101 年委託研究報告

電視事業產業現況調查分析與傳播資料庫內容規劃委託研究案

（中英文精簡版）

計畫委託機關：國家通訊傳播委員會

中華民國 101 年 11 月

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中華民國 101 年 11 月

第一章 研究背景與目的

電視產業生態近年來因市場競爭、政策環境等因素以及新興媒體與數位匯流等趨勢影響，產生巨大變化。為瞭解電視產業現況、發展趨勢與需求，並進行電視事業市場結構與經營績效之資料蒐集及分析，除據以提出產業發展趨勢與政策建議外，另對傳播統計調查資料提出既有資料項目修正、新增統計及調查項目與產出報表格式等建議，以強化國家通訊傳播委員會傳播資料庫內容，另做為產業政策研擬之參據。

本案主要研究目的為延續並深化去年調查結果與聚焦產業趨勢議題，依據電視產業鏈，進而進行基礎研究調查，相關目的說明如下。

(一) 進行年度電視產業結構與營運現況調查，以掌握整體電視產業市場競爭態勢與產業結構，以作為相關政策擬定之參據。

(二) 深化及延續上年度調查發現，透過電視產業基礎資料調查及連續資料掌握年度趨勢變化與比較，監測電視產業發展軌跡與關鍵業者營運現況，以利後續相關趨勢研究提出前瞻政策建議。

(三) 聚焦家族頻道、 MSO等占電視產業產值較高之產業，分析其營運現況、市場競爭及對整體電視產業之影響與問題分析。

(四) 檢視調查項目與提出新增統計項目，並整合會內相關資料庫提出會內電視產業資料庫建置規劃及產出報表與重要觀察指標計算依據之具體建議，以作為長期觀察產業趨勢之平台。

(五) 依據年度調查結果，據以估算我國廣播電視產業總體經濟產值，並對電視產業產值與商機，提出具體政策建議。

(六) 綜合電視產業調查統計分析與整體電視產業經濟產值，據以提出我國產業現況分析、趨勢預測、競爭態勢（SWOT），進而研擬相關政策及具體建議。

第二章電視產業調查結果與分析

100 年度電視事業共 168 家業者，調查結果分析如下所示：

一、基本資料

(一) 平均登記資本額部分，無線電視業者37.4億元、有線電視業者8.6億元、衛星電視業者4.5億元、直播衛星業者1.4億元。

(二) 總資產部分，無線電視業者292.4億元、有線電視業者1,687.4億元、衛星電視業者401.5億元、直播衛星業者10.4億元。

(三) 總負債部分，無線電視業者80.5億元、有線電視業者965.8億元、衛星電視業者401.5億元、直播衛星業者4.1億元。

(四) 員工人數部分，無線電視事業3,011人、有線電視事業5,271人、衛星電視事業11,335人、直播衛星事業124人、IPTV事業8,183人，整體電視產業共27,924人。

二、營支狀況

(一) 營收狀況部分，無線電視事業91.9億元、有線電視事業381.4億元、衛星電視事業533.5億元、直播衛星事業1.6億元、IPTV事業18.4億元，整體電視產業共1,026.8億元。

(二) 營收結構部分，無線電視事業以「廣告收入」占總營收比例55.3%為最高；有線電視事業以「訂戶收視業務收入」占總營收比例85.0%為最高；衛星電視事業則以「廣告收入」占總營收比例之30.4%為最高；直播衛星事業則以「訂戶收視業務收入」占總營收比例51.5%為最高；IPTV業者以「訂戶收視業務收入」占總營收比例59.3%為最高。

(三) 支出狀況部分，無線電視事業95.7億元、有線電視事業316.7億元、衛星電視事業311.0億元、直播衛星事業3.4億元、IPTV事業48.6億元，整體電視產業共775.4億元。

(四) 支出結構部分，無線電視事業以「節目支出」占總支出34.4%為最高；有線電視事業以「節目支出」占總支出47.1%為最高；衛星電視以「節目支出」占總支出28.9%為最高；直播衛星以「其他支出」占總支出36.7%為最高； IPTV以「硬體支出」所占總支出39.8%為最高。

三、製播狀況

(一) 製作方式部分，無線電視播出自製節目比例為73.7%、衛星電視播出自製節目比例為55.3%。

(二) 節目製作成本部份，無線電視平均每頻道節目自製成本為8億3,590萬元，占製作成本之92.4%、播出每小時自製節目成本為12.9萬元；平均每頻道節目非自製成本為6,882萬元，占製作成本之7.6%、播出每小時非自製節目成本為3.0萬元。衛星電視平均每頻道節目自製成本為6,646萬元，占製作成本之67.4%、播出每小時節目自製成本為1.4萬元；平均每頻道節目非自製成本為3,209萬元，占製作成本之32.6%、播出每小時節目非自製成本為0.8萬元。

(三) 影片產出格式部分，無線電視以「SD」產出時數較多，占整體比例之94.9%；而「HD」產出時數則占整體比例之5.1%。衛星電視以「SD」產出時數較多，占整體比例之66.8%；「類比」產出時數為14億791小時，占整體比例之16.4%；而「HD」產出時數則為14億4,225小時，占整體比例之16.8%。

(四) 播出情形部分，無線電視新播時數占總播出時數之45.5%、首播占37.2%、重播占17.3%。衛星電視新播時數占總播出時數之44.7%、首占20.9%、重播占34.4%。

(五) 節目播出類型部分，首播時數以「新聞」為多，占總數之38.2%，其次為「戲劇」，占總數之26.3%；重播時數以「戲劇」為多，占總數之30.9%，其次為「綜合」，占總數之30.0%。衛星電視新播時數以「財經」為多，占總數之19.4%，其次為「新聞」，占總數之18.4%；首播時數以「電影」為多，占總數之55.6%，其次為「戲劇」，占總數之20.0%；重播時數以「戲劇」為多，占總數之22.9%，其次為「綜藝」，占總數之22.2%。

(六) 節目語言類型，在無線電視的播出節目語言類型部分，以「國語」為主、占總播出時數之90.9%；其次為「台語」、占總播出時數之5.3%；再次之為「英語」、占總播出時數之2.3%。衛星電視的播出節目語言類型部分，以「國語」為主、占總播出時數之58.6%；其次為「英語」、占總播出時數之20.8%，再次之為「日語」、占總播出時數之6.8%。

四、購買與銷售狀況

(一) 購買時數與金額部份，無線電視業者每頻道購買節目平均時數為2,304小時；而購買高畫質節目時數則為247小時。「購買節目平均總金額」為6,882萬元、購買每小時節目平均金額為3.0萬元；而「購買高畫質節目金額」則為4,659萬元、購買每小時高畫質節目平均金額為18.9萬元。衛星電視業者每頻道購買平均節目時數為3,916小時；而購買高畫質平均節目時數則為298小時。另於購買金額部份，購買節目平均總金額為3,209萬元、購買每小時節目平均金額為0.8萬元；而購買高畫質節目平均金額則為1,841萬元、購買每小時高畫質節目平均金額為6.2萬元。

(二) 購買來源部分（占購買時數比例），無線電視業者主要來源為亞洲地區，共約占購買時數之7成，國外部分以「日本」為最大來源國，占總數之28.2%。衛星電視業者主要來源亦為亞洲地區，共約占購買時數之6成，國外部分亦以「日本」為最大來源國，占總數之24.1%。

(三) 銷售地區部分，無線電視業者以「星馬」為最多，占總銷售金額之34.0%。衛星電視業者則以「本國」為最高，占總銷售金額之49.6%。

第三章 國內外傳播指標比較分析

一、 與國外指標共同性

(一) 電視產業收入

臺灣既有的指標中，「電視產業營收」與英國的「電視產業營收」、中國的「全國廣播電視收入情況」、香港的「上市電視公司收入」、「上市電視公司營利」、「電視廣播有限公司地區營業額」等相似，可見營收係為產業觀察基礎必要指標。

(二) 廣告收入

臺灣的「無線電視廣告金額」、「有線電視廣告金額」與英國的「廣告收入占總營收比例」相似，故廣告收入亦為檢視電視產業需求之參考性的指標。新加坡的「電視節目受廣告商資助比例」也同樣看重廣告商的影響，但是此指標衡量的是非廣告時段所受到之廣告商資助。

(三) 電視產業產值

韓國與臺灣同樣重視量測產值此項目，包括臺灣的「電視產業產值」、「電視產業出口值」，以及韓國的「衛星通訊服務產值」、「有線通訊設備產值」、「通訊設備國內生產值」、「資訊設備國內生產值」、「廣電設備國內生產值」。

(四) 營利事業家數及電視頻道總數

臺灣所量測的「營利事業家數」、「衛星頻道數」，近似於國外所量測的有線電視頻道數。例如：英國的「電視頻道總數」、韓國的「有線電視頻道數」、中國的「全國廣播電視覆蓋情況」、「全國廣播電視有線電視發展情況」、「全國廣播電視播出機構情況」、「全國廣播電視傳輸覆蓋情況」等。

(五) 有線電視訂戶數(數位電視、IPTV)

有線電視訂戶數的統計值可見於多國通訊傳播主管機關。包括臺灣「有線系統訂戶比例」、「有線系統數位訂戶比例」、「有線電視訂戶數」，以及英國的「數位電視訂戶比例」，日本的「有線電視裝設家戶數」，韓國的「有線系統訂戶數」，中國的「全國廣播電視有線電視發展情況」、「全國有線廣播電視用戶情況」，新加坡的「有線電視訂戶數」、「數位電視訂

戶數」、「IPTV 訂戶數」，而臺灣與他國相異處是將「有線電視收費平均值」加入測量範圍。

(六)從業人數

國內「電視產業從業人數」指標與他國有符合之處，例如日本的「通信業從業人數」。不過，日本亦將「通信機械業者家數」之硬體供應業者加入指標。

二、 與國外指標相異性

(一)美國

美國則有「平日收視時數」、「週末假日收視時數」，並依照年齡及性別再分出不同的收視時數統計值。

(二)英國

英國有「前十大收視節目」、「前百大最常錄下收視節目」、「前五大頻道市場占有率」。此外，英國也有統計「每人每日收視時數」。

(三)日本

日本有「持有聯網電視家戶百分比」、「有線電視自製節目數」、「有線電視播放節目數」。

(四)中國

中國有「全國電視節目製作、播出情況」、「全國廣播電視節目交易情況」、「全國廣播電視節目進出口情況」、「全國廣播電視節目綜合人口覆蓋情況」、「全國廣播電視節目綜合人口覆蓋情況」、「全國公共電視節目播出情況」、「全國公共電視節目製作情況」、「全國廣播電視從業人員情況」、「全國廣播電視節目交易情況」。

(五)新加坡

新加坡有「公共電視節目達成數」、「公共電視平均收視率」、「公共電視節目觀眾滿意度」、「各類型電視節目比例」。

第四章 我國傳播事業員工性別分析

一、 本報告以 167 家傳播業者為研究對象，統計資料以 101 年 6 月底資料為準，男性 10,629 人，占總員工人數的 53.8%；女性 9,112 人，占總員工人數的 46.2%。

二、 學歷部分，整體電視產業從業人員以「大專、學院及大學」為主，約占總數之 6 成；「高中（職）及以下」，約占總數之 3 成；「研究所及以上」僅占不到總數之 1 成。

三、 職業部分，「專業人員」、「技術員及助理專業人員」之男性比例明顯高於女性，「事務工作人員」、「服務工作及售貨員」則是女性比例略高於男性。

四、 年齡部分，整體電視產業從業人員以「25～44 歲」為主，約占總數之 7 成，其中又以「35～ 44 歲」為最多。35 歲以後之男性員工比例皆高於女性，其中又以「35～44 歲」較為明顯。

五、 平均月薪部分，以「無線電視事業」最高、其次為「衛星電視事業」、「有線電視事業」再次之、「直播衛星事業」則相對最低。整體電視產業中不論何教育程度之男性員工平均薪資大部分皆高於女性，僅於「直播衛星事業的高中(職)及以下」與「衛星電視事業的大專、學院及大學」兩學歷之女性平均月薪高於男性。

六、 傳播產業員工在 100 年度有請（陪）產假者，男性占總員工數的 2.2%，女性占總員工數的 2.8%；在 100 年度有請育嬰假者，男性占總員工數的 0.2%，女性占總員工人數的 1.4%。

七、 有 35.3%的企業在 100 年中有辦理性別平權課程，一年中的平均總時數為 6.1 小時。

八、 在 100 年中未辦理性別平權課程的企業中，也有 81.5%的企業有意願於未來辦理相關課程。不過依舊有 18.5%的企業認為無需辦理，原因主要可歸納成「覺得社會的媒體宣傳已經性別平權了不需辦理」、「覺得公司內部已經性別平權了不需辦理」以及「認為性別平權與產業績效無關」等三種。

第五章 電視產業發展趨勢與競爭態勢

此章節共分有線電視之 MSO 業者與衛星電視家族頻道兩部分討論，分述如下：

一、有線電視 MSO

(一) 就營收狀況而言，有46.8%業者營收為5億～未滿10億元、43.5%之業者營收未滿5億元、9.7%之業者營收為10億元以上。就支出狀況而言，有48.4%之業者支出未滿5億元、有46.8%之業者支出為5億～未滿10億元、4.8%之業者支出為10億元以上。整體而論，有線電視產業以員工規模在50～99人、營收在5億～未滿10億元之業者競爭密度較高。

(二) 平均來說，各MSO業者以「訂戶收視業務收入」為主要收入來源，占79.0%；其次為「電路出租收入」，占8.9%；再次之為「頻道出租業務收入」，占為5.6%。

(三) 五大MSO業者已成為有線電視產業發展之主軸，其系統市場總占有率約為73.2%、占有線電視產業總營收約達77.5%。

(四) MSO 業者與頻道供應商之間的垂直整合（Vertical Integration）共分為兩種流向：

(1) 金流方面：MSO業者的主要營收來自於顧客與廣告商所分別給付的收視服務與廣告刊播費用，並抽取部分作為給付頻道業者或各地方系統台的費用。

(2) 物流方面：擁有頻道內容的地方系統業者，會透過平台將頻道內容與其他延伸性加值服務傳送至收視戶終端，也同時提供給廣告代理商或業主進行廣告刊播。

(五) 有線電視未來發展趨勢：

(1) 有線電視將成為多元應用服務提供者。

(2) 有線電視數位化後將催化分組付費制度之形成。

(3) 跨區經營開放後將可能使有線電視市場版圖異動。

二、衛星電視家族頻道

(一) 就營收狀況而言，有約8成業者未滿7億元，而約有2成之業者營收超過11億，兩群集間呈現明顯差異。就支出狀況而言，有近9成業者未滿7億元，剩餘8家之支出皆超過9億，兩群集間亦如營收般呈現明顯差異。整體而論，衛星電視產業以員工規模在0～49人、營收在7億元以下之業者競爭密度較高。

(二) 根據本次調查結果三立、東森、中天、八大、TVBS、年代、緯來與福斯集團等8家業者，其營收估計約269億元，占整體衛星電視產業營收之50.4%。

(三) 我國有線電視系統通路具優勢，衛星電視業者相對處於弱勢。目前市場的狀況有可能為有線電視業者付費給頻道商；但也有可能是頻道商主動付費取得上架機會，不同的業者可按照其收視率狀況取得議價空間。故頻道業者通常將各家族頻道進行綑綁銷售聯賣較易取得較佳的議價談判空間。

(四) 家族頻道的經營策略的重要優勢之一，即透過不同的頻道定位進行市場區隔吸引最多數潛在閱聽眾。因此就節目編排本身而言，家族頻道也挾有多頻道之優勢，透過豐富的資源逐漸發展出「節目差異化、市場區隔化」策略，以吸引更多的閱聽大眾而產製新型態的節目內容及頻道調性，以維持一定的收視率達到規模經濟或範疇經濟的優勢。

第六章 廣播電視產業投入產出關聯分析

一、100 年廣播電視產業之總營業收入約為 1,064.93 億元。

二、以產出效果來看，廣播電視產業營業收入 1,064.93 億元將使得國內整體產值變動增加 2,660.93 億元、產值變動率（產值幅度）增加 0.93%，其中，廣播服務業產值變動增加 341.99 億元、產值變動率增加 0.12%，電視服務業產值變動增加 1,039.63 億元、產值變動率增加 0.36%。由此可知當廣播電視產業最終需求增加每億元，將使國內經濟體系的總產值額外提升 2.50 億元，增加 0.93%幅度。

三、以附加價值效果來看，廣播電視產業營業收入 1,064.93 億元將使得國內整體附加價值變動增加 1,064.93 億元、附加價值變動率（附加價值幅度）增加 0.89%，其中，廣播服務業附加價值變動增加 134.74 億元、附加價值變動率增加 0.11%，電視服務業附加價值變動增加 409.59 億元、附加價值變動率增加 0.34%。由此可知當廣播電視產業最終需求增加每億元，將使國內經濟體系的總附加價值額外提升 1 億元，增加 0.83%幅度。

四、以所得效果（勞動報酬）來看，廣播電視產業營業收入 1,064.93 億元將使得國內整體勞動報酬變動增加 613.16 億元、勞動報酬變動率（勞動報酬幅度）增加 0.97%，其中，廣播服務業勞動報酬變動增加 79.21 億元、勞動報酬變動率增加 0.13%，電視服務業勞動報酬變動增加 240.80 億元、勞動報酬變動率增加 0.38%。由此可知當廣播電視產業最終需求增加每億元，將使國內經濟體系的總所得(勞動報酬)額外提升 0.58 億元，增加 0.97%幅度。

第七章 國內電視產業 SWOT 分析

目前國內電視產業 SWOT 分析如下：

一、優勢：

(一) 硬體產製技術成熟，收視終端價格降低。

(二) 創意人才豐沛，挹注內容輸出動能。

(三) 觀眾對高畫質數位內容認同度漸增，間接提升市場需求。

(四) 置入性行銷及冠名贊助鬆綁，有助於電視產業資金能量成長。

二、劣勢

(一) 數位政策期程不明確、配套措施尚嫌不足。

(二) 平台間具不對稱管制、無法提供良性競爭環境。

(三) 本土高畫質內容較少，易造成外來文化入侵。

(四) 硬體標準未統一，降低閱聽人使用誘因。

(五) 節目內容於多元平台整合程度需強化。

三、機會

(一) 有線電視數位化將於2014年完成。

(二) 經濟部成立數位媒體發展中心，驅動新匯流媒體服務。

(三) 雲端概念興起，驅動智慧電視普及、內容發展。

四、威脅

(一) 新媒體入侵，替代性服務漸增。

(二) 國際競爭壓力漸強，人才、資源流失。

第八章 結論與建議

綜整本次調查結果進一步提出電視產業發展趨勢、立即可行之建議與中長期性建議，分述如下：

一、電視產業發展趨勢

(一) 數位匯流時代，OTT分食電視產業市場。

(二) 家族頻道業者攜手合作，強化市場競爭力與提升綜效。

(三) 有線電視數位化提升，開創數位內容業者市場契機。

(四) 數位內容產品多元性強，提升經濟效益。

(五) 有線電視開放跨區經營、自然整合趨勢仍存。

二、立即可行之建議

(一) 將業者自行提報資料義務納入法規，透過第三方進行資料稽核以做為產業趨勢研究之基礎。

(二) 資料庫建議新增營業支出項目、瞭解產業資金挹注狀況。

(三) 有線電視數位化比例仍偏低，應進一步詳訂各期程目標與後續因應配套措施。

(四) 將性別主流化成果納入評鑑指標，創造電視產業平權環境。

三、中長期性建議

(一) 類比退場數位進場，驅動全數位化之收視環境。

(二) 強化平台間齊頭式管制、促進視訊市場競爭公平性。

(三) 適度鬆綁戲劇娛樂音樂節目廣告置入，以強化電視產業與其他產業之連結，擴張產業關聯效益。

(四) 以「提供服務」者而非以「使用技術」做為法制基礎，以符合產業發展趨勢。

Commissioned Study Report of 2012

Investigation and Analysis of the Current Situation of TV Industry and Enterprise and the Content Planning of Broadcast Database

(The Abridged Version)

Plan Commission Organization: National Communications Commission

November, 2012 in Taiwan

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Investigation and Analysis of the Current Situation of TV Industry and Enterprise and the Content Planning of Broadcast Database

(The Abridged Version)

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November, 2012 in Taiwan

Chapter One Research Background and Purpose

In recent years, the TV industry ecology has gone through dramatic changes due to factors like market competition and political environment, etc as well as the influence of tendencies such as new media and digital convergence. To explore the present situation, development tendency and demand of TV industry, and conduct data collection and analysis of marker structure and business performance of TV industry, in addition to put forward industry development tendency and policy suggestion, this study also make suggestions like revising existing data and adding statistic and investigation project as well as output report format to broadcasting statistic investigation data, so as to strengthen the database of National Communications Commission. In addition, it can also be regarded as the reference for the development of industry policy.

The main purpose of this study is to continue and deepen the investigation result and the issue of focus on industry tendency in past year and then conduct basic research investigation according to TV industry chain, the relevant purposes are explained as follows:

1. Making investigation on structure and operating situation of TV industry, so as to understand the competition situation and industry structure of the whole TV industry market as the reference for policy making.

2. Deepening and continuing the findings of last year to understand and compare the tendency and change through basic data investigation and continuous data of TV industry, and monitoring the development track of TV industry and operating situation of key practitioners, which is conductive to the subsequent relevant tendency research to make far-sighted policy suggestion.

3. Focusing on family channel and MSO which has higher proportion in TV enterprise to analyze their operating situation, market competition as well as the influence on whole TV industry and problem analysis.

4. Inspecting projects and putting forward new statistic projects, and integrating relevant database to make concrete suggestion for establishment planning and output reports TV industry database as well as the calculation basis of important observation indicators.

5. The general output value of broadcasting and TV industry in Taiwan is estimated according to the annual survey result, while concrete policy suggestions are made for the output value and business opportunity of TV industry.

6. By integrating TV industry survey statistic result and the overall TV industry output value, the analysis of current situation, development tendency, competition situation (SWOT) of TV industry in Taiwan is put forward, and then relevant policy and concrete suggestion are developed.

Chapter Two TV Industry Investigation Results and Analyses

In 2011, there are altogether 168 practitioners in TV enterprise, the investigation result and analyses are listed as follows:

One the basic information

1. In average registered asset, terrestrial TV practitioners have 3.74 billion NTD, cable TV practitioners 0.86 billion NTD, satellite TV practitioners 0.45 billion NTD, DBS practitioners 0.14 billion NTD.

2. In total assets, terrestrial TV practitioners have 29.24 billion NTD, cable TV practitioners 168.74 billion NTD, satellite TV practitioners 40.15 billion NTD, DBS practitioners 1.04 billion NTD.

3. In total debt, terrestrial TV practitioners have 8.05 billion NTD, cable TV practitioners 96.58 billion NTD, satellite TV practitioners 40.15 billion NTD, DBS practitioners 0.41 billion NTD.

4. In staff numbers, terrestrial TV enterprises have 3,011 staffs, cable TV enterprises 5,271, satellite TV enterprises 11,335, DBS enterprises 124 and IPTV enterprises 8,183. The overall TV industry altogether 27,924.

Two business income and expense

1. In business income, terrestrial TV enterprises have 9.19 billion NTD, cable TV

enterprises 38.14 billion NTD, satellite TV enterprises 53.35 billion NTD, DBS enterprises 0.16 billion NTD and IPTV enterprises 1.84 billion NTD. The overall TV industry altogether 102.68 billion NTD.

2. In business income structure, terrestrial TV enterprises account for 55.3% in total business income by "advertising income" which is the highest; cable TV enterprises account for 85.0% in total business income by "subscriber watching business income" which is the highest; satellite TV enterprises account for 30.4% in total business income by "advertising income" which is the highest; DBS TV enterprises account for 51.5% in total business income by "subscriber watching business income" which is the highest; IPTV practitioners account for 51.5% in total business income by "subscriber watching business income" which is the highest.

3. In expense situation, terrestrial TV enterprises have 9.57 billion NTD, cable TV enterprises 31.67 billion NTD, satellite TV enterprises 31.10 billion NTD, DBS enterprises 0.34 billion NTD and IPTV enterprises 4.86 billion NTD. The overall TV industry altogether 77.54 billion NTD.

4. In expense structure, terrestrial TV enterprises account for 34.4% in total business expense by "program expense" which is the highest; cable TV enterprises account for 47.1% in total business expense by "program expense" which is the highest; satellite TV enterprises account for 28.9% in total business expense by "program expense" which is the highest; DBS TV enterprises account for 36.7% in total business expense by "other expenses" which is the highest; IPTV practitioners account for 39.8% in total business expense by "hardware expense" which is the highest.

Three production and broadcasting situation

1. In ways of production, the percentage of self-produced program broadcasted in terrestrial TV is about 73.7%, while satellite TV 55.3%.

2. In costs of program production, the average costs of self-produced program in every channel of terrestrial TV is 835,900,000 NTD, which accounts for 92.4% in production costs, the program broadcasted per hour costs 129000 NTD; the

average costs of non-self-produced program in every channel is 68,820,000 NTD, which accounts for 7.6% in production costs, the program broadcasted per hour costs 30,000 NTD; the average costs of self-produced program in every channel of satellite TV is 66,460,000 NTD, which accounts for 67.4% in production costs, the program broadcasted per hour costs 14,000 NTD; the average costs of non-self-produced program in every channel is 32,090,000 NTD, which accounts for 32.6% in production costs, the program broadcasted per hour costs 8,000 NTD.

3. In the format of production, terrestrial TV produces more “SD” format which accounts for 94.9% in total; while “HD” format produced by terrestrial TV accounts for 5.1% in total. Satellite TV produces more “SD” format which accounts for 66.8% in total; the time of “analogy” format produced is 1.4 billion and 791 hours, which accounts for 16.4% in total. While the time of “HD” format produced are 1.4 billion and 4,225 hours, which accounts for 16.8% in total.

4. In broadcasting situation, the new broadcast time of terrestrial TV accounts for 45.5% in total broadcast time, first broadcast accounts for 37.2 % and rebroadcast accounts for 17.3%. the new broadcast time of satellite TV accounts for 44.7% in total broadcast time, first broadcast accounts for 20.9 % and rebroadcast accounts for 34.4%.

5. In program broadcasting type, news accounts for 38.2% in first broadcast hours which is the most, next is drama which accounts for 26.3%; dramas account for 30.9% in rebroadcast hours which is the most, next is variety show which accounts for 30.0%. Financial programs account for 19.4% in new broadcast hours of satellite TV which is the most, next is news which accounts for 18.4%; Movies account for 55.6% in first broadcast hours which is the most, next is drama which accounts for 20.0%; drama account for 22.9% in rebroadcast hours which is the most, next is variety show which accounts for 22.2%.

6. In the program language, the language of programs broadcasted in terrestrial TV is mainly Taiwan mandarin, which accounts for 90.9% in total hours; next is Taiwanese, which accounts for 5.3%; third is English, which accounts for 2.3%. The language of programs broadcasted in satellite TV is mainly Taiwan mandarin, which accounts for 58.6% in total hours; next is English, which accounts for

20.8%; third is Japanese, which accounts for 6.8%.

Four purchase and sales situation

1. In purchasing hours and its amount of money, terrestrial TV practitioners purchase average 2,304 hours of program and 247 hours of HD program per channel. The average total money of purchased program is 68.82 million NTD; the average money of purchasing program per hour is 30,000 NTD; while the total money of purchasing HD program is 46.59 million NTD, the average money of purchasing HD program per hour is 189,000 NTD. Satellite TV practitioners purchase average 3916 hours of program and 298 hours of HD program per channel. In addition, the average total money of purchasing program is 32.09 million NTD; the average money of purchasing program per hour is 8,000 NTD; while the average money of purchasing HD program is 18.41 million NTD, the average money of purchasing HD program per hour is 62,000 NTD.

2. In the source of purchasing (the percentage in purchasing hours), the main source of terrestrial TV practitioners is Asia, which accounts for about 70.0% in purchasing hours, Japan is the largest source of foreign countries, which accounts for 28.2%. The main source of satellite TV practitioners is Asia, which accounts for about 60% in purchasing hours; Japan is also the largest source of foreign countries, which accounts for 24.1%.

3. In sales area, Singapore and Malaysia are the most in wireless practitioners, which accounts for 34.0%. While Taiwan is the highest in satellite TV practitioners, which accounts for 49.6%

Chapter Three comparative analysis of broadcasting indicator at home and abroad

One the community with foreign indicator

1. TV industry income

In the current indicators of Taiwan, the “TV industry income” is similar to the “TV industry income” of UK, the “national radio and television income” of mainland

China, the “Listed TV company income”, “Listed TV company profit” and “Television Broadcasts Ltd area turnover” of Hong Kong. Thus it can be seen that business is a basic and necessary indicator of industry observation.

2. Advertising income

The “terrestrial TV advertising money” and “cable TV advertising money” of Taiwan is similar to the “percentage of advertising income on total business income” of UK, thus advertising income is also reference indicator for inspecting TV industry demand. The “the percentage of TV program which is sponsored by advertisers” of Singapore is also pay attention to the influence of advertisers. However, the thing measured by this indicator is the advertiser sponsorship in no advertising period

3. TV industry output value

Both South Korea and Taiwan pay attention to this indicator, including “TV industry output value” and “TV industry export value” of Taiwan as well as satellite communication service output value, “cable communication equipment output value”, “domestic communication output value”, “domestic information equipment output value” and “domestic broadcasting and television equipment output value” of South Korea.

4. The number of profit enterprises and TV channels

The “number of profit enterprises” and “number of satellite channels” measured in Taiwan is closely similar to the number of cable TV channels measured in foreign countries. For instance, the “number of TV channels” of UK, “number of cable TV channels” of South Korea, as well as “national radio and TV coverage situation”, “national radio and TV coverage development situation”, “national radio and TV broadcasting organization situation” and “national radio and TV broadcasting transmission situation” of Mainland China.

5. The statistics of cable TV subscribers (digital TV, IPTV)

The statistics of cable TV subscribers can mostly be seen in responsible institution of communication and broadcasting, including “proportion of cable system subscriber”, “proportion of cable system digital subscriber” and “the number of cable TV subscriber” in Taiwan, “proportion of digital TV subscriber” in UK, “the number of cable TV installment household” in Japan, “the number of cable system subscriber” in South Korea, “national broadcasting and TV cable TV development situation” and “national cable broadcasting and TV subscriber situation” in Mainland China as well as “the number of cable system subscribers”, “the number of digital TV subscribers ” and “the number of IPTV subscribers ” in Singapore. The difference between Taiwan and other countries is putting “average value of cable TV charges” into the range of measurement.

6. The number of practitioners

The indicator “the number of TV industry practitioners” has something in common with other countries. For example, “the number of communication industry practitioners” in Japan. However, Japan also put the hardware supply practitioner of “the number of communication practitioners” into indicator.

Two the diversity with foreign indicator

1. US

There are “viewing hours in ordinary days” and “viewing hours in weekend” in US, and then different viewing hour statistics is classified according to age and gender.

2. UK

There are “top ten TV programs”, “top hundred most videoed TV programs” and “top five channel markets share” in UK. In addition, “viewing hours of everybody everyday” is counted in UK

3. Japan

There are “the percentage of households which have connected TV ”, “number of cable TV self-produced program” and “number of cable TV broadcasting program” in Japan

4. Mainland China

There are “national TV program production and broadcasting situation”, “national radio and TV program transaction situation”, “national radio and TV program import and export situation”, “national radio and TV program comprehensive population coverage situation”, “national public TV program broadcasting situation”, “national public TV program production situation” and “national radio and TV program practitioners situation” in Mainland China.

5.Singapore

There are “number of public TV program agreement”, “average audience ratings of public TV”, “the satisfaction degree of viewers towards public TV program” and “the proportion of various TV programs”.

Chapter Four analysis of the gender of broadcasting enterprise personnel in Taiwan

1. This report takes 167 broadcasting practitioners as research subject, the statistic data is subject to the data in the end of June, 2012, the number of male practitioners is 10,629 which accounts for 53.8% in total employees; female practitioners 9,112 which accounts for 46.2%.
2. In education background, most of TV industry practitioners come from academies and universities, which accounts for about 60.0% in total; high schools and below account for about 30.0% in total; graduate schools and above account for less than 10.0%.
3. In professions, the percentage of men whose job is professional, technician or assistant professional is significantly higher than women, while women whose

job is affair officer, servant or salesclerk is slightly higher than men.

4. In age, most of the practitioners in TV industry are between 25 and 44, which accounts for about 70.0% in total, among which the practitioners whose age is between 35 and 44 are the most. The percentage of male workers whose age is more than 35 years old is all above female workers, among which the practitioners whose age is between 35 and 44 are the most obvious.

5. In average month salary, terrestrial TV enterprises is the highest, next are satellite TV enterprise and cable TV enterprise, and then is DBS enterprise, which is the lowest. In the whole TV industry, the average salary of male workers is higher than female workers mostly no matter what education background they are. Only female workers whose education background is high school or below and work in DBS enterprise do as well as whose education background is academy or university and work in satellite TV enterprise do their average month salary higher than male workers.

6. Among workers of communicating enterprise who have ever ask for maternity leave in 2011, male workers account for 2.2% in total, while female workers account for 2.8% in total; Among workers who have ever ask for parental leave in 2011, male workers account for 0.2% in total, while female workers account for 1.4% in total

7. 35.3% of the enterprises have opened curriculum for gender equality in rights, the average curriculum hour in a year is 6.1 hour.

8. Among the enterprises which have not opened curriculum for gender equality in rights in 2011, 81.5% of which is willing to but have not opened relevant curriculum. But there are still 18.5% of enterprises who think there’s no need to open curriculum, the reasons can mainly be concluded in three kinds as “media publicity in society has achieved gender equality in rights”, “gender equality in rights have been realized within the company” and “gender equality in rights has nothing to do with industry performance”.

Chapter Five the development tendency and competition situation of TV industry

The MSO practitioners of cable TV and satellite TV family channel are discussed in this chapter as follows:

One cable TV MSO

1. As for business income, 46.8% of practitioners are between 0.5 and 1 billion NTD, 43.5% is under 0.5 billion NTD and 9.7 above 1 billion NTD. As for expenditure, 48.4% of practitioners are under 0.5 billion NTD, 46.8% is between 0.5 and 1 billion NTD and 4.8% above 1 billion NTD. As a whole, practitioners whose staff number is between 50 and 99, business income is between 0.5 and 1 billion NTD have the highest competition density in cable TV industry

2. On the average, every MSO practitioners take “Subscriber viewing business income” as the source of income, which accounts for 79.0%; next is “TV Circuit Rental Income”, which accounts for 8.9%; then is “Channel Rental Business Income”, which accounts for 5.6%.

3. Five major MSO practitioners have become the main force of cable TV industry development, which accounts for about 73.2% in system marker and about 77.5% in the business income of cable TV industry.

4. The vertical integration between MSO practitioners and channel suppliers can be classified into two flows:

   First, in capital flow, the main business income of MSO practitioners comes from the viewing service fees paid by customers and advertising fees paid by advertiser, and part of which is selected as the expenses of pay channel practitioners and local channels.

   Second, in material flow, the local channel practitioners who own channel content will transmit channel content and other extensible value added services to terminal of viewers through platform as well as provide advertising agencies and practitioners with the publishing of advertisement.

5. The future developing tendency of cable TV:

   First, cable TV will become the multi-application service provider.

   Second, the digitalization of cable TV will promote the forming of classified payment system.

   Third, the opening of interregional business will probably change the cable TV market territory

Two satellite TV family channels

1. As for business income, about 80.0% of practitioners is under 0.7 billion NTD and about 20.0% of practitioners is above 1.1 billion NTD, so there is obvious difference between two groups. As for expenditures, nearly 90.0% of practitioners is under 0.7 billion NTD, other 8 practitioners are all above 0.9 billion NTD, so there is obvious difference between two groups as business income. On the whole, practitioners whose staff number is between 0 and 49, business income is under 0.7 billion NTD have the highest competition density in satellite TV industry

2. According to the result of this investigation, it is estimated that the business incomes of eight practitioners such as SET, ETTV, CTI, GTV, TVBS,ERA, Videoland and Fox group, etc is about 26.9 billion NTD, which accounts for 50.4% in the whole satellite TV industry.

3. The cable TV system in Taiwan has advantages while the practitioners of satellite TV are still in disadvantage. In the current market situation, cable TV practitioners are likely to pay money to channel operators, but it is also likely that channel operators pay money actively to get the opportunity to hit shelf. Different practitioners can achieve chance to negotiate price according to audience ratings. Therefore, channel practitioners always sell their family channels by bundling which is easy to achieve a good chance to negotiate.

4. One of the advantages in the strategy of operating family channels is to make market segmentation through different channel positioning so as to

attract more viewers. Thus as for programming itself, family channels also have the advantages of multi- channels, which have gradually developed a strategy of “program differentiation, market segmentation” so as to attract more viewers to produce new kind of program content and style and to achieve the advantage of scale economy or scope economy by maintaining certain audience rating

Chapter Six analysis of the relation between input and output of Broadcast and TV industry

1. The gross business income of radio and TV industry in 2011 is about 106.493 billion NTD.
2. From the aspect of output effect, the gross business income of radio and TV industry will make overall output value in Taiwan increase 266.093 billion NTD, variation ratio of production (production range) increase 0.93%, among which radio service industry output value increases 34.199 billion NTD, variation ratio of production increase 0.12%, TV service industry output value increases 103.963 billion NTD, variation ratio of production increase 0.36%. Thus it can be seen that when the ultimate demand of radio and TV industry increases 0.1 billon NTD, it will makes the total value of output in economic system of Taiwan increase additional 0.25 billion NTD, which increases 0.93% in percentage.
3. From the aspect of additional value effect, the gross business income of radio and TV industry will make overall additional value in Taiwan increase 106.493 billion NTD, variation ratio of additional value (additional value range) increase 0.89%, among which radio service industry additional value increases 13.474 billion NTD, variation ratio of additional value increases 0.11%, TV service industry additional value increases 40.959 billion NTD, variation ratio of additional value increase 0.34%. Thus it can be seen that when the ultimate demand of radio and TV industry increases 0.1 billon NTD, it will makes the total additional value in economic system of Taiwan increase additional 0.1 billion NTD, which increases 0.83% in percentage.

4. From the aspect of income result (labor remuneration), the gross business income of radio and TV industry will make overall labor remuneration in Taiwan increase 61.316 billion NTD, variation ratio of labor remuneration (labor remuneration range) increases 0.97%, among which the labor remuneration of radio service industry increases 7.921 billion NTD, variation ratio of labor remuneration increases 0.13%, the labor remuneration of TV service increases 24.080 billion NTD, variation ratio of labor remuneration increase 0.38%. Thus it can be seen that when the ultimate demand of radio and TV industry increases 0.1 billon NTD, it will makes the overall income in economic system of Taiwan (labor remuneration) increase additional 0.058 billion NTD, which increases 0.97% in percentage.

Chapter Seven analysis of TV industry SWOT in Taiwan

The TV industry SWOT now in Taiwan is analyzed as follows:

One advantage:

1. The technology of hardware industry is becoming mature, thus the price of terminal is becoming lower.
2. Abundant creative talents enrich the content and output kinetic energy.
3. The degree of viewer’s recognition on HD digital content is increasing gradually, which promotes the market demands indirectly.
4. The deregulation of product placement and title sponsorship helps the capitals and energy of TV industry to grow.

Two disadvantage

1. Digital policy is uncertain and supporting facilities are still not enough.
2. Asymmetric regulation existing between platforms, thus a healthy competition environment cannot be provided.
3. There is few HD content in Taiwan, which will results in the invasion of foreign culture.

4. The hardware standard has not been unified, which can lower the use of audience.
5. Program content need to be strengthened according to the integration degree of multivariate platforms.

Three opportunities

1. Cable TV digitalization will be completed in 2014.
2. Digital Media Development Center is established in Ministry of Economic Affairs so as to promote new convergence media service.
3. The rise of the cloud promotes the popularity of smart TV and development of TV content.

Four Threats

1. The increase of substitute service due to the invasion of new media.
2. The loss of talents and resources due to the enhancement of international competition.

Chapter Eight Conclusions and Suggestions

By integrating this investigation result, further TV industry development tendencies, feasible suggestions as well as medium and long-term suggestions can be put forward, which are explained as follows:

One TV industry development tendencies

1. In the era of digital convergence, OTT shares TV industry market.
2. Family channel practitioners cooperate with each other, which enhances market competitiveness and improve synergy.
3. The improvement of cable TV digitalization creates opportunities for digital content practitioners.
4. Digital content products are in great diversity, which improves economic benefits.
5. Cable TV opens interregional business and natural integration still remains.

Two feasible suggestions

1. Put data reported by practitioners into legal system and conduct inspection on data through a third party as the basis of the industry tendency research.
2. The database is suggested to increase operating expense items so as to understand conditions of industrial capital injection.
3. Because the proportion of cable TV digitalization is still low, detail goals in each period and subsequent corresponding and supporting measure should be set in detail.
4. Bring the outcome of gender mainstreaming into the evaluation indicators so as to create gender equitable environment in TV industry.

Three medium and long-term suggestions

1. The replacement of analog TV by digital TV promotes full digital viewing environment.
2. Strengthening block style control between platforms so as to promote fair competition in video market.
3. Deregulating commercial placement in programs of drama, music, entertainment so as to strengthen the connection between TV industry and other industries, and expand industry correlated benefits.
4. Regarding “providing service” rather than “using technology” as the basis of legal system to correspond with industry development tendency.