

2018 Survey on TV Utilization Behavior and Satisfaction

Abstract

Keyword: Television, Usage Behavior, Satisfaction, MOD, online viewing platforms

The 2018 Survey on TV Usage Behavior and Satisfaction is a study of diverse TV viewing platforms. The various reception platforms covered by the study include the wireless TV platform, cable TV platform, MOD and online viewing platforms. Research design utilized a multi-method approach. In the first phase, quantitative surveys were carried out, with CATI Interview being conducted on people above the age of 13 in the northern, central, southern, eastern, and outlying islands regions of Taiwan.

In addition to conducting landline telephone interviews, this research will complement landline telephone surveys by conducting cellphone telephone interviews and online questionnaires, in order to collect the more diverse visual and audio viewership and audience preferences of the young population.

There were 4,004 valid landline survey samples. With a 95% confidence level, overall sampling error is $\pm 1.55\%$. Valid cellphone interview samples are 1,503, and in a confidence level of 95%, overall sampling error is $\pm 2.53\%$. There were 610 valid online survey samples.

In the second phase, information is collected via Focus Group Discussion method. Through the focus group, the Project Director sought to understand the various preferences and opinions of the viewers and audience in-depth. This research has already completed 10 Focus Group Discussions: 4 regular viewer and audience Focus Group Discussions (One each for the North, Central, South, and East regions), 5 special viewer and audience Focus Group Discussions (including children and youth, the visually impaired, the aurally impaired, New Immigrants, aboriginals), and 1 Focus Group Discussion for experts and scholars.

The following observations have been gathered via the research:

I .Differences in usage across different viewing platforms

1) Among the major viewing platforms, cable TV commanded the highest percentage (landline 59.1%, cellphone 53.9%). Following are 3C products (landline 31.2%, cellphone 41.3%) and Chunghwa Telecom MOD (landline 12.1%, cellphone 16.1%).

2) The main reason for watching broadcast TV is due to the service being offered free of charge. Over 50% of viewers and audience expressed satisfaction (landline 57.4%, cellphones 53.0%), with news and weather report programs taking the highest proportions of viewership.

3) The main reasons for viewing cable TV are the availability of numerous channels, and their round-the-clock availability. Around 50% of viewers express satisfaction (landline 50.7%, cellphones 47.9%), and the most viewed program categories are weather reports, news reports, European and American movies, and Taiwan-produced Mandarin drama.

4) The main reasons for viewing programs via Chunghwa Telecom MOD are their round-the-clock availability, higher image quality, and availability of more sports and movie channels. Approximately half (landline 58.9%, cellphone 63.8%) of viewers expressed satisfaction. The programs most often viewed are news reports and weather reports, European and American movies, and sports programs.

5) The main reasons for viewing programs via online audiovisual platforms are their constant availability, access offered from different locations, and rapid program updates. Approximately 80% (landline 80.5%, cellphone 85.8%) of viewers and audience expressed satisfaction, and the programs most often viewed are Mainland Chinese drama, Korean drama, European and American movies, and Japanese and Korean movies.

II. TV Programs and Online video viewing behavior

1) The major time segments for viewing programs TV programs during the weekday and weekend and holidays are the prime time hours,

with average viewing times of 2-3 hours. Approximately 40% to 50% of viewers and audience (landline 40.6%, cellphone 47.2%) use their smartphones as they watch TV, and they mainly use instant messaging applications, social networks, and play online games.

2) The major time segments for viewing online videos during the weekday and weekends and holidays are the prime time hours, with average viewing times of 2-3 hours, with more than 20% (landline 22.4%, cellphone 24.6%) of viewers and audience using their smartphones as they watch online videos. They mainly use online instant messaging applications, view social networking websites, and play online games.

III. Overall satisfaction with, and recommendations for, nationally produced programs

1) The highest proportion of viewers watch Taiwan programs, with American and Korean shows commanding the next highest proportion. 25.8% of viewers are dissatisfied with locally produced drama programs, with the main complaints being that the storylines are unappealing, low quality of content, and dragged-on plot development.

2) 39.1% of viewers expressed the opinion that Taiwan-produced TV programs should occupy 25% of the proportion of all shows during prime time hours. Furthermore, 41.1% of viewers think that the number or proportion of Taiwan-produced TV programs and shows is just about right.

IV. Opinions on embedded advertising and title sponsorship, and understanding of content maturity regulation

1) 86.0% of viewers had an erroneous understanding of the maturity content designation in use. 48.0% of viewers were satisfied with the time segments which the program contents are arranged into, as well as the maturity content restriction regulation, and 5.6% of viewers and listeners expressed dissatisfaction with the aforementioned time arrangements and regulations. The main reasons for dissatisfaction are the opinion that program content for restricted maturity should be more stringently

defined, that more stringent regulation is needed for the time segments to which different maturity content level programs are assigned, and that labeling should be enhanced for the content of the various maturity levels.

2) 28.0% of viewers and listeners were satisfied with the practice of company sponsorship of content with names attached, 23.0% are dissatisfied, and 27.2% have expressed no opinion or unawareness of the situation. The main reasons for dissatisfaction are over-advertising or the presence of company names throughout the whole program lowering the desire to watch. Complaints also covered overly-long company names or overly large fonts, over-similarity between the program name and company name leading to confusion, and the image of the company or product being incongruent with the property of the program.

3) 23.9% of viewers and audience were satisfied with embedded advertising in TV programs, 25.7% expressed dissatisfaction, and 25.1% expressed no opinion or unawareness of the situation. The main reasons for dissatisfaction were over-presentation of products, logos, or services, or the dissonance that the products created as they are unable to blend into the story and felt out of place.

4) 41.4% of viewers were of the opinion that limiting the time segments that international programs receive company sponsorship to 2 hours is appropriate. 44.6% expressed no opinion or had no answers.

V. Satisfaction level with TV program content and unsatisfied needs

1) 33.4% of viewers and audience were satisfied with Taiwan's current TV program content. 27.2% expressed dissatisfaction. 72.6% of viewers and audience felt that TV programs are satisfying the needs of a diverse society, and the viewers and audience who expressed that they felt the needs of a diverse society are not being satisfied were of the opinion that the proportion of programs for children, youth, seniors (above age 65), and women should be increased.

2) 22.8% of viewers and audience were satisfied with current TV news reporting, with 48.7% expressing dissatisfaction. The main reasons for dissatisfaction were massive repeated reporting of same news events

or topics, the weak positive influence on Taiwan society that news reporting exerts, and lack of objectivity in news reporting.

The Research recommends the following:

I. Viewership and audience trends and demand for program types

1) Viewers and audience of different age groups utilize different viewing and listening platforms. Satisfaction with TV audiovisual platforms is lower than online audiovisual platforms. It is appropriate for the government to further explore management of this disparity.

2) Viewers and audience think that there is too much repetition across Taiwan drama and movies, and that the demand for diverse program types is not being satisfied. The percentage of those viewing and listening to the programs offerings of other countries via online audiovisual platforms has increased.

II. Quality of Taiwan-produced and broadcast programs

1) The proportion of Taiwan-produced programs meets the demands of the viewers and audience, but the quality of programs requires improvement.

2) It is recommended that industry members jointly fund programs, and that the government offers subsidies to programs of high quality so that premium drama programs can be produced, thereby elevating the production and broadcast quality of nationally produced programs.

III. Quality of News Reporting

1) Through results gathered by hosting the Focus Discussion Groups, it is recommended that the fairness and accuracy of news content be enhanced, that broadcasting and reporting be carried out on the subsequent outcomes of efforts to respond to important events and their development, and increasing international news reports and positive, caring news events.

2) It is recommended that news channels also be arranged according to maturity content, and the information be available, so that viewers and

audience have the rights to proactively choose the news channels suitable for them.

IV. Put into practice the TV maturity content segmentation system, and controls on TV advertising

1) Through the Focus Discussion Groups, it was discovered that promotion of the maturity content segmentation regulations need to be enhanced. Parents with non-adult children at home need to be the primary targets. Some entertainment programs or animations need to have warnings attached to them.

2) Most viewers and audience think that it is necessary for named company sponsorship of content and embedded advertising are necessary, but the methods of display requires improvement.

3) It is recommended that in the future, relevant awards be established to reward filming and photography presentation, and to provide samples of winners for reference.

V. TV content guaranteeing the rights of the disadvantaged population and diversity of TV program content

1) Based on the results of the Focus Discussion Groups, it is recommended that TV programs for children and youth be prime targets for improvement. This can be done by increasing the types of programs available for children and youth.

2) It is recommended that news reporting and TV programs avoid creating negative caricatures of new immigrants and aboriginals, and aim to elevate the image of new immigrants and aboriginals.

3) It is recommended that the Taiwan Broadcasting System take as its primary concern the viewership and listening habits of the visually and aurally impaired viewers and audience, as well as seniors who have experienced degeneration in their visual and listening acuity, and produce and broadcast programs that meet their needs.

VI. Respond to the transferal and takeover of new media platforms (including OTT (Over-the-Top) administration protocol)

1) The Communication Act of the United States does not afford the Federal Communications Commission with the authority to administer online visual and audio signals. OFCOM of the United Kingdom takes the approach of minimizing industry regulations and maximizing protection of consumer rights, in order to achieve the goal of allowing industry development and protection of consumer rights to coexist.

2) Experts and scholars recommend that the government takes as its priority building the robustness of market order, and use fair mechanisms to deal with all platforms. It is recommended that the OTT (Over-the-Top) administration method (deregulation) of the United Kingdom and the United State be taken into account, and free the media and broadcasting industry from undue regulations, and only carry out regulations targeting the most fundamental issues of fair market competition and rights of viewers and listeners (prohibiting infringement of copyright or infringement of rights of viewers and listeners to view and listen)

3) The Internet is different from traditional broadcasting and TV media, and has the properties of being international, diverse, and open. Content changes are frequent, and mobility is high. If no laws are transgressed against, democratic and progressive countries should avoid having government authority getting involved. It is recommended that the industry regulate itself, or have citizens participate in oversight.

Because the content on the Internet encompass all varieties of topics, and much of it involves problems arising from online content providers publishing illegal or inappropriate content, the internet content management methods of our country are the same as that used for physical society, with individual government agencies carrying out administration based on their areas of responsibility.

It is recommended that in the future, regulation should be mainly carried out by industry members and that cross-agency cooperation and government-private collaboration be the methods by which further studies and analysis on administering online visual and audio platforms can be carried out.