Introduction

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The year 2017 marked the twentieth anniversary of Hong Kong's return to Chinese sovereignty. Round-number anniversaries like this one are good moments for scholars to look back and analyse what has changed and what has stayed the same since the important event. For researchers at Hong Kong Baptist University's School of Communication, the two-decade mark provides a good opportunity to examine the state of the territory's media today. "One country, two systems"—the coexistence of China's communism and Hong Kong's free-market capitalism—has been the governing principle for Hong Kong, and this pairing of opposites has resulted in fluctuating levels of cooperation and tension. This applies to the media and communication sectors as much as any other areas of life in Hong Kong.

The main task of this edited volume is a difficult one: to capture the current state of Hong Kong's media and communications development, media education, advertising and public relations (PR) research, and evaluate their application. The problem is not so much in the themes themselves but in the major changes witnessed by Hong Kong society, in general. As the contributors to this volume aptly highlight, what is happening in the media has its roots in the deep and diverse changes that are taking place in society, politics, ideology, economics and technology. The difficulty in discussing the transformations of media and communication professions themselves—such as journalism, PR, advertising and so on—is compounded by the complexity of its causes.

Providing an in-depth analysis for the main communication and media sectors in Hong Kong, this volume identifies the difficulties and opportunities of media professionals to engage with their audiences. At the same time, some of the authors highlight how the audience—through their rituals of

consumption—have an evolving role in deciding the fate of media and communication industries.

Researchers from the Anglo-American realm point to technology and economics as the main basis for the media transformation of recent years. The process in the Western sphere involves the decrease in revenue for traditional media industries due to the shift from the one-to-many model of communication to a many-to-many model in which the public can circumvent established media outlets. In Hong Kong, which has, as the authors of this volume point out, one of the highest penetration rates of technological convergence and the world's freest economy, the processes of change have been further complicated by the social tumult that erupted in in the autumn of 2014, when the students took to the streets in a mass protest known as Occupy Central and dubbed by the international media the Umbrella Revolution. These political developments have added extra layers to the task of analysing media changes in the territory, making it particularly difficult to take a snapshot of the current situation. With digital technology bringing about extreme changes in the ways media is produced, distributed and consumed, journalists and other communication professionals are striving hard to stay up-to-date, but sometimes this is not enough to keep their media profitable or even to keep their jobs.

The State of Hong Kong's Media Twenty Years On

In recent months, one of the most respected media institutions in Hong Kong—Cable News—has been struggling with what are, on the surface at least, financial problems. The parent company announced it will not be able to finance Cable's operations in the future because television is becoming less and less profitable. We have yet to see whether the business can be saved in the long run, but there are voices suggesting the issue is not just a question of audience and profitability. The reporters of this television station are known not to hide their criticism of the Beijing government when necessary, and some think the parent company wishes to sell in order to protect its other business interests from possible political backlash. This is a prime example of how media development in Hong Kong operates at levels and in contexts that are much more nuanced than in the Anglo-American context.

The question of how China would deal with Hong Kong after 1997 dominated the public sphere both before and immediately after the handover.

Fears of fast changes in cultural policies proved to be unfounded, and, twenty years later, Hong Kong looks robust in its ability to maintain a high level of freedom of speech. The media today remains outspoken in its criticism of the local administration. Nevertheless, the autonomy of Hong Kong remains a hot topic of discussion, with a growing presence of political groups calling for localism. One could argue this is the direct result of the failure of political and electoral reform packages offered by Beijing. As highlighted by the Occupy Central social movement, those who were very young in 1997 are today at the forefront of political groups calling for Hong Kong's independence. The older generation, expecting worse, were just relieved that freedom of speech was maintained after 1997. The new generation, very young at the time or not even born then, have experienced the territory's high educational standards and been able to learn about the liberties and rights that are present in functional democracies around the world but missing in Hong Kong. Thus, the transformations Hong Kong has gone through in the past twenty years and the challenges it faces today are related to the coming of age of this younger generation. As we will see in the chapters of this volume, they have different media consumption habits, both in terms of the news they consume and the technological devices they use to receive, create and distribute content. Just as important for media producers and advertisers, the young have very different media preferences from their parents.

Introducing the Chapters

This book provides case studies and analyses in several fields of Hong Kong's communication sector: traditional media, new media, PR and advertising, media education, media credibility, health communication and street movements. The articles are written from a vast array of theoretical standpoints and rely on both quantitative and qualitative methodologies. The contributors are all specialists in their fields of research and have strong voices in the local research realm. Their contributions are clustered into themes.

Part I starts with a chapter authored by Bess Wang and Tinchi Wong who provide an overview of the distribution and consumption of newspapers in Hong Kong. Their analysis shows that young people do not read newspapers in high numbers. There is also a gap in which newspapers different generations read, with young people tending to read *Apple Daily* and older people *Oriental Daily News*. Thus, we can argue that the polarisation of

politics is also visible in the choice of newspaper, as *Apple Daily* is perceived as a pro-democracy newspaper, though with low credibility, and *Oriental Daily News*, once pro-Kuomintang in stance in its early years, is perceived as being pro-establishment since the handover.

C. K. Lau and Siu Wai Cheung present an overview of the telecommunications, magazines and English-language newspapers in Hong Kong. The telecommunications market in Hong Kong remains a liberal one, with a free flow of information. The government imposes no control on the number of service providers and no restrictions on foreign investment in media outlets. The high state of deregulation sped up the penetration of mobile services, with, at the end of 2016, 16.72 million subscribers in a population of just over 7 million. The news magazine industry in Hong Kong is also facing financial turmoil. All three types of magazines—local, political gossip and international—face shrinking revenues. The owners of these magazines are concerned and anxious as they face unprecedented challenges in a city that moves faster and faster, allowing less and less time for the reading of long-form stories. There is also media saturation in this segment of the media business, and it is difficult to imagine that many of the magazines currently available on the market will survive in the long term. The English-press market was once dominated by the *South China Morning Post* (*SCMP*), which back in the day built up a domestic and international reputation as a trustworthy source of news on China. Today, despite a decline in its reputation due to its perceived support of the pro-Beijing camp, it continues to be an important source of information for those who live in Hong Kong but are not literate in Chinese. Recently, the online version of the *SCMP* removed its paywall, so anyone can access its news at no cost. Other competitors are the free newspaper *The Standard* and also Hong Kong Free Press (HKFP), an online-only media outlet which finances itself mostly from the donations of its readers. It is interesting to notice that the main competitors for the English-language market in Hong Kong are a newspaper with a long history and a new media website with an online-only business model. It is worth paying attention to see which one will dominate the market in the years to come.

Florin C. Serban provides a first-hand examination of the difficulties faced by television journalists who must deal with technological convergence and public participation. These two processes are affecting the journalistic work, but perhaps surprisingly, they are not as disruptive in Hong Kong as they

are elsewhere in the world. This is because Hong Kong journalists are early adopters of technological gadgets and, especially television journalists, have extensive experience with using technology in their daily work. Instead of making the journalistic practices more complicated, technological convergence may help journalists to better connect with their audiences.

In "The State of the Radio Sector in Hong Kong", Jenny Lam thoroughly examines the radio market in Hong Kong. Radio Television Hong Kong is highlighted as the most trusted of the electronic media, thus fulfilling its mission as a public service broadcaster. However, less than 5% of the population listen to radio news regularly, a problem which radio companies will have to tackle in the near future if they want to keep themselves in the market. It is interesting to note that the audience is clearly segmented between those older than fifty, who listen to programmes on analogue radio sets, and younger listeners, who tend to use their smartphones to tune in. Radio stations in Hong Kong also face the challenge of having to digitise their operations—an extremely high cost given the low revenues—at a time when their audience is declining. It is likely that radio operators will have to cater to younger audiences if they want to survive in the long run.

The second part of the book examines new media in Hong Kong. Compared to Part I, which deals mainly with traditional media, the outlook for new media is not as bleak. As Alice Lee points out, internet media in Hong Kong are positioning themselves as strong rivals to old mainstream media, and do a much better job in reaching a younger audience. There is a connection between the arrival of many alternative new media sites and the social movements Hong Kong is getting used to. One of them, InMedia Hong Kong, was established in October 2004 by a group of social activists and public intellectuals. These new outlets are perceived by their public (especially the young ones) as addressing problems that are closer to their interests, unlike the traditional media, which mostly discuss social themes of concern to the establishment. The main challenges faced by these new media outlets are: to be recognised as professional entities in the field and financing themselves without corporate support, like that offered to traditional media sources.

The chapter by Roselyn Du and Alex Tang examines the role of social media in Hong Kong's changing ecology of news production and consumption. According to their research, Facebook is the first place of contact for reading breaking news in Hong Kong. This should not be surprising, as the average

daily time spent on social media by locals is 1.5 hours, a situation that has come about largely because of the fast penetration of digital technologies in the territory. In terms of news production, they examine the use of digital and social media by mainstream journalists. Television Broadcasts Limited (TVB) distinguishes itself by having a much stronger social media presence than any of its competitors. In fact, many of the social media accounts of mainstream news outlets have little engagement with users. One reason for this is the lack of dedicated staff to push content out on social media platforms. The article also points to some very interesting online behaviour of traditional media: in an attempt to reach a younger audience, some radio stations set up Instagram accounts, which are for posting pictures. This is very interesting because the audio nature of the medium is displaced in the online realm to cater to the visual needs of the younger audience.

Ke Zhang and Yunya Song discuss the public's use of social media, noting that WhatsApp and Facebook are the two most used platforms in Hong Kong. The authors point out that social media platforms popular in Mainland China, such as WeChat and Weibo, have yet to gain traction in the Hong Kong market. In turn, this could explain why content originating in China on these social platforms is not popular in Hong Kong.

Part III deals with the credibility of media in Hong Kong. In his contribution, Steve Guo takes an off-the-beaten-track perspective as he examines what media credibility means for the audience, rather than what it means for academics and journalists themselves. Based on focus groups and surveys, his research shows that readers' perceptions of credibility are very tied to the perceived ideology of the newspaper. Thus, a rise in a newspaper's readership can be explained not by a paper's credibility, but by its stance—pro-democracy or pro-Beijing. It is also very interesting to note that media credibility is a marginal issue in people's choice of what to read. For example, although *Ming Pao* is perceived to be one of the most credible media outlets in Hong Kong, it does not have the same number of readers as other newspapers—especially *Apple Daily*—that score low in credibility. Thus, although it might seem surprising, especially given the previous research on this topic, it seems that, in Hong Kong, media credibility is not the main gratifier for audiences. Everyday people do not take these processes into account in their daily decisions of what to read, what radio station to listen to, or what television channels to watch.

Wai Han Lo and Benjamin Cheng investigate how animation, as a presentation feature, influences perceived credibility, its relationship with the concept of "presence" and with media dependency and use. They first illustrate the recent development of melodramatic animated news and how media use and dependency may interact with animation to influence perceived news credibility. Then, they discuss why the concept of presence can be the mediator of the relationship between animation and perceived news credibility. Finally, a discussion of two research findings and their implications for future research is provided.

Part IV is concerned with the development of PR and advertising in Hong Kong. Relying on interviews with local PR leaders, the authors—Angela Mak, Regina Chen, Lennon Tsang and Hyun Jee Oh—describe the main challenges PR professionals are facing in detail. Remarkable in this article is the information given the by PR "gurus", providing both a list of challenges and several proposals for guidelines that could fix the current problems. The PR industry is under severe stress because the business environment, the employment environment, the new media environment and the relationships with stakeholders are all changing. The Hong Kong PR industry is changing from being a stepping stone for companies that wish to enter Mainland China for business to one that works primarily for the local market. Technology is also a game changer for PR as the public become more engaged with gadgets and spend less time reading and watching traditional media. To address these issues, PR professionals should learn how to talk with the public, and not just limit themselves to talking to it. Interactivity might be a buzzword, but it is identified as a crucial feature that will have to be taken into account by future PR professionals if they want their organisation to succeed. This can in fact be easily done with the help of digital and networked gadgets that Hong Kong people enjoy using so much. Thus, PR companies will have to build on their localised marketing strategies, recruit local talent and find clients with a proper understanding of the role of a PR company.

Advertising in Hong Kong is also discussed in this part. Kineta Hung points out that, now more than ever, advertisers must reconsider their practices as they must share the stage with the audience. For revenue reasons, the industry must now follow the audience, with the desirable demographics now online more than ever. Given the decline of print, advertisers are spending more and more time and money on social media, and the figures show that interactive

and mobile ads gathered more than three times the amount of revenue compared with that spent on radio advertising, for example. Although the numbers for TV advertising (31% in 2015) and newspaper advertising (29% in 2015) are still high, it is expected that more and more will be spent in coming years on interactive and mobile ads. A quarter of the jobs currently available in advertising are for social media. Thus, the industry is in growing need of professionals who have the skills and knowledge to carry out advertising in the online realm. Also, given the high number of tourists in Hong Kong, those entering the advertising business will need to have insights not only into local residents but also inbound visitors.

In their contributions, Terri Chan and Vivienne Leung argue that the ad industry must find better ways to connect and engage with a digital-native audience. The top spender in the advertising industry is the Hong Kong government, which invested close to HK$2 billion in public campaigns. Financial companies, such as banks and investment funds, are close behind, ahead of pharmaceutical and health companies. Local advertising agencies like to distinguish themselves based on the awards they receive, and for this they need to be more resourceful. Based on qualitative interviews with several creative professionals in the advertising sector, the article finds that creativity is crucial for advertising. However, creativity should not be carried out for the sake of itself, but must be anchored in practicality. The interviewees point out that advertising is more creative in the Hong Kong market than in Mainland China, with strategic planning being a key driver to promotional effectiveness. It is important to strike a balance between creativity and practicality, especially in the Chinese culture with its high value on harmony and personal prestige.

Kara Chan shifts the focus as she looks at attitudes towards specific advertisements in Hong Kong, examining consumers' reactions to them. Generally, consumers have a positive outlook towards television advertising, with less than 10% considering it to be bad. Furthermore, younger respondents are neutral towards advertising in general, while older generations show some liking of advertising. It is worth pointing out that the level of income is an important variable as well. The higher the income of those interviewed, the higher the possibility that they would consider advertising a good thing.

Maggie Fung assesses public complaints made to the advertising standards and regulatory body—the Communication Authority. Though Hong Kong has a liberal approach to advertising, any individual can file a complaint.

In 2014 and 2015, the regulatory body received sixteen advertising-related complaints, with an overwhelming number of grievances related to the embedding of advertising material within TV and radio programmes and the extensive display of sponsored material. However, with the expansion of social networking platforms, more complaints are being voiced in the online realm, thus not ending up with the regulatory body. In Hong Kong, there is no legislation or regulation for online media, and this could encourage some advertisers to explore advertising practices as they wish.

The final part of this volume deals with communication and society in Hong Kong. The themes discussed are media and populations, the state of health research and the pro-democratic movements. Dominic Yeo discusses media-related issues and problems that are faced by some minority populations (i.e., sexual minorities, ethnic minorities, youth and the elderly) in Hong Kong. He examines their relationships with both traditional and new media over the last decade. The public still has limited and biased exposure to LGBT issues given the lack of coverage in the local media, while the rise of social media brings more opportunities for LGBT individuals to stay connected and raise public awareness. Ethnic minorities in the city also experience negative media coverage, and the media often shape people's understanding of the ethnic groups they report on. More than 80% of the population of Hong Kong has access to the internet, with the local mobile penetration rate exceeded 230%. Yeo's study also examines two age groups—the young and the elderly, by revealing some of their experiences when navigating the internet.

The medical system in Hong Kong relies on a mix of Chinese and Western values. Timothy Fung, Terri Chan, Yu-Leung Ng, Sice Wu, and Jun Lam systematically review health communication literature in the territory to see which journals publish Hong Kong-based research; what the prevailing theoretical and methodological approaches are; and what countries, media and diseases scholars focus on. The results show that almost 150 journal articles were published in the past twenty-five years, with 40% focused on the Hong Kong region, and they used both quantitative and qualitative approaches. Survey and content analysis were the preferred research methods for local scholars. This study highlights the low presence of theory building and comparative research for local scholars as well as the significance of health communication in the unique cultural context present in Hong Kong.

The final article of this volume is authored by Ringo Ma and draws a comparison between the street movements that took place in Taiwan and Hong Kong in 2014. Ma argues that although the two events have plenty of similarities at first glance, they were quite different in nature. This is because the political and cultural contexts for both territories were quite different: while Taiwan had already experienced two significant changes in power and in 2014 was a full democracy, Hong Kong did not have a fully democratic system. The Sunflower Movement in Taiwan aimed to trigger an awakening of its citizens, a reaction to the shortcomings of the representative system in their democracy. On the other hand, Hong Kong's Occupy Central can only be considered a democratic movement within a dictatorship. Thus, both social movements occurred in different stages of democratic development, with the Taiwan movement being, of course, more advanced. Despite the numerous similarities in the objectives of the two movements, Ma argues that Occupy Central should not be perceived as a replica of the Sunflower Movement, as it was very different in nature. Instead, the two movements taking place in the same year should be seen more as a coincidence and as special cases for research into multi-society movements.

It is impossible to envision how Hong Kong media will develop over the next twenty years. Nevertheless, the safest bet is to assume that media professionals in Hong Kong should expect both exciting and difficult times in the near future. A continuous decline in audience will likely push media professionals to envision new ways of connecting with their public. Technological developments will continue to influence the media and communications landscape. This will have consequences in the way media professionals are trained, the performance of their daily duties, and the role they play in society as communication leaders. Just as well, as there is no indication that the influence of Mainland China will decline in these sectors. It is up to media and communication professionals in the territory to find the best ways to remain relevant in an ever-growing competitive market. It is our hope that this edited volume will stand the test of time and provide a reference point in a time when the media and communication sectors were at a crossroad in their developments.