hong Kong remained with HutchVision, still majority-owned by the founding family because of regulatory restrictions. Furthermore, transnational satellite channels are often carried by locally-owned cable operations in the various countries of Asia, ranging from neighbourhood entrepreneurs to large firms with national political affiliations. A recent development has been the formation of formal strategic alliances and joint-ventures between transnational and domestic broadcasters, as well as with domestic programme producers, cable networks and the like. In terms of corporate citizenship then, whether one might classify StarTV as a transnational, a sub-regional or quasi-domestic satellite broadcaster is now an open question. The experience of StarTV and its followers into the Asian market demonstrates the principle that the greater the number of strategic alliances or joint-ventures formed, the more significant the impact of transnational television on the domestic broadcasters, advertisers, and audiences in that market, and vice-versa.

#### 9.1.4 Advertising/marketing environment

*International ad agencies.* The most positive responses to the use of transnational satellite television as an advertising medium were from Hong Kong where the international ad agencies have a direct presence and dominate the advertising industry. Invariably these agencies act either as formal or *de facto* regional or subregional coordinators of advertising for a number of multinational marketer clients. To them, a transnational medium such as StarTV is an attractive option over dependence on multiple branch or affiliate agencies to deliver consistency of advertising via domestic broadcasters across a regional market. In Indonesia and India, where the international ad agencies and their MNC clients were compelled by law to operate as joint-ventures with local firms, there was considerable pressure to advertise domestically and thus resistance towards regional advertising initiatives. Also in these countries there were restrictions on the purchasing of advertising time or space on regional television media, primarily via foreign exchange constraints. Indian-based agencies were marginally more responsive to the new medium than Indonesian ones, because they felt some responsibilities for subregional markets, even if only to expatriate/diasporic Indians there. Thus the stronger the presence of international ad agencies in a country the more



likely that a transnational medium such as StarTV would be utilised for advertising in that national market and for the region or subregion of which it was a part.

Table 9E: Advertising/marketing environment of transnational satellite television

<i>Selected factors</i>	<i>Indonesia</i>	<i>India</i>	<i>Hong Kong</i>
International ad agencies	Via affiliates/ national	Via affiliates national/subregional	Direct presence subregional/regional
Global/MNC clients	Via agents	Joint-ventures	Regional offices
Product categories	Corporate/ services	Domestic/ luxury	Global/ services
Media alternatives	Moderate	Wide	Moderate
Creative styles	Cosmopolitan/ regional	Cosmopolitan/ domestic	Western/ global

*Global/MNC clients:* It appears that the greater the number of multinational clients operating directly in key markets of a region, the more significant the commitment to advertising regionally via transnational satellite television. This is closely related to the situation above with international ad agencies which tend to service the MNC marketers. Both these ad agencies and their MNC clients were likely to have had experience with regional advertising via satellite television in Europe or North America, or even global advertising, and were therefore more interested in replicating that practice in Asia once the option was available. In some cases advertising of a global product via domestic media could be coordinated through national offices, joint-ventures or sole agents in various countries of the region. But apart from this being a cumbersome process, it was fraught with difficulties given the varying regulations on content, not to mention restrictions on the use of foreign-produced television commercials imposed by many governments in the region including India and Indonesia. In analysing the clients of StarTV, this research uncovered different national offices of MNC marketers purchasing advertising time on the same transnational medium primarily to target a domestic market, whether in collaboration with or independent of their regional office. As a general rule, wherever the regional headquarters of MNCs were predominant, there was greater openness to experiment with the new transnational television medium as a viable alternative or at least complement to domestic advertising.

*Product categories:* Generally, advertising on the transnational medium tended also to be of up-market products and services targeted at the socio-economic elite of regional markets, since these were the innovators and early adopters of this new medium. Advertising which originated from Hong Kong was primarily of a corporate nature or promoted financial services, the line between them being not always distinguishable. Therefore where the clients handled by ad agencies in a country required a considerable emphasis on corporate advertising or services advertising, the more likely was transnational satellite television to be utilised as a medium. Financial advertising and liquor were placed on StarTV by Indian advertisers because they not permitted on domestic television and the primary target market was the relatively wealthy expatriate Indians in the Middle East. Together with upmarket cars, electronic appliances and fashionwear these were placed on what was considered a strategic medium for targeting domestic Indian consumers of the middle class and above. In the case of Indonesia, the only

advertisers allowed to utilise the transnational medium were those of upmarket services targeted at foreigners such as Indonesian airlines and luxury hotels. So where there were restrictions on using transnational media for domestic markets, a medium such as StarTV was used to advertise domestic products for transnational markets. Thus analysis of the products advertised on StarTV was revealing of the strategies adopted deliberately or unwittingly in the use of a transnational television medium.

*Media alternatives:* Developing countries which have a wide range of advertising media, especially television, are less likely to utilise the transnational medium, as illustrated by Indonesia which has five quasi-national television networks. On the other hand advertisers in a country like India which had limited access to domestic television embraced the transnational medium such as StarTV in its early days even though they utilised it as a domestic medium. If a product was distributed solely to urban areas of a country, it was likely that transnational television would be considered, though it was only true when there was no commercial television or a second public channel which had a more urban reach than the national broadcaster. Thus in India, StarTV and ZeeTV found themselves competing with DD2 for the urban markets of India, while in Indonesia RCTI and SCTV were the unquestioned choice for the same purpose. Hong Kong represented a special case since the territory is largely urbanised, and both TVB and ATV had territory-wide as well as southern China coverage. But since the domestic television media were mass-market oriented and the cable/pay-TV service was prohibited from carrying advertising, some upmarket products utilised StarTV to reach the expatriate market in Hong Kong. Thus despite their availability, the domestic media were not strictly viable alternatives and a transnational medium enjoyed considerable demand from advertisers in particular product niches.

*Creative strategy:* Where the perception among advertising executives was that cultural differences between their country and those of other countries were almost insurmountable, then there would be a decided preference for local creativity. Advertising executives in Indonesia were the most forceful in arguing for the imperative of domestic creativity, albeit of a cosmopolitan nature, as necessary for effective marketing communication, though it might also be a rationalisation for retaining advertising budgets domestically and not challenging government restrictions. Those in India seemed equivocal about the need for domestic creative styles and an informal review of their commercials shows that they have opted for a more regional-cosmopolitan style than a domestic-traditional one for the upmarket products and services advertised on transnational and domestic channels alike. Invariably the same commercials for upmarket products were placed on StarTV as well as the more sophisticated DD2. Executives in Hong Kong were almost indifferent but most prone to choosing a more Western-creative style in domestically-produced commercials, if not using global commercials of Western origin or adapting the concept slightly in domestic remakes. The preference of an ad agency for a more 'Western/global or at least a cosmopolitan-regional creative style generally commends the use of transnational media over any domestic one.

The inductively-derived analytic framework sketched above is tentative and seeks to elucidate the major factors in the impact of transnational satellite television in Asia, largely as seen by key decision-makers in the region's cultural industries. It is qualitative and admittedly not finely defined in its three-point to five-point scales, though it may be utilised to derive quantitative relationships at some later stage. At this stage of the diffusion of transnational satellite

television in Asia, the descriptions of the selected factors are perhaps more accurate concerning the urban-metropolitan areas of each country than as generalisations about each country as a whole. The following sections of this chapter will revisit the research questions first stated in Chapter Three in the course of summarising the findings of the research for this thesis. Through answers to these questions the macro issues surrounding transnational satellite television and micro strategies adopted by key players in the industry will be expanded upon, and generalised with caveats to other developing countries in Asia.

## 9.2 MACRO ISSUES

The global market for goods and services has grown since the 1970s, due in part to new technologies in transportation, communications, information and production which make it both quicker and cheaper to move goods, services, information, capital and people between countries, increasing their accessibility to and from markets. This was accompanied in the late 1980s by the demise of the communist economic system of planned production and trade, deregulation in capitalist-oriented economies, and a decline of ideologically-driven national development among developing countries. All of these changes have contributed to the growth of the global economy which forms the macro-environment for the development of transnational satellite television and advertising in Asia. Each related politico-economic and socio-cultural issue raised in the research questions of this dissertation will be addressed in turn in this section in an endeavour to arrive at some general principles governing the experience of developing countries, at least in Asia.

### 9.2.1 Regulation/liberalisation

*Research Question 1:* Which governments in Asia have perceived transnational satellite television as a threat, and why? How have they sought to control its access, and how successful have these efforts been? [Issues of economic and political globalisation].

As seen in this research, most governments in Asia felt threatened by the advent of transnational satellite television and endeavoured via various means to control access to it. The countries most threatened were those which had the strongest ideological commitments to national cultural and political integration, and/or centralist social and economic planning. Realising that their various current media regulation had failed to achieve sufficient control, some governments went on to make concessions to or collude with the transnational broadcasters, while others simply conceded defeat by default. Deregulation of the media, by which governments abdicate control and allow private enterprise to operate with minimal restraint, is one of the key symptoms of economic and political globalisation, and this has been much in evidence in Asia in the 1990s.

*Control:* Governments are by their very definition nationalistic and fear the intrusion of transnational television which they have little control over into their political environment. Based on the perceived threat to its national culture, each developing country in the region has sought to adapt in differing ways to the advent of satellite television. The controls exercised, ranging from 'active suppression' to 'liberal access', have been elaborated upon in Chapter Four and the shifts in policy made by countries over time reiterated there and more specifically in

the case-studies. The prime response of Asian governments has been some deregulation of their terrestrial-domestic television industries as in Indonesia, India and Thailand either in anticipation of transnational satellite television or in forced response to overwhelming competition. In the more politically conservative countries, the preferred option is expansion and diversification of the government-owned or controlled media, as in the PRC, Malaysia and Nepal. While the more liberal countries such as the Philippines, Nepal and Thailand seem content to let market forces prevail, others like Korea and Pakistan appear to adopt a wait-and-see attitude, though clearly biased towards a more conservative alternative of regulation. In any case control over access grows increasingly difficult with technological advances, such as greater power of DBS satellites making dish-antennae for reception smaller and less detectable.

*Collusion:* While strict regulation of broadcasting may not be acceptable to multinational corporations, considerable de-regulation may be unacceptable to developing countries either, and so a tension exists between transnational television broadcasters in Asia and the countries under their satellite footprints. Still, commercial television and Asian governments are not at odds as it seems on the surface. For instance, in the 1994 Indian election, ZeeTV offered to broadcast political rallies for the Congress Party when the latter was in a dilemma over not being able to use the public broadcaster Doordarshan (DD) for party purposes. Later the same year in an attempt to win friends in the government, StarTV broadcast 'live' the traditional prime minister's speech on independence day, previously carried solely by DD. For a time CNNi was broadcasting from a Indian government satellite, while assisting DD to improve its news service. News Corporation has made amends with the PRC government over Murdoch's speech in 1994 on satellite television threatening totalitarian states, by publishing Deng Xiao Peng's memoirs worldwide through its subsidiary Harper Collins while cancelling last Hong Kong governor Chris Patten's. StarTV has more recently formed joint-ventures for programme production, channel provision and cable networks in the PRC, India and Indonesia, with domestic businesses which have the right political and business connections to facilitate greater penetration.

*Concession:* One concession made by countries in Asia such as Malaysia and Singapore, which restrict the reception of free-to-air satellite television, has been to provide a cable television service on which is available programming similar to transnational satellite broadcasters or down-linked selectively from them. Similar to the case for terrestrial television, their authorities are able to apply pressure concerning, if not outright control over, programming and advertising either legally or morally on cable providers in a way not possible with transnational broadcasters. Oftentimes though such pressure is somewhat superfluous since the domestic cable services are run either by a corporation owned by the government, by a political party in government, or by the family and friends of political leaders. Some governments such as China and India have even entered the transnational television business themselves, while others are contemplating doing so, at least on an Asia-wide basis as an extension of their use of satellites for domestic television which results in considerable spill-over anyway. The underlying rationale of such concessions must be that the wider and more attractive the choice of domestic terrestrial and satellite broadcasts and also cable narrowcasts, the less likely their citizens are to be influenced by viewing commercial transnational television via pan-Asian satellites.

To a considerable extent all these strategies to control transnational satellite television seem to have succeeded because in many Asian countries local dramas and news on domestic television continue to be the

programmes with highest audience ratings. The gradual growth in transnational satellite television viewership, in those countries which do permit access to it, does not seem to be at the expense of domestic terrestrial television watching. Neither does advertising revenue for domestic broadcasters seem to be declining in the region, possibly due to the high economic growth among many East and South Asian nations in the early 1990s spurring expansion of marketers' budgets. The effectiveness of transnational satellite television in attracting domestic audiences seems to involve the interaction of such factors as terrestrial programming versus satellite programming, cultural and linguistic barriers, access costs for consumers, economic affluence, among many others. Thus regulation is a poor predictor of the impact of transnational satellite television because there are other factors to be considered in the equation, in recognition which some governments in Asia have since deregulated their television industries. While other governments hold on to their regulations or make further pronouncements on control, most of them fail either to implement them or try to, except erratically, constrained by their push for integration into the capitalist world-economy.

### 9.2.2 Capitalism/communication

*Research Question 2:* What are the links between global capital, media corporations and political elite, if any, in transnational satellite television in Asia? More specifically, what are the ownership structures and business alliances between satellite owners, transnational broadcasters, domestic broadcasters, cable networks, advertisers, programme production houses and other cultural industries? [Issues of economic and political globalisation].

Transnational satellite television in Asia was an initiative of regional or global businesses to provide a pan-Asian advertising medium, and not of governments or intergovernment organisation (IGOs) to provide a public service to the region. So from the start, multinational corporations (MNCs) of either regional or Western origin have dominated the transnational television industry in Asia, as has been the case elsewhere in the world, whether it be the hardware of satellite technology or the software of programming or advertising. With the increasing incidence of collaboration between transnational broadcasters and domestic cultural industries, and the trends in domestic television towards privatisation and deregulation, the role of media conglomerates and marketing multinationals seems to be expanding in tandem with commercial and political interests in the various countries of Asia.

*Satellite dependency.* Even before the era of transnational television, communications satellites for development were recommended to the governments of Third World countries such as India and Indonesia by First World governments or their surrogate IGOs, usually at the lobbying of their MNCs, as seen in the case-studies. But the purported benefits of national integration, administrative effectiveness, provision of educational services and of news/information, and their deliverability, may be questioned. For it is doubtful whether the medium of domestic satellite television can realistically overcome the need for local autonomy, bureaucratic centralism and inefficiencies inherited from colonial powers, and general deficiencies of finances, trained personnel and support equipment which are often characteristic of developing countries. Although extensive research funded by the governments and their donors/sponsors has revealed some positive social and economic change with the use of satellites, the reality was often that the somewhat minuscule change might have been achieved more cost-effectively by alternative communications media, including traditional forms. So even the public broadcasters of

Asia were in a dependency relationship with the First World and its MNCs for technology, well prior to the arrival of commercial transnational television via satellite.

*Space treaties:* Although ideally under early space treaties the benefits of outer space should be shared by all countries, in reality they have accrued largely to developed countries rather than the developing countries. This is because the former's commercial satellite businesses often apply pressure via their governments on the ITU, as regulator of global telecommunications, for satellite orbital slots. Besides it is difficult for ITU to allocate slots equitably because there are multiple users of each commercial satellite, each of different corporate citizenship, and also because some territories such as Hong Kong are not signatories to the space agreement. Countries like Indonesia, India and China which have used their own satellites in their assigned orbital slots to enhance their social and economic development are well within their rights. But many other countries, such as the Pacific island nations, are in no position to utilise effectively any slots they are entitled to but are often persuaded by commercial interests in the West to lobby for slots and then sublease these to them for television and telecommunications purposes. So the role of transnational satellites operating in Asia probably warrants some judicial attention under the international treaties relating to the commercial utilisation of outer space.

*Players and platforms:* This dissertation has listed and classified the major transnational television broadcasters and satellite platforms in Asia in the mid-1990s in Chapter Four, from which it is quite evident that the field is dominated by MNCs. Even where the satellites are owned by national governments or corporations owned by them, as for instance Indonesia's Palapa satellites, or IGOs such as Intelsat, most of the television channels they carry are commercial and owned by domestic and transnational broadcasters, a trend that continues unabated. Other satellites are owned or part-owned by regional or domestic conglomerates, such as AsiaSat, Apstar, Thaicom and Measat satellites, although most of such firms have connections with or participation by government, political party, armed forces or other important domestic power bases. With few exceptions such as the cases of India and China, the satellites are constructed by First World MNCs to the specifications of their Asian owners and their potential broadcaster clients, and launched at facilities owned by First World governments or consortia of them. Some satellite owners and even manufacturers are diversifying into the business of programming and channel establishment, in other words expanding from hardware into software. Although on the surface, broadcasters from within the Asia region are holding their own against the transnationals, even beating them at their own game, the reality is of continued domination of the industry's hardware and software markets by MNCs from the First World.

*Cable-satellite links:* A symbiotic relationship might also be said to exist between transnational satellite channels and domestic cable television networks despite their sometimes competing business agendas and unwillingness to acknowledge dependence on one another. Redistribution of television signals to cable networks was the first major use of satellites to be made by the television industry in the US and continues to be a prime factor in the utilisation of satellites in Asia. Extensive pirating of signals by individuals and illegal cable operators using satellite dish-antennae in countries such as Taiwan and India, has necessitated the scrambling of signals by transnational satellite broadcasters in Asia, and again involves utilising technologies patented and so controlled by Western corporations, including News Corporation. Although technology for direct broadcast satellites (DBS) has been in existence for decades and in Asia for half a decade now, it has not gained widespread acceptance in the

marketplace due to the higher cost of reception via dish-antennae for consumers. Some Asian countries such as Japan, Indonesia and Taiwan have adapted it for pay-TV purposes in their attempts to regulate access to transnational broadcasts as discussed above. But often government attempts to regulate the multitude of small domestic cable networks have usually opened the door to foreign MNCs to form multi-service operations (MSOs) in joint-ventures or strategic alliances with domestic or regional corporations, medium or large.

*Control of domestic media:* The present research has demonstrated also how domestic television in all three countries is in the hands of a domestic political and economic elite. In Indonesia the domestic public broadcaster TVRI was in the hands of a politicised government bureaucracy while the domestic commercial broadcasters such as RCTI, TPI and IVM, narrowcasters such the pay-TV monopoly Indovision, and satellite owners such as IndoSat were controlled by conglomerates with close links with the political centre. Likewise in India, the domestic broadcaster is in the hands of a government bureaucracy based in Delhi in the Hindi-speaking north and subject to considerable political influence. The domestic commercial broadcasters in India have been largely a marriage of non-resident Indians, local business elite as well as political parties and state governments particularly in the non-Hindi-speaking south, who together have increasingly taken on the role of multi-service providers. In the PRC, national, provincial and city-based television networks as well as cable networks are owned by the state, military or communist party subsidiaries. A similar situation exists in Taiwan with the terrestrial television broadcasters, though here the neighbourhood cable networks were previously dominated by opposition political parties and their sympathisers. Following regulation by government there has been increasing involvement of pro-government business interests who already control terrestrial television. Hong Kong itself is exceptional in not having a public television station, and though its commercial stations and cable services are owned by leading business families and local corporations, they are highly regulated by the government, and have been even prior to the handover of its sovereignty from the UK to the PRC.

So the present reality in Asia is admittedly one of growing domination of media/cultural industries by commercial interests, often multi-national, regional or even subnational, rather than by public interests which tend to be largely national in focus. Domestic commercial broadcasters, even public broadcasters, have had to mimic the transnational broadcasters in programming practices in order to compete for audiences and advertisers. There is no doubt that global media corporations are not driven by nationalistic agendas but by market imperatives which transcend borders. However, due to consumer demand for culturally contextualised programming, transnational broadcasters in Asia have become dependent on domestic production houses for some of their programming. Pragmatically they prefer to outsource such production, for greater flexibility, creativity and lower costs as well as reduced risk. At the same time, production operations for both domestic and transnational consumption tend to be geographically clustered as in the case of Bombay and Hong Kong to enjoy business synergies and economies. These industries are then protected by their national governments, less as developers of subregional or geolinguistic cultural identities, but more as contributors to the domestic economies through jobs, technology, industry expertise and export income. Thus the increasing commercialisation of television in Asia has resulted in convergence of interests between transnational and domestic television broadcasters, and between public and commercial sectors in related cultural industries.

### 9.2.3 Nationalism/ethnicity

*Research Question 3:* Has transnational satellite television attracted sizeable audiences of particular cultural or socio-economic backgrounds in certain countries, and why? Why has it not had appeal to other segments in these and other countries? [Issues of cultural and social globalisation].

The distinct experience of the early transnational satellite television broadcasters in Asia has been that they are unable to attract any significant audiences among the more than half the world's population under their satellite footprints. StarTV was rather modest in claiming to appeal to only the socio-economic elite of the major countries which its signal reached, but even this failed to attract advertising income despite competitive rates. This could be due to scepticism of marketers over their audience research which provided large potential penetration figures, often bolstered with evidence of higher-than-average household income levels, but no actual viewership figures or ratings. Whatever independent research conducted, even if somewhat unsystematically, seemed to indicate almost insignificant audience ratings for transnational television programmes in most markets. There are various reasons put forward by those executives interviewed for this research and writers of articles for industry media as to why transnational satellite television has not lived up to its full potential in Asia.

*Language and culture:* Transnational broadcasts in world languages such as StarTV provided initially in English are able to attract only minuscule audiences across Asia, largely expatriate executives or a urban cosmopolitan elite who are able to relate to the content and be comfortable with the language. As seen in the secondary data provided in this dissertation, domestic television channels, whether public or commercial, tend to attract far larger audiences in any single Asian country than any pan-Asian ones such as those via satellite and cable, with very few exceptions. This is because any country's cultural milieu affects the role that television plays in it and its appeal to particular segments or the broader population. What StarTV took a few years to concede, other transnational satellite broadcasters such as CNBC, HBO and Discovery realised quite soon after their entry into the Asian market: that in order to command significant audiences in each country and thus attract advertisers, they had to localise or at least culturally contextualise their programming somewhat. Domestic broadcasters then discovered that in order to beat the transnationals or at least not suffer significant erosion of their audiences, they had to upgrade the quality of their locally-produced and imported programming. One other strategy was to provide or emphasise sub-national ethnic programming which the transnationals would not have expertise in doing. This public domestic broadcasters had been previously averse to doing, as in the case of DD in India, CCTV in China or TVRI in Indonesia, because of their political mandate as public broadcasters to promote national cultural integration, while domestic commercial broadcasters saw little need to in their pursuit of audience shares in a mass market.

*Urban and cosmopolitan:* Transnational satellite television took off in the urban metropolitan areas of India and Taiwan because it was compatible with existing practices of watching cable television, and could be trialed at low cost in contrast to the situation in Indonesia and Hong Kong for instance, where expensive dish-antennae or pay-TV had to be installed. Also, transnational programming represented a quantum leap in quality over the existing programming fare on domestic television in the former countries, and so represented a relative advantage to potential adopters who could observe this for themselves in advance through their social networks. To further apply the Rogerian model of diffusion, innovators in the adoption of transnational satellite television in



all of these countries were culturally 'cosmopolitans' rather than 'locals', and generally financially better off. Thus its diffusion in the metropolitan areas of these countries represents acceptance by the early majority of adopters and it is only now spreading to the rural towns of Indonesia, India and Greater China where the late majority are largely represented by small entrepreneurs and landowners, a process aided also by the increasing cultural contextualisation of the programming and breadth of channels.

*Domestic alternatives:* The programmes on domestic television in most Asian countries are often either locally-produced programme genre or clones of foreign programmes, or at least foreign-produced and locally dubbed, all of which are popular with heavy-viewing domestic audiences, usually of the lower middle socio-economic classes. Thus they are probably more effective at cultivating values and attitudes desirable to advertisers among a developing country's citizens than any transnational television programmes in a foreign language. Furthermore, programming directions on domestic television channels sometimes reflect the cultural hegemony of the country's urban politico-economic elite who can be from a dominant ethnic or minority subcultural group within that country. In other words, there is often as much cultural hegemony exercised within a country than from without. As transnational television channels increasingly target domestic markets with localised programming, domestic broadcasters may use direct-broadcast satellites and expanded channels to increase penetration, a trend which is discernable already in Japan, Malaysia and Taiwan. But the risk for domestic broadcasters is still that of centralising programming for the whole of their countries, rather than decentralising it to states or subregional cities and therefore relinquishing some measure of control. Otherwise they would afford little access for non-capital city cultural sources, and it may simply mean perpetuating the intra-national cultural imperialism which has already been the case for years via terrestrial television.

*Global-diasporic and subnational-ethnic:* StarTV and its followers into the Asian market may not have succeeded at their original aim of being pan-Asian media, but somewhat belatedly they stumbled on the reality of diasporic ethnic/language groups across national borders, as well as minorities within many of the countries under their footprint. In fact it would be reasonable to suggest that it was advertisers who first used the medium in innovative ways such as Indian advertisers using StarTV to reach NRIs in West Asia, or consumers who responded unpredictably, such as the high viewership of StarTV among Taiwanese (when it had been originally targeting the PRC) which raised the attention of the transnational broadcasters to this untapped market. Although StarTV and other transnationals have expanded their channel offerings subsequently, in actual fact it was the pan-Asian but ethnic channels such as TVBS, CTN and ZeeTV which blazed the trail. Other late-comer channels such as SunTV and Asianet which had no major transnational ambitions but were using the satellite medium to circumvent national regulations, heightened industry awareness about subnational ethnic groups whose cultures and languages were not catered to by the dominant domestic television media. Even in this case, it led to the discovery of major markets among expatriates in West Asia and migrants in Southeast Asia, reachable only via a transnational medium.

Given the design of the present research it is not possible to assess in detail the impact of transnational satellite television on specific audiences. In any case the impact is a difficult, if not possible, to measure because the medium might be consumed differently in various cultural and economic contexts. How transnational satellite television fits into viewers' lives in Indonesia, India or Greater China, or for that matter any subnational group there

may differ greatly, and unless extensive ethnographic studies are conducted, it is only possible to speculate or generalise. If indeed cultural texts are polysemic, then how the urban elite in any Asian country view the programmes and advertising of StarTV could be very different from how the rural poor of the same country or urban elite in any other might. Might the former aspire to the cosmopolitan lifestyles portrayed, while the latter resent the growing wealth of the upper classes, for instance? Perhaps the popularity of RCTI, ZeeTV, TVB and other commercial channels represents a working-class revolt against the cultural hegemony of the political elite via the domestic public broadcasters in their respective nations. In the cases of Indonesia, India and China, satellite and cable television seems still largely a phenomenon of the largely urban middle and upper classes, and it is arguable whether by transnational or localised programming and advertising they are invariably being incorporated into the expanding global market for goods and services.

#### 9.2.4 Imperialism/postmodernity

*Research Question 4:* Has cultural change in each of the countries researched been influenced significantly by transnational satellite television, and if so, how? Or if not, what other factors might explain the changes perceived in some segments of these societies? [Issues of cultural and social globalisation].

Since transnational satellite television has had limited penetration in Asia, it would seem not unreasonable to assert that the cultural influence has been minimal, confined to an urban middle to upper-class elite minority. While government officials may make speeches to the contrary on the detrimental effects of the medium on youth and be echoed by some conservative journalists, it is important to realise that it is not possible to separate the effects of transnational satellite television from all the other cultural influences on major cities of countries undergoing rapid economic development through participation in the world market. Furthermore, culture is a complex concept over which there is some consensus in the anthropological definition that it applies to more than high culture but to all aspects of human and social life. However those who raise the issue of cultural influence are concerned primarily with superficial manifestations of dress fashions, music preferences, food habits, attitude towards tradition, values in relationships, and the like. As such it is possible in the context of the present research only to discuss cultural change issues in general and tentative terms.

*Imperialism vs. integration:* Developing countries in Asia of the 1990s are probably less influenced by issues of cultural imperialism and more by pragmatic technological change and political democratisation, viewing information less as a political than as an economic resource. Most are seeking to fast-track the development of their telecommunications infrastructure as part of a strategy of integration into the information-based global economy. In such a context of national socio-economic planning, transnational satellite television comes to be thought of as one of many information resources rather than as a mass-medium source of cultural imperialism. However in desiring integration into the information-based global economy developing country governments may have to forfeit any authoritarian commitment to national culture because it is invariably undermined by global communications. Their ideal may be to have the best of both worlds, the retention of traditional culture and the incorporation of progressive new values and attitudes, but that may be impossible due to intrinsic contradictions. Furthermore the question arises regarding who decides what is the traditional culture, since in practice this has

involved cultural hegemony within the nation-state by some dominant or even minority socio-economic or cultural group.

*Imports and clones:* Although there is wariness among the leaders of Asian countries about questionable Western values from transnational satellite television, one might just as much allege that these are transmitted indirectly by imported programming on domestic television as well. Any survey of domestic television in Asia, even in the post-transnational satellite television era as before it, would find that a good proportion of all programming on its public or commercial channels is imported, even if their actual consumption as measured by ratings were small. Some such studies were cited in the case-study sections of this dissertation on public broadcasters and television audiences. On the surface then this would seem to imply that there could be minimal impact of television on social change if most viewing was of locally produced programming. But this does not take into consideration the cloning of foreign programmes in the production of local programmes. The cultural studies school of thought would tend to assume that audiences would take an oppositional reading of the programmes and commercials watched, but that would depend very much of the particular individual and group positions within the social and political structure of that society. The assumption that audiences have complete freedom of media choice is questionable when most audiences have to take what is made available to them. It might also be the case that media consumption might be done for its own sake or for reasons that even the viewer might not be able to articulate, a position which the uses-and-gratifications school of thought refuses to acknowledge.

*Cultural osmosis:* The question facing any policy maker is which medium might have the greatest social influence: transnational satellites, domestic satellites with transnational stations, or domestic stations with imported programming. Most satellite and cable households seem to use the technology to watch domestic or sub-regional ethnically-similar as well as transnational programming. Domestic commercial television might possibly still have had greater impact through its imported programming and domestic advertising in Indonesia, India and China than any transnational broadcaster as of the mid-1990s. Furthermore language was a significant barrier to viewership of transnational satellite television in all these countries, even if more so in some than others, thus giving domestic television an edge in all but the urban metropolises. If there is any direct influence of transnational satellite television then it must largely be on the urban elite who have access to satellite dishes or cable television. But though the rural masses do not subscribe to it, they could still be influenced indirectly by those who do by virtue of social interaction and observation. Thus it may be argued that the impact of transnational satellite television is felt gradually by cultural osmosis throughout the country, regardless of its social, political or economic background though perhaps at different rates due to these latter factors.

In the longer term, impact on behaviour and culture comes not from transnational satellite television alone, a convenient scape-goat, but from other sources of social change within the country itself. Although it is beyond the scope of this dissertation to attempt to investigate the impact of other causes or concomitants of cultural change, it is obvious that all three countries investigated have undergone rapid change over the past decade, beginning well before the advent of transnational television. As with other societies that have embarked on programmes of economic modernisation and experienced growing material affluence, they have experienced some changes from traditional values, attitudes, opinions and behaviours. Television, whether transnational or

domestic as argued above, is a correlate of such developments and its acceptance may have been predicated on earlier cultural change as much as a stimulus of further change. Thus the relationship between the medium and culture is far too complex to attribute directly and solely to transnational satellite television, and is possibly beyond establishing via current social research methods.

As noted in this section most national cultural policies are driven by fears of Western cultural homogenisation, or more specifically Americanisation, whether in Asia or Europe. Although transnational satellite television may aspire to create a global village by breaking down political and cultural barriers to reach consumers spread across many different countries, in reality only certain types of channels, such as news, sports and music, seem to cross boundaries effectively or better than others. Increasingly though, policy-makers in Asia have come to recognise that their countries cannot develop without contact with other cultures, and so urge the reinforcing of their own cultures through producing quality television programmes to counter consumerist influences of transnational programming. But then their upgraded domestic television programming is often a clone of the global, and no less consumerist in its values, or culturally imperialist in other ways. In any case, audiences simply do not differentiate sources of their preferred programming and advertising in quite the same way as social researchers and government policy-makers do. Therefore it is quite unreasonable to conceptualise television, whether domestic or transnational, as extraneous to everyday life but as part and parcel of it, and having a transforming cultural role within developing countries. The next section will evaluate the operation of the micro-context of television programming and advertising or, in other words, the strategic decision-making of media and marketing entities.

### 9.3 MICRO STRATEGIES

As seen in the previous section the impact of transnational satellite television on the Asian continent defies the simplistic notion that it is unilateral and uniform. Transnational broadcasters and their audiences in any country have a relationship within the context of a society often comprising multiple co-existent cultures, and any globalisation of the media has to paradoxically involve some localisation. The new medium has also to contend with quite varied politico-economic environments in each country, which may curtail or even enhance its impact. Therefore the primary strategy for transnational broadcasters and advertisers may not be global but rather a multi-domestic or hybrid global-local one. Since evidently media globalisation in Asia has not been uni-directional, with Westernised global cultural products obliterating traditional local cultures, this section will examine how and why transnational television programming and advertising has often been characterised by both globalisation and localisation at the same time.

### 9.3.1 Globalisation/localisation

*Research Question 5:* How have transnational satellite broadcasters differentiated themselves from domestic broadcasters and each other by their programming strategies? Have advertiser and audience response or non-response to their offerings in Asia affected transnational broadcaster programming strategies subsequently? [Issues of media and broadcast globalisation].

Early transnational satellite broadcasters such as CNNi and StarTV adopted a global or pan-Asian strategy when they first entered the Asian market, clearly differentiating themselves from the nationally-oriented domestic broadcasters. But since Asians proved more diverse culturally and economically than these transnational broadcasters had assumed from the experience of their counterparts in North America (and to a lesser extent, Europe with its bilingual and multilingual citizenry) it was not simple to promote programming or advertising cross-culturally. Realising therefore that it was not able to attract much advertising and sponsorships StarTV, followed soon after by some of the other transnational broadcasters, diversified into Greater China, India/South Asian, Indonesian/Malay and other market segments. Making appropriate changes in programming and language of broadcast, they took on the domestic broadcasters compelling them to respond with changes to their strategy.

*Genre specialisation:* While domestic television broadcasters have been generalists in their programming in their attempt to cater to a wide range of audiences, pan-Asian television broadcasters are usually quite specialised. For instance, CNNi specialises in news, ESPN in sports, while the StarTV stable had specific channels for music, news, sports and entertainment, although the last of these comprised a fair assortment of programme genre. This strategy of the transnationals was their strength as they were able to provide far more programming attractive to sports fans, music lovers or news-sensitive politicians and businesspersons, than any of the domestic broadcasters. Nonetheless, the early transnational broadcasters soon realised that this was not sufficient to attract a critical mass of audiences across Asia. The exceptions seemed to be the ethnic/language channels of Star Chinese and ZeeTV which enjoyed broad-based audiences in specific countries or subregions of Asia. Without abandoning its strategy of specialised programming, StarTV began expanding each channel's offerings by language, culture or subregion. Thus it offered Channel V in both a northern version catering to Greater China music fans who appreciate both 'Canto-pop' (see glossary) and Filipino music fans who prefer a higher content of Western rock, and a southern version with a higher content of 'Bollywood' (see glossary) film music to cater to fans of such in both South and West Asia. Similarly Prime Sports was offered in two language versions which coincided with northern and southern footprints, and provided more of the sports that interested each subregional market, for example badminton for Indonesia, cricket for India and basketball for China.

*Geolinguistic segmentation:* As implied above it might be possible to segment the Asian regional market by cultures, which may have a major geographical focus but also be scattered across the whole continent and beyond. It is possible to speak of a Chinese-Confucian segment centred on Hong Kong, but extending to Taiwan and PRC and to overseas Chinese throughout South East Asia, even worldwide. Other North East Asian countries such as Japan and Korea might be considered cultural cousins due to colonial links, even if there has been a history of understated animosity since. There is also a Hindi-Hindu segment centred on India but extending to other South Asia countries by language if not religion as well, and to their expatriates and migrants in West and South East Asia, East Africa, Europe and North America. A Malay-Islamic culture is located in Indonesia and

Malaysia but diffused also to southern Thailand and southern Philippines, as well as having religious, though not ethnic, affiliates in Pakistan, Bangladesh, and the Middle East. Finally there is a Cosmopolitan-English segment, having a sizeable membership among the urban elite and expatriates of Asia especially in the world-class cities such as Hong Kong, Singapore, Bombay and the like, as well as a small audience in the Philippines.

*Multilingual soundtracks:* There has been considerable scope for pan-Asian channels in Chinese and Hindi, since both are more widespread as languages and cultures throughout Asia than Malay/Indonesian, Japanese, Korean and the like. But sub-regional programming for North East Asia, South and West Asia, or South East Asia respectively may not work very well for though the languages may be similar across national borders, they are quite culturally diverse as indicated by the fact that the highest rating programmes in many of the constituent countries are very much productions with a local idiom. Pan-Asian programming received a new lease of life when it became technically possible to have different soundtracks accessible simultaneously to viewers using decoders. It was also another way for satellite broadcasters to utilise the increased channels available to them through digital compression, inexpensively yet highly effectively. Thus most transnational broadcasters have been able to go a step further to customise channels for subregions if not for specific countries, a practice that could be characterised as fragmentation and hybridity.

*Domestic sourcing:* Over the past five years, the satellite and cable television industries in Asia have been increasingly characterised by strategic alliances with domestic broadcasters and programme producers. This has been partly due to domestic firms lacking finance to expand their own operations, as well as government restrictions on foreign ownership which prevented global firms from entering on their own. Furthermore the convergence of technologies in television, telecommunications and information have prompted firms to seek out expertise in related areas in the course of business expansion. One characteristic development has been the strategic alliances between film and television producers and cable/satellite broadcasters and other distributors, many of them via ethnic (sometimes family) businesses which span continents such as the overseas Chinese and non-resident Indian networks. The result has been that transnational satellite broadcasters were tapping the very same sources of programming as domestic broadcasters, bringing both types of broadcaster into direct competition in national, if only urban markets. But this does imply that domestic production houses do not truly represent a post-Fordist mode of cultural production because they are so closely allied to global media conglomerates, if not actually part-owned by them.

This domestication of transnational satellite television makes it difficult for social critics to allege media or cultural imperialism, unless one takes the extreme position that it is the programme genre that counts rather than country-of-production. But it would be well nigh impossible to deny that certain genres such as drama and comedy have a long tradition in most local cultures prior to television, and it might be argued instead that television, whether transnational or domestic, have been instrumental in their preservation in rapidly modernising countries. In its search for larger national audiences, transnational satellite television may be simply playing its role as a postmodern medium in reconstituting a new culture out of the fragments of traditional-local and modern-global cultures. So certainly it may be said that in Asia, local cultures are being coopted in the process of the globalisation of their cultural industries and postmodernisation of cultures. There seems to be recognition of that media ecology and cultural hybridity work in concert for transnational television to gain acceptance in any country. Perhaps what

needs to be realised by transnational broadcasters is that their markets may not be strictly pan-Asian or subregional or national, but comprise intersecting and overlapping segments based on multiple dimensions of culture and affluence within their satellite footprints.

### 9.3.2 Competition/cooperation

*Research Question 6:* How have domestic television broadcasters responded to the entry of this new competitor of transnational satellite television? Which of their strategies have been more effective than others? [Issues of media and broadcast globalisation].

Domestic terrestrial stations in Asia, particularly those which were public bureaucracies, had failed in the past to provide sufficient entertainment value to its audiences, and have now come under pressure to provide quality and variety in programming comparable to that available on transnational satellite television. Since the 'message' of the television medium is meant to be entertainment, national audiences have turned to transnational broadcasts for it, wherever it is accessible economically and culturally. Most of the domestic broadcasters have had to respond by increasing channels, adapting Western television genre, providing more subnational-ethnic programming which though popular involve higher costs in local production, as well as enter into some collaboration with the transnational channels instead of outright competition. Thus this subsection will analyse how domestic terrestrial channels in Indonesia, India and China have been quite resilient in the face of new competition from transnational satellite television.

*Increased channels:* One strategic alternative for terrestrial broadcasters has been to segment their domestic market along linguistic and subcultural lines, and position themselves as providing a superior service in those areas. As seen in the case-studies, over the years 1993-94 Doordarshan launched thirteen new and revamped satellite channels with the express intent of weaning Indian audiences off StarTV, ZeeTV and other domestic commercial satellite broadcasters. They included offerings of movies, sports, business news, current affairs, music and 'enrichment' or educational, religious and nationalistic programmes, all of them in very localised languages. Similarly Indonesia liberalised its domestic television industry, encouraging the entry of over five commercial channels broadcasting nationally but with some differences in programme positioning. Even China permitted strategic alliances in programme production and imports for its domestic channels, as well as re-packaging of transnational broadcasts by its public broadcaster CCTV for pay-TV cable channels. The consequence for consumers in almost all Asian countries has been expansion of channel choice and improvement of programme quality. However local programming on many of these channels mimic Western genre such as sitcoms, talk shows, soap-operas, games shows and the like.

*Downlinking for rebroadcast:* There is an increasing incidence of domestic commercial and even public broadcasters down-linking transnational satellite programming for re-broadcast terrestrially incorporated in their channels or via cable/pay-TV under license. On the one hand the growth of programming hours has meant that domestic or regional film and television producers (often terrestrial broadcasters themselves) have been able to market programmes produced previously for domestic consumption, to satellite and cable channels for re-broadcast transnationally. On the other hand since domestic channels have proliferated, they are in need of programming to fill the time, and find it profitable to rebroadcast transnational satellite television programming not

available otherwise to much of their terrestrial audiences. Furthermore due to a glut of transponders, domestic television channels are able to utilise satellites cheaply to broadcast within the region, thus catering to audiences of similar culture and language located across national boundaries, though sometimes this is done for political standard-bearing rather than commercial astuteness. Thus transnational satellite television, and domestic terrestrial or cable television need no longer be perceived as mutually exclusive and opposing alternatives to marketers wishing to advertise.

*New business opportunities:* Another strategy of domestic commercial broadcasters has been the export of their television management expertise and programming to newer terrestrial broadcasters in the region. For instance, TV3 of Malaysia helped Vietnam develop its domestic television station and been a provider to it of sports and other programming, Shinawatra of Thailand was a partner with the Cambodian government in the setting up of and provision of programming for Cambodia's first UHF television station, and TVB of Hong Kong assisted in the setting up of Indosiar in Indonesia. The more recent practice of countries importing programming from within a region or other culturally-similar source calls for a revaluation of the past accusation of First World dominance of television programming worldwide. Thus in the decline stage of their existing business life-cycle, domestic terrestrial television broadcasters in Asia are finding new business niches elsewhere in the region in order to revive their fortunes, a case which world-systems theorists may cite as semi-periphery countries exploiting the periphery.

So it was a naïve argument that global media such as transnational satellite television would supercede domestic media, especially when that had not happened in other industries, whether they be food products or airline services. The reason for the growth of transnational television has to some extent been supply-driven in that the global media corporations have been motivated to maximise returns on their existing investments by expanding internationally. But their growth in Asia is also consumer demand-driven, having been given impetus by economic affluence and technological change, areas which deserve more extensive and intensive research. The deregulation of media industries in Asia is acknowledgement of these developments there, but it is also a worldwide trend in most industries and represents a symptom of a new relationship between weakened states and ascendant corporations, in a relatively unchallenged capitalist economic world-system.

### 9.3.3 Transnational/multi-domestic

*Research Question 7:* Has transnational satellite television caused the consolidation of advertising strategy, media buying and creative execution through international advertising agencies, as expected? If this has not happened, what are the reasons? [Issues of marketing and advertising globalisation].

The debate over the globalisation of markets has raged for some decades now. Many MNC marketers still believe in global advertising, or in other words, that the same advertising campaign can be used effectively worldwide and cite the fact that it is cost-effective and helps build a consistent corporate image internationally. Others point to the impossibility of a single campaign communicating well in all nations because it would have to conform to local cultural distinctives, government regulations and local product usage patterns. The advent of transnational satellite television was expected to remove the need to comply with multiple national regulations and so facilitate the use of global advertising campaigns. This was the original positioning strategy of StarTV which



argued for the cultural similarity of the pan-Asian elite segment. Yet global or regional advertising did not take off with transnational satellite television in Asia and the reasons for why it is so will be reviewed in this subsection.

*No realignment:* Contrary to expectations, in none of the countries researched for this thesis was there any significant realignment of advertising accounts with international ad agencies reported as a result of the advent of transnational satellite television. With growing deregulation around the world there now is a preponderance of global marketers over local ones among the top advertisers, and of global agencies among the top advertising agencies which often had the similar rankings worldwide as well as locally. That has been true of Asia where, with the exception of Japan, most of the largest agencies are foreign multinationals, and that certainly was the case in the markets scrutinised in this dissertation, namely Indonesia, India and Hong Kong. But often these are local affiliates or subsidiaries of global agencies servicing global and local/regional marketers and so the terms 'global' and 'local' are somewhat imprecise, given their complex ownership structures and diverse spheres of operation. Furthermore it may be argued that the local agencies and marketing communications industry as a whole which global marketers have helped spawn around the world have in time come to assert their independence of practice, developed their own hybrid-cultural idiom and actually come to compete with US-owned agencies for advertising accounts of MNCs.

*Minimal creative:* Liberalisation of the advertising content regulations or the availability of transnational media which is not subject to much regulation was expected to see some advertisers switching agencies or to media brokers as a consequence of no longer needing creative services or preferring to use commercials produced by their global agencies. International advertising agencies have long tended to side with their global clients in lobbying regulatory bodies against the local film/video production industry concerning foreign content in commercials or rather for the freedom to decide when a global campaign is appropriate and when a multi-domestic campaign (needing local production) is. Despite the apparent cost-effectiveness of transnational television, Asian advertisers and their agencies seeking to communicate with national market segments have still preferred to utilise domestic television. Their argument has been that just as audiences relate best to local programmes, they comprehend local television commercials better for cultural reasons, as has been argued by some academics such as those cited in the literature review earlier. However local commercials, like local programmes, commercials adopt and sometimes adapt the creative strategies, appeals, values and so on of foreign commercials, but clothe them in local personages, settings and idiom. There seem also to have been virtually no television commercials created solely for pan-Asian use as a result of transnational satellite television, and commercials used were either global imports or the same commercials used for domestic markets.

*Critical mass:* It took StarTV a number of years to come to grips with the fact that the pan-Asian elite segment, though homogeneous on some socio-economic dimensions, was not large enough to support regional advertising. Asia has either a small number of wealthy people in a large country or a large number of wealthy in a small country but StarTV was looking either for large markets (ethnic/ geographic) to use mass programming and to sell advertising for, or for small segments across countries. Furthermore there is probably a far greater difference in income and lifestyle between rural and urban populations in Asia, than in the West. Another view is that a pan-Asian elite market existed which coincided with frequent travellers in the region, and though small that they were the prime market for transnational satellite television in its early global form. But this elite segment has probably

little time for mass media generally and possibly prefers the more portable print medium. In any case it was thought that pan-Asian television would not work at attracting such audiences except possibly with specialist programming, for example the all-news CNNi or all-documentary Discovery channels, though not for channels like Prime Sports and ESPN because sports was culture-specific. Thus advertising media-buying on StarTV and most of the pioneering transnationals in their early years were confined to corporate image, financial services, business travel and the like, on the news/information channels.

Certainly the debate over localisation versus standardisation of transnational advertising appears far more complex than was envisaged by its initiators in the 1960s and 1970s in North America and Europe. It was noteworthy that in Asia the liberalisation of media content via the availability of transnational media has not resulted in an avalanche of global commercials on the domestic media. More often than not, international advertising agencies have appropriated local cultural symbols in their successful promotion of global, regional or multi-domestic products via their television commercials on domestic media. Perhaps further research may even prove this debate to be irrelevant to the socio-cultural and economic-technological environment of Asia in the postmodern 1990s. For instead of cultural hegemony imposed from without by a medium such as transnational satellite television, many Asian societies, especially the post-colonial ones, seem to manifest symptoms of the cultural eclecticism of postmodern cultures which it thought to be more prevalent in western countries and largely attributed to the impact of television media and advertising there.

#### 9.3.4 Cross-cultural/Comparative

*Research question 8:* What are the products and brands advertised on, target markets of and creative styles used in commercials on transnational satellite television? How different are these from advertising on domestic television in the three countries? [Issues of marketing and advertising globalisation].

The availability of various media and their use by consumers varies between nations, and these together with public ownership of television, low literacy and newspaper use, and relatively high costs from domestic television monopolies may often limit the use of global advertising campaigns. The advent of a new transnational medium should mean a vital tool for the creating of new markets and better communication with potential buyers for international marketers. Advertisers' use of StarTV in its early days, illustrates some of the distinctive features of transnational satellite television especially when it was being positioned as a pan-Asian medium.

*Corporate/upmarket products:* As demonstrated in Chapter Eight, the majority of commercials on a StarTV showreel in 1992 were of corporate image or business-to-business advertising, even when the founding owner of the broadcaster was offering advertising discounts to local business associates. Upmarket fashion/accessories were a close second and included a number of global brands, followed by consumer electronics, vehicles, banks and airlines. It was only in the food/beverage as well as cosmetics/toiletries that local brands were commonplace and targeted at domestic markets, while the soft drink category was dominated by the global brands of Coca-Cola and Pepsi and regional in market focus. While some brands are categorised as global, they may actually have been manufactured locally in the region, for example Nike shoes. Furthermore the advertising might have been created in the Asia region as well, even if it adopts a global theme or format, Western models and locations. In our postmodern age with post-Fordist flexible manufacturing systems, not to mention

almost ethereal global financing, it is not quite possible to designate any products or services as global, regional or local with much accuracy any longer.

*Markets and media:* Initially StarTV adopted that strategy of targeting the socio-economic elite but discovered over its first three years that the segment was not large enough, even across this most populous continent, to attract an adequate advertising revenue stream. Despite the novelty of StarTV's largely western programming initially and its apparent popularity among this segment in each Asian country, there were sizeable audiences in the footprint unresponsive to it. StarTV has never disclosed its advertising revenues but its executives have not-so-privately admitted to running losses and hoping to breakeven by the late 1990s. So when News Corporation took control of StarTV it began using split beams and differentiated programming thought to be more appropriate to audiences and advertisers alike. With its migration to the digital AsiaSat2, StarTV was expected to become even more country-specific in its programming. Yet while adjacent nations as a whole in a subregion may be treated as quite distinct markets, for example India and Pakistan, minorities within each may actually be of the same ethnicity. In some other cases, minorities in nations quite geographically distant may be quite similar, as is the case with the diasporic Chinese and Indians resident virtually worldwide. Although transnational communications may have reduced the significance of geographical and political boundaries for advertising, the social and cultural borders are more complex.

*Soft-sell vs hard-sell:* Transnational advertising may appeal to a globalised elite segment in Asia, the products targeted at them being those commonly seen on broadcasters such as StarTV, namely airlines, hotels, resorts, up-market cars, luxury goods, investments and so on, rather than food and clothing appealing to the larger segments. Global marketers like Coca-Cola, for instance, were believed to be keen on StarTV's initial boast of being pan-Asian elite English-language medium, as evidenced by its extensive image advertising especially on MTV/Channel V. There was no formal investigation conducted for this dissertation about creative styles in transnational and domestic television since it was not possible to obtain showreels of TVCs in the three countries from the same year for comparison. However, based on informal yet systematic watching of domestic and transnational television in Indonesia, India and Greater China, there seem to be four types of advertising creative styles discernible: traditional-domestic, cosmopolitan-domestic, cosmopolitan-regional, and western-global. The latter two types tend to predominate on the transnational channels, each coming in at least two languages: a world language, usually English and a national or subnational-ethnic language such as Hindi, Tamil, Indonesian, Mandarin and Cantonese. The former two types predominate on the domestic channels, but there is evidence of a trickle-down effect of advertising creativity as well as product promotion from transnational advertising to domestic advertising.

*Global plus local:* There is considerable debate still over whether promotion should be done on a national or global basis though most multinational corporations would subscribe to the view that a consistent international image needs to be maintained whichever approach is taken in. A common compromise involves choosing to use global commercials for image purposes on television but allowing local print and radio for tactical advertising under strict guidelines imposed and an approval process controlled by corporate headquarters. This is reflected in the practice observed in Asia of using the same global or regional commercials on both transnational and domestic television. With the advent of transnational broadcasting, though, a critical issue is the transferability

of television advertising cross-culturally within the geographic region covered by the satellite footprint. Some advertising appeals such as case histories, productivity, novelty and service might be more adaptable globally than other appeals such as humour, morality, lifestyles and aesthetics which are more culture-bound. But the present research was not able to investigate these issues fully within its scope, important though they may be.

In their own search for market share, domestic broadcasters have all aimed at middle-of-the-road programming which results in the fragmenting of their loyal mass audiences. Now transnational satellite and cable channels needing advertisers are doing the same and further fragmenting the audience, forcing all channels operating in a national market to segment aggressively. Transnational satellite television exists and grows not only when it is itself commercially viable, but because it is also lucrative to broadcasters, marketers, advertising agencies, programming producers, technology suppliers and other players in the media industries of the region. All these media corporations, both transnational and domestic, tend to believe in the globalisation myths that 'big is better' for them and that 'more is better' for their consumers, but need to realise that, certainly in the Asian context of cultural contrasts, they might be undermining themselves. While the economic impact of transnational satellite television is fairly evident, its cultural impact is speculative and a controversial matter to determine. The next section addresses some of the challenges encountered in this research, examines its limitations and suggests what future researchers may wish to explore further.

## 9.4 RESEARCH IMPLICATIONS

This dissertation has sought to research systematically the globalising impact of transnational satellite television on the broadcasting and advertising industries in Asia even if it has not addressed all the issues raised. Previous discussions on the topic have tended to depend on anecdotal evidence and speculative projections, in large part because of the complexity of the phenomenon. Furthermore, measuring impact is still a controversial theoretical and methodological issue given the many other intervening variables such as penetration, access cost, service quality, competitive offerings, cultural preferences, political-legal constraints and economic affluence, to name but a few. From the vantage point of hindsight, this section will reflect on some of the methodological issues raised by research into television impact, review the limitations of the present study and seek to chart some possible courses for future exploration in Asia on this topic.

### 9.4.1 Reflections on methodology

The inherent difficulty in any research attempted on media impact, is separating the effect of one factor such as transnational television or pop music or movies or any particular consumer good from that of other concurrent factors such as affluence, government policies, education, and so on. No culture is static now or has ever been, for while what we now call Chinese, Indian or Indonesian may have roots in the past, these cultures over the last two decades would not be identical to what they were two hundred years ago. But perhaps it is more important these cultures thus labelled as national are artificial constructs, for cultures in any geographical region are far from homogeneous. Han Chinese culture has its roots in the dynasty by that name, so-called Indian culture is

an amalgam of cultures of various kingdoms that predated the British colonial establishment of a single empire, and Indonesian culture is a post-colonial creation to meld the quite distinct cultures of the numerous islands of the archipelago. If anything, what is held up as national is that of one subcultural or ethnic group, perhaps the majority though sometimes a minority, which holds political and economic power. At best it is a composite culture attempting to represent some diversity within the nation though this is often of a character that does not inspire any of the constituents.

Much current global media research is often lacking in rigour because, influenced by some variant of the cultural imperialism viewpoint, it tends to seek to demonstrate socio-cultural impact of 'Western' media on 'Eastern' cultures. However, such change is difficult to demonstrate, let alone to isolate from other contributory factors of modernisation such as other media, marketing efforts, economic affluence, immigration, and so on. If instead of anecdote and conjecture, some measurement of the impact over time of transnational satellite television were to be attempted, it would have to take one of four basic forms: first, content analysis of programmes and advertising; second, textual analysis of the meanings conveyed by them; thirdly, surveys of values of audiences exposed to such broadcasting in differing degrees; and fourthly, monitoring of actual economic, social and political behaviours. Yet the first form, content analysis, may be considered inadequate to the task of explaining impact because it fails even to take into account audience perception, especially cross-culturally, let alone resultant behaviour. While the second form, textual analysis, attempts to incorporate perception, it is prone to subjectivity of interpretation by the researcher. The difficulty which the latter two forms of measurement would encounter is that of demonstrating causality when there are, quite self-evidently, numerous intervening variables in the wider social context. Besides the logistics of conducting surveys or monitoring behaviours in three Third World countries are too cumbersome for a single researcher, not to mention the insurmountable difficulties of obtaining government permission for access.

Interviews used in the present research were invaluable in filling in the gaps in published secondary data and for gaining access to proprietary data. They were also crucial when, as with Taiwan and Indonesia, little had been written let alone published, at least in English. The earlier interviews in Hong Kong in December 1992 and in Indonesia in January 1994 served as a pilot programme for the later interviews in those and other national sites. The process of interviewing multiple respondents from the industry might be considered similar to that of a focus group except that the respondents were not in the same room at the same time, a physically proximate situation being not feasible given their job constraints. In any case, the respondents were probably freer with their comments in the privacy of their offices than they would be before their competitors or regulatory overseers. By conducting multiple interviews within each profession, it was possible during the data analysis to counteract extremes of perception and achieve a consensus of opinion at least within each sector. Still the qualitative interviews which were a major part of this research were a form of ethnographic study of the broadcasting and advertising industries of the countries concerned. Survey research of such key decision-makers would not have worked since the respondents were likely not to return their questionnaires as evidenced by non-response for subsequent requests for feedback. This was probably due to their work priorities and also because they might have felt that whatever answer options they were given in a questionnaire did not plumb the depths of the issue's complexity. Besides a

mail questionnaire or even a structured interview would have failed to reveal the richness of data on Asia which was possible through the multiple sourcing used in this research.

As a piece of qualitative research, this dissertation would argue for a revision of the technical criteria for evaluation. It is totally inappropriate to apply the rules of quantitative research such as validity and reliability, even if they might be stretched to fit. Because qualitative research involves gathering a great amount of data about a small range of cases, this research has endeavoured instead to meet alternative criteria as credibility, integrity and dependability. For instance, the methodology used in this research was credible because it was impossible to use quantitative methods such as surveys when the phenomenon of transnational satellite television was complex and the variable unclear, not to mention the impossibility of achieving a reasonably response rate, as explained above. The integrity of the research is demonstrated in the commitment to an empathic understanding of the media industry and of the political, economic, social and cultural contexts of countries researched, as well as the approach of in-country face-to-face interviews. The dependability of the findings is underscored by the triangulation of primary data sources such as the interviews and videotaped commercials, secondary data sources such as newsclippings and reports, as well as observation such as systematic viewing of prime-time programming. In any case, media practitioners in particular and business executives as a whole have little problem with using qualitative research by itself or in conjunction with quantitative, often secondary data in their decision-making. Yet social scientists and business academics tend to be almost obsessive in their insistence on quantitative primary data in support of specific, almost simplistic hypotheses, in order to feel justified in making general conclusions. The case study method used was particularly suited to deal with the complexities of structure, context and audiences combined, and to provide insights on media globalisation from multiple national contexts.

#### 9.4.2 Assets and caveats

The author's own nationality and ethnicity was a factor in the fieldwork, especially given its qualitative nature. Being Asian was an advantage in communication, for it was possible for the mostly Asian interviewees to identify with me and feel that I would understand their viewpoints. Having worked in the First World and with expatriates in Asia, I am effectively bi-cultural and so able to interact equally well with the Western executives interviewed. Although the interviews were conducted in English, my minimal knowledge of local languages or accents and diction was invaluable in communicating with the interviewees as well as secretaries, receptionists, and such in order to establish contact with the interviewees. As someone of South Asian ethnicity I was able to establish rapport particularly with interviewees in India, certainly after I had satisfied their curiosity (after expecting a Welshman from Australia) about my complicated ancestry. It was also helpful in Indonesia that I was a Singaporean by nationality and thus a fellow-citizen of ASEAN, but especially not being of Chinese ethnicity. In Hong Kong and Taiwan, my knowledge of Chinese culture and a smattering of the language from having been resident in Singapore for decades, was probably of some value in opening doors, though perhaps not as much as my career experience in advertising in the region and thus having 'connections' in the media industry.

While my national and cultural background was beneficial in interviewing the decision-makers, it would not have been sufficient for a survey or ethnographic study of audiences. For one thing, audience research in Indonesia and China especially would have required official permission which meant submitting the questionnaire

for approval, translation and back-translation, collaborating with a local institution, and having a government cadre accompany me on field trips, all of which would have delayed and changed the research, if not significantly biased the findings. Besides my experience with community surveys in Asia has been that there is a strong tendency to provide socially desirable answers as well as to seek to reflect the broad community consensus opinion. Furthermore, being resident abroad and working as an academic full-time precluded having lengthy periods of in-country data gathering. Besides the research project had evolved from one concerned with media-induced socio-cultural change to one interested primarily in the understanding the impact of transnational satellite on the television and advertising industry in Asia as perceived by key decision-makers in those sectors.

One disadvantage, however, of any qualitative method, of course, is the volume and disparate types of data which are time-consuming to collect, complex to analyse and awkward to summarise. This proved to be the case with the present research, and is reflected in the length of this dissertation because it incorporates interview responses into the text. Despite collecting more data than was actually needed or used, there still were some gaps in knowledge for some country case-studies which could not be filled easily later from a distance. The researcher had to be content with updating parts of the dissertation up to mid-1997 from published sources including from the Internet and information garnered on incidental travels in Asia. As a general rule no data sources dated from 1997 onwards was incorporated into this dissertation except in the specific cases where they reported research in 1996 and prior. In addition it was seldom possible to find strictly comparable data, due to differing availability, methodologies, language constraints and so on. Even though there is a shared signifying system within the media and advertising industries spawned by capitalism, the data analysis in this research on transnational satellite television may have to be somewhat tentative given the slight possibility of different cross-cultural interpretation of its impact despite Asian cultures sharing relatively similar value structures in contrast to Western cultures.

The present study involved researching not one, but three countries with somewhat different politico-economic and socio-cultural backgrounds, not at just one point in time but over five years of adaptation to changes in their media and advertising environments, and so has had on occasion to substitute breadth for depth. There was considerable difficulty of keeping track of developments in a rapidly changing industry across a large continent, as there is invariably a time-lag between announcement and event, and an even greater one between sighting the former and the publishing of dissertation. There was also the challenge of verifying the reliability of data from secondary sources such as trade magazines but one has to accept these sources as the very same ones that those in the broadcasting and advertising industry were dependent upon for their strategic business decisions. Another downside of comparative case-study research was the near impossibility of finding strictly comparable data across all three countries, and staying up to date in a rapidly changing environment. So while secondary data on domestic and transnational television in Asia may be subject to some scepticism about unreliability, such data as was made available to this researcher has been cited and analysed in this research with appropriate caveats. Depth of detail might only have been possible with a single-country case study, but then any one country would be far less representative of the diversity of reaction to the new transnational medium in the region. What this researcher has chosen to do in this dissertation therefore is trade depth of information for the more critical insights possible only through breadth of analysis across Asia.

A drawback of researching from abroad was being able to make only one or at best two brief trips to each country and having to work with persons and secondary data available at that point in time, with little opportunity for subsequent clarification. In the case of the present research, considerable and varied data collected largely on the field had to be sifted through later in order to discover and describe the complex contexts and consequences of the phenomenon of transnational satellite television in Asia. For one thing, having returned to Australia after the fieldwork it was not easy to clarify responses or seek additional information during the data analysis stage. For while fax, phone and email may theoretically lessen the problems of distance, the likelihood of receiving a timely and accurate response was found to be quite minimal in the few cases where it was sought. For another, the process of data analysis took almost two years which in terms of the rate of change in the advertising and broadcast industries was quite long. The respondents also would not have remembered what they said then, and their opinions could have changed since. The few interviewees who subsequently asked for copies of academic papers based on the fieldwork, made no further response to the papers sent despite a specific request for feedback. They probably found the papers too 'theoretical' compared to their industry information sources, and too historical to be relevant to their current and future needs. Besides the interviewees themselves were likely to be preoccupied with the practical concerns of having to anticipate the market developments years in advance rather than reflecting on the past. Given the nature of the advertising industry particularly and the broadcasting industry as well, by the time any follow-up interviews could be conducted the original interviewees would be often no longer in the professional positions they held or even in the same organisations when the fieldwork was conducted.

#### 9.4.3 Directions for future research

If this research has had to trade breadth for depth, then there are a number of directions for future researchers to delve into the impact of transnational satellite television in Asia. For a start, given the nature of the industry there have been significant developments in the three major markets studied since 1996, and it is about time to do a follow-up study in one or another of them. It would be instructive to chart over time how StarTV has fared with its subregionalisation programme and how domestic broadcasters have responded since. The regulatory situation in Indonesia, India and the PRC has shifted to considerably in the late 1990s and will continue to do so, and this has implications for the transnational broadcasters as well as the domestic cable and terrestrial networks. Even though India and China have been relatively unaffected by the economic downturn, Indonesia certainly has been, and how this will affect transnational broadcasters' expansion plans based on previous projections of rapid economic growth in the region is worth investigating.

*Media/cultural industries approach:* The present study could be replicated with other secondary markets from the three subregions, perhaps Philippines for South East Asia, Pakistan for South Asia, and South Korea for North East Asia. Alternatively such a media industries study could be extended to the subregions not covered by the present one, namely the satellite-saturated West Asia, the relatively undeveloped television market of Central Asia and the Australia-New Zealand media dominated South Pacific. Through such extensions of the present research design, it would be instructive to discover how generalisable the findings of the present research are. Future research could concentrate instead on the development of other global-commercial transnational broadcasters such as CNNi, CNBC Asia, TNT/Cartoon and Discovery Channel in the same markets of Indonesia,



India and the PRC, or other markets. Studies could also be done of regional commercial channels such as ABN, CETV and ZeeTV and their relative impact on domestic broadcasters in comparison with other transnationals. The expansion of domestic-public channels such as DDI, CCTV-4 and TCSI into Asia-wide satellite broadcasts in response to the continuing competition from transnational commercial broadcasters, would make for an interesting case-study of strategic re-orientation. Now that some of the key variables in the globalisation of television in Asia via transnational satellites have been identified, it might be possible to conduct extensive surveys of decision-makers in the broadcasting industries in a number of countries in the region. This could be done via mailed questionnaires, though based on this researcher's experience of organisational cultures in Asia, it would be more productive to conduct administered questionnaires or better yet face-to-face highly structured interviews. Through the use of more quantitative methodologies it might be possible to establish statistically significant relationships between some of the factors identified in the analytical framework proposed above. There is scope also for the application of other theoretical perspectives to the analysis of transnational satellite television in Asia.

*Audience research approaches:* One area that the present research did not focus on for lack of time and resources was on the audiences for transnational satellite television. An active audience approach could seek to analyse viewing habits and motivations perhaps by having focus groups discuss them. There have been only the beginnings of such a shift in research on transnational satellite television in Asia to looking at what uses and gratifications audiences have gained from it as compared to domestic television and other media. Research on transnational satellite television should ideally include ethnographic observation at other social sites such as the workplace, school, shops and clubs at which audiences process their television viewing through discourse. Thus there might be globalisation of programme genre, formats, plots and production effort, but not necessarily of consumption of creative content. The popularity of some transnational satellite television and not others might thus be understood in terms of the relative exposure of cultures and subcultures across national borders. Greater diversity of choice in television entertainment made possible via satellite, cable, VCRs, video-on-demand, computer games, even the Internet, may mean that consumer-citizens exercise selectivity in watching only what interests them. Invariably the growth of television channels and other electronic media is accompanied by higher number of hours devoted to them, and the cost of this in terms of other personal and community activities has seldom been explored. Are television soap-operas and sitcoms taking the place of local community, talk-show hosts or news-anchors superseding social and political leaders, or televised sports substituting for religious gatherings? Since the present qualitative research has demarcated the broad issues of transnational television consumption, it may be feasible to conduct extensive surveys of the urban populations or postmodern cities in the region effects on viewership patterns in a multi-media, multi-channel entertainment environment. But it is worth keeping in mind that critical scholars from the Frankfurt School onwards have alleged with some justification that quantitative research methods had failed to explicate the more insidious effects of the media.

*Cultural studies approaches:* By adopting a cultural studies approach the popularity of some transnational television programmes and the non-acceptance of others could be understood in terms of their wider social and political context, such as the relative globalisation of subcultures within and across national borders. Textual analysis is identified particularly with the cultural studies school of media theory and has been referred to variously as a naturalistic, interpretative, even postmodern paradigm. Audience studies have demonstrated amply

that there can be no pre-judged dominant reading, simply points of departure for alternative readings to be generated by different socio-cultural groups, making cross-cultural textual analysis of a medium such as transnational television a challenge. A cultural studies approach could be utilised to show how the new transnational medium is used by the masses in Asia to give voice to their lives, rather than how they have been coopted to serve the capitalist system. This may be simply in terms of seeking entertainment alternatives which reflect their aspirations, or a way of quiet assertion, perhaps even rebellion against the predominant nationalistic cultural straitjacket. Even if there were universal availability of and access to transnational satellite television in Asia, it is not necessarily or certainly seldom that there is a homogeneous interpretation of it as a cultural text. Thus the need to move beyond an aesthetic critique of transnational television from an elitist perspective could be highlighted by an empirical cultural studies study.

*Political economy approaches:* Researchers favouring a strict political economy approach could be interested in investigating further the utilisation of present and to-be-launched satellites which would be indicative of the formal or informal alliances between satellite owners and channel providers, global, regional and local. While there might even be globalisation of programme genre, formats and plots, but not of production source or actual creative content. Content analysis of programming schedules or actual programmes videotaped for country of origin, genre types, programme flows would provide further insights into the complex relationships of global capital in the cultural industries. But political economists may need to look also at the demand side of global television, not just its supply, as the source of the phenomenon of globalisation. Perhaps television is unlike any other product or service because there is something addictive, almost mesmerising, about seeing reality played back selectively and sensationally as news, information, documentary, or seeing pseudo-reality created as soap-operas and sitcoms which provide escapism. The growth of the transnational and domestic broadcasting industries would also be a barometer of business confidence in the economic recovery of the newly industrialising countries in the region, still called the Asian 'tiger economies'. But business academics, in particular, need to go beyond active theorising of the development of international businesses such as the media conglomerates, to standing back and critically evaluating its role and contribution to national societies and the world economy. Less of the micro-empirical approach is needed, for there is ample such research produced in the service of business interests, and more of the macro-critical approach for there is much too little of that instead in the service of the wider political economy.

Whatever its shortcomings might be, this dissertation has sought to provide vital independent feedback to transnational and domestic broadcasters in Asia on the long-term implications for their investments, in terms of the likelihood of attracting audiences and thus advertisers, given particular satellite footprints and programming. This research may also assist marketers and advertising agencies in the the rest of the developing world in assessing, albeit in a qualitative way, the relative effectiveness of their expenditure on this new medium versus using domestic media, given the experience and perceptions of their counterparts in Asia. It is hoped that the findings of the current research will also help guide governments and inter-government organisations on cultural policy formulation and on the consequent regulation of terrestrial, cable and satellite broadcasting. Learning from the experiences of Asia

might save developing countries in other parts of the world from futile attempts to severely restrict access, but instead explore ways to moderate, compete or cooperate with transnational broadcasters who will increasingly characterise the globalised economies societies we live in.

## Chapter Ten

### EPILOGUE

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Since this dissertation utilises a case-study approach in the main, perhaps this concluding chapter should address the question: what then should governments, broadcasters, ad agencies, or marketers do about transnational satellite television? The broader questions then must surely be: is the phenomenon of television globalisation good, bad or indifferent, and can it or should it be interfered with? These in turn raise the issue of who decides: whether it is governments, inter-government organisations, citizens/consumers as individuals or lobby groups, global media corporations, or domestic broadcasters? The problem of ethics, always difficult without a common reference point such as Judaeo-Christian thought used to be in the West, is even more problematic due to the relativism enshrined in postmodern thought, as well as pluralism in the East. Still, this concluding chapter will attempt to grapple with some of the ethical issues presented by the advent of transnational satellite television in Asia and maybe elsewhere in the Third World.

#### 10.1 SATELLITES AND THE ECONOMY

The convergence of media, telecommunications and computing technologies, the end of spectrum capacity constraints through digitisation, and the proliferation of television providers via free-to-air, satellite, pay-TV and video-on-demand, afford the television industry many unanticipated business opportunities. These developments have wide-ranging politico-economic as well as socio-cultural implications, worthy of some thought by governments and citizen groups faced with myriad policy alternatives. Yet these same developments also make the television industry seem more like any other industry, and it may be argued by proponents of free-market capitalism that it would be unfair for governments to single it out for special attention. This section will look closely at some of the politico-economic implications and the question of regulation.

##### 10.1.1 Neo-colonialisation and media poverty

Mega-theories of development like dependency theory or world-systems theory may be deficient because they tend to concentrate on the relationship between nation-states or groups of them such as First World versus Third World, without recognising the diversity and changeability of exploitative dependency relationships within each nation or group of nations. One major change needed in the world-systems model is the countries which constitute the core, semi-periphery and periphery, for it is debatable today whether the US shares the core of the 'world-system' with Japan and the European Union, whether the semi-periphery is still comprised of the former communist states now seeking full membership in the capitalist system or of the newly-industrialising countries (NICs) such as those in Asia researched for this thesis. The economic

downturn in a number of the Asian NICs does not negate but actually confirms their status as relatively dependent on the economies of the core countries. As semi-periphery countries these NICs seem to be exploiting their less-developed neighbours, through privatised telecommunications firms acting as surrogates for governments, as for instance, Shinawatra does for Thailand, Indosat for Indonesia, and Apstar for China. The old Cold War rivalry in the space race is now being played out in the bidding for contracts by the US, Europe, China and Russia to build and launch satellites for developing countries. The periphery countries in Asia are sometimes pawns in the game of snapping up orbital slots which they cannot afford to use, only to then lease to multinational corporations from the core or semi-periphery countries and on whom they become dependent for their telecommunications technology. In any case, satellite television might be superseded technologically by video-on-demand, the Internet, fibre-optic cabling and the like, in which case it might actually become the dominant medium for the least developed countries of the Third World. Thus many nations in Oceania, Africa and Central Asia seem at risk of becoming information-poor, by-passed by the 'Information Superhighway' while being dumped on by global or regional satellite television services.

#### 10.1.2 Counter-imperialism and fragmented societies

Cultural imperialism may not be a new phenomenon, dating only from the European colonial era, and only from the West towards the East, for it has existed at virtually any time societies have had contact whether through political or military force, or through commerce and trade. There has always been hybridisation of the colonisers' and colonised's cultures, and much more cross-pollination of cultures than admitted especially by the colonisers. Post-colonial nations may be said to be proto-globalised societies given their cultural syncreticism and cosmopolitanism particularly in their urban metropolises. The concept of cultural imperialism presupposes the primacy of the nation-state and nationalism, but if nation-states are themselves 'imagined communities' comprising, in reality, multiple ethnic groups dominated by one such group or social class, then there might be just as much cultural imperialism from within the nation-state than from without. As such transnational satellite television may be a means of giving voice to minorities, some spanning various countries, which are ignored by their nationalistic domestic media, whether public or commercial, under the control of a dominant group. If the invention of printing led to the formation of dominant languages out of regional dialects, and that in turn to the rise of nationalism, then the McLuhanesque aural and orality of the new technologies such as satellite communications might portend the reverse process. That might mean the fragmentation of nation-states, perhaps more than we are already seeing at the close of the 20th century. Is national government alarm at global media then just a smoke-screen for their own cultural domination of their multicultural societies? To some extent this may explain the considerable collusion between national governments in Asia and domestic commercial media often in the hands of politico-economic elite, against the twin threats of globalised ethnic broadcast media as well as local narrowcast media. But might Asian television channels, whether domestic or regional, be merely surrogates for Western global media corporations or even just clones in the same capitalist economic game? If such cultural hybridity is re-defined also as a form of cultural imperialism, then the latter may be a process far more insidious under the guise of economic globalisation than previously imagined.

### 10.1.3 World trade in cultural products

Though they may be still be considered 'semi-periphery' because their rapid growth is still relatively dependent on investments by the core countries, some of these NICs may soon exceed the 'core' countries in the share of their GDP generated by industry. The next stage, one already in motion since the 1990s is some reversal of the trade in services, including that of entertainment, information and other output of the cultural industries. This has resulted in flows from the developing to the developed countries or in flows among developing countries, such as those of ethnic television programming via satellite and/or cable. Closer examination reveals that in Asia transnational satellite television has not only eroded government control over the broadcast media but drawn domestic commercial and even public broadcasters into the competitive arena of global media. It has even engaged them not only economically as joint-venture and strategic alliance partners, but also culturally as buyers, providers and users of 'glocalised' programming. The trend towards the globalisation of communication is clearly demonstrated in the alliances and conglomerates formed in recent years in the converging television, music, advertising and news media industries, in Asia as well as worldwide. What is fairly obvious is that developing countries are having their cultures co-opted, in much the same way as Western radical subcultures have been, and hybridised in the process of converting them into markets for global products. There has always been vocal social criticism about the alleged role that advertising plays in raising false expectations and creating artificial demands in the developing world, and this has reached a fever pitch in Asia with the growth of transnational television. Arguably the medium may provide them information on alternative ecologically-sound lifestyles which may be not much different from what they have known historically or are at least aware of in their geographical area. That access to transnational television need not necessarily spell greater consumerism for developing countries because people so excessively exposed may develop a reaction against materialistic modernity, is a weak conjecture. The reality is that images of plenty beamed incidentally to those in want, can only serve to heighten the perception of their plight. The persistent migration of peoples from the Third World to the First might be just one symptom of that disenchantment with being deprived of the material wherewithal which is being promoted globally as the good life via the television media. However, cultural imperialism theories have simply had no conception of recognising the legitimate economic aspirations of people, regardless of how such aspirations have been derived.

## 10.2 TELEVISION AND CULTURE

Countries which choose to develop and modernise in a capitalist-dominated world, invariably globalise whether economically, culturally or both. As such they have little immunity against transnational satellite television, except to seek to domesticate it by downlinking, then subtitling or dubbing, and even censoring its programming. Even though transnational satellite television might be an elite medium in many countries of Asia, a much larger proportion of the population if not the majority of them, cannot help but have their lives

touched indirectly by the globalised culture which that medium is propagating, which the products and services available locally suggest, and which their own social elite exemplify. No longer is the written or spoken word the primary persuader of cultural change, but the televisual image which warrants no logical arguments for or against, but which persistently invites imitation. Thus the disparate impact of transnational satellite television in the region has only been partly due to the fact that national governments have responded in differing rational ways to the perceived cultural globalisation.

#### 10.2.1 Cultural control and circumvention

The countries which reacted most forcefully to transnational satellite television were those which have authoritarian governments and therefore felt most under threat. The mistake that such governments seem to have made with their initial media policies towards transnational satellite television is that of assuming that it was simply a more powerful form of domestic television. In other words, that it was aiming to acculturate the national population in the same way that domestic television, whether public or commercial under license, was designed to, when transnational satellite television is clearly not such an unchallenged mass medium. Furthermore governments have had only limited success with their regulatory policies because of popular demand which has found ways to circumvent the restrictions, and domestic businesses have colluded with transnational ones, officially or unofficially, to meet this demand. There have also been political and economic imperatives for the governments to abandon or at least not enforce their policies, such as their desire to achieve integration of their economies into the capitalist world-system. The findings of this research on transnational satellite television confirm that its impact on domestic broadcasting and advertising industries may not be moderated by regulatory policies alone. The impact of transnational satellite television on each country under its footprint varies considerably depending on the domestic media scene, government policy, cultural heritage, politico-economic ideology, economic affluence, and so on. Thus there might be various socio-cultural and political-economic impacts upon television from the society in which it operates, which are less discussed as issues and so less researched than vice-versa. There is a paradox between the perceived power of the medium in social change in Asia, and the evidence of subjective, even dissenting interpretation and of the limited use of transnational television by citizens. The real risk to governments is not that transnational satellite television will swamp their national culture and make its citizens pseudo-Westerners, but that the growth of domestic and regional television that it stimulates may render the populace either disinterested in national political discourse and planning to emigrate for economic reasons, or agitating for subnational political or ethnic cultural autonomy. Perhaps future communications research on transnational television needs to address such social and political issues at subnational, national and international levels.

#### 10.2.2 Postmodernity and cultural identity

Postmodernism may be thought of as the sceptical aftermath of the optimistic humanism and technological utopianism of the modern era. In the postmodern era, the process of production has been superseded by that of consumption as the determinant of social relations, an inevitable next stage of capitalism. Thus politico-economic production relations are being overtaken by socio-cultural consumerist

identities, while class membership is being superceded by ethnic or subcultural affiliation. Naturally, governments are concerned about controlling access to identity-generating technologies such as the media, whether domestic or transnational. Consequently consumers in many countries are getting not direct access to but a filtered version of transnational television. But the question remains as to who should control the filter: the consumers individually, consumers collectively, local business, governments, or global media corporations keen not to be shut out, or some combination of these social forces? Characteristically the television media pervade our postmodern societies, structuring our social experience of reality while expressing political-economic relations, reflecting cultural values, and helping to define personal and national identity. Therefore a case has been made strongly from time to time, for domestic broadcasting to be supported as a national resource and not be left to commercial interests. This is usually accompanied by a somewhat patronising appeal that its programming not cater to the lowest common denominator but aim to educate tastes. Such a plea makes little sense if and when directed at transnational television via satellite, usually commercial in nature, which seems to fragment and co-opt contemporary popular culture in various countries it broadcasts to and then reformulate it in varying forms of hybridised global culture. The global pervasiveness of television presently, made possible by whatever technological means, might shift people from being literate or non-literate to being post-literate in one generation or less, more comfortable with learning about life and the world via images rather than via reading or writing. Perhaps viewers of transnational television feel increasingly part of a global pseudo-community, capable even of political participation on a global scale, assisted by interpersonal communication via the Internet, while somewhat alienated from their national societies or local communities.

### 10.2.3 Media monoliths or multiplicity?

Transnational satellite television in Asia is scarcely global in compass any longer, and increasingly multi-domestic or multi-national in the strict definition of these terms. It is probably transnational only in the sense that it forms symbiotic relationships, even strategic alliances with domestic broadcasters, cable operators or multiservice operators in different countries. Satellite and cable television may be seen as an expression in the broadcasting industry of the business trend of 'mass customisation' by which globalised products are capable of rapid manufacture in numerous permutations of specifications to cater for local, even individual, preferences. Thus satellite channels today do not resemble mass propaganda to captive local audiences as could be and was alleged of terrestrial television in decades past. Instead they may serve rather as electronic libraries located on satellites or actually earth stations, and accessed selectively via cable/DTH by 'active' audiences faced today with numerous other alternatives in electronic information and entertainment. Transnational satellite television may be largely responsible for a trend towards putting together your own cultural identity out of all the alternatives presented on the medium, or a radical form of do-it-yourself culture. Those who subscribe to the view that an economically-dominant medium imposes a globalised culture may fail to realise the power of discernment and discretion of viewers, even in developing countries with relatively recent experience of television. This mistaken assumption of docile audiences can be made and has been made both by transnational satellite television broadcasters as well as the governments in Asia seeking to



regulate access to them. As television becomes plentiful through the technology of satellites, and in all likelihood repetitious in content, might it not become more like books and magazines indulged in at leisure rather than demanding attention by its previous characteristic of a one-time performance? Blanketing the region or even the world with television simply does not and cannot mean that people will watch everything on offer. Nonetheless it is certainly different from books in that most viewers will watch something virtually everyday, and so the question remains of what they will watch most. If national broadcasters give way to multi-channel and multi-mode television, will there be room for new community-based or social movement-run television? It is still an open question how individuals and social groups might put together their own television viewing or cultural consumption out of the myriad offerings available in Asia at the turn of the 20th century.

### 10.3 ADVERTISING AND MARKETS

As the competition between satellite channels in Asia intensifies and the pan-Asian market fragments, targeting of the audiences becomes essential for channel survival. While satellites can potentially break down political borders to reaching consumers in diverse countries, in reality only certain programming genre such as news, sports and music seem to cross cultural barriers effectively. Transnational television broadcasters face the dilemma of selling advertisers on the efficiency and effectiveness of the new medium, while reassuring governments of only limited social and cultural effects. If domestic public television via terrestrial or satellite transmission was a tool of nationalism and modernisation in the hands of the state, then transnational commercial television via satellite and cable may be an instrument in the hands of the multinational corporation for the globalisation of markets and postmodernisation of consumption in their favour. The overwhelming choice among electronic media surrogates or substitutes may not represent real choice of distinct alternatives, because most promote the same overarching message of consumption.

#### 10.3.1 Consumers or citizens

Commercial media are invariably inundated by advertising which tends to convey images and feelings better than facts and thoughtful opinions. Transnational satellite television and domestic television under the control of multinational or regional corporations and devoted to promoting consumerist messages might be inhibiting a society's ability to debate public issues via the forum of the electronic media. The electronic media are arguably more powerful a medium of socialisation than the family, community, school, or any other social institution, and may be undermining the ability of citizens to cope with complex written discourses. In a sense, rampant world-capitalism, of which the commercialised and pervasive electronic media is a symptom, might be no less totalitarian than state-communism. With the demise of communism in Eastern Europe and the former Soviet Union, there is little hope of a socialist world-government alternative to the capitalist world-system as Wallerstein and other critics envisaged. Since the aim of capitalism is not to educate but to sell, its media especially transnational satellite television programming and advertising might

actually undermine the realisation of the liberal democratic ideals of modern urban society by promoting instead the *status quo* of economic inequities and cultural hegemony. Secondary centres of geo-linguistic cultural production could be taken as fulfilling the role of semi-periphery countries to stabilise the capitalist world-system. Cultural eclecticism in a postmodern world is evident in the cosmopolitan lifestyles and consumption habits of the developed world as well as the urban elite of developing countries. But is postmodernism a form of moral bankruptcy and an excuse for lack of activism over the direction of social and political change, by privatising the notion of cultural identity and associating it closely with consumption? Despite having alternative identities by virtue of consumption patterns, most people seem to retain primary cultural identities in terms of birth-place, citizenship, ethnic cultures, even social class, albeit to varying degrees.

### 10.3.2 Culture and change

Cultures are almost too complex to define; they are certainly not static but permeable and changeable over time, a fact which advertisers and marketers are quick to realise and to exploit. Cultures may be changed by any innovation of product or practice, though the extent of change could range from gradual evolutionary to dramatic revolutionary. Globalisation is reflected in both the import of foreign cultures and the export of local ones, and in essence is a deterritorialisation of culture. The process is less novel than believed via our national cultural myths, but what is new is the rapid pace at which it is being achieved through multiple new communication technologies, with the growth of transnational satellite television being just one. But is hybridisation of culture really homogenisation is another guise, or a preliminary stage of the latter? If identity is a socio-cultural construct, then the natural question is who constructs it and benefits from that construction: is it governments, socio-political movements, ethnic groups, or marketers and advertisers? Distinctions between cultures are often stereotypical since there is a human fascination with the exotic otherness of cultures and to claim moral superiority if not geographical sovereignty: hence the desire to contrast Western and Eastern cultures. In reality these are mere labels which mask an incredible cultural diversity, which ironically the expansion of television alternatives and their subsequent differentiation have highlighted. This has proven especially true with the plethora of transnational satellite channels which have developed for India catering to the ethnic minorities of the region previously unrecognised nor catered for by the domestic public broadcaster carrying out its national integration agenda. If history is any guide, as a general rule modernisation and technology tend to be add-ons or renewals rather than radical replacements for traditional culture and practice. They are often the very means by which a traditional culture previously in decline is resuscitated, as seems to be the case via the television media in Asia. In all probability, only surface culture, such as dress, music and forms of speech, changes rapidly with globalisation, while deep culture, such as values, attitudes and social habits, metamorphosises at a much slower pace. So while urban metropolitan or cosmopolitan cultures across the world may seem rather similar, the phenomenon may be simply an illusion or at least a deceptive veneer. Cultures are generally not adopted *in toto* but adapted selectively and given new interpretations in foreign contexts, a phenomenon reflected in domestication of television programme genre which originated in the West such as soap operas and talk shows. The present research underscores the importance of

recognising that transnational satellite television has subtly influenced cultures in Asia in as much as the medium has been transformed by them in turn.

### 10.3.3 Markets versus nations

The growth of commercial media and the advertising industry is symptomatic of an increasingly capitalist world economy, following the demise of the USSR and its hegemony over Eastern Europe and other satellite nations. Is globalisation then just another form of colonialism? Or is it, as in the exact definition of a global business, about adopting from any national market what is best, most appropriate or saleable for use anywhere else in the world or in the markets covered? Might targeting by multinational marketers of the urban cosmopolitan elite in the world-class cities of Asia, such as Bombay, Jakarta and Hong Kong be the thin end of the wedge through which their wider national and subregional markets are gradually being brought into the global economy? In other words, is hybridisation of media culture the key to homogenising consumer markets? Perhaps advertisers, marketers and broadcasters are achieving the economic empire that political and military strategists through the ages have always found elusive. Will there be a new social hierarchy defined by media use: with the global-media technocrats at the top and domestic-media lumpen-proletariats at the bottom with subregional-media proletariats in the middle? What are the ethics of denying access to some sectors of society due to their lack of economic resources to participate in an increasingly commercialised media and communications system? What are the consequences for political participation by the masses if the media comprised of simulations is controlled by the socio-economic elite who set the agenda? With the acceleration of commodification of culture via television, consumer markets might be growing increasingly globalised and integrated, and yet nation-states seem increasingly split by ethnic, religious and political differences.

### 10.3.4 Global media governance

Convergence of communications technologies into the information superhighway has been too sudden for planned and effective response by societies and nations. By virtue of trends in deregulation, there is increasing vertical integration and horizontal conglomeratisation, leading to business oligarchies, if not monopolies, in the field of communications. Such multinational corporations (MNCs) are beholden to marketers and consumers for advertising and their owners and shareholders for profits, and not to the wider nations and societies in which they operate. Perhaps because they operate across borders in a number of nations, these corporations feel less constrained to acknowledge the jurisdiction of any one of them. Since global media corporations have no inter-government organisations which can effectively regulate their activities, they enjoy the freedom to broadcast as they choose to. Globalisation seems therefore the password for exemption from social governance of business activity for MNCs. One response would be to create checks-and-balances on an equally global scale through inter-government organisations (IGOs) such as UNESCO, even though these have been anathema since the collapse of the NWICO lobby. But the deeper issues are how does the IGO arrive at a global standard of communication ethics in a postmodern age and how does it monitor, let alone enforce the same in a world dominated by MNCs. Yet without global

regulation, these corporations will invariably favour the lowest ethical standards as being the most suitable for profitability in the short to medium term. If IGOs are not up to the task, perhaps it might be left to multiple non-government organisations (NGOs) working synergistically yet independently in characteristic postmodern fashion to exercise influence, if not globally, at least in significant centres of cultural production and/or markets of media consumption. Without some form of governance as counterpoint, we may well experience the unfettered tyranny of capitalism over global media by early next century, if not sooner.

#### 10.4 GLOBALISATION AND ASIA

As far as this dissertation is concerned, globalisation is characterised by that sense of belonging to one world, the experience of time-and-space compression, the interdependence of nations and economies in a capitalist world-system, the spread of marketing and advertising practices, and the convergence of urban elite lifestyles and consumption patterns, all of which is enhanced via electronic communication technologies and the ubiquity of television worldwide. The globalisation of television operates at several levels: in the increase of foreign commercial broadcasts available in a country or region, in the imports of programming or cloning of various programme genre, in the foreign equity, strategic alliances and consultancy relationships in domestic cultural industries, and so on. The globalisation of advertising is discernible in the dominance of international advertising agencies and their affiliates in national markets, in the adoption or adaptation of global television commercials, the growth in the number of imported brands and product categories advertised, the buying of regional media or domestic media on a regional basis, and so on. The globalisation of the economy and polity<sup>1</sup> is all too evident in the integration of world markets for capital, commodities, labour, products and services, and the interdependence of nation-states in the capitalistic world-system which is documented daily in our news media. The globalisation of society and culture via hybridisation is more subtle and controversial, but no less real to the more critical and observant. The process of globalisation which takes place across these fields and arenas is multidirectional in causal links, and hence difficult to operationalise for micro-analysis via quantitative reductionist research.

Transnational satellite television has blurred the arbitrary boundaries between nation-states and undermined the artificial notions of national cultures. The notion of globalisation as Westernised homogenisation may have come from ardent nationalists under threat, accusing their political and cultural rivals of what they have been doing themselves to homogenise national culture, unwittingly or otherwise. Transnational television might be of value to societies in undermining repressive nationalism, but still be detrimental in commercialising and commodifying culture. Perhaps in future cultural and social entities might be defined by satellite footprints, cable networks and television programming choice, just as at present they are defined largely by geo-political boundaries and print literature. Transnational television makes accessible geographically far-away cultures and thus socialisation from afar, or at the very least globalisation of consumption behaviour. By giving their people a choice of imported cultural products and allowing them to make their own selection, governments might be allowing them to be turned into postmodern consumers

for a global market rather than remaining citizens loyal to a nation-state. If domestic television may be seen to assist in the formation of mass cultures out of various taste cultures within the country, then sub-cultures might be said to find their expression in other smaller, less expensive media. The narrowcasting made feasible through cable might represent in future one of the alternative media favoured by subcultures within a country or transnationally. To extend this reasoning on an international scale, while domestic terrestrial television gives expression to national cultures however artificial, perhaps transnational satellite television furthers the development of globalised cultures, whether hybrid or diasporic or both. Thus, globalisation via transnational satellite television need not spell the relative homogenisation of cultures or subcultures worldwide into a Westernised culture, but the renaissance of ethnic cultures often geographically dispersed or the hybridisation of local ethnic sub-cultures with foreign neo-colonial cultures. But will ethnic cultures and religious practice replace ideology as the basis of political conflict, even wars, in the post-Cold War era? Will diversified transnational television programming and advertising be the basis of cultural identity and political formation rather than ideological treatises and literature?

Lest it has not been sufficiently explicit, the central thesis of this dissertation is that globalisation of television media in Asia involves neither homogenisation nor Westernisation, but takes place via a process of local contextualisation, 'glocalisation' or hybridisation. At best and more often this represents a form of synergistic blend of the West and East, and at worse and hopefully less often, a form of dysfunctional mutation which occurs in the context of various economic, political, social and cultural processes within each society. As such the local cultures in Asia are gradually coopted to serve the global economic imperative, in much the same way that subcultures in the West get coopted into mainstream media, fashion, language, music and so on. Neo-colonialisation may do more to change societies and cultures around the world by materialistic seduction than politico-economic imperialism ever did by military subjugation. But just as the process of modernisation has not been uniform across developing countries given their heterogeneity politically, economically, socially and culturally, likewise globalisation in a postmodern world takes place differently from country to country, and even in ethno-geographical parts or socio-economic levels within countries. The country case-studies in this thesis, Indonesia, India and China, illustrate this diversity between Third World nations in Asia alone as well as within each nation, both prior and after the advent of transnational satellite television. So globalisation is not about rapid homogenisation but rather involves calculated hybridisation; it is more like osmosis rather than fusion. One unwavering inference of this dissertation must then be that the same growth of transnational satellite television and advertising which is subtly undermining national cultural policies around Asia, may actually be facilitating the formation of hybrid socio-cultural identities, on a subnational, regional, even global basis.

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## Appendix A

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Appendix B  
PRIMARY DATA SOURCES

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B.1 INTERVIEWEES

**Indonesia**

1. Advertising agencies

*Personnel interviewed:*

- Ids 01.01 CEO, MNC/local joint-venture advertising agency
- Ids 01.02 CEO, major local advertising agency
- Ids 01.03 CEO, MNC/local joint-venture advertising agency
- Ids 01.04 Media executive, MNC advertising agency
- Ids 01.05 CEO, major local advertising agency
- Ids 01.06 Media executives, major local advertising agency
- Ids 01.07 Creative director, major local advertising agency
- Ids 01.08 Media executive, regional joint-venture advertising agency
- Ids 01.09 Media executive, MNC advertising agency

*Organisational affiliations:*

- Grafik McCann, Jakarta (McCann-Erickson affiliate)
- Cabe Rawit Advertising, Jakarta
- Perwanal Advertising, Jakarta (DMB&B affiliate)
- Matari Advertising, Jakarta (BBDO affiliate)
- Citra Lintas Indonesia, Jakarta (Lintas Worldwide affiliate)
- Inter-Admark, Jakarta (Dentsu affiliate)
- B&B Advertising, Jakarta
- SilAd, Jakarta
- Saatchi & Saatchi, Singapore

2. Media-Owners

*Personnel interviewed:*

- Ids 02.01 PR executive, commercial Indonesian broadcaster
- Ids 02.02 Research executive, commercial Indonesian broadcaster
- Ids 02.03 PR executive, commercial Indonesian broadcaster
- Ids 02.04 Engineering executive, Indonesian satellite provider
- Ids 02.05 Senior executive, Indonesian satellite provider
- Ids 02.06 Senior executive, major Indonesian radio station
- Ids 02.07 PR executive, commercial Indonesian broadcaster
- Ids 02.08 Senior executive, transnational pay-TV provider
- Ids 02.09 Research executive, commercial Indonesian broadcaster
- Ids 02.10 Marketing executive, transnational television broadcaster
- Ids 02.11 Marketing executive, transnational television broadcaster

*Organisational affiliations:*

- RCTI, Jakarta
- SCTV, Jakarta
- TPI, Jakarta
- Malicak/Indovision, Jakarta
- Indosat, Jakarta
- Indostar, Jakarta

Prambors Radio, Jakarta  
 Asian Business News, Singapore  
 StarTV South East Asia office, Singapore

### 3. Researchers

#### *Personnel interviewed:*

Ids 03.01 Academic researcher, Indonesian university  
 Ids 03.02 Academic researcher, Indonesian university  
 Ids 03.03 Academic researcher, Indonesian university  
 Ids 03.04 Research executive, Indonesian market research firm  
 Ids 03.05 Research executive, MNC market research firm  
 Ids 03.06 Social researcher, Indonesian media research organisation  
 Ids 03.07 Social researcher, Indonesian department of information  
 Ids 03.08 Research executives, MNC market research firm  
 Ids 03.09 Research executive, MNC market research firm

#### *Organisational affiliations:*

Survey Research Indonesia, Jakarta (Nielson SRG affiliate)  
 Survey Research Group, Singapore (Nielson SRG affiliate)  
 Inmar Infos Sarana, Jakarta (commercial media research firm)  
 Dept of Mass Communication, University of Gajah Mada, Jogjakarta  
 Faculty of Communication Science, University of Padjajaran, Bandung  
 University of Indonesia, Depok  
 Open University, Ciputat  
 Institute of Mass Communication Research and Development, Jakarta  
 Media Information Centre, Department of Information, Jakarta

### 4. Policymakers/Regulators

#### *Personnel interviewed:*

Ids 04.01 Senior official, Indonesian social policy-making body  
 Ids 04.02 Senior official, Indonesian department for telecommunications  
 Ids 04.03 Senior official, Indonesian department of information  
 Ids 04.04 Senior official, Indonesian department of information

#### *Organisational affiliations:*

Dept of Posts, Telecoms and Tourism, Jakarta  
 Bappenas, Jakarta  
 Dept of Information, Jakarta

## **India**

### 1. Advertising Agencies

#### *Personnel interviewed:*

Ind 01.01 CEO, major local advertising agency  
 Ind 01.02 CEO, major local advertising agency  
 Ind 01.03 Media executive, MNC/local joint-venture advertising agency  
 Ind 01.04 Media executive, MNC advertising agency  
 Ind 01.05 Media executive, MNC/local joint-venture advertising agency  
 Ind 01.06 CEO, major local advertising agency  
 Ind 01.07 Creative director, major local advertising agency  
 Ind 01.08 Media executive, MNC advertising agency  
 Ind 01.09 Executive, advertising agencies association  
 Ind 01.10 CEO, major local advertising agency

Ind 01.11 Advertising executive, MNC/local joint-venture advertiser

*Organisational affiliations:*

Everest Advertising, Bombay (Saatchi & Saatchi affiliate)

Chaitra Leo Burnett, Bombay (Leo Burnett affiliate)

Hindustan Thompson, Bombay (J. Walter Thompson affiliate)

Mudra Communications, Bombay

Lintas India, Bombay (Lintas Worldwide affiliate)

Sobhagya Advertising, Bombay

Radeus Advertising, Bombay

ImageAds & Communications, Bombay

Ogilvy & Mather, Bombay

Advertising Agencies Association of India, Bombay

Hindustan Lever, Bombay

## 2. Media-Owners

*Personnel interviewed:*

Ind 02.01 Marketing executive, commercial Indian satellite broadcaster

Ind 02.02 Marketing executive, commercial transnational broadcaster

Ind 02.03 Production executive, programme production subsidiary for commercial Indian and transnational satellite broadcasters

Ind 02.04 CEO, programme producer and media brokers for Indian public broadcaster

Ind 02.05 Senior executive, domestic Indian public broadcaster

Ind 02.06 Marketing executive, commercial Indian satellite broadcaster

Ind 02.07 Senior executive, commercial transnational broadcaster

Ind 02.08 Senior executive, cable operator organisation

*Organisational affiliations:*

Doordashan, Delhi

ZeeTV, Bombay

United Television, Bombay

Nimbus Communications, Delhi

StarTV, Bombay

JainTV, Delhi

Cable Operators Federation of India, Delhi

CNNi, Delhi

## 3. Researchers

*Personnel interviewed:*

Ind 03.01 Academic researcher, Indian university

Ind 03.02 Academic researcher, Indian university

Ind 03.03 Research executive, Indian market research firm

Ind 03.04 Research executive, Indian market research firm

Ind 03.05 Research executive, Indian media conglomerate

Ind 03.06 Academic researcher, Indian social research organisation

Ind 03.07 Research executive, Indian market research firm

Ind 03.08 Academic researcher, Indian social research organisation

Ind 03.09 Editor, Indian media organisation

Ind 03.10 Research executive, Indian media organisation

*Organisational affiliations:*

Indian Institute for Mass Communication, Delhi

University of Poona, Dept of Communication & Journalism, Pune

Tata Institute of Social Research, Delhi

Times of India Response, Bombay

A & M Magazine [Advertising & Marketing], Delhi  
 IMRB, Bombay  
 ORG, Bombay  
 MARG, Bombay  
 Indian Newspaper Society, Delhi

#### 4. Policymakers/Regulators

##### *Personnel interviewed:*

Ind 04.01 Senior executive, Indian foreign exchange controls  
 Ind 04.02 Former senior executive, Indian research organisation  
 Ind 04.03 Senior civil servant, Indian department regulating media  
 Ind 04.04 Senior official, Indian policy organisation  
 Ind 04.05 Member, Indian policy board

##### *Organisational affiliations:*

Indian Reserve Bank, Bombay  
 Indian Space Research Agency, Ahmedabad  
 Consortium for Education Television, Delhi  
 Board of Censors, Delhi  
 Ministry of Information & Broadcasting, Delhi

### **Greater China**

#### 1. Advertising Agencies

##### *Personnel interviewed:*

Chn 01.01 CEO, MNC advertising agency  
 Chn 01.02 CEO, MNC advertising media agency  
 Chn 01.03 Media executive, MNC advertising agency  
 Chn 01.04 Deputy CEO, MNC advertising agency  
 Chn 01.05 Media executive, MNC advertising agency  
 Chn 01.06 Media executive, MNC advertising agency  
 Chn 01.07 Media executive, MNC advertising agency  
 Chn 01.08 Chairman, major local advertising agency  
 Chn 01.09 Regional media director, MNC advertising agency

##### *Organisational affiliations:*

Ogilvy Media Asia, Hong Kong  
 McCann-Erickson HK  
 J. Walter Thompson China  
 D'Arcy Masius Benton & Bowles HK  
 DDB Needham Worldwide, Hong Kong  
 Leo Burnett, Hong Kong  
 Grey Advertising, Hong Kong  
 United Advertising, Taiwan

#### 2. Media-Owners

##### *Personnel interviewed:*

Chn 02.01 Research executive, MNC commercial stv broadcaster  
 Chn 02.02 Marketing executive, commercial HK broadcaster  
 Chn 02.03 Senior executive, MNC commercial stv broadcaster  
 Chn 02.04 Marketing executive, commercial HK broadcaster  
 Chn 02.05 Senior executive, Hong Kong pay-TV broadcaster  
 Chn 02.06 Marketing executive, commercial Chinese broadcaster

- Chn 02.07 Research executive, MNC commercial stv broadcaster
- Chn 02.08 Marketing executive, MNC commercial stv broadcaster
- Chn 02.09 Senior executive, commercial Taiwan television broadcaster
- Chn 02.10 Senior executive, Taiwan cable television broadcaster
- Chn 02.11 Editor, Chinese private television station

*Organisational affiliations:*

- TVB International head office, Hong Kong
- Po-Hsin Multimedia, Taipei
- Turner International/CNNI Far East regional office Hong Kong
- ATV head office, Hong Kong
- TTV, Taipei
- StarTV head office, Hong Kong
- Wharf Cable head office, Hong Kong
- Oriental TV, Shanghai, PRC

### 3. Researchers

*Personnel interviewed:*

- Chn 03.01 Research executive, MNC market research firm
- Chn 03.02 Academic researcher, Hong Kong university
- Chn 03.03 CEO, Hong Kong market research firm
- Chn 03.04 Research executive, MNC market research firm
- Chn 03.05 Academic researcher, Hong Kong university
- Chn 03.06 Academic researcher, Taiwanese university
- Chn 03.07 Research executive, Taiwan market research firm
- Chn 03.08 Academic researcher, Taiwanese university
- Chn 03.09 Research executive, Taiwan market research firm
- Chn 03.10 Academic researcher, Hong Kong university

*Organisational affiliations:*

- Survey Research Group, Hong Kong (Nielson SRG affiliate)
- Chinese University of Hong Kong
- Research Asia, Hong Kong
- Frank Small & Associates, Hong Kong
- Survey Research Taiwan, Taipei (Nielson SRG affiliate)
- World College of Journalism and Communication, Taipei
- Rainmaker Industrial, Taipei
- National Chengchih University, Taipei

### 4. Policymakers/Regulators

*Personnel interviewed:*

- Chn 04.01 Senior official, television licensing authority
- Chn 04.02 Senior official, television licensing authority
- Chn 04.03 Member, broadcast policy-making body
- Chn 04.04 Senior civil servant, government department regulating media
- Chn 04.05 Senior official, public broadcast organisation

*Organisational affiliations:*

- Television and Entertainment Licensing Authority, Hong Kong
- Hong Kong Broadcasting Authority
- Government Information Office, Taiwan
- Broadcast Development Fund, Taiwan



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B.2 AUDIO-VISUAL MATERIALS**Indonesia**Television commercials

All domestic TVCs which appeared in April, July-Dec 1993 and Jan-June 1994  
(7 videotapes containing approximately 1,600 TVCs)

Prime-time programming

*Domestic:* RCTI (9 hours)  
SCTV (6 hours)  
TPI (6 hours)  
*Transnational:* Star Plus (3 hours)  
Channel V (6 hours)  
CNNI (6 hours)  
AusTV (6 hours)  
CFI (3 hours)

**India**Television commercials

*Domestic:*  
276 TVCs entered for the Indian Academy of Advertising Film Art awards in 1993  
401 TVCs taped off-air from Zee TV in 1994

Prime-time programming

*Domestic:* DD1 (6 hours)  
DD2 (6 hours)  
Zee TV (15 hours)  
SunTV (2 hours)  
Trivandrum (2 hours),  
Jain TV (3 hours)  
*Transnational:* BBC (6 hours)  
Channel V (6 hours)  
Star Plus (3 hours)

**Greater China**Television commercials

*Domestic TVCs:* Hong Kong (46 TVCs)  
Shanghai (28 TVCs)  
Taiwan (20 TVCs)

Prime-time programming

*Domestic:* ATV Home (8 hours)  
ATV World (3 hours)  
TVB Jade (8 hours)  
TVB Pearl (8 hours)  
OCTV - China (6 hours)  
CTV - Taiwan (3 hours)

*Transnational:* Channel V (6 hours)  
Star Chinese (6 hours)  
Prime Sports (3 hours)

**Transnational Broadcasters**Television commercials:

StarTV showreel of advertisers in 1992: 130 TVCs

TVCs taped off-air in India in 1994: Star Plus (40 TVCs) and Channel V (20 TVCs)

TVCs embedded in programming taped-off air (see under countries)

Prime-time programming:

Star Plus and Channel V sales tape: programme sampler (20 minutes)

Asia Business News programme sampler (15 minutes)

Programmes on transnational channels during national/regional prime-times  
(see under countries)

## Appendix C

### INTERVIEW PROTOCOL

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Listed below is a sample of the general type of questions that were directed at the interviewees. As elaborated in Chapter Three on methodology, the topic area in which questions began varied depending on the vantage point of the particular key informant, that is his or her professional involvement and expertise in the media industry. Furthermore the relative importance of the questions varied from one country to the next. Finally, responses from one interviewee was often placed anonymously before another in order to elicit consensus or dissent on particular issues, making the process a form of Delphi technique, in a sense.

Invariably the interviews were conducted at the respondents' work-place which had the advantage of them having ready access to information or informed advice from others, but the disadvantage of work-related interruptions. The interviewees were usually of individuals but on occasion were conducted with one or two other executives present by the design of the primary respondent, often a CEO, and as such was treated as a single interview. Referrals to other potential suitable interviewees were sought from respondents resulting in a snow-balling of interview contacts and helped motivate participation by subsequent interviewees. Within each strata, further interviewees were selected by a combination of judgement sampling that the respondent was able to represent the views of that organisation and by quota sampling to ensure that executives with differing responsibilities in similar organisations were adequately represented.

In order to ensure efficient use of time on the field, chief executives of the organisations were written to up to a month prior to the country visit, the letter explaining the research and seeking an exploratory interview with themselves or a referral to someone else in the organisation who might better be able to answer the questions. On arrival in each country, if not sooner, the researcher contacted the organisation by phone to schedule an interview, a typical day involving the interviews of two or three executives/officials. Interviews were not taped, so as to put interviewees at ease and allow them to be candid, though short notes were taken and transcribed/paraphrased within days, if not the same day. See Chapter Three, Section 3.4 for full details and explanations.

#### Political-economic:

What has been the economic impact of transnational satellite television, if any, on your country?

Are governments concerned about multinational corporations circumventing national controls on broadcasting and advertising?

Has the government perceived any political implications of transnational satellite television on ethnic minorities, nationalism and globalisation?

What are the government regulations on licensing receivers, cable operators, new domestic commercial stations, terrestrial programming and advertising?

How has the government reacted to the arrival of transnational satellite television in terms of policies, regulations, education, etc.?

Socio-cultural:

- Has transnational satellite television had any cultural impact in your country (such as of values, attitudes, opinions, behaviour, consumer tastes, etc.)? Has there been any attempt to measure this, and if so by whom? What are their findings
- Is transnational satellite television programming and advertising interpreted differently by similar social groups in the various countries in which it is watched? Has this been researched, and if so where is it published?
- Is transnational satellite television watched by audiences of a different cultural or socio-economic background from those watching domestic commercial television? How has this been confirmed?
- Is there such a thing as a pan-Asian elite or cosmopolitan up-market segment, as StarTV claims to reach?

Media/Broadcasting:

- Has the reach and viewership of transnational satellite television been increasing in your country? Why is this so, or not so?
- By what means are people getting access to transnational satellite television? Has domestic cable or pay-TV helped or hindered its growth?
- Has the growth been at the expense of domestic television? Are there any statistics? How have domestic broadcasters responded to this new competition?
- Has the introduction of more transnational satellite television grown the market or fragmented it?
- Is it an elite medium catering to an upmarket segment in your country? Are they mainly expatriates or an ethnic minority? Or has it gained a broad local following?
- Is there secondary data available on reach and penetration, viewership and ratings and audience profiles? If so, where from? If not, why not?
- What are your predictions about future trends in transnational satellite television? At what point might there be saturation?

Marketing/Advertising:

- Are more advertisers using transnational satellite television? Are they using it globally, regionally, nationally or ethnically?
- Has there been a shift of advertising expenditure from domestic to regional media, and from print to television in recent years? Why or why not?
- Are regional/global advertising accounts moving to international ad agencies because of satellite television or some other reason?
- What brands or product categories in your agency are utilising transnational satellite television?
- Would the introduction of more transnational satellite television broadcasters change your recommendations to clients?
- Have there been television commercials created specifically for transnational satellite television? Are they pan-Asian or domestic in creative execution?
- Are media budgets being siphoned from national into regional advertising accounts in order to advertise on transnational satellite television?
- Is advertising on transnational satellite television or domestic television more effective and/or efficient in stimulating position brand attitudes and purchase behaviour?

## Appendix D

### GLOSSARY & ABBREVIATIONS

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- ABN:** Asian Business News, the first Asia-wide, satellite business news service, owned by a consortium of foreign and regional news corporations.
- adspend:** expenditure by marketers on various advertising media, which is a major constituent of 'billings' which includes creative development and production charges.
- ad agency:** advertising agency, a firm specialising in advertising services such as creative production of television and print advertisements, selecting and buying media time and space, which works on behalf of a number of marketing organisations.
- AMIC:** Asian Media, Information and Communications Centre, a non-government research and consultancy organisation based in Singapore.
- AMCB:** monthly industry news bulletin produced by AMIC for its members.
- APTC and APTC&S:** Asia Pacific Television: Channels and Asia Pacific Television: Cable and Satellite, annual reference guides to the media industry in the region.
- Asean/ASEAN:** Association of South East Asian Nations comprising seven nations, namely Malaysia, Indonesia, Thailand, Singapore, Philippines, Brunei and Vietnam, and slowly expanding to include the countries of IndoChina such as Burma, Cambodia and Laos; proposing in future to act as a free trade area: Asean FTA or AFTA.
- Asian A&M:** Asian Advertising and Marketing, leading regional bi-monthly magazine for practitioners.
- Asianet:** a commercial television service via satellite in Malayalam serving the dominant ethnic group of the southern Indian state of Kerala as well as expatriates from there in West Asia.
- ATV:** Asia Television, a Hong Kong-based commercial television station.
- ATVI:** Australia Television International, the satellite television channel of the ABC broadcasting to Southeast Asia, which now prefers to be known simply as Australia Television to differentiate it from the Hong Kong broadcaster immediately above.
- AWJSJ:** Asian Wall Street Journal, regional version of the US/international finance/business newspaper.
- beam:** signals from a satellite aimed at a particular area on the earth; broad beams covering almost a third of the earth's surface and spot beams focussing on a small area. See also 'footprint'.
- Bollywood:** Colloquialism for the prodigious Indian movie industry based in Bombay, hence 'Bombay-Hollywood'.
- BPS:** acronym in Bahasa Indonesia for the Central Bureau of Statistics (Biro Pusat Statistik), which conducts census.
- cable television:** 'ctv' or more often the term 'CATV' for Cable Access Television is used, for a system of delivering television channels from a number of terrestrial or satellite sources via underground or overhead cable to subscriber homes.
- Canto-pop:** popular or rock music composed in or translated into Cantonese from English, though often used generically of pop music in other Chinese dialects.
- C-band:** a frequency band, around 4-6 Ghz, allocated for the transmission of satellite signals, but prone to interference from other terrestrial services using microwave transmission.
- CCTV:** China Central Television, the central government-owned network in PRChina which broadcasts nationwide and increasingly regionally.
- CETV:** China Entertainment Television, a commercial satellite broadcaster based in Hong Kong famed for its 'No sex, no violence, no news' programming policy to gain acceptance with authorities in the Peoples' Republic of China.
- CTN:** an all-Chinese all-news satellite service headquartered in Hong Kong, owned by interests there and in Taiwan, and serving the whole Greater China region.
- CTS:** China Television Service, a Taiwanese terrestrial broadcaster, owned by the ROC army.
- CTV:** China Television Company, a Taiwanese terrestrial broadcaster, owned by the ruling KMT party.

- CNNi:** Cable News Network International, a global news network established by the US-based Turner Broadcasting Network which has since merged with the Time-Warner media conglomerate.
- channel providers:** often cable systems which compile channels for their subscribers out of other terrestrial and satellite channels, domestic or transnational, and from programme providers.
- crore:** ten millions (or one hundred lakhs), often used in India, usually to quantify money in rupees.
- DBS or DTH:** direct broadcast satellites or direct-to-home satellites for which homes or communities do not need to use a large satellite dish to receive the television signal.
- DD:** Doordarshan, the Indian government television broadcaster.
- DD-ARU:** the Audience Research Unit of DD, which monitors broadcasting and advertising in India.
- developed countries/economies:** see First World
- developing countries/economies:** see Third World
- dish-antennae:** dish-shaped antennae which can receive television signals from satellites but not transmit them; known variously as satellite dishes, TVRO (TV receive-only) antennae, parabolic antennae, and simply parabolas (in Indonesia).
- downlink:** process of obtaining television signals transmitted from a satellite transponder via its beam.
- DPI:** acronym in Bahasa Indonesia for the Ministry of Information (Departemen Penerangan Indonesia), which regulates broadcasting.
- encryption:** scrambling of television signals to allow reception only by paying subscribers using a decoder.
- EL-TV:** an Indian pay-TV channel available via satellite, a joint-venture of ZeeTV and its affiliate StarTV.
- ESPN:** Entertainment and Sports Program Network, a satellite channel.
- EU:** European Union, a regional economic and political union comprising countries of Western Europe and increasingly some of the transitional economies of Eastern Europe; previously known as the European Community (EC) and European Common Market (ECM).
- FEER:** Far East Economic Review, leading political and business newsmagazine in East Asia, comparable to *The Economist*.
- First World:** refers to the industrialised economies or developed countries of North America, Western Europe, Australasia and often Japan; sometimes collectively, if inaccurately, referred to as the 'North' or 'West'.
- footprint:** the area on the earth's surface covered by signals from one or more beams from the satellite's transponder.
- fibre-optic cable:** a fine glass fibre through which digitally-encoded laser light is passed, capable for carrying about ten times the capacity of the older coaxial cable.
- GATT:** General Agreement on Tariffs and Trade, which governed international trade; superseded by the World Trade Organisation.
- geo-stationary orbit:** a satellite placed at 35,800 km about the equator, known as the Clarke Belt, would have an orbital speed equal to that of the world's rotation, though it needs occasional assistance from rocket-propulsion to remain perfectly stationary. Also known as geo-synchronous orbit.
- GIO:** Government Information Office in Taiwan/ROC, which regulates broadcasting.
- HBO:** Home Box Office, a movie channel on satellite/cable television.
- HK:** Hong Kong, a British colony returned to China's sovereignty in 1997 and now a Special Administrative Region (SAR) of the PRC under the 'one country, two systems' political-economic policy.
- HK\$:** The Hong Kong dollar; at the time of the research fieldwork in 1994 worth about HK\$8 to the US\$, and relatively stable since.
- HTA:** Hindustan Thompson Advertising, the Indian affiliate of the international ad agency J Walter Thompson.
- IGOs:** inter-governmental organisations, which include such as Intelsat, the UN and its agencies, WTO, NATO, Asean and so on.
- IIMC:** Indian Institute of Mass Communications, a government-funded research institute based in New Delhi.
- IMF:** International Monetary Fund, closely affiliated to the World Bank.
- IMRB:** Indian Media Research Bureau, which compiles television ratings in India.
- Indian MIB:** Ministry of Information and Broadcasting, the regulatory body for television in India.
- Intelsat:** International Telecommunication Satellite Organisation, a consortium of governments to share satellite technology, which makes transponders on its own satellites available to developing countries on concessionary terms.

- ITU:** International Telecommunications Union, regulatory body for transborder telecommunications, whether terrestrial or satellite, which seeks to allocate orbital slots on a national basis equitably without regard to each nation's ability to utilise the slots immediately. It also organises regular inter-government conferences which regulate telecommunications globally.
- Ku-band:** a frequency band, around 11-15 Ghz, allocated for the transmission of satellite signals potentially direct-to-home, and free of interference from microwave transmissions but reception is affected by weather such as rain.
- lakhs:** one hundred thousand, often used in India to quantify currency in rupees.
- LDCs:** Less Developed Countries, sometimes used as a synonym for developing or Third World countries in general, but usually to refer to a subset of them which have been slower at achieving social and economic development.
- MIB:** Ministry of Information and Broadcasting, India which regulates telecommunications and broadcasting.
- microwave transmission:** high-capacity signals for terrestrial re-transmission of television broadcasts.
- MMDS:** Multichannel Multipoint Distribution System, a cable or microwave system transmitting TV channels to households within a limited area.
- MNCs:** multinational corporations or businesses whose operations span a number of countries; sometimes referred to by the UN as transnational corporations (TNCs) or by others as global corporations though these terms are not strictly synonymous.
- MRFT:** Ministry of Radio Film and Television in the PRC, which regulates broadcasting.
- NAFTA:** North American Free Trade Agreement comprising the US and Canada initially and now including Mexico.
- NAM:** Non-Aligned Movement, a group of Third World nations which sought to be independent of the parties in the Cold War, particularly the US and USSR; not to be confused with American colloquial abbreviation of Vietnam.
- NGOs:** non-governmental organisations, which include worldwide bodies such as Greenpeace, International Red Cross, Amnesty International, Medecins Sans Frontieres, Intermediate Technology Group, World Wildlife Fund and the like.
- NICs:** Newly Industrialising Countries or a subset of developing/Third World countries which have successful at achieving rapid economic development. Sometimes also referred to as NIEs or newly industrialising economies.
- NIEO:** New International Economic Order, proposed by Third World countries under the auspices of UNCTAD and the United Nations, and largely ignored by the First World in favour of GATT and the WTO.
- NT:** New Taiwan dollar; at the time of the research fieldwork in 1995 worth about NT27 to the US\$ and relatively stable since.
- NTSC:** an American colour transmission standard used in a number of countries, disparaging called 'Never The Same Colour' by those who prefer the technically superior European PAL standard
- NWICO:** New World Information and Communication Order, proposed by Third World countries under the auspices of Unesco and the UN.
- O&M:** Ogilvy and Mather, a leading MNC advertising agency with offices throughout Asia.
- orbits:** satellites may be placed in equatorial, polar or inclined paths around the earth, and their orbits could also be either circular or elliptical.
- orbital slot:** point in the Clarke Belt above the equator where geo-stationary satellites are 'parked' and designated by geographical coordinates relative to the earth.
- PAL:** a superior colour transmission system developed in Germany and the standard for television in most of Western Europe, Latin America and Asia.
- pay-TV:** cable or satellite channels offered to households or businesses for a subscription fee; usually providing superior programming to that available free-to-air and without interruptions by ad breaks.
- programme providers:** often film/video production houses and sometimes also media brokers who trade programming to television channels in return for advertising time.
- PRC:** Peoples' Republic of China, communist-led nation of mainland China.

- PPPI:** acronym in Bahasa Indonesia for the Indonesian Association of Advertising Agencies, which produces comprehensive data on advertising and media.
- Rmb:** Renminbi, the PRC currency; at the time of research fieldwork in 1995 worth about Rmb 8 to the US\$ and relatively stable since.
- RCTI:** Rajawali Citra Televisi Indonesia, the dominant Indonesian commercial domestic broadcaster.
- ROC:** Republic of China, the anti-communist government of China pre-1947; since then in exile based in Taiwan but claiming sovereignty over mainland China as well.
- Rp:** Rupiah, the Indonesia currency; at the time of the research fieldwork in 1994 worth about Rp 2,200 to the US\$, and in late 1997, worth about Rp 8,000 and fluctuating.
- Rs:** Rupees, the Indian currency; at the time of the research fieldwork in 1994 worth about Rs 32 to the US\$, and in late 1997, worth about Rp 38 to the US\$.
- satellite:** an artificial object put in space and moving in orbit around a planet relaying telecommunications and television signals.
- satellite television:** transmission of television programming via the use of satellites which may be directed primarily at a domestic market or a transnational one.
- SCMP:** South China Morning Post, a respected English-language newspaper published in Hong Kong.
- SCTV:** Surya Citra TeleVisi, the second Indonesian commercial television domestic broadcaster to be established, possibly still the second or third largest.
- SECAM:** French improvement on the NTSC colour broadcasting system, used largely in Eastern Europe, Francophone Africa and the CIS (ex-USSR).
- Second World:** usually refers to the present or previously planned economies of the USSR and Eastern Europe and often includes their satellites such as Cuba, Angola and Vietnam; sometimes collectively referred to as the 'Eastern Bloc' or 'East' in contrast to the 'West'.
- SMATV:** Satellite master antennae television systems, where one TVRO dish feeds a number of TV sets inside an apartment block, office building or hotel.
- SRG:** Survey Research Group, a market research company in Asia now owned by Nielsen, which specialises in television ratings and advertising expenditure monitoring, known also in each country as SRI (Indonesia), SRH (Hong Kong) and SRT (Taiwan).
- StarTV:** strictly an acronym for Satellite Television Asia Region but used as a brand name for the pioneering transnational satellite television broadcaster in Asia.
- SunTV:** a commercial television service via satellite in Tamil serving the dominant ethnic group of the southern Indian state of Tamil Nadu as well as migrants from there in Southeast Asia.
- TELA:** Television & Entertainment Licensing Authority of Hong Kong, which regulates domestic and transnational broadcasts originating in the territory.
- Third World:** usually refers to developing countries/economies which were former colonies of European powers in Asia, Africa and Latin America; sometimes collectively, if inaccurately (geographically) referred to as the 'South'.
- TPI:** Television Pendidikan Indonesia, or Indonesian Educational Television, a quasi-commercial station.
- transnational or transborder television:** television signals which deliberately cross national boundaries, usually through the use of satellite technology.
- transponder:** equipment on a satellite which receives and transmits a television or other telecommunication signal (made up from the words 'transmitter' and 'responder').
- TTV:** Taiwan Television, a terrestrial broadcaster owned by the Taiwan provincial government.
- TVB:** Television Broadcasters Ltd, a major Hong Kong-based television station and television programme producer, operating internationally as TVBI.
- TVBS:** TVB's Superchannel, a transnational satellite television service in Mandarin to Greater China.
- TVRs:** Television Rating points, sometimes referred to by the acronym TRPs.
- TVRO:** TV Receive-Only: describes satellite dishes which can receive television signals but not transmit them; aka. parabolic antennae.
- TVNZ:** Television New Zealand, previously a public broadcaster, now privatised.

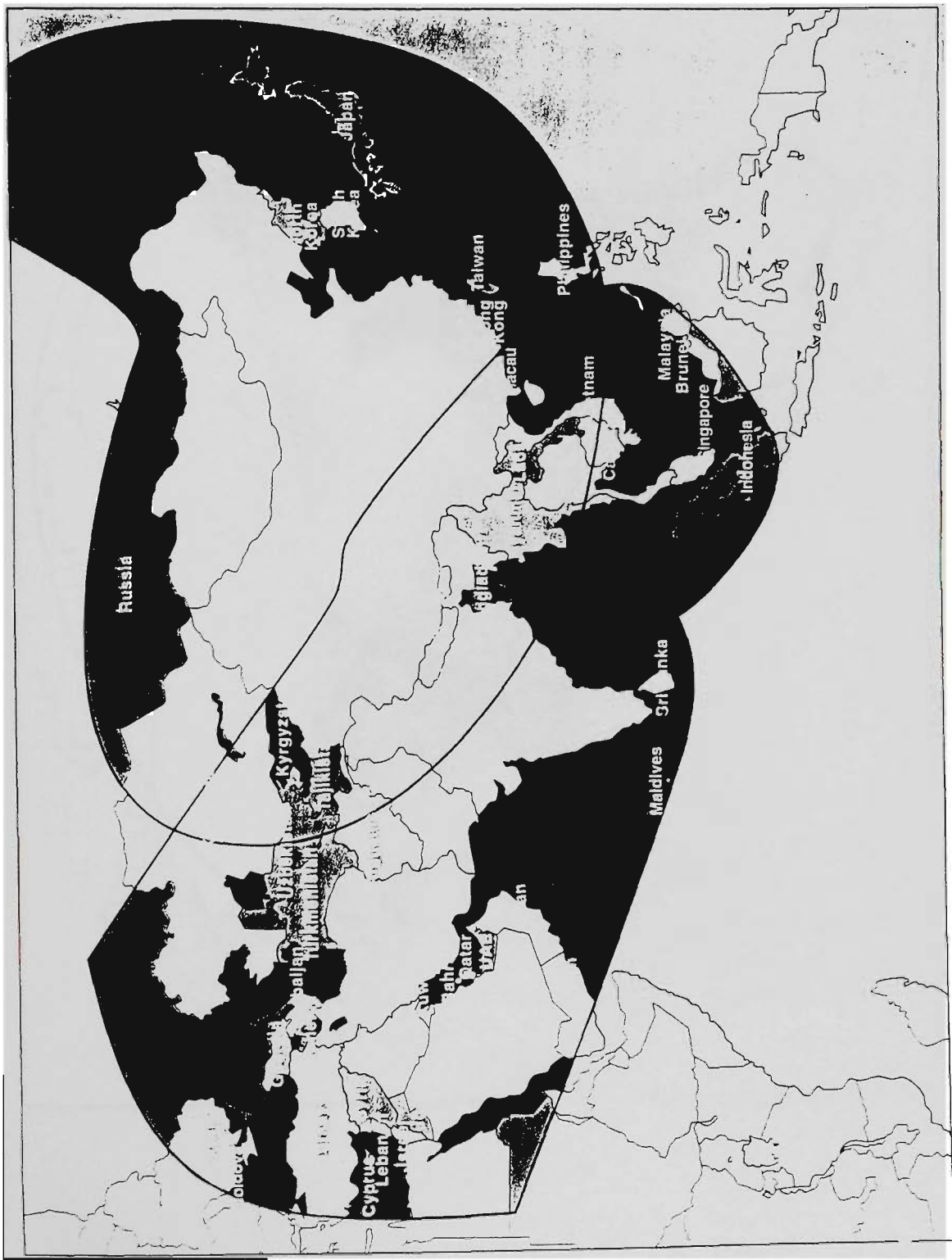


- UNESCO:** United Nations Educational, Scientific and Cultural Organisation, an inter-government body responsible for issues of culture and media, among other social, scientific and educational matters. It has a general mandate to enhance and moderate global communication flows among nations, and promotes 'free-flow of information research' to eradicate barriers to the communication while it also funds 'communications development' projects to increase the communications capacity of developing countries.
- uplink:** Process of transmitting television signals from earth to a satellite, usually through large uplink centres through increasingly possible from small mobile equipment.
- UTV:** an Indian programme production house, subsequently part-owned by News Corporation and since then expanding operations to other Asian countries.
- VoD:** video-on-demand, a cable television system which allows subscribers to select programming to watch at their own time on a pay-per-view basis; also known as interactive cable.
- WTO:** World Trade Organisation, successor organisation to the GATT, following the successful completion of its final Uruguay Round.
- ZeeTV:** transnational satellite broadcaster which pioneered broadcasts in Hindi targeted at India, and since then diversified into other South Asian dialects/languages and diasporic markets.

Appendix E

SATELLITE BROADCAST FOOTPRINTS

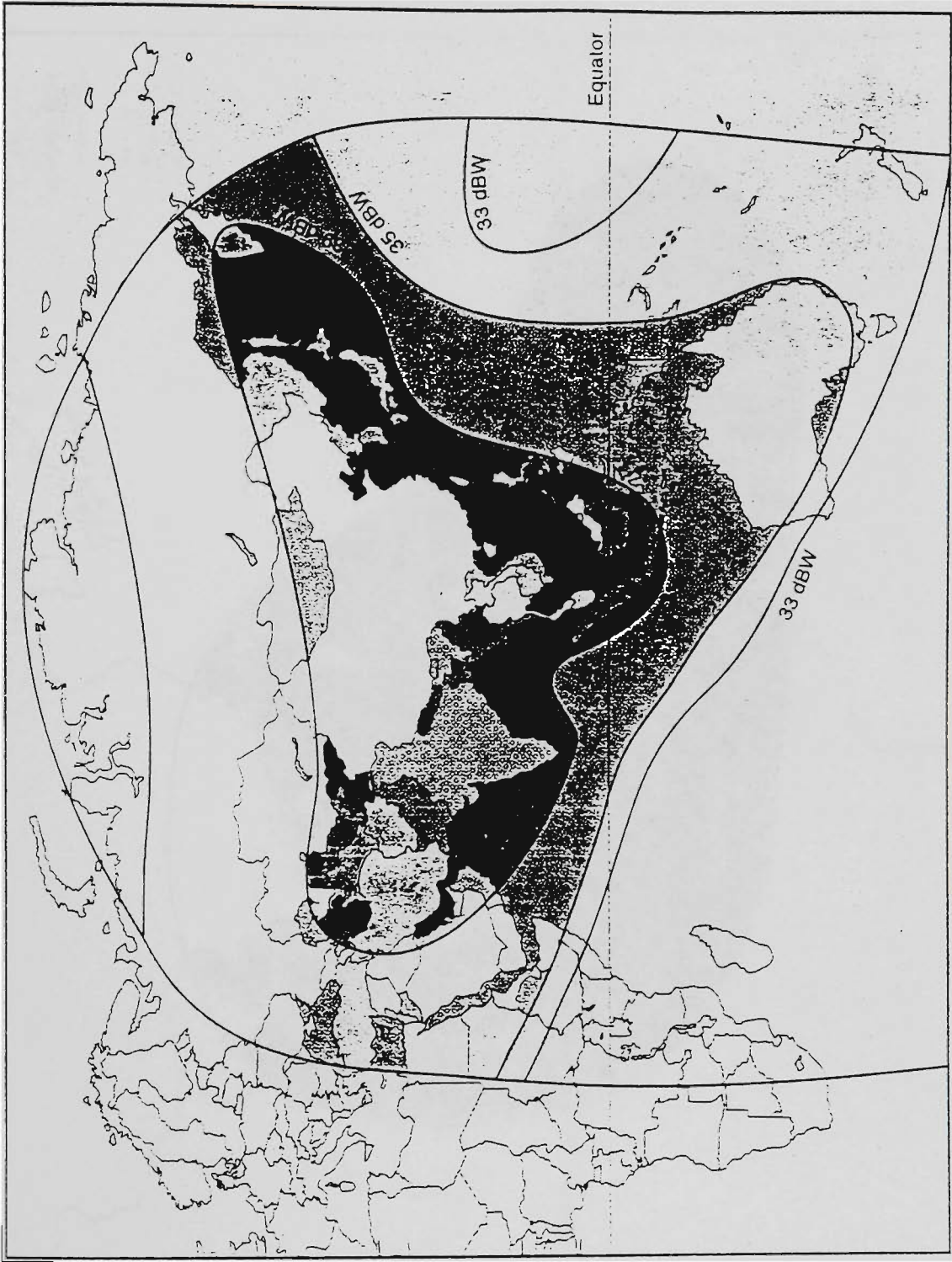
E.1 ASIASAT1:  
StarTV, Pakistan TV, Myanmar TV, etc.



Source: StarTV [1997] *Media Pack*

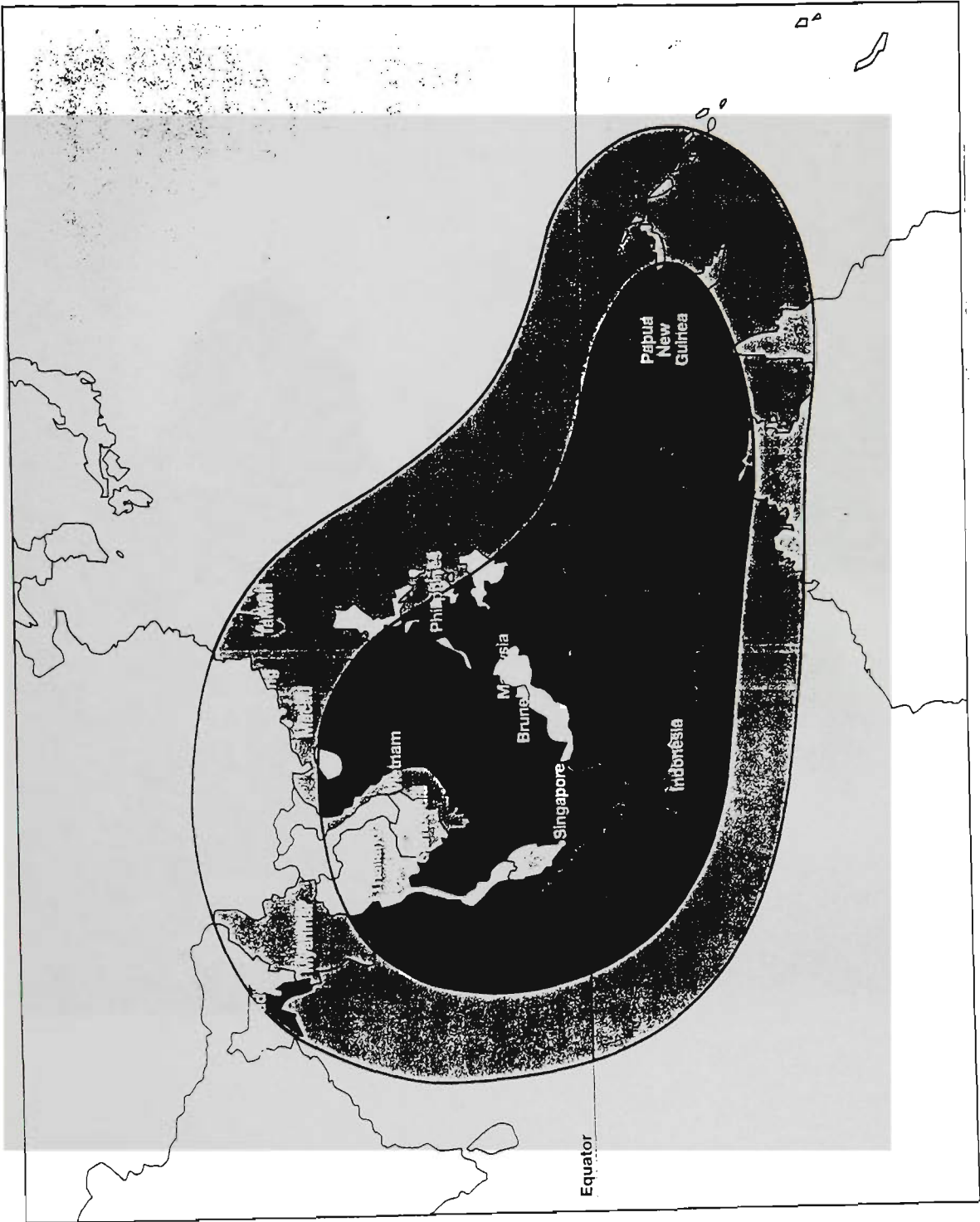
E.2 **ASIASAT2:**

StarTV, CCTV4, Deutsche Welle, CNBC, NBC, etc



Source: StarTV [1997] *Media Pack*

E.3 **PALAPA B2P:**  
StarTV, CNNi, ESPN, HBO, ABN, ATVI, CFI, etc.



Source: StarTV [1997] *Media Pack*.

E.4 **APSTAR1:**

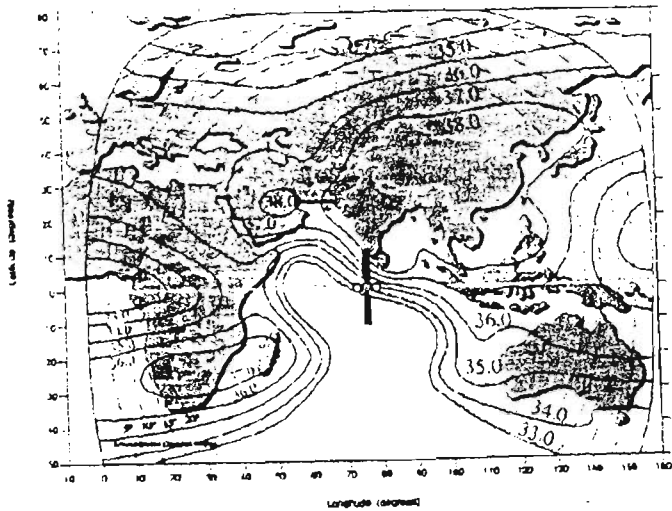
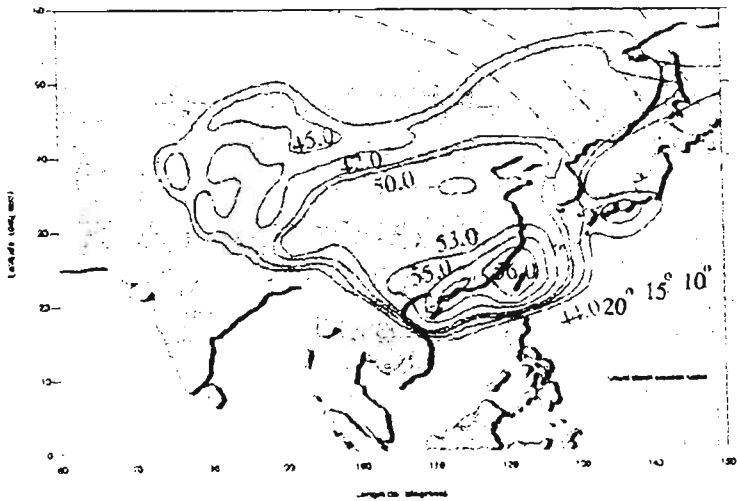
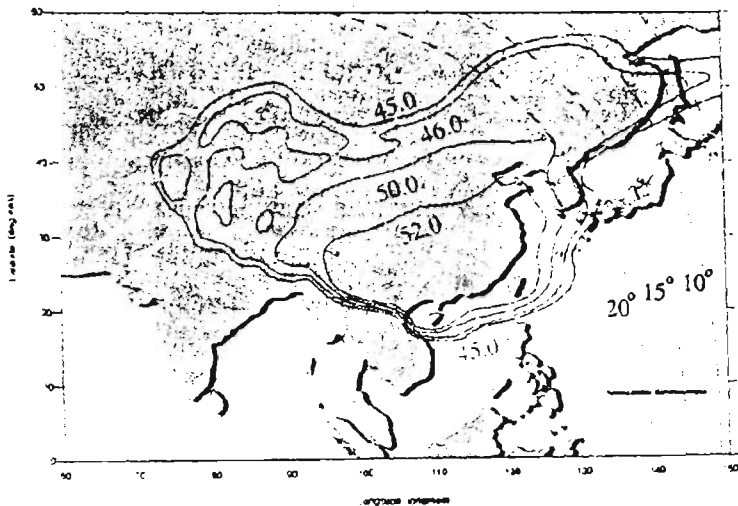
Time-Warner, ESPN, MTV, CNNi, HBO, Discovery, CETV, etc.



Source: Television Asia [1996f]

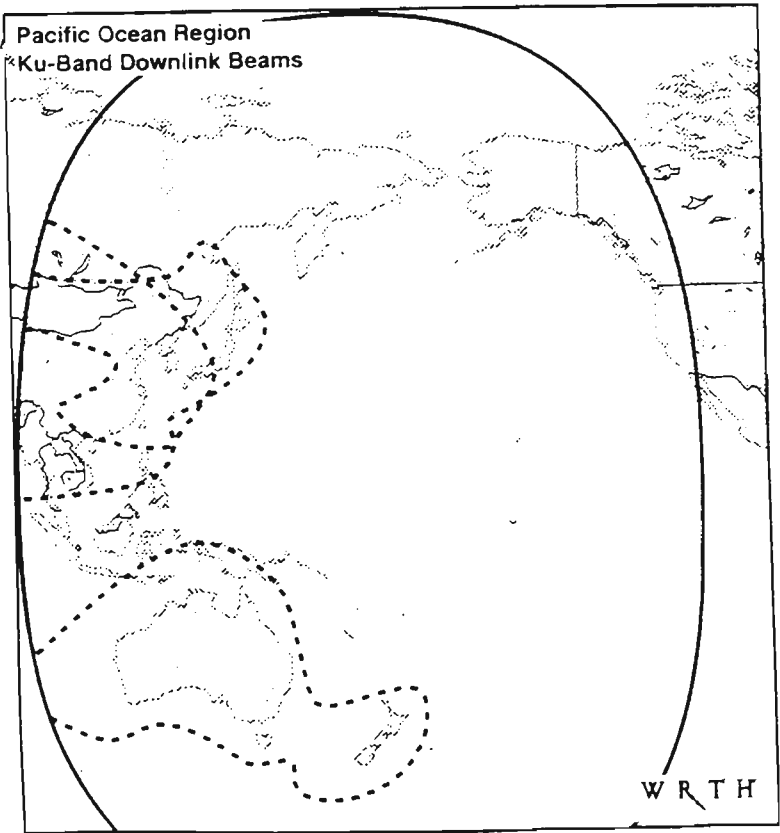
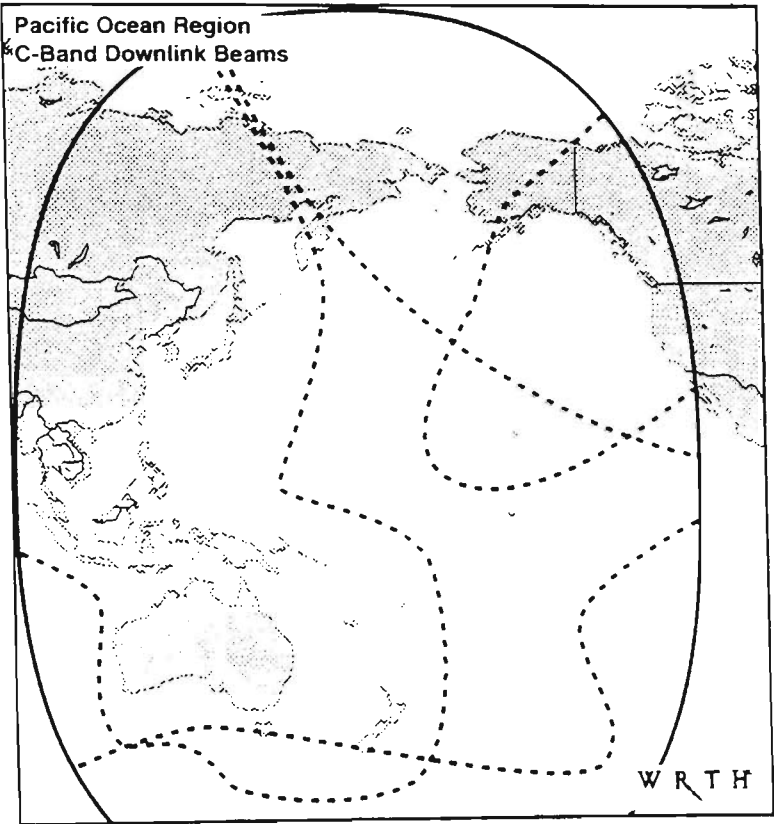


E.5 APSTAR2R:



Source: Television Asia [1996f]

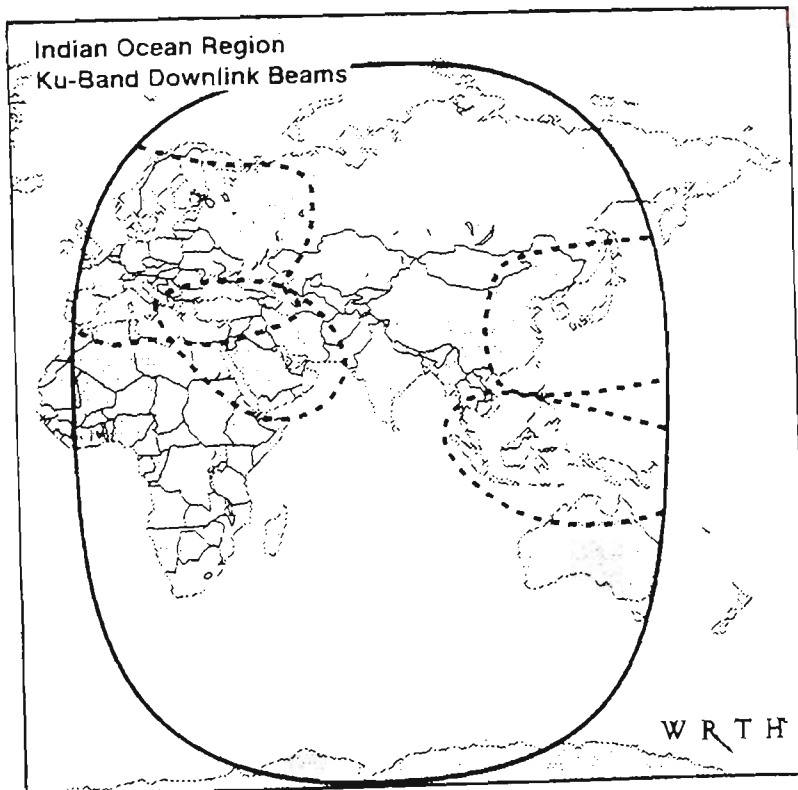
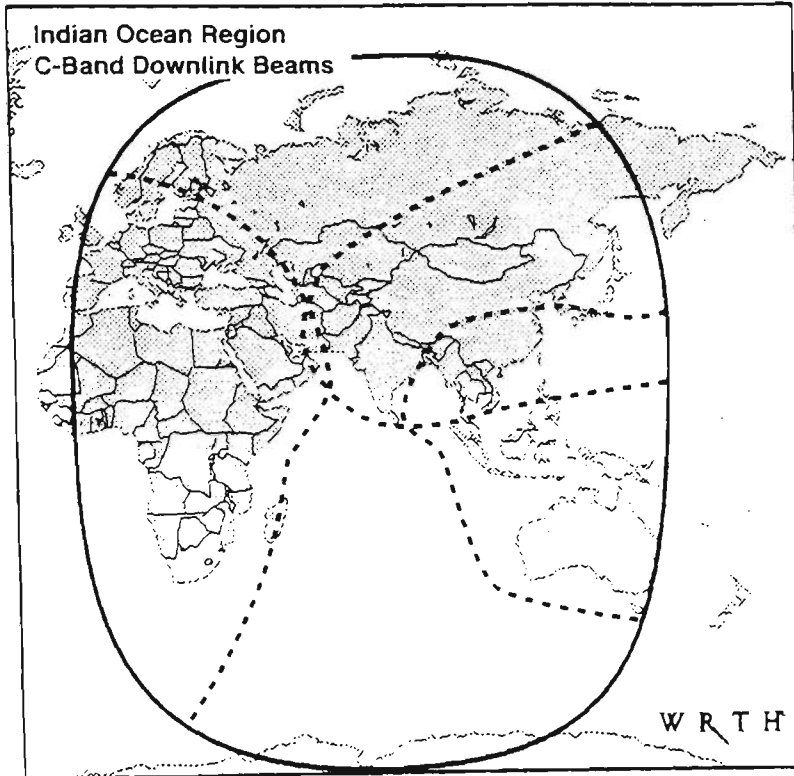
E.6 **PANAMSAT-2:**  
ABN, Disney, Discovery, ESPN, NBC, TCSI, TNT, MTV Asia



Source: Kuperus [1994] *WRTH Satellite Broadcasting Guide*

E.7 **PANAMSAT-4:**

BBC, CNNi, ESPN, Disney, TNT, MTV Asia, etc.



Source: Kuperus[1994] *WRTH Satellite Broadcasting Guide*