ABSTRACT

I. Research Methodology

With the objective of providing a reference for relevant authorities to promote policy, the survey adopted quantitative and qualitative research methods to analyze user behavior of various video platform services and explored satisfaction levels of television programs and advertisements of those viewers aged thirteen and older.

For the first stage of the quantitative study, computer-assisted telephone interviewing (CATI) was used to conduct telephone interviews on both landlines and mobile phones; Stratified Random Sampling was adopted as a basis for the sampling design. The sampling population were stratified by county and city, and then randomly selected according to the population rate of those thirteen years old and above in each county and city. The internet survey was conducted using the Computer-Assisted Web Interviewing (CAWI) system and the survey questionnaire was sent to the respondents over the internet, so that those responding could do so on their computer or mobile phone.

Links to the survey questionnaire were set up on various popular websites (Facebook, PTT, etc.) and various incentives, such as supermarket gift cards and lucky draws, were designed to attract people to complete or share the questionnaire.

The telephone survey was conducted during the period from August 10 to September 2, 2020, whereas the mobile phone survey was undertaken during the period from September 8 to September 14, 2020, from 18:00 to 21:30 on weekdays and from 13:30 to 17:00 and 18:00 to 21:30 during weekends and public holidays. The internet questionnaire survey took place from September 2 to September 23, 2020. In all, a total of 9,789 Taiwanese people (TV and

non-TV viewers) participated with 2,115 interviews taking place on a landline, 2,537 on a mobile phone and 5,137 via the internet.

For the second stage of qualitative research, focus groups were held for three categories of viewers: general viewers, special viewers, and experts and scholars. For general viewers, four focus groups were held, focusing on viewers from the northern, central, southern and eastern regions to impart views on the presentation of program and advertising content, as well as the management of related government authorities.

For special viewers, five focus groups were held, focusing on viewers with visual or listening impairments, foreign residents, indigenous peoples and juveniles, so as to understand specific needs and opinions of these viewers. The last session invited scholars and experts to provide policy recommendations for television programs and advertising content from the perspective of broadcasting rights.

II. Study Findings

The findings in Parts 1 to 6 of the study have been presented as weighted data after combining the results from the same questions in the landline and mobile phone surveys. Since the number of questions in the mobile phone survey was fewer than both the landline and internet surveys, unlike the landline and internet surveys, the mobile phone survey did not ask questions on opinions on television related policies". Owing to the fact that the landline and internet surveys adopted different methodologies, merging the data was a complex task. Consequently, Section 7 outlines the data on Opinions on Policies Related to TV Programs" of the telephone and internet surveys separately.

(I) Viewership of Various Platforms

According to the results of the 2020 survey, 85% of respondents had watched television programs or videos on the internet on TV, mobile phones or computers during the previous week. Of the 15% who had not watched such content during the previous week, 56% of respondents attributed the reason to lack of time, followed by 14.72% due to poor, low-quality TV programming. 12.85% stated they did not have televisions or other devices at home while 6.69% stated they did not have the habit of watching television videos on line. Lastly, 1.94% stated they do not view television or video content due to old age and/or poor eyesight.

The most popular platforms used by the public to watch video and audio programs during the previous week were computers/3C products (69.46%), followed by cable TV (51.42%), Chunghwa Telecom MOD (15.80%), wireless TV (11.45%), connected/Smart TV (9.65%) and cloud multimedia players (7.54%).

(II) Viewer Satisfaction with Various Platforms

The following table lists viewer data of wireless TV, cable TV, CLP MOD, and network AV platforms (including cloud multimedia players, internet/smart TV and computers/3C devices). In terms of overall platform satisfaction, the satisfaction rate for internet content/media platforms is the highest, accounting for 86.71%, whereas the satisfaction rate for cable TV is the lowest, accounting for 59.40%. In terms of kind of program and genres, the most frequently watched genre on internet platforms is drama, while news is the most frequently viewed genre on all other platforms. Drama is the second most frequently watched genre on TVB and cable TV; movies are the second most frequently viewed genre on MOD, while variety show is the second most frequently watched genre on internet TV platforms.

	Wireless TV n=453	Cable TV n=2,034	MOD n=625	Internet Video Platform n=2,844
Selection Reason				
Main Reason	Habitual Viewing (38.96%)	Habitual viewing of cable TV (38.65%)	Bundled with internet offers (27.39%)	Can be viewed any time (flexibility) (60.08%)
Secondary Reasons	Free (18.74%)	Wide selection of channels (24.89%)	More movie and sports channels (17.90%)	Richer content and more choices (30.71%)
Overall Satisfaction				
Satisfaction	66.21%	59.40%	70.79%	86.71%
Dissatisfaction	12.03%	21.16%	14.34%	4.29%
Improvements				
Primary Improvement	Poor/low quality content (30.02%)	Overly repetitive (39.06%)	Not enough enjoyable channels and programs (37.31%)	Too many commercials (35.45%)
Secondary Improvements	Poor channel signal (23.86%)	Cable TV costs (27.01%)	Expensive Fees (14.52%)	Unstable download links (20.02%)
Most Watched Genres				
Most watched	News (66.87%)	News (66.50%)	News (49.14%)	Drama (34.17%)
Second	Dramas (28.18%)	Dramas (26.62%)	Movies (33.82%)	Variety (30.27%)
Third	Variety (21.83%)	Movies (24.57%)	Dramas (26.60%)	News (19.33%)
Domestically-Produced Programs				
Too much	7.39%	9.52%	6.60%	5.37%
Just right	39.53%	35.40%	36.42%	51.04%
Too few	39.77%	37.35%	41.02%	26.92%
Program & Content Satisfaction				

	Wireless TV n=453	Cable TV n=2,034	MOD n=625	Internet Video Platform n=2,844
Satisfaction	53.74%	45.63%	45.95%	59.86%
Dissatisfaction	27.84%	37.19%	34.15%	18.99%

Note: n denotes the number of samples viewed using the platform。

(III) Viewing Behavior：Television Programs

According to the 2020 survey results, the time slot with the highest proportion of television viewers during the weekdays (66.01%) was 8:00-9:59 PM, followed by 6:00-7:59 pm (54.20%) and 10:00-11:59 pm (35.64%). The remaining time slots all fell under 10%. The average number of hours people spend watching television programs per day on weekdays is 3.18 hours. Similarly, the 8:00-9:59 PM time slot was also the most popular time slot during weekends and holidays (44.30%), followed by 6:00-7:59 p.m. (39.73%), 10:00-11:59 p.m. (25.19%), 12:00-1:59 p.m. (17.57%), 2:00-3:59 p.m. (16.33), 4:00-5:59 p.m. (14.87%), and not necessarily at night (10.08%), while the rest were less than 10%. The average number of hours people spent watching television content during the holidays was 3.53 hours per day.

As for devices that viewers use while watching video content, smartphones (38.97%) accounted for the highest percentage, with all other devices falling below 10%. The reasons for watching television programs and using other devices at the same time are engaging in other things while watching TV (51.23%), followed by not wanting to watch commercials (28.57%), boring, uninteresting plots (17.44%), and wanting to watch two programs at the same time (9.67%) (overlapping airtime). As for specific activities viewers engage in while watching content, using instant messaging software accounts for 46.37%, followed by reading social media websites (30.12%), playing online games (17.00%) and handling work-related matters (12.11%).

(IV) Viewing Behavior: Online Videos

The 8:00-9:59 PM time slot during the weekdays had the highest proportion of people watching videos on the internet (47.65%), followed by 10:00-11:59pm (39.05%), 6:00-7:59pm (27.53%) and 12:00-5:59pm (13.42%), while the rest of the time slots were less than 10%. The average number of hours people spent viewing videos online during the weekdays was 2.80 hours. Likewise, the 8:00-

9:59 PM time slot during the weekends and holidays also showed the highest proportion of people watching videos online(34.48%), followed by 10:00-11:59 p.m. (27.44%), 6:00-7:59 p.m. (24.46%), 2:00-3:59 p.m. (19.87%), 4:00-5:59 p.m. (17.39%), 12:00-1:59pm (12.15%), and less than 10% for the rest of the day. The average number of hours people spent watching online videos on weekends and holidays was 3.34 hours, higher than the average of 2.80 hours during weekdays.

Smartphones (19.18%) are the most popular device for people to use while watching internet videos. As for the reasons why viewers use other devices while watching videos online, 69.49% of people responded that they engage in other activities while watching online content, followed by 13.06% who want to watch two programs (overlapping airtime) at the same time. As for specific activities viewers engage in while watching videos on the internet, using online instant messaging software accounts for the highest percentage (31.75%), followed by watching television (19.17%), playing online games (14.62%), handling work-related matters (14.23%), and visiting social networking sites (FB, IG) (13.05%). All remaining activities were less than 10%.

(V) News Programs

In terms of overall satisfaction with news coverage in Taiwan, 33.60% expressed satisfaction while 47.94% were more dissatisfied. As for areas of improvement for television news programs, unfair and biased news coverage accounted for the highest percentage (32.94%), followed by the overly repetitive coverage of single news issues (24.18%), insufficient coverage of international or foreign news events (18.10%), low credibility of news coverage (17.74%), and low positive impact of news on Taiwan society as a whole (15.65%). Remaining areas of improvement all fell below 10%. As for sources of news, the internet accounted for the highest percentage (74.55%), followed by television (63.02%), with less than 10% from other sources. Meanwhile, 1.58% said they do not watch the news.

(VI) Subtitles for and dubbing of foreign language programs

The survey shows that 18.36% of respondents had the habit of watching foreign language programs without Chinese subtitles or dubbing while 80.76% did not. What's more, 36.43% stated they needed Chinese subtitles or dubbing; 30.13% needed Chinese subtitles but did not need Chinese dubbing; 0.94% needed Chinese dubbing but did not need Chinese subtitles; another 26.43% stated they needed neither Chinese subtitles nor Chinese dubbing.

(VII) Related Policies for Television Programs

i. Sufficiency of four domestically-produced genres: drama, variety, children, movies

Results of the landline survey showed that 5.28% were leaning towards too much omestically-produced content (3.28% too much, 2.00% somewhat too much), 14.08% were leaning towards not enough (5.79% somewhat lacking, 8.29% too little), while 58.31% said they were "just right." Results of the online survey showed that 11.24% were leaning towards too much (2.88% too much, 8.36% somewhat too much), 24.45% were leaning towards not enough (22.38% somewhat lacking, 2.06% too little), while 64.31% said "just right".

ii. Necessity for increasing the proportion of domestically-produced programs during major time slots to 25%

The results of the landline survey showed that 37.18% thought there was a need to increase the proportion of domestically-produced programs to be broadcast during primetime slots, while 48.26% did not. Meanwhile, results of the internet survey showed that 62.01% thought it was necessary to increase the proportion of domestically-produced programs during prime time, while 37.99% did not.

iii. Necessity of increasing or extending the designated airtime of domestically-produced program content during specific time slots (25% of domestic original programs)

The results of the landline survey showed that 18.26% of the respondents thought there was a need to further increase or extend the designated airtime, while 71.24% did not. In contrast, results of the online survey showed that 51.88% of the respondents thought there was a need to further increase or extend the designated time slots, while 48.12% did not.

iv. Adequacy of new domestically-produced program broadcasts in Taiwan

According to landline survey findings, 5.69% thought the proportion of new domestically-produced programs was on the high side (3.78% too much, 1.91% somewhat too much), 20.83% were on the low side (9.38% somewhat too little, 11.45% too little); another 57.35% said it was "just right." The online survey showed that 13.65% thought the proportion of domestically-produced program broadcasts was on the high side (3.96% too much, 9.70% a bit too much), 20.96% thought the proportion was on the low side (18.64% a bit too little, 2.32% too little); another 65.38% said it was "just right".

v. Television Content Rating System

According to landline survey findings, respondents thought that the area where the Television Content Rating system most needed improvement was stricter restrictions on program content (3.15%), followed by more explicit labeling of each level of content (2.16%), more explicit labeling (1.82%), and 75.55% said no improvement was needed. According to results of the online survey, respondents thought that the area where the Television

Content Rating system most needed improvement was the application of the rating system to commercials (30.57%), followed by strengthening the labeling of each level of content (28.45%), the application of the rating system to news content (23.33%), the rating labeling should be more obvious (20.51%), stricter restrictions on restricted content (20.06%), relaxing the time slots for different program ratings (15.80%), planning a more detailed content rating system (15.72%), and relaxing the content of restricted programs (11.46%); another 17.78% said no improvement was needed.

vi. Television Program Title Sponsorships

According to the landline survey findings, 38.85% of the public were satisfied with the way the names of programs were presented with title sponsorships, 34.08% were dissatisfied, and another 7.73% said they were "just right."

According to the landline survey findings, for those respondents who were further questioned regarding their dissatisfaction with program title sponsorships, the highest percentage of people (39.44%) stated that they were less willing to watch a program when title sponsorships were excessively promoted or the sponsor's name appeared throughout the entire program, followed by the sponsor's name being too long or too large (18.77%), the image of the sponsor or product not matching the program's attributes (14.46%) and the program's name being easily confused with the sponsor's name (12.09%). The remaining items were less than 10%. According to the results of the online survey, for those respondents who were further questioned regarding their dissatisfaction with title sponsorships, the highest percentage of people (71.36%) stated that they were less willing to watch a program when title sponsorships were excessively promoted or the sponsor's name appeared throughout the entire program, followed by the sponsor's name being too long or too large (48.97%), the image of the sponsor or product not matching the program's attributes (43.99%) and the program's name being easily confused with the sponsor's name (35.68%).

vii. Product Placement Marketing

According to the landline survey findings, 39.82% were satisfied with the way the product placements were presented during TV programs, 35.99% were dissatisfied, and another 9.43% said they were “just right.”

According to the landline survey findings, for those respondents who were further questioned regarding their dissatisfaction with product placement marketing in TV programs, the highest percentage of people (39.25%) stated that the placed products, trademarks or services were excessively promoted during the program (39.25%), followed by those who felt that the products did not fit into the plot and felt abrupt (20.23%), the hosts or guests over-exaggerated the effectiveness of the products (19.04%), the content of the program directly encouraged them to buy products or services (11.42%), and those who did not want placed product marketing in the TV programs (7.54%). According to the results of the online survey, for those respondents who were further questioned regarding their dissatisfaction with product placement marketing in programs, the highest percentage of people (65.53%) stated was that the products did not fit into the plot and felt abrupt, followed by over-promotion of products, trademarks or services (59.32%), over-exaggeration of product efficacy by the host or guests (55.84%), and direct encouragement from program content to buy products or services (40.17%).

viii. Diverse Viewership Needs

According to the landline survey findings, 49.82% thought television programs in Taiwan met the needs of most people, while 30.95% did not; the online survey findings showed that 61.23% thought television programs in Taiwan met the needs of most people, while 38.77% did not. According to the landline survey findings, for those respondents who think the majority of the public's needs cannot be met and were further questioned on what demographic needs additional TV program content, seniors (65+) accounted for the highest percentage (46.05%), followed by children and teenagers (35.26%), people with physical and mental disabilities (32.67%), foreign residents (24.02%), indigenous Taiwanese (21.80%), and women (15.64%).

According to the results of the online survey, for those respondents who think the majority of the public's needs cannot be met and were further questioned on what demographic needs additional TV program content, children and teenagers accounted for the highest percentage (54.13%), followed by seniors (65+) (38.82%), women (30.34%), foreign residents (28.29%), people with physical and mental disabilities (21.35%) and indigenous Taiwanese (14.81%).

III. Policy Recommendations

(I) The behavior of the viewing public is gradually changing, with a higher proportion of viewers using computer/3C products over other platforms. In order to meet development trends in OTT industries, it is recommended that a mechanism be established with an inter-ministerial committee to address fair market competition and viewers' rights with related planning.

(II) The ratio of Taiwan’s new original programming broadcasts meets the viewer needs, but the quality of programs and content still needs to be improved.

(III) Balanced news coverage and fact checking should be strengthened, overly repetitive reporting and coverage of single news issues improved, and greater coverage of international news and more “positive” news stories should be attained.

(IV) Regular publication of observational reports on television news can help achieve the principle of fairness in news - adjusting the time and frequency of these observations, and establishing long-term trend analyses can help maximize benefit and impact of these reports.

(V) Most audiences are satisfied with the title sponsorship and product placement marketing in television programs, but the presentation should be enhanced and the gate-keeping and qualification for product placements should also be strengthened.

(VI) The implementation of television content ratings and monitoring the alignment of content rating labels and television content should be enhanced. Parents with children tend to attach more importance to news content, so we recommend that there should be more explicit gate-keeping of news content, so that news channel content is in alignment with universal content and information disclosure.

(VII) It is recommended that more educational program content be produced for seniors, children and teenagers, and that more programs or channels for foreign residents.

(VIII) The Public Broadcasting Group's funding should be enhanced to meet the needs of different demographics for viewing, such as audio descriptions, real-time captioning and sign language, and to license its productions to other commercial television stations.

(IX) The number of shopping channels does not exceed the regulatory limit – Thus, it is proposed that no regulation is required and that regulation should only be imposed when the regulatory limit is exceeded.

(X) It is recommended that local channels can be promoted in order to enhance their recognition and benefit the local community.