

## **Abstract**

Keywords: television, usage behavior, satisfaction, MOD, online video platform

Due to the continuous evolution of communications technology, as well as the increasing ubiquity of broadband internet, the channels through which people receive video content are steadily diversifying. Traditional "television," which was once just a terminal carrier for viewing terrestrial content, is now facilitating a diverse range of services, such as cable and multimedia-on-demand (MOD) systems, as well as over-the-top (OTT) media services as broadband speeds in households increase. Even the Golden Bell Awards, one of the most prestigious awards of the media industry in Taiwan, for the first time in 2021, considered online content, no longer limiting entries to terrestrial, cable, or MOD broadcasts, demonstrating further how the role of television has been evolving.

Since 2008, the National Communications Commission (NCC) has conducted biennial surveys on viewing behaviors and satisfaction with view to adopting the most appropriate policies. As well aligning with user behavior and satisfaction, the policy planning of the NCC should also be in line with societal trends. In 2016, in response to amendments to the Radio and Television Act and the Satellite Broadcasting Act, the commission revised relevant regulations. In particular, in order to encourage investment in the television industry, NCC promulgated Regulations for the Distinction between Television Programs and Advertisements, Product Placement Marketing, and Sponsorships. However, the impact of the COVID-19 pandemic over the past two years has resulted in a decline of advertising revenue and the disruption of program production, including those that were locally-produced. Moreover, policies regarding local channels, shopping channels and

English subtitles have to factor in industry trends and capabilities, public needs and rights, as well as policy objectives. With this perspective, this study compiles feedback on relevant policies from members of the public for future planning purposes.

The 2022 Television Usage and Satisfaction Survey was conducted using a multi-method research approach over two phases. During the first phase, a computer-assisted telephone interviewing (CATI) was carried out with members of the public. A CATI was employed to collect data via landlines, mobile phones and internet surveys. The valid sample size after a weighting was applied to the combined landline phone and mobile phone surveys stood at 3,610. The survey held a confidence level of 95% and a margin of error of  $\pm 1.63\%$ , while the valid sample size of the online survey was 2,064.

During the second phase, focus group discussions were held to assemble data, consolidate the findings of the quantitative data and invite representatives from different ethnic groups to present views and suggestions. These discussions, presided over by a chair, were organized to gather data and acquire deeper understanding of the opinions of the respondents. Eleven focus group discussions were conducted: four sessions for general audiences (in the northern, central, southern and eastern regions), six for special audiences (including children and adolescents, the visually impaired, the hearing impaired, Hakka people, new immigrants and indigenous peoples), and one for experts and academics.

## **The findings of this study are as follows:**

### **I. Viewing devices and usage**

1. A higher percentage of viewers (46.2%) had primarily watched programs or accessed web-based video services via an internet video platform over the previous week, followed by cable television at 43.4% and Chunghwa Telecom MOD at 11.9%. A comparison of the years 2018, 2020 and 2022 shows that the subscription rate of internet video platforms has been increasing year on year across all survey formats.
2. The main viewing platforms vary by region, age group, occupation and monthly personal income.

### **II. Sources of information, media trust and verification of information**

1. Respondents primarily received information from the internet (57.3%), followed by television (38.9%). A higher percentage of respondents ranked television as the most trusted source of information (43.1%), followed by the internet (40.1%). Among them, women, aged 60 and older, with elementary school education, expressed higher trust in television, while men, aged 39 and younger, with tertiary education and above, had higher trust in online media.
2. When misinformation was detected, 51.2% of respondents replied that they would check online to see if the information was true, while 41.4% said they would not verify the information. The percentage of respondents who go online to verify the information was higher among males, aged 39 or below, with postgraduate education or above, and who are professionals by profession; while the percentage of respondents who would not verify information was higher among females, aged 70 or above,

from the central region, with elementary education or below, and who have retired.

### **III. Analysis of different viewing platforms**

1. The main reason for watching programs on terrestrial television was that they were free of charge; 48.5% of respondents were satisfied with programs and most of them watched news/weather reports.
2. The main reasons for watching programs on cable television were the availability of many channels and the fact that they can be watched at any time; 40.0% of respondents were satisfied with the programs, and a higher proportion of them watched news/weather reports, European and American movies and Taiwan's Mandarin-speaking dramas.
3. The main reasons for watching programs on Chunghwa Telecom's MOD system were that they are available at any time; family members had usually chosen to install it from a special offer on the internet; 49.4% of respondents were satisfied with the programs, and a higher percentage of them watched news/weather reports, sports programs and European and American movies.
4. The main reasons for watching programs on online video platforms were that they can be viewed at any time, the content was more informative and there was greater choice of programs; 73.6% of respondents were satisfied with the programs, and a higher proportion of them watched South Korean dramas, European and American movies and sports programs.
5. Meanwhile, 54.1% of respondents paid to subscribe to an online video platform, primarily for reasons such as greater choice, subscribing with friends/coworkers and having access to the

latest movies or television series.

6. Lastly, 79.0% of respondents would not report inappropriate content on an internet video platform to the authorities; 43.8% thought that there were not many choices of Taiwanese dramas on the platform, and 51.5% said that they had few options for Taiwanese movies.

#### **IV. Viewing behavior**

1. Television programs were mostly watched during prime time on weekdays and holidays, with an average viewing time of about three hours.
2. Approximately 60% of respondents watched internet videos at a time slot different from other platforms, with prime time viewing dominating on weekdays, but not necessarily on holidays, with an average of about 2.5 hours of viewing.

#### **V. Satisfaction and suggestions for domestically-produced programs**

1. 45.9% of respondents rarely or never watch Taiwanese dramas, and were dissatisfied with locally-produced dramas mainly due to their unappealing storylines, poor filming techniques, and slow-moving pace.
2. 51.6% of respondents rarely or never watch Taiwanese variety shows, and were dissatisfied with the programs mostly for reasons such as unattractive themes, copying from foreign variety shows and inappropriate game designs.
3. 30.3% of respondents believed that there was a need to increase the rate of locally-produced programs during prime time, while 39.7% thought otherwise.
4. 55.4% of respondents did not think that the proportion of locally-

produced programs in Taiwan should be increased or their time slots should be extended, while 17.6% felt otherwise.

## **VI. Satisfaction and suggestions for television news programs**

1. The survey showed that 26.4% of respondents were dissatisfied with Taiwan's current news programs, mainly due to repetitive coverage of a single news issue, partiality of coverage and the low coverage of international or foreign news events; 23.8% were satisfied and 39.9% indicated average/neutral feelings.
2. 37.5% of respondents were dissatisfied with news programs in terms of fact checking and fairness, while 15.9% were satisfied and 32.8% expressed average/neutral feelings.
3. Meanwhile, 33.5% of respondents were dissatisfied with political talk shows in terms of fact checking and fairness, 11.8% were satisfied, 24.3% indicated average/neutral feelings and 30.5% were unaware of the situation and expressed no opinion.
4. Lastly, 50.9% of respondents found the television news observation report helpful in achieving fairness of the news, while 22.7% thought otherwise.

## **VII. Satisfaction and suggestions for policies on television programs**

1. Results showed that 46.0% of respondents stated that there were not too many cases of "inappropriate content beyond a certain rating" in television programs, while 38.6% were unaware of the situation and expressed no opinion.
2. In addition, 24.5% of respondents were satisfied with title sponsorship in television programs, 19.8% were dissatisfied and 40.9% indicated average/neutral feelings. Meanwhile, 21.5% of respondents were satisfied with product placements in television programs, 26.6% were dissatisfied and 34.7% expressed

average/neutral feelings.

3. Moreover, 71.5% of respondents rarely or never watch shopping channels, while 84.5% rarely or never watch local channels, and 43.0% of those who did watch the local channels were satisfied with the content, 9.1% were dissatisfied and 41.2% described the content as average.
4. Lastly, 47.1% of respondents felt that television programs were fulfilling the needs of a diverse society, but the proportion of programs for children and adolescents, seniors (aged 65 or above) and the physically and mentally challenged should be raised.

**Based on these findings, this study makes the following  
recommendations:**

**I. The policy approach for domestically-produced programs**

1. The rate of locally-produced programs is in line with the needs of audiences, who expect more quality home-produced programs. It is recommended that the policy should focus on enhancing the quality and visibility of local programs.
2. It is recommended that the government should incentivize and subsidize the production of quality dramas through co-funding or upstream and downstream collaboration, to enhance the quality and distribution channels of local productions.

**II. Improving the quality of television news programs**

1. The relevant ministries should encourage the media operators to increase the coverage of international news to foster diversity through a guidance mechanism.
2. The government should raise the media literacy of the public and allow them to monitor the implementation of factual verification and fairness in the programs.

3. The television news observation report has the effect of both external and internal regulation on the performance of the media in news reporting. It is suggested that the internal editor of news stations should be allowed to make decisions at their own discretion, in line with journalistic autonomy, as long as they comply with principles of impartiality.

### **III. Advertising regulations and management, placement marketing and sponsorship (including title sponsorship)**

1. Audiences are receptive to product placement, but would like to see more sophisticated presentation. It is recommended that the government should continue to observe the situation to deter operators from violating relevant regulations and affecting the rights of audiences.

### **IV. Television programs addressing the rights of the disadvantaged and multiculturalism**

1. It is recommended that the relevant ministries should consider drawing up budgets for programs that deal with the rights of vulnerable groups and multiculturalism, with priority given to those targeted for children and adolescents, the physically challenged and social concerns.
2. It is recommended that educational training should be organized for radio and television personnel to acquire deeper understanding of multiculturalism and the rights of the underprivileged.
3. It is suggested that cable television operators should provide friendlier and accessible services for the hearing impaired, the visually impaired and elderly groups.



## **V. The rating system and English subtitles for television programs**

1. It is advised that cooperation with NGOs and schools should be increased to promote the rating system in a bid to heighten public awareness; the government should also work with relevant agencies to more comprehensively ascertain how to prevent children and teenagers from being exposed to inappropriate content online.
2. The needs for English subtitles differ between different viewing groups, and it is suggested that phased promotion should be carried out after assessing the availability of the workforce and resources.

## **VI. Policy on shopping channels and local channels**

1. As the viewership of shopping channels is declining each year, the number of shopping channels and segment management can be incorporated into future policy research.
2. It is recommended that the content of local channels could be integrated with community life and issues of concern to the middle-aged and elderly viewers, so as to offer more localized programs and services.

## **VII. Online platforms**

1. It is advised that the internal and external regulation mechanisms of the operators should be tightened to enhance online media literacy of viewers and to protect the rights of subscribers.
2. It is recommended that inter-ministerial cooperation should be established to furnish more resources to the domestic film and television industry and to help it cope with the highly competitive international market.