



2017 Communications Market Survey in Taiwan

Creating Taiwan's Digital Economy
in the Era of Convergence

Preface

In the era of the digital economy, how we use communications services is not only vital to business operations and technological developments of the communications industry, but is also a significant factor influencing other industries; consequently, it has become closely tied to the development of the national economy.

The purpose of conducting this research was to obtain detailed and objective data with regards to consumer behavior and preferences through a comprehensive investigation. By analyzing key developments in consumer behavior and innovative applications, as well as other developments in telecommunications, broadcasting, broadband, and digital convergence, we are able to ascertain fundamental factors that guide regulations and policy making.

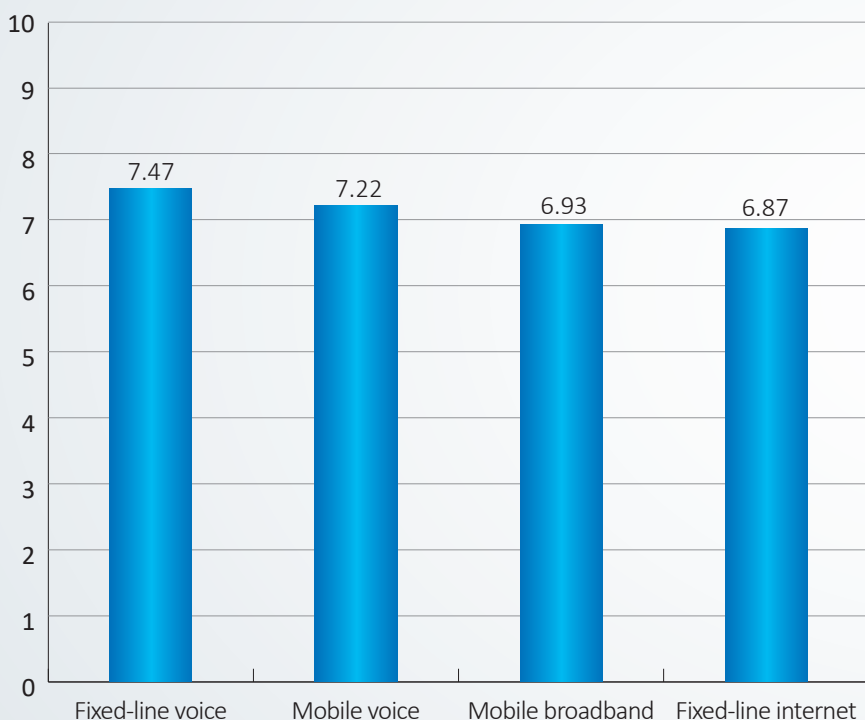
Communications Market Survey

- Target: People aged 16 and above living on the island of Taiwan
- Method: Face to face interviews
- Duration: August 17 - October 5, 2017
- Sample size: 1,131 individuals (Telecommunication Market, Broadband Usage Surveys), 1,126 individuals (Broadcasting Market Survey), 1,140 individuals (Digital Convergence Survey)
- Sampling error: 95% confidence level; sampling error is $\pm 3.0\%$



Satisfaction of Telecommunications Service

In our survey, the satisfaction rate of the fixed-line phone service is 7.47, which is the highest among these four telecommunications services.



Note: 1 point refers to very unsatisfied; 10 points refers to very satisfied

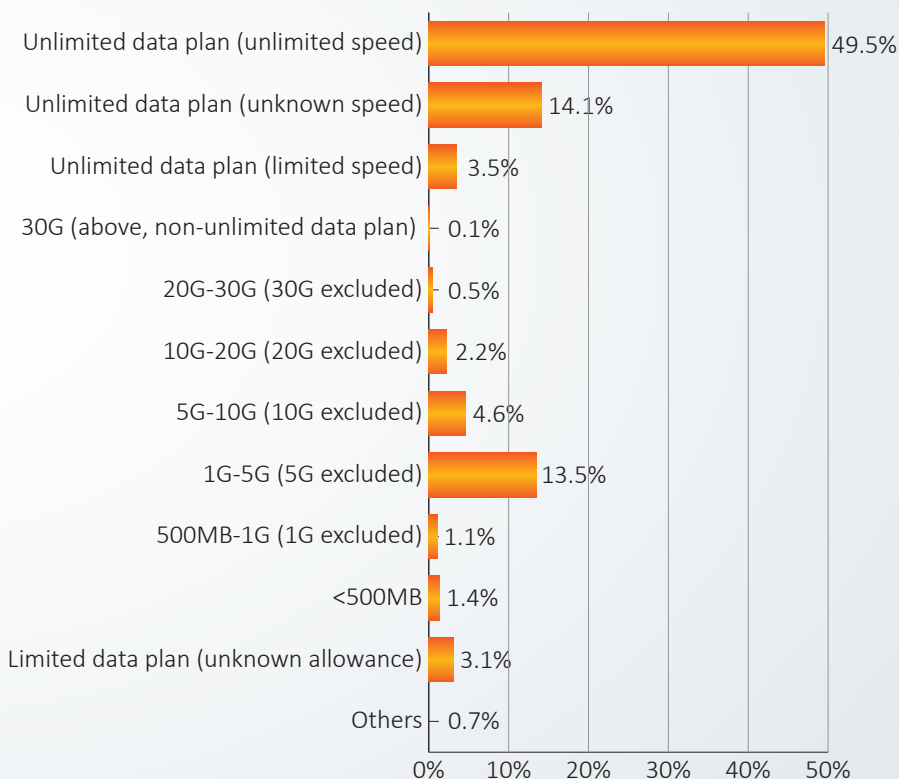
Base: Fixed-line voice N=910; Mobile voice N=934;

Mobile broadband N=899; Fixed-line internet N=772



Mobile Broadband Data Allowance

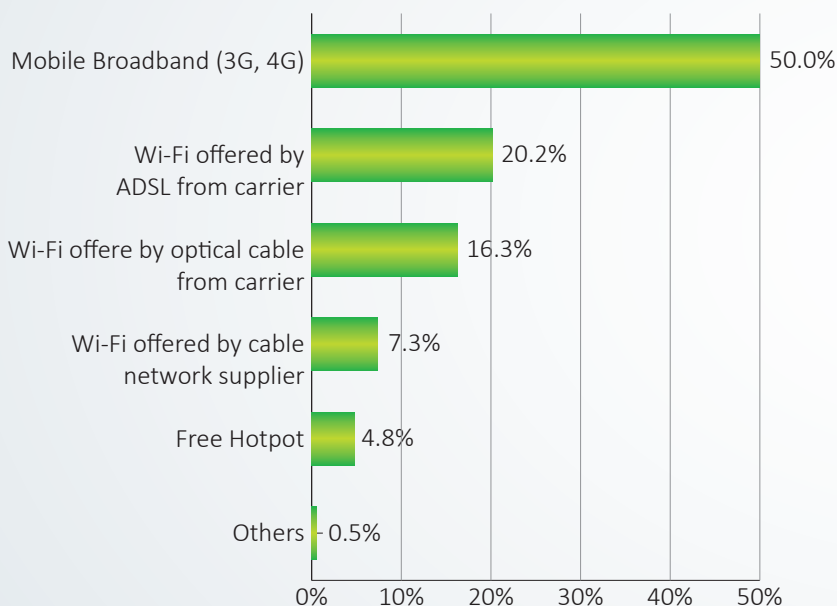
The unlimited data plan (without speed limitation) is the most preferred (49.5%), followed by the unlimited data plan with unknown speed (14.1%). Among the limited data allowance plans, the 1G-5G (5G excluded) plan has the highest rate of 13.5%.



Base: N = 899 (don't know=5.6%)

The Most Common Ways Used to Access the Internet at Home

54.8% of Taiwanese adults access the Internet at home through mobile broadband such as 3G, 4G or hotspot. The rate of using fixed broadband (ADSL fiber optical and cable broadband) services is 43.8%.

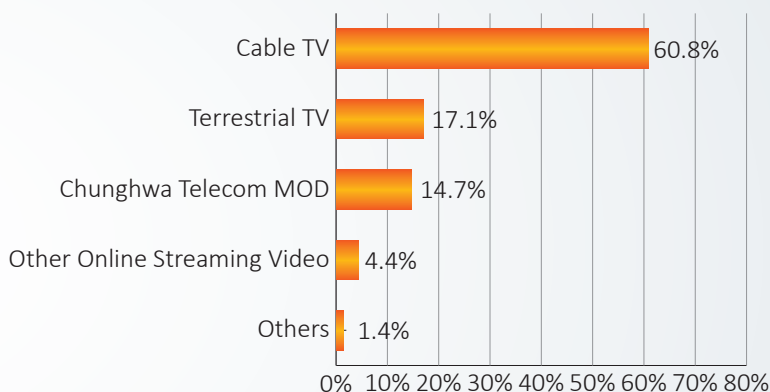


Base: N = 951 (don't know = 1%)



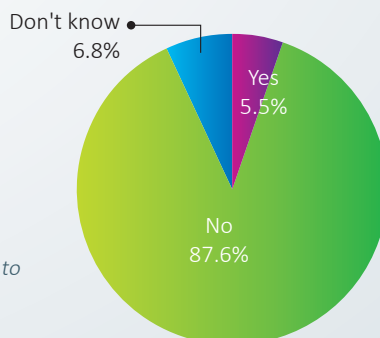
Only 5.5% Consider Suspending Cable TV Service

Cable TV is still the most preferred means of watching television at home (60.8%), followed by terrestrial TV (17.1%), and MOD of Chunghwa Telecom (14.7%). Only 5.5% of those surveyed express they would consider suspending their cable TV service.



Base: N=998 (refuse to answer = 0.1%; don't know = 1.5%)

Will You Consider Ending your Subscription to Cable Television Service?

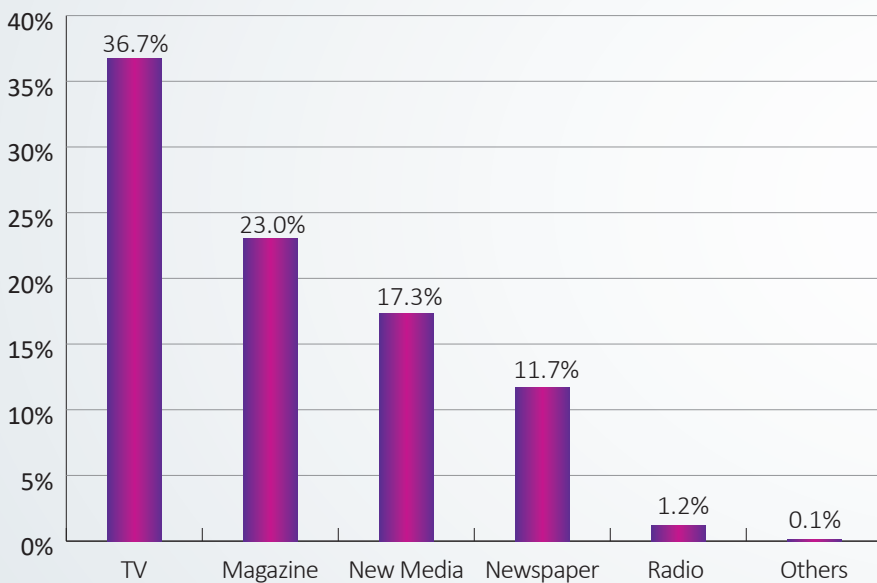


Note: The numbers may vary slightly due to different rounding.

Base: N=664

Privacy Issues in the Broadcasting Market: TV > Magazine > New Media

In terms of what the public considers to be the most common channels for disclosing the privacy of public figures without prior consent, new media ranks in third place.

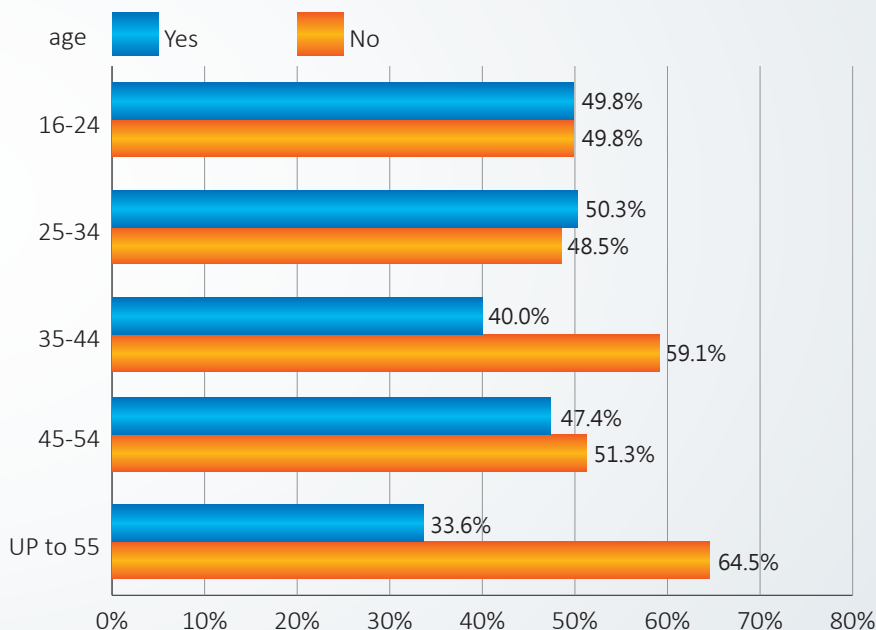


Base: N=1,126



Under 35s Express More Concerns about the Internet

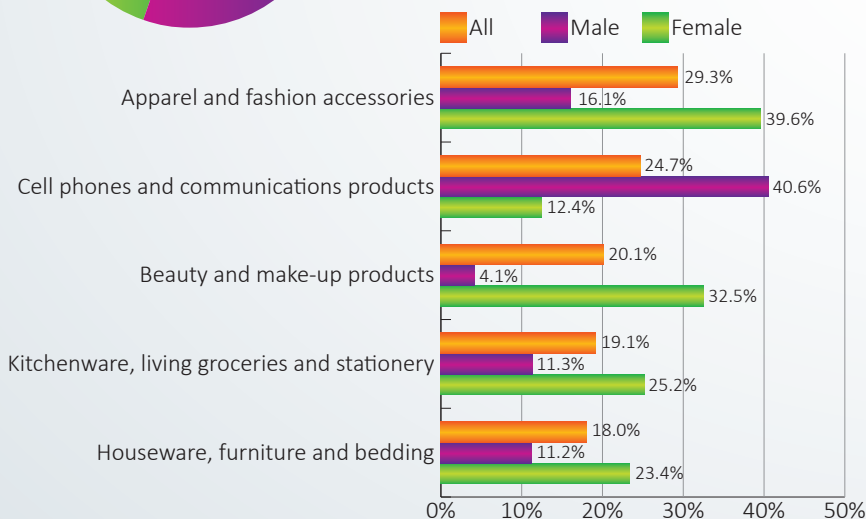
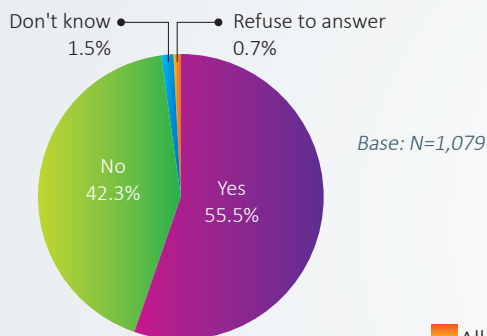
The 25-34 age group is the only group wherein the rate of people (50.3%) who have concerns about internet use is higher than that of people who have no concerns (48.5%). The highest rate of no concerns regarding internet use is 64.5% among people aged up to 55.



Base: N=1,131 (refuse to answer =1.3%)

More than Half Have Experience of Online Shopping

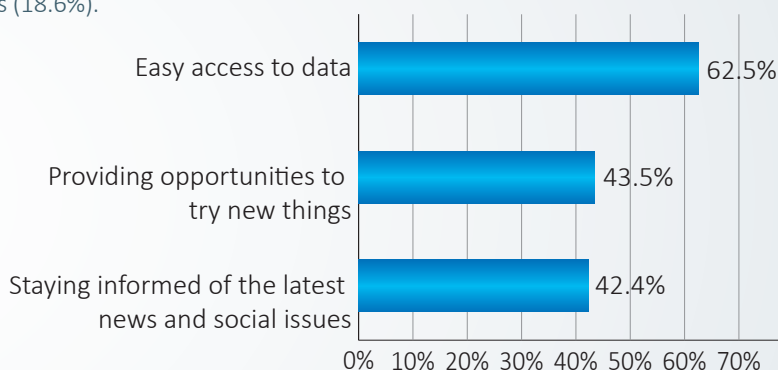
The survey shows that 55.5% of Taiwanese people aged 16 and above have shopped online, with apparel and fashion accessories (29.3%), cell phones and communications products (24.7%) and beauty and make-up products (20.1%) being the most purchased items over the past 12 months.



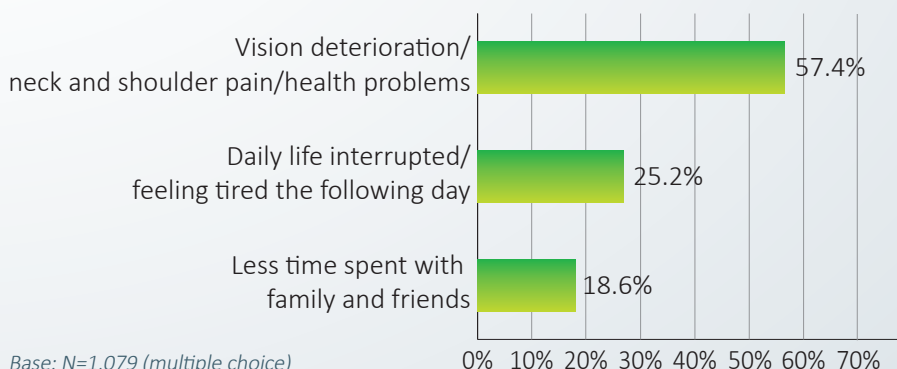
Base: N=570

The Impact of the Internet on Daily Lives

The top three positive impacts of the Internet on people's daily lives (work) are considered to be easy access to data (62.5%), opportunities to try new things (43.5%), and staying informed of the latest news and social issues (42.4%); while the most commonly considered negative impacts of the internet on daily lives are health problems (57.4%), interruption of daily life (25.2%), and less time spent with family and friends (18.6%).



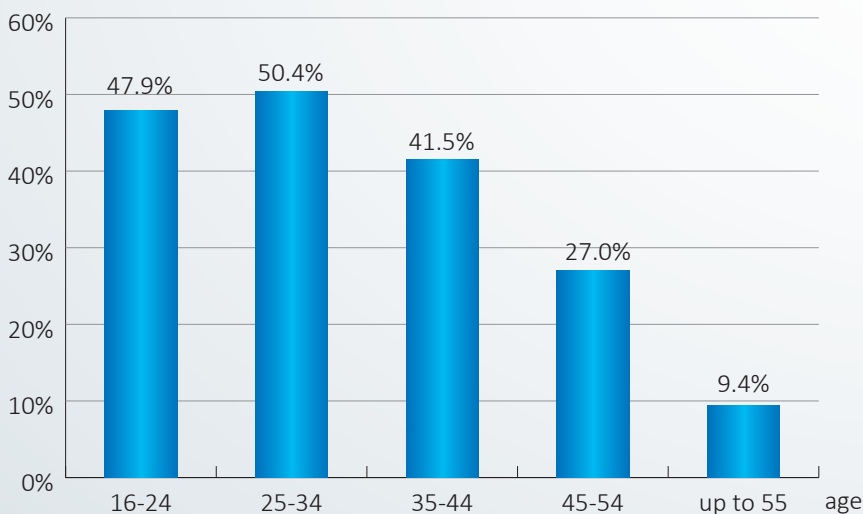
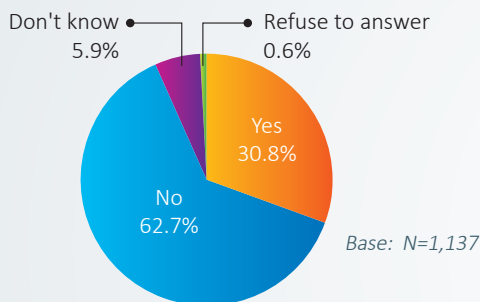
Base: N=1,079 (multiple choice; don't know =3.1%, refuse to answer = 0.7%)



Base: N=1,079 (multiple choice)

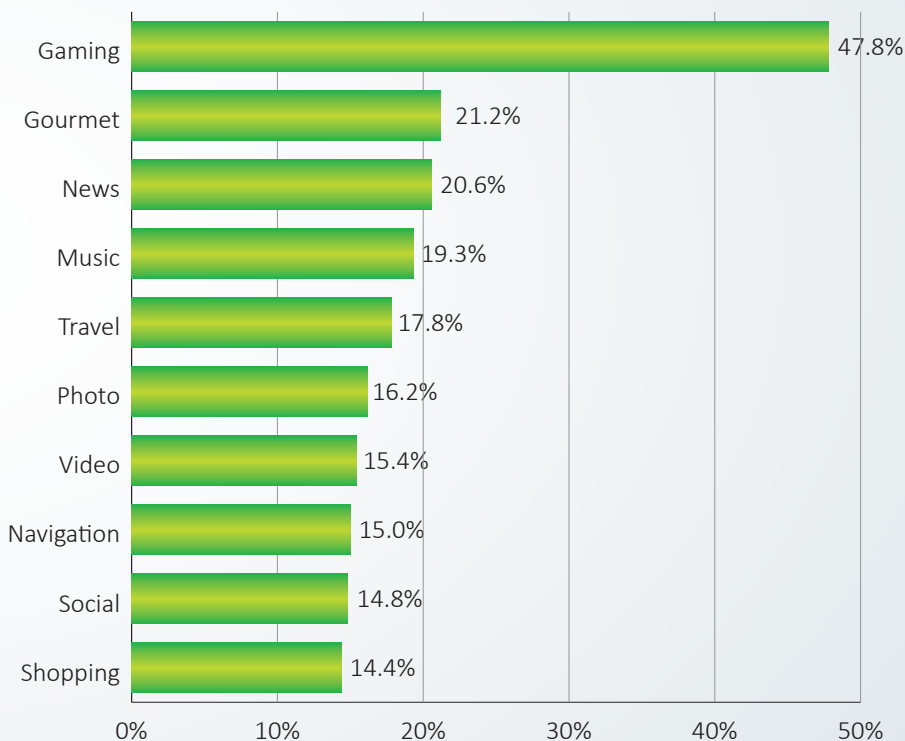
30.8% of People Have Watched Streaming Video

30.8% of people have watched streaming video (including the pay-TV service). And 50.4% of the 25-34 age group have watched streaming video, which is the highest.



Most Commonly Used APPs

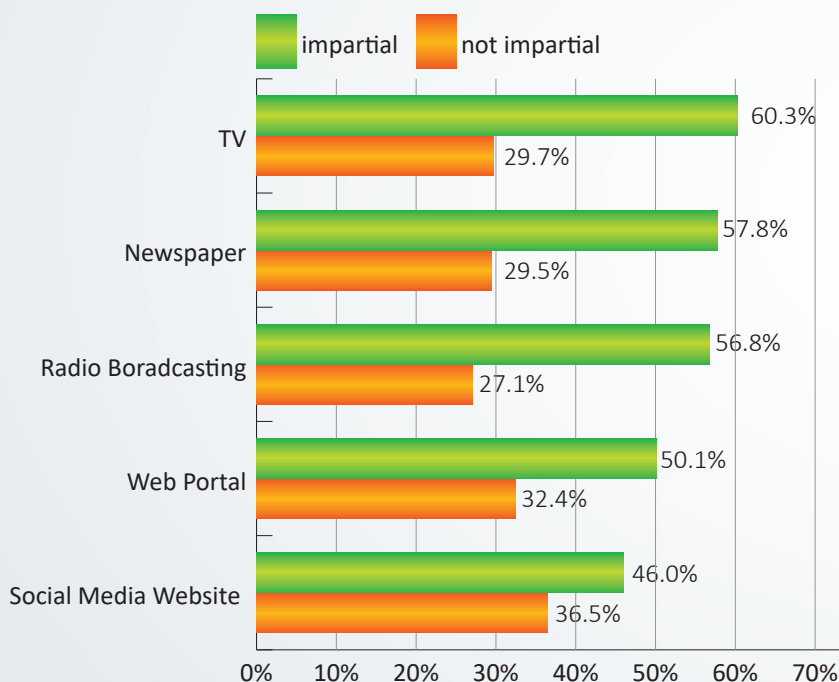
The three most commonly used APPs by adults aged 16 are gaming (47.8%), gourmet (21.2%), and news (20.6%).



Base: N=769 (multiple choice)

The Impartiality of News Source

60.3% of people think that TV news is impartial (either very impartial and fairly impartial), ahead of newspaper (57.8%), radio broadcasting news (56.8%), web portal news (50.1%), and social media website news (46.0%). Notably, 36.5% people think social media website news is not impartial.



Base: N=1,140



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National Communications Commission