A Summary of Key Industry Data for 2022

2022

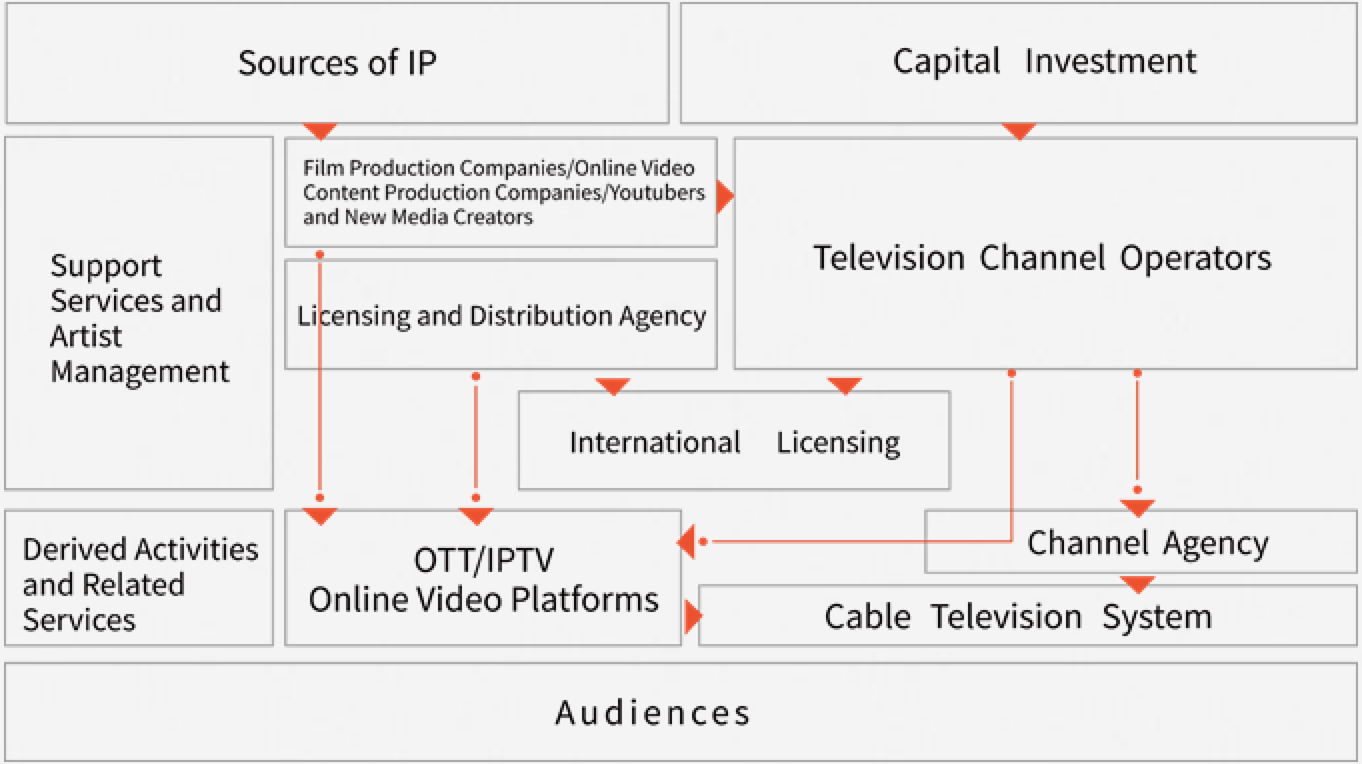
Key Data of Television and Online Video Industry in Taiwan

TAICCA 文化內容策進院 TAIWAN CREATIVE CONTENT AGENCY

Key Trends in Taiwan's Television and Online Video Industry in 2022

- The overall revenue of the television industry continued to grow, reaching NT$178.2 billion in 2022, with a growth rate of 9.66%, the highest in recent years. The export value was nearly NT$1.4 billion, also growing by 6.66%, the highest in the past five years. Additionally, the number of businesses in online video-related industries, including "program production" and "digital distribution and broadcasting," grew by 17.12% and 16%, respectively. The number of businesses producing online video programs doubled from 2019 to 2022.
- The total number of broadcast hours for television programs in Taiwan reached 91,729 hours, a decrease of 1.62% compared to 2021. Of these, Taiwanese television programs accounted for approximately 34,777 hours, an increase of 12.04% compared to 2021.
- The new programs' production hours (including online-only series) were 11,457 hours, an increase of 5.36% compared to 2021. Among these, dramas, general programs, and variety shows saw growths of approximately 2% to 10%. The most popular genre for drama programs continued to be romance. The production hours for new series that aired exclusively online totaled 111 hours, doubling in growth over the past two years.
- Overseas TV channels and OTT platforms, such as those in Japan, Malaysia, and Singapore, broadcast nearly 60% of the new dramas produced. The licensing of IPs (intellectual properties) for derivative work led to a wide array of applications, including mobile games, virtual characters, and reality TV spin-offs.
- Of the 200 most influential YouTube creators in Taiwan, 70% were domestic creators, and 8.33% were from Malaysia, making it the largest foreign group.

Taiwan's Television and Online Video Industry Chart



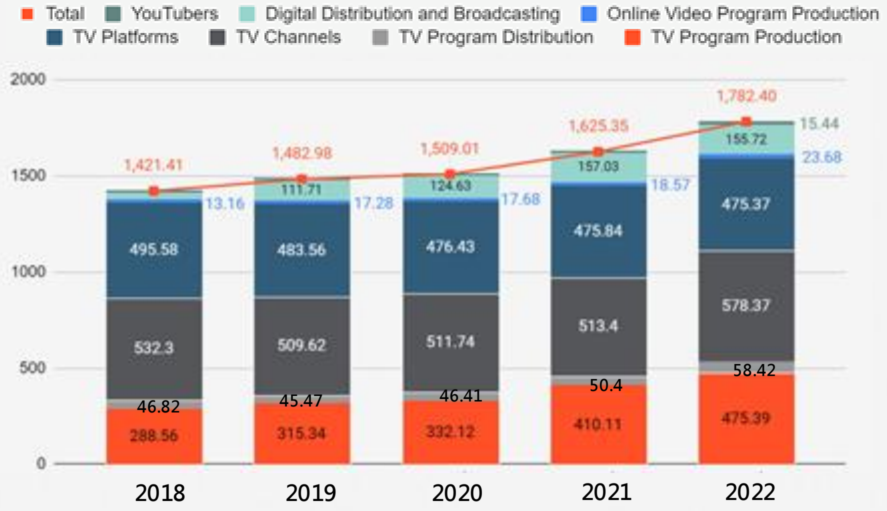
Revenue Changes by Industry Sectors Over the Years

- In 2022, the total revenue of the television industry was NT$178.24 billion, an increase of 9.66% compared to 2021, showing a growth trend for five consecutive years. Within the industry, the online video sector generated NT$19.485 billion in revenue.
- Compared to 2021, the growth rates of various sectors within the television industry in 2022 were as follows:
  - TV Program Production: 15.92%
  - TV Program Distribution: 15.91%
  - TV Channels: 12.65%
  - TV Platforms: -0.10%
  - Online Video Program Production: 27.52%
  - Digital Distribution and Broadcasting: -0.83%
- Revenue from online video creator (such as YouTubers) companies was newly surveyed this year, amounting to NT$1.544 billion in 2022.

Source: Estimated by this survey.

Revenue Changes by Industry Sectors from 2018 to 2022

Unit: NT$100 million



Notes:

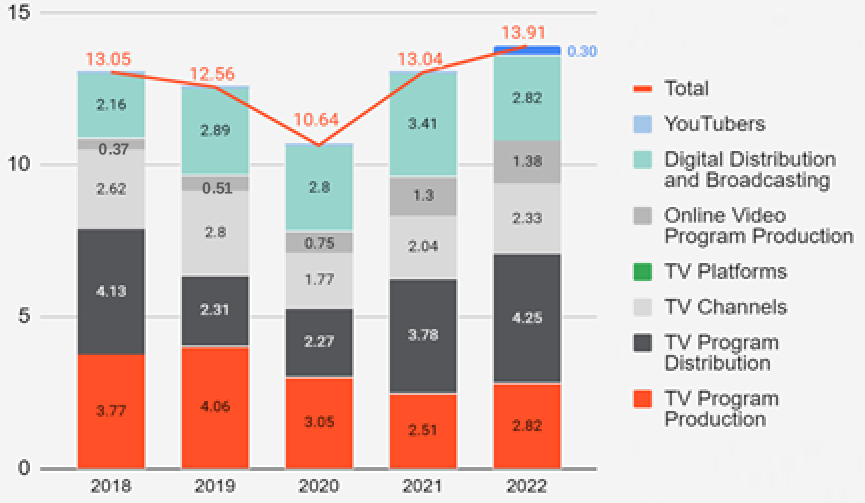
- Due to the inability to separate statistical data for television post-production and movie post-production in the related post-production industry, all post-production data has been included in the movie industry statistics since 2012, after the revision of tax industry standard classification. Please refer to the key data for the movie industry.
- We estimated the digital distribution and broadcasting sector's revenue after 2019 by analyzing the business volume of companies that provided film and television broadcasting services, excluding duplicate companies, and cross-referencing data from telecom platforms based on user numbers, pricing standards, and market share.
- This year's addition of YouTuber's revenue should be cautiously referenced since some YouTube creator companies were established for non-video-related businesses such as food, fitness, and training courses.
- This report provides rounded figures. If individual data points are added directly, there may be slight discrepancies compared to the original statistical data, but these differences do not affect the overall trend interpretation.

Changes in Export Value by Industry Sectors Over the Years

- In 2022, the total export value of the television industry (including the online video industry) was NT$1.391 billion, an increase of 6.66% compared to 2021.
- The TV program production sector's export value overcame the pandemic's decline in 2022, growing by 12.40% compared to 2021, but it still fell short of the pre-pandemic level.
- In 2022, the TV program distribution industry grew by 12.43% compared to 2021, while the TV channel industry grew by 14.22%.
- The export value of the online video sector was NT$450 million in 2022. The online video program production industry grew by 6.25%, while the digital distribution and broadcasting industry declined by 17.34% compared to 2021.

Changes in Export Value of Various Television Industry Sectors from 2018 to 2022

Unit: NT$100 million



Source: Estimated by this survey.
Notes:

- Due to the inability to separate statistical data for television post-production and movie post-production in the related post-production industry, all post-production data has been included in the movie industry statistics since 2012, after the revision of tax industry standard classification. Please refer to the key data for the movie industry.
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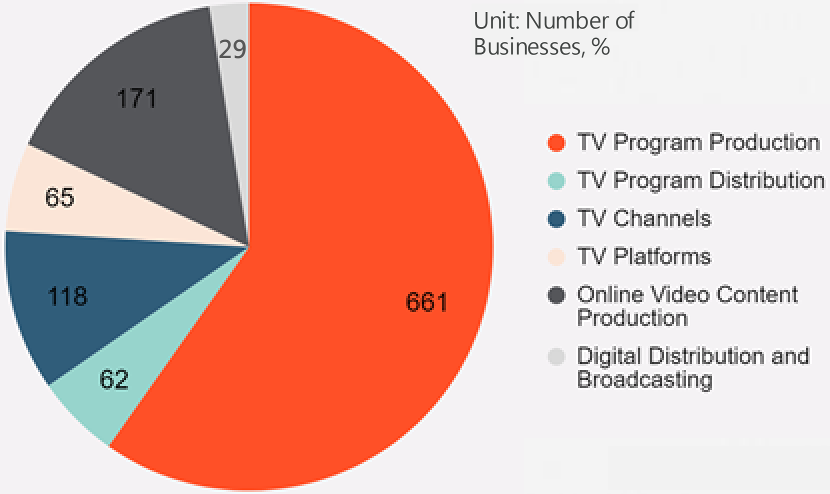
Number and Distribution of Businesses in Various Industry Sectors

- In 2022, the total number of television industry companies was 1,106, an increase of 0.91% compared to 2021.
- In 2022, the total number of companies in the television content sector (TV program production and TV program distribution) was 723, a decrease of 2.56% compared to 2021.
- In 2022, the number of operating companies in the online video program production sector was 171, showing a continuous growth. The number of operating companies had doubled compared to 80 in 2019.
- In 2022, the total number of operating companies in the digital distribution and broadcasting sector was 29, an increase of 16% compared to 2021.

Number and Distribution of Businesses in Various Television Industry Sectors



Source: Organized from data provided by the Fiscal Information Agency of the Ministry of Finance.

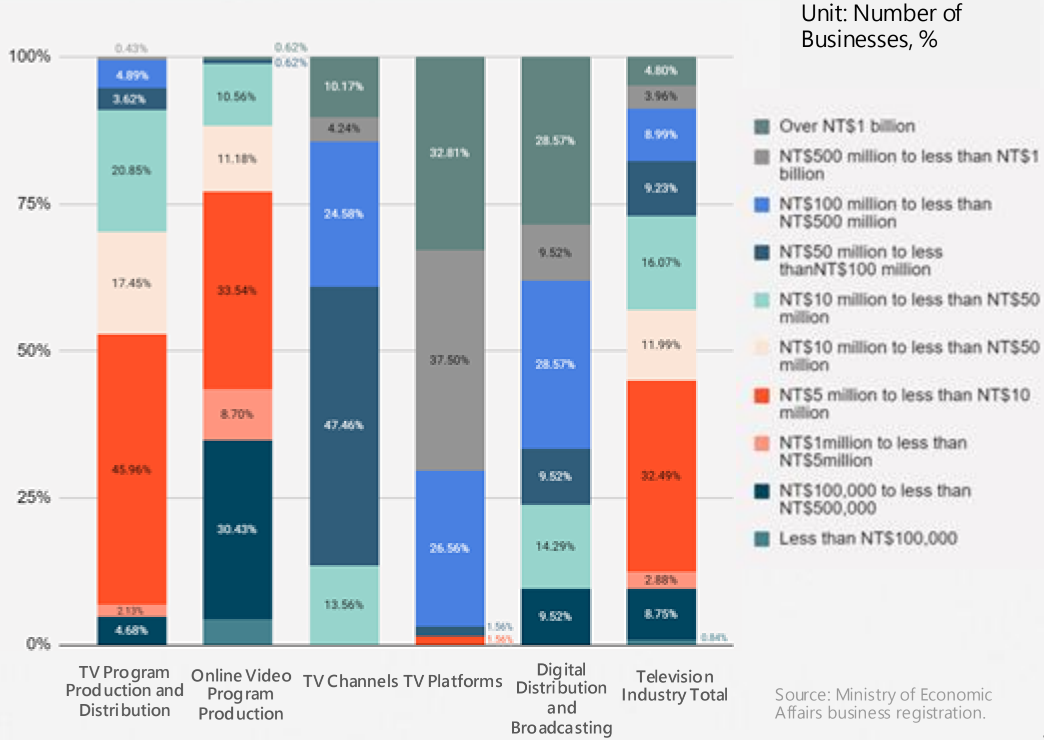
Notes:

- According to the National Communications Commission 's (NCC) Overview of the Telecommunications and Broadcasting Industry, there were 137 satellite television providers and 5 terrestrial television providers as of the fourth quarter of 2022. Since some operators also run foreign live broadcast satellite, foreign satellite channels, and other types of channels, duplicate operators have been excluded from the chart.
- The list of television platform operators included cable television system operators listed by the NCC as well as Internet protocol television (IPTV) providers but excluded live satellite television broadcast service providers who were also satellite television program providers.

Distribution of Capital Scale by Industry Sector

- Compared to other sectors, the TV program production and distribution sector, as well as the online video production sector, had a relatively small capital scale. Those with less than NT$5 million accounted for 52.77% and 77.02%, respectively. The latter were mostly sole proprietorships, small teams, or studios.
- The average paid-in capital for the TV channel sector was NT$389 million, with the majority concentrated between NT$50 million and NT$100 million (47.46%).
- The TV platform sector primarily concentrated its capital scale above NT$500 million (70.31%).
- The digital distribution and broadcasting sector had a diverse composition, including original online platforms, telecom or TV channels expanding into the business, and other film and television companies operating their own platforms.
- Certain international platforms have established offices in Taiwan, primarily dedicated to advertising. They are mostly small in scale. Telecom and TV channel companies that expanded into platform operations have relatively larger capitals, demonstrating a polarization in capital scale within the industry.

Proportion of Capital Scale by Industry Sector in the Television Industry in 2022



Source: Ministry of Economic Affairs business registration.

Distribution of Revenue Scale by Industry Sector

- Approximately 69.44% of the TV program production and distribution companies in 2022 made a revenue of less than NT$10 million. Most online video program production companies were independent companies or small studios, with 80% of companies having revenue below NT$10 million.

- In 2022, 37.15% of TV channel companies had annual revenue above NT$100 million, a decrease of 11.24 percentage points compared to 2021. For the TV platform industry, 45.16% of companies had revenue exceeding NT$100 million.

- The digital distribution and broadcasting platforms included original online platforms, telecom companies, or TV channel companies expanding into the business. There was a significant difference in overall revenue, with 80% of companies having revenue above NT$100 million in 2022.

Overview of Business Revenue Across Various Industry Sectors in Taiwan's Television Industry in 2022

<table>
<tr><th>Sector</th><th>TV Program Production</th><th>Online Video Program Production</th><th>TV Channels</th><th>TV Platforms</th><th>Digital Distribution and Broadcasting Platforms</th></tr>
<tr><td>Less Than NT$1 million</td><td>14.81%</td><td>13.33%</td><td>8.57%</td><td rowspan="7">9.68%</td><td rowspan="8">20.00%</td></tr>
<tr><td>NT$1 million to less than NT$5 million</td><td>36.11%</td><td>41.67%</td><td>2.86%</td></tr>
<tr><td>NT$5 million to less than NT$10 million</td><td>18.52%</td><td>25.00%</td><td>11.43%</td></tr>
<tr><td>NT$10 million to less than NT$20 million</td><td>6.48%</td><td>3.33%</td><td>11.43%</td></tr>
<tr><td>NT$20 million to less than NT$40 million</td><td>10.19%</td><td>5.00%</td><td>14.29%</td></tr>
<tr><td>NT$40 million to less than NT$60 million</td><td>4.63%</td><td>1.67%</td><td>5.71%</td></tr>
<tr><td>NT$60 million to less than NT$80 million</td><td>1.85%</td><td>-</td><td>2.86%</td></tr>
<tr><td>NT$80 million to less than NT$100 million</td><td>0.93%</td><td>1.67%</td><td>5.71%</td><td>-</td></tr>
<tr><td>NT$100 million to less than NT$250 million</td><td>5.56%</td><td>6.67%</td><td>17.14%</td><td rowspan="3">90.32%</td><td>40.00%</td></tr>
<tr><td>NT$250 million to less than NT$500 million</td><td>0.93%</td><td>1.67%</td><td>-</td><td>20.00%</td></tr>
<tr><td>Over NT$500 million</td><td>-</td><td>-</td><td>20.00%</td><td>20.00%</td></tr>
<tr><td>Total</td><td>100.0%</td><td>100.0%</td><td>100.0%</td><td>100.0%</td><td>100.0%</td></tr>
</table>

Source: Organized by this survey.

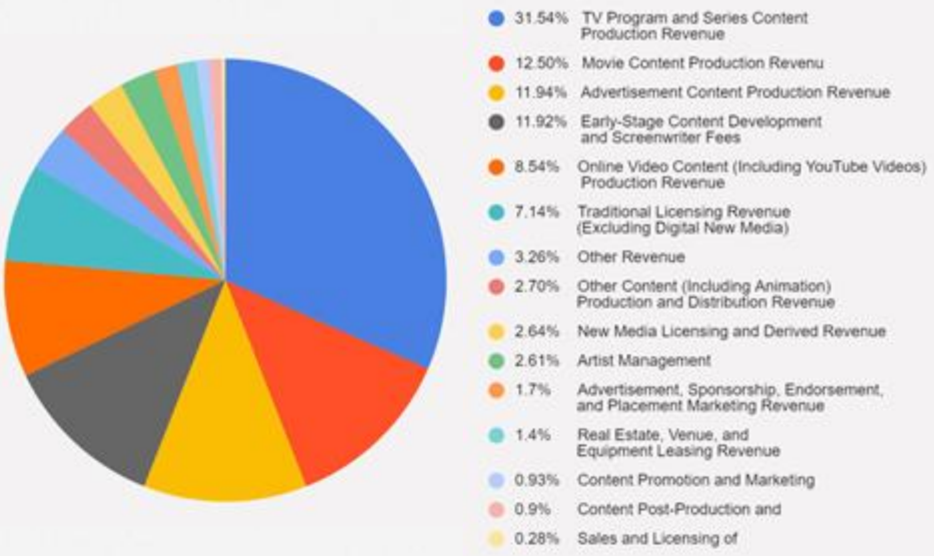
Revenue Structure of the TV Program Production and Distribution Sector

- In 2022, the revenue structure of the TV program production and distribution sector was as follows: the production and distribution of TV programs and series content accounted for 31.54% of total revenue, while the production and distribution of movie content, including box office shares and distribution revenue, accounted for 12.50%.

- The revenue related to movie content production and distribution was mainly driven by the growth of OTT platforms and many film production companies expanding into series production in recent years. However, due to the increased digital dividends and internet traffic during the pandemic, many companies that had ventured into related fields returned to film production after the pandemic.

Revenue Structure of Taiwan's TV Program Production and Distribution Industry in 2022

Unit: %



Source: Organized by this survey study

Note: This year's survey was adjusted in response to changes in the television industry and after consultation with public association organizations. Caution is advised when making comparisons between years.

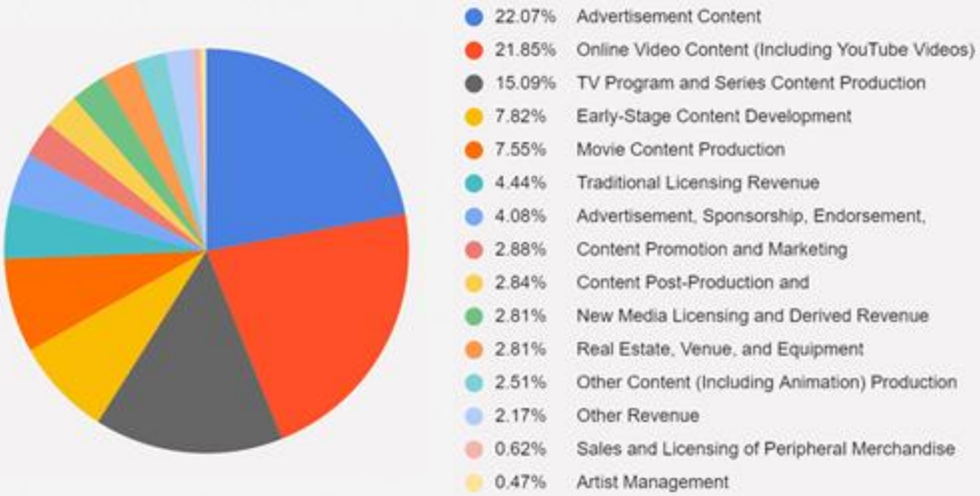
Revenue Structure of the Online Video Production Sector

- The online video program production industry was made up of existing movie and television companies, advertising video production companies, and YouTube content creators. Online video content (including YouTube videos) and advertising content production revenue made up 21.85% and 22.07% of the revenue structure, respectively.

- Revenue from advertisements, sponsorships, endorsements, and product placements accounted for about 4.08%, slightly higher than that of the TV program production and distribution sector.

Revenue Structure of the Online Video Program Production Industry in 2022

Unit: %



Notes:
- This year's survey was adjusted in response to changes in the television industry and after consultation with public association organizations. Caution is advised when making comparisons between years.
- The video content produced by TV, movie, and online video program production companies for commercial services was referred to as advertising content production. Revenues generated in this manner differed from the revenue obtained through video content from advertisements, sponsorships, endorsements, and product placements.

Source: Organized by this survey study.

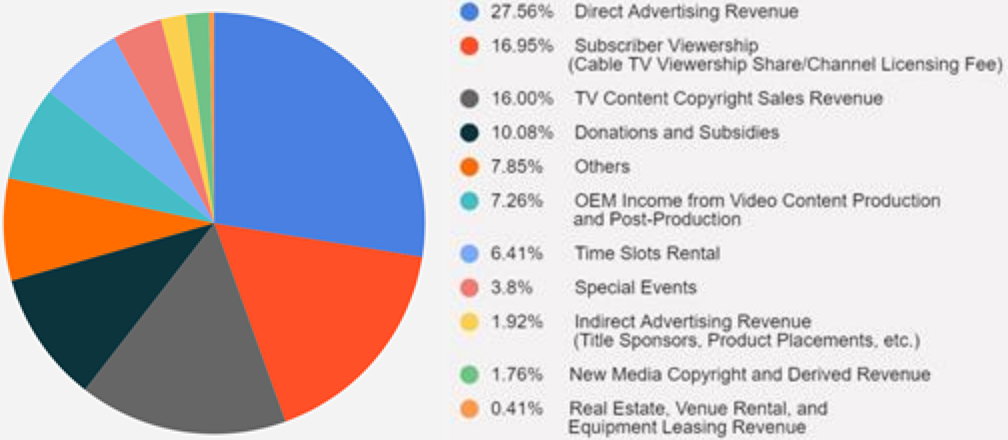
Revenue Structure of the TV Channel Sector

- The main sources of revenue for the TV channel sector were as follows:
  - Direct advertising revenue: 27.56%
  - Subscriber viewership: 16.95%
  - TV content copyright sales revenue: 16.00%
  - Donations and subsidies: 10.08%

- The TV channel sector heavily relies on advertising income. However, multiple factors have affected this revenue source, such as OTT platforms providing on-demand content that competed for consumer attention, the proliferation of pirated set-top boxes, and licensing fee disputes between channel agents and system operators in response to changes in audience viewing habits, causing the industry to face operation pressure.

Revenue Structure of the TV Channel Sector in 2022

Unit: %



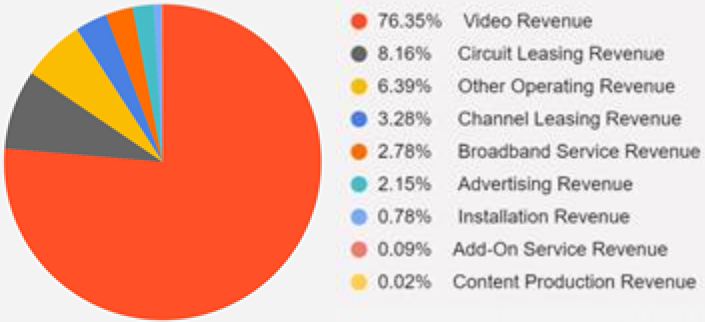
Note: This year's survey was adjusted in response to changes in the television industry and after consultation with public association organizations. Caution is advised when making comparisons between years.
Source: Organized by this survey

Revenue Structure of TV Platform and Digital Distribution and Broadcasting Sectors

- In 2022, the revenue sources for the TV platform sector were mainly video revenue (76.35%), followed by circuit leasing income (8.16%). The overall revenue structure was largely the same as the previous year.

Revenue Structure of the TV Channel Sector in 2022

Unit: %



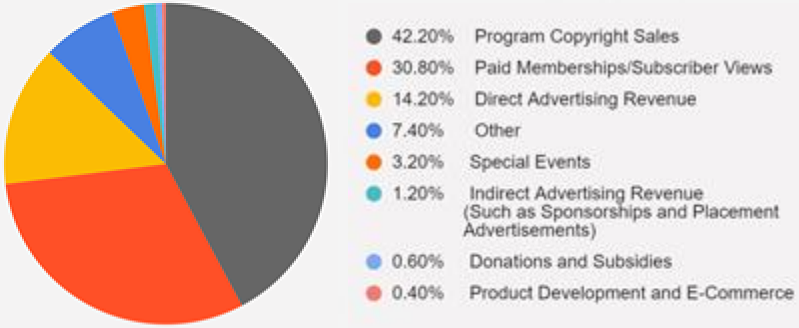
Note: This year's survey was adjusted in response to changes in the television industry and after consultation with public association organizations. Caution is advised when making comparisons between years.
Source: Organized by this survey.

- In 2022, the primary revenue sources for the digital distribution and broadcasting sector were as follows:
  - Program copyright sales: 42.20%
  - Paid membership/subscriber viewership income: 30.80%
  - Direct advertising revenue: 14.20%

- Certain platforms provide free content through advertisements, thereby attracting audiences and driving revenue growth in this category.

Revenue Structure of the Digital Distribution and Broadcasting Sector in 2022

Unit: %



Source: Organized by this survey

Overseas Copyright Transactions of Taiwan's Television Industry

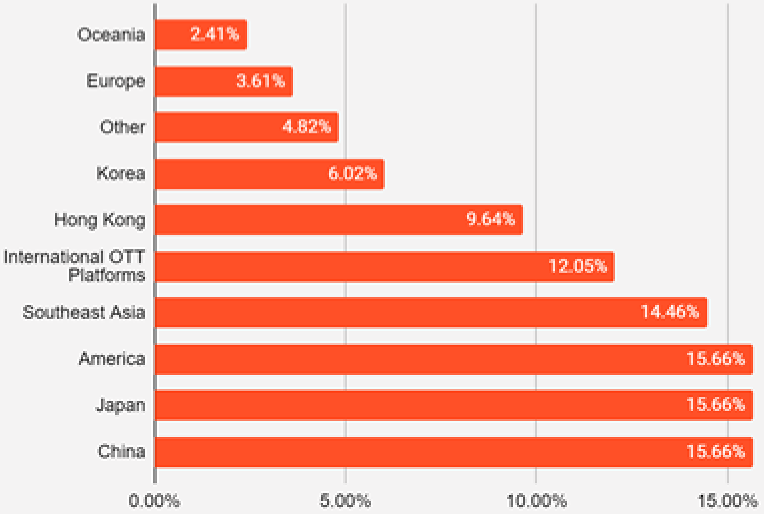
- In 2022, China, Japan, and the Americas each accounted for 15.66% of the main countries and regions for copyright transactions in the TV channel, TV program production and distribution, and online video program production sectors, while international OTT platforms accounted for 12.05%.

- In addition to the Chinese markets in Southeast Asia (such as Singapore and Malaysia), companies also increased cooperation with markets in Indonesia, Vietnam, and India.

- Other countries accounted for 4.82%. Certain companies engaged in overseas copyright transactions with Middle Eastern partners.

Licensed Regions of Taiwan's Content in 2022
(Percentage of Transactions)

Unit: %



Notes:
- This year's survey was adjusted (such as expanding the survey scope from the US to the entire American continent) in response to changes in the television industry and after consultation with public association organizations. Caution is advised when making comparisons between years.
- The percentages shown above were based on the number of times transactions occurred instead of the revenue generated.

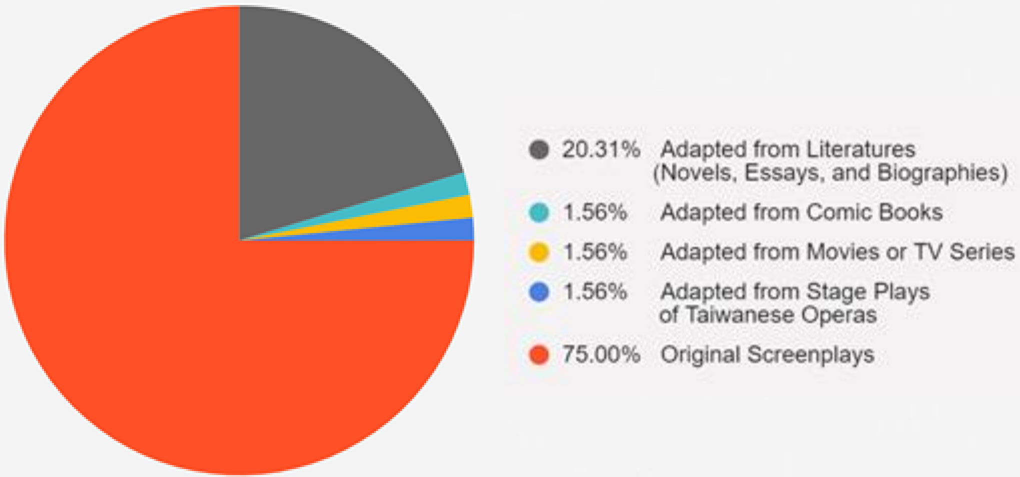
Source: Organized by this survey

Taiwan's Drama IPs: Sources of Inspiration and Overview of Derivative Works

- Taiwanese drama content is mainly based on original screenplays (75%).
- Subsequent derivative works have diversified, expanding to include reality TV spin-offs, idol groups (IT BOYZ), virtual character NFTs (De Lu Tiger), and mobile games, among others.

Text Sources for New Dramas in 2022

Unit: %



Source: Compiled from official press releases and public news reports of various dramas.
Note: The number of new dramas produced and broadcast in 2022 (calculated by broadcast time, including online-only) was 64.

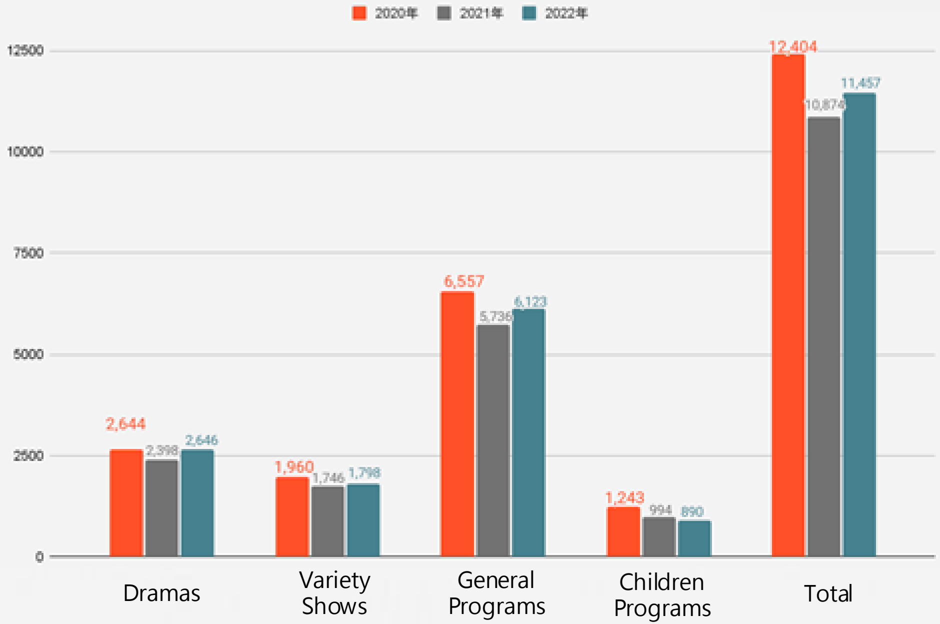
Trends in Production Hours of New Programs in Taiwan

- In 2022, the production hours of new programs in Taiwan (calculated by broadcast time) were 11,457 hours, a recovery of 5.36% compared to 2021, but still lower than 2020 due to the continued impact of the pandemic.

- The growth rates of production hours for various types of new programs in 2022 compared to 2021 were as follows:
  - Dramas: 10.34% growth
  - General Programs: 6.75% growth
  - Variety Shows: 2.98% growth
  - Children Programs: 10.46% decrease

Changes in Production Hours of New Programs from 2020 to 2022

Unit: Hours



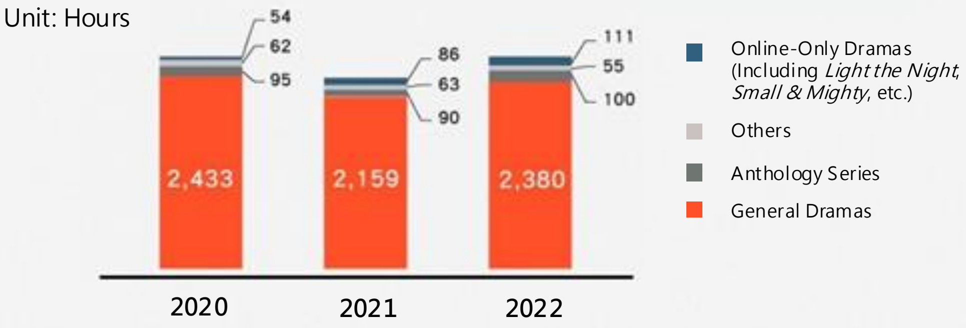
Note: "New programs" refer to those broadcast for the first time on domestic cable broadcasting systems (including cable TV systems), direct satellite broadcasting services, or other platforms accessible to the public, as defined by the NCC revision. The production hours of drama programs are calculated based on broadcast time, and cross-year productions (such as 2021/2022 and 2022/2023) are only counted for the current year.
Source: This survey organized the data from the program schedules of each channel, the 22nd National Children and Teenager Program Selection, the 2022 Hakka TV Annual Report, and the 2022 Public Television Service Foundation Annual Report.

Trends in Production Hours of Taiwanese Dramas

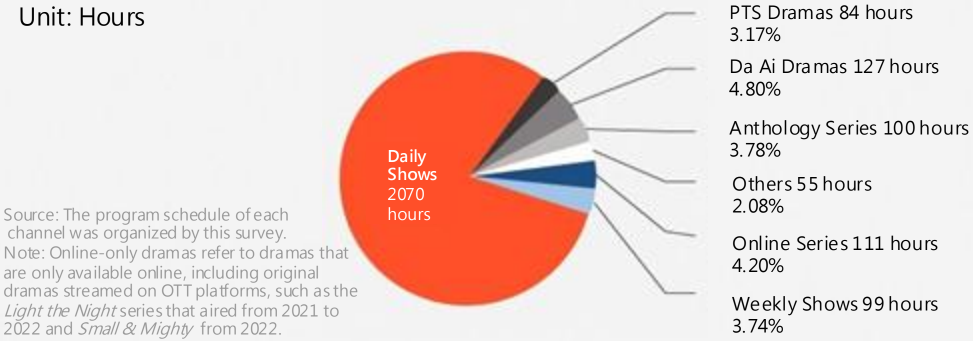
- In 2022, the production hours of Taiwanese dramas (calculated by broadcast time) were 2,646 hours, returning to the 2020 level. General drama programs were slightly below the 2020 level, while dramas that streamed exclusively online totaled 111 hours, doubling compared to 2020 and growing nearly 30% compared to 2021.

- In 2022, the production hours of drama programs excluding online-only dramas (referred to as TV dramas) were 2,535 hours, a 9.65% increase compared to 2021. The type distribution was mainly daily dramas, with production hours reaching 2,070 hours, accounting for about 80%.

Distribution of Drama Hours from 2020 to 2022



Distribution of New Drama Types om 2022 by Hours



Source: The program schedule of each channel was organized by this survey.
Note: Online-only dramas refer to dramas that are only available online, including original dramas streamed on OTT platforms, such as the *Light the Night* series that aired from 2021 to 2022 and *Small & Mighty* from 2022.

Taiwan's Television Program Production Costs

- In 2022, the average production cost per episode of television drama programs increased by 7.86% compared to 2021, after excluding extreme values, with a median of NT$5.5103 million.

- In 2022, the average production cost per episode of television non-drama programs increased by 7.88% compared to 2021, with a median of NT$1.7447 million.

- In recent years, non-drama programs have seen an increase in large-scale investment due to trends such as outdoor camping and diverse reality shows following the pandemic, and some producers have adopted movie or series specifications for shooting. Some non-drama programs have capitalized on the professional abilities or fan bases of YouTubers and influencers, inviting them to participate as guests or create specific programs, resulting in a polarization of production budget planning.

Distribution of Production Cost for Taiwan's Television Drama Programs 2020 to 2022

Unit: $NT

Production Cost Per Episode	2020	2021	2022
Average Production Cost	5,310,820	5,828,528	6,286,872
Median	4,797,649	4,770,877	5,510,269
Maximum Value	15,750,000	12,020,550	17,004,563
Minimum Value	977,958	2,085,974	401,792

Note: Have excluded data of extremely large productions.
Source: Subsidy data for television program production (for dramas) from the BAMID of the Ministry of Culture organized by this survey.

Distribution of Production Cost for Taiwan's Television Non-Drama Programs 2020 to 2022

Unit: $NT

Production Cost Per Episode	2020	2021	2022
Average Production Cost	1,712,940	1,672,132	1,803,936
Median	1,744,724	1,446,080	1,588,973
Maximum Value	6,538,462	8,497,936	7,284,000
Minimum Value	525,088	611,302	321,154

Note: Average production cost has excluded data of extremely large productions.
Source: Subsidy data for television program production (for non-dramas) from the BAMID of the Ministry of Culture organized by this survey.

Taiwan's Children Program Production Costs

- In 2022, the average production cost per episode of children programs decreased by 3.59% compared to 2021, with a median of NT$1.4236 million.
- The decrease was due to the higher per-episode cost of large-scale productions in 2021, which were relatively higher in numbers, thereby raising the average production cost per episode.

Changes in Distribution of Production Cost for Taiwan's Children Programs 2020 to 2022

Unit: $NT

Production Cost Per Episode	Industry Distribution		
	2020	2021	2022
Average Production Cost	1,921,541	1,624,255	1,565,917
Median	1,235,544	823,000	1,423,923
Maximum Value	4,635,750	4,133,333	3,584,250
Minimum Value	249,900	202,125	258,596

Notes:

- This section's data is compiled from the relevant production auxiliary materials announced by the BAMID of the Ministry of Culture. According to the "Key Points for Subsidizing the Production of Children Television Programs," the term "children" refers to individuals under the age of twelve, per Article 2 of The Protection of Children and Youths Welfare and Rights Act.
- Due to the varied implementation schedules of the Children Television Program Production Grant, the second batch of subsidy applications did not match this report's survey period. As a result, the data on children television programs in the 2022 movie, television, and animation industry survey report only included information from the first batch of applications in 2021, whereas this year's survey presents the complete data from 2021.

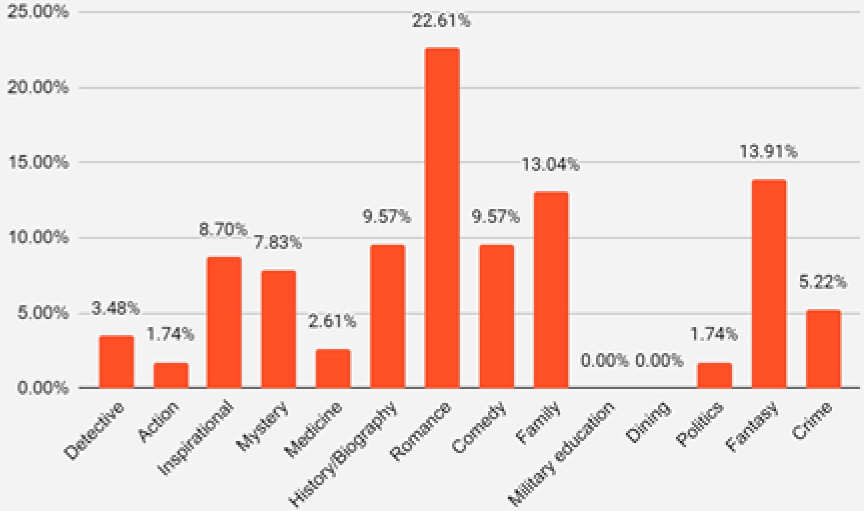
Source: Subsidy data for children television program production from the BAMID of the Ministry of Culture organized by this survey.

Genre Breakdown of New Taiwanese Drama Programs

- In 2022, the most common genres of Taiwanese dramas were romance (22.61%) and fantasy (13.91%).
- Many dramas were complex and included various elements, covering a wide range of themes, including futuristic science fiction, crime investigation, historical biography, and sports.

Unit: %

Topics and Elements of Taiwanese Dramas (Including Online-Only Series) Produced in 2022



Data: Compiled from various drama program schedules.

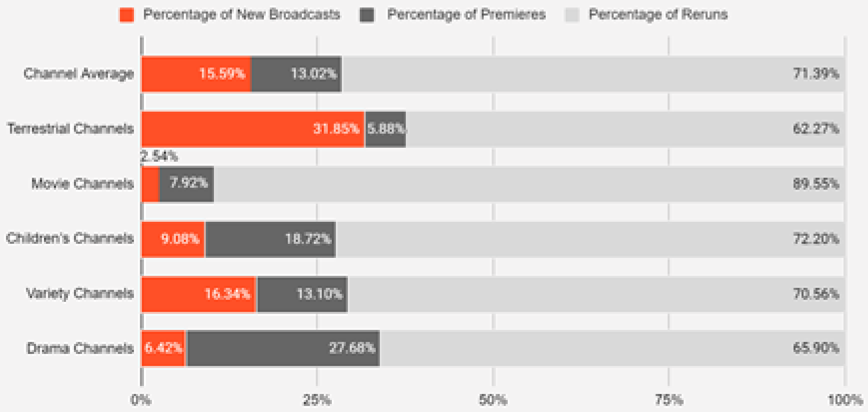
Notes:
- The naming of the types of dramas referenced the categories from the British Film Institute. Newly added categories include military life, medical, food, politics, and martial arts.
- This survey manually determined the newly produced dramas in 2022. Each drama may be categorized under a maximum of three genres (taking into consideration the purpose of production and nature of the television dramas, but excluding Da Ai shows and anthologies such as Life Story).

Broadcasting Status of Various Channels

- In 2022, the average new broadcast rate for various channels in Taiwan was 15.59%, an increase of 0.75 percentage points from 14.84% in 2021. The total number of new broadcast hours for various channels was 39,500, an increase of 5.06% from 37,600 hours in 2021.
- The channel types that experienced significant growth in new broadcast hours in 2022 were:
  - Children channels had 1,524.50 hours, up 22.83% from 1,241.10 hours in 2021, showing the largest growth.
  - Variety channels had 21,475.10 hours, up 10.75% from 19,391.45 hours in 2021.
- The resumption of filming and the introduction of new seasons and episodes of non-drama programs following the pandemic in 2022 were the main factors contributing to the growth in new broadcast hours.

Ratios of New Broadcasts, Premieres, and Reruns on Taiwan's TV Channels in 2022

Unit: %

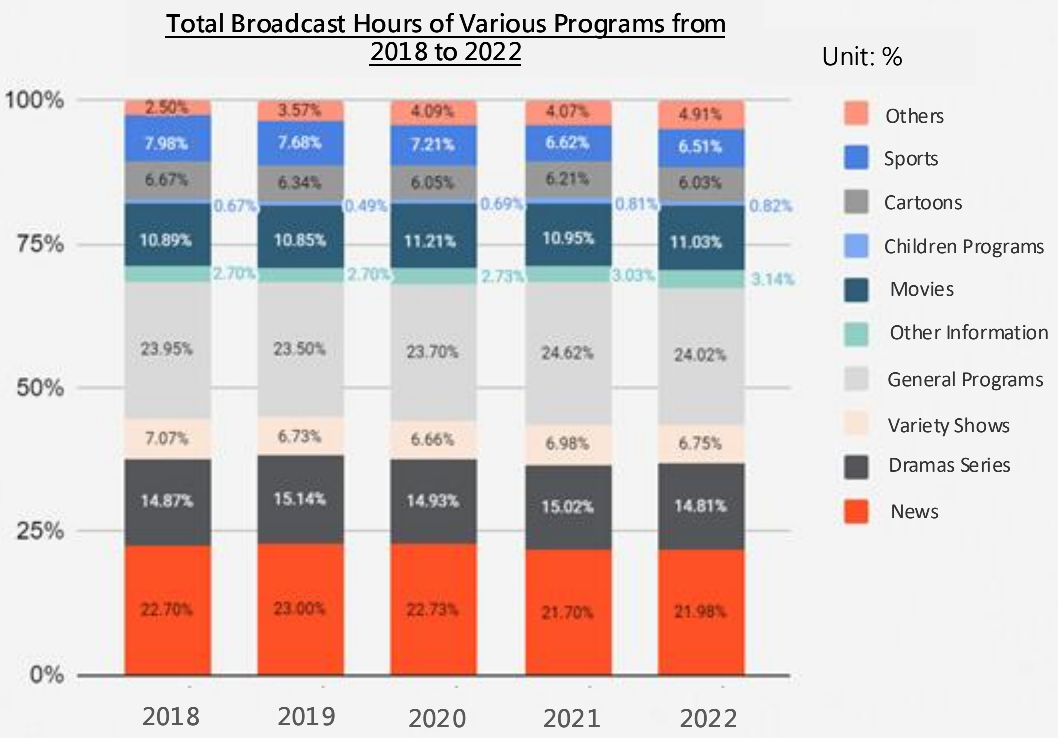


Notes:
- Among the types of channels analyzed by this survey, satellite television channels mainly consisted of cable TV systems. Drama channels included EBC Drama Channel, Videoland Drama Channel, and GTV Drama Channel. Variety channels included CTi Entertainment, CTi Variety, GTV One, GTV Variety, SET Taiwan, SET Metro, EBC Variety, Star Chinese, Videoland Variety, TVBS (Variety Channel), TVBS-G, MUCH TV, Super TV, Azio TV, and JET Variety. Movie channels only included EBC Movie, EBC Foreign Movie, VideoLand Movie, and SCM, while children channels only included EBC YOYO TV and MOMO Kids.
- Data on rates of new broadcasts, premieres, and reruns was taken from NCC Open Data: "Satellite TV channels broadcast programs according to the number of hours and proportions of new broadcasts, premieres, and reruns" and "Terrestrial television channels broadcast programs according to the number of hours and proportions of new broadcasts, premieres, and reruns." The definitions of television channel new broadcasts, premieres, and reruns were based on the definitions of the NCC, and the sum of the categories above was 100%. The NCC's revised definition of "new broadcast" was "the first time a program is broadcast by a domestic cable TV broadcast system operator (including cable TV program broadcast systems), live satellite broadcast television service company, or other public broadcasting platform."

Source: Summarized from the NCC open data.

Changes in Total Broadcast Hours of Various Program Types Over the Years

- In 2022, general programs accounted for the largest share of total broadcast hours by program type, at 24.02%.
- News, TV dramas, movies, variety shows, sports, and cartoons came next.



Source: Nielsen Television Audience Measurement Service. The copyright of Nielsen Television Audience Measurement Data belongs to Nielsen. Reproduction is strictly prohibited without authorization, including in any form such as mechanical, electronic, or photographic, for any commercial use.

Notes:

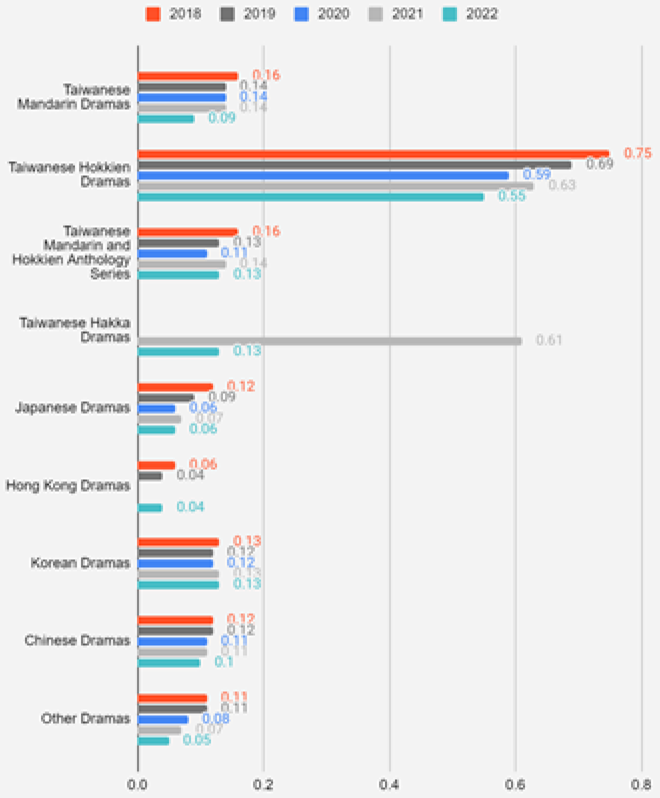
- General Programs: According to the definition by the Bureau of Audiovisual and Music Industry, MOC, general programs include natural science, humanities, and lifestyle programs, as well as games and reality shows. The scope of this survey comprises variety shows, information, food, and travel programs based on categories classified by the Nielsen Company.
- Movies: Include domestic and foreign movies as well as European and American series.
- Variety Shows: Include entertainment, music, and competition variety shows based on the Nielsen classification.
- Cartoons: Include both children cartoons and anime for teenagers.
- The total broadcast hours in 2022 are the sum of total hours for both drama and non-drama programs, with N=619,448 hours.

Average TV Drama Ratings by Language and Country of Origin

- In 2022, the average rating for Taiwanese Hokkien dramas was the highest at 0.55%, followed by Mandarin and Taiwanese Hokkien single-episode dramas, Taiwanese Hakka dramas, and Korean dramas, all with an average rating of 0.13%.

- In 2022, the exclusive broadcast of popular series like Light the Night Season 3, Mom, Don't Do That!, and Taipei Girls on OTT platforms attracted more viewers, thereby impacting the ratings of Taiwanese Mandarin drama. The ratings for Taiwanese Hakka dramas also saw a significant decline compared to the previous year's large production, Gold Leaf, which set a high benchmark.

Unit: %



<u>Average ratings of dramas by language and country from 2018 to 2022</u>

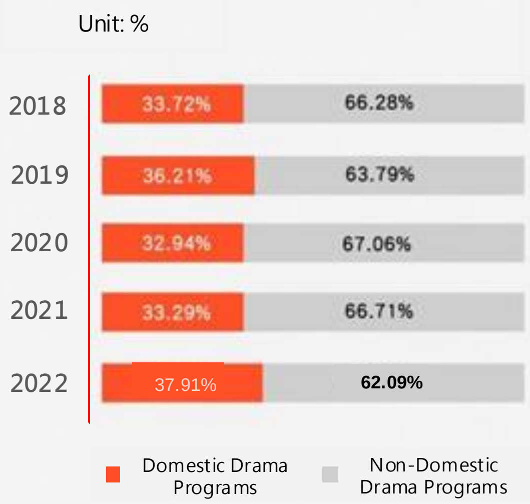
Note: The Nielsen TV ratings for 2020 did not include data on Taiwanese Hakka dramas and Hong Kong dramas; the 2021 ratings did not include data on Hong Kong dramas.
Source: Nielsen Television Audience Measurement Service.

Taiwanese Drama Broadcast Hours in Major TV Time Slots Increased by 20% in 2020

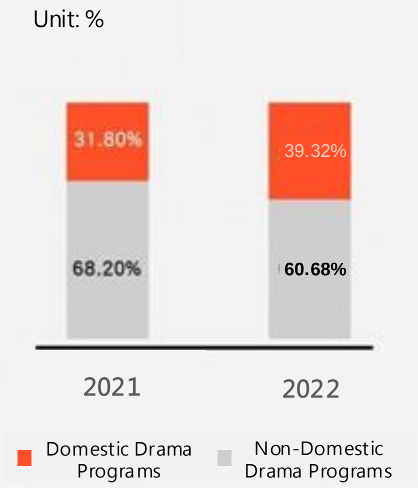
- In 2022, the total broadcast hours of TV drama programs across all time slots were 91,729 hours, a decrease of 1.62% compared to 2021. The broadcast hours of Taiwanese TV dramas were 34,777 hours, an increase of 12.04% compared to 2021.

- In 2022, the NCC’ s main time slot for TV drama hours was 12,858 hours, a decrease of 0.99% compared to 2021. Among these, the broadcast hours of Taiwanese dramas were 5,056 hours, an increase of 22.42% compared to 2021; the proportion of Chinese, Korean, and Japanese dramas declined.

Proportion of Total Broadcast Hours for TV Dramas from 2018 to 2022



Proportion of Prime-Time (20:00-21:59) Broadcast for TV Dramas from 2021 to 2022



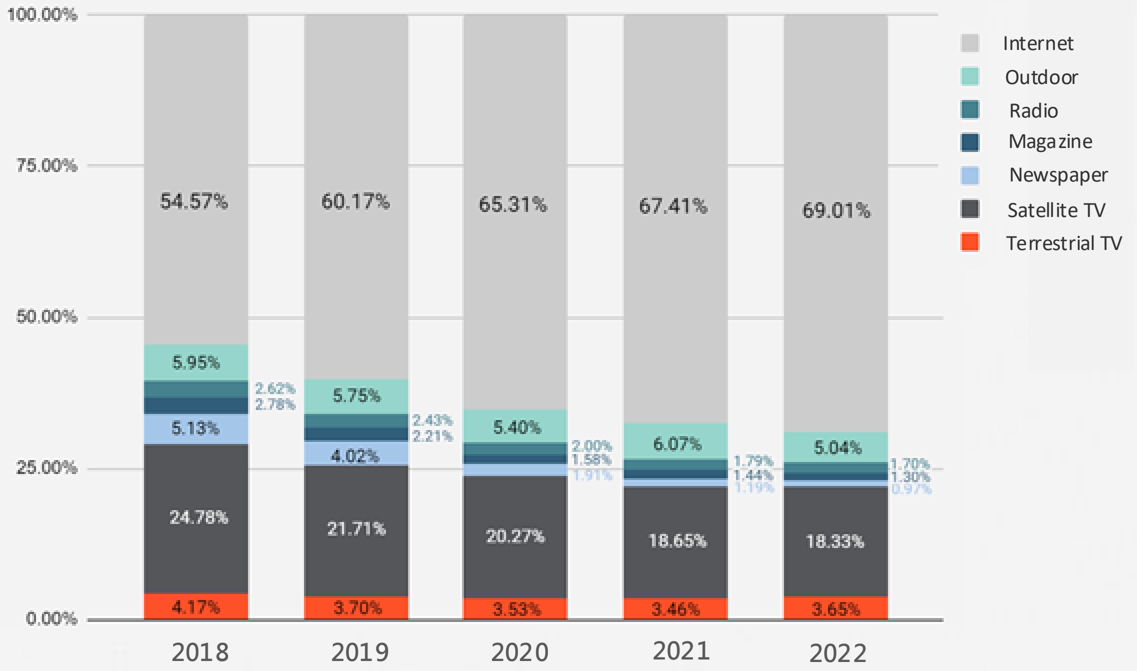
Trends in Various Media Advertising and Television Advertising Over the Years

- In 2022, the media advertising volume was NT$85.437 billion, an increase of 5.81% compared to 2021.

- In 2022, the proportion of total advertising excluding the internet was 30.99%, with the advertising volume slightly increasing by 0.62% compared to 2021. Among these, the proportion terrestrial television advertising increased in 2022, while satellite television slightly declined.

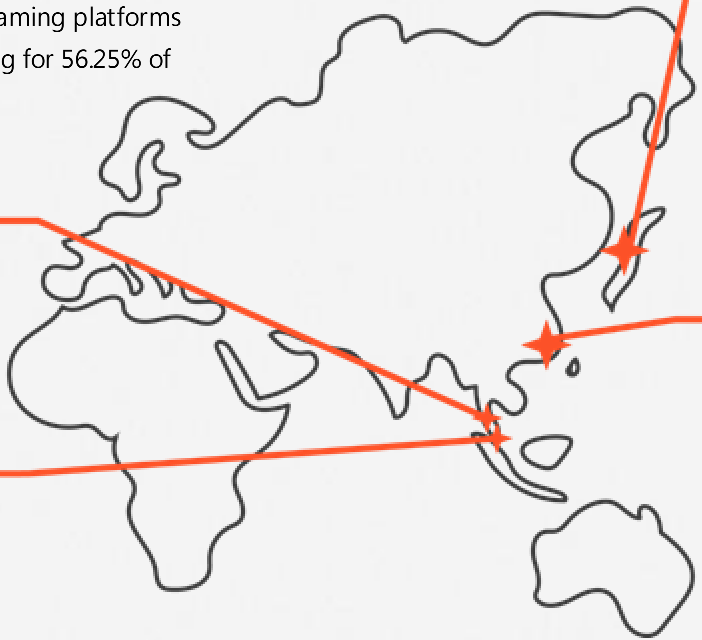
Source: Summarized from the *2022 Media Book* produced by the Media Agency Association (MAA). The *2022 Media Book* got its data from Nielsen Ad Intel and the Digital Marketing Association (DMA).

Proportion of Media Advertising from 2018 to 2022



Broadcasting Status of New Taiwanese Dramas on Overseas Channels and Platforms

- In 2022, a total of 36 new Taiwanese drama programs were broadcast abroad through streaming platforms and overseas TV channels, accounting for 56.25% of the new dramas aired.



Japan

In 2022, Japanese TV channels did not broadcast any new Taiwanese dramas. However, OTT platforms in Japan offered at least 10 dramas (mostly BL-themed or available on Netflix).

Malaysia

Local TV channels broadcast 13 dramas, primarily on Astro Hua Hee Channel; at least 16 dramas were also available for viewing on OTT platforms.

Hong Kong

Only *Oh Marriage* was broadcast on TV channels in Hong Kong. Additionally, 11 new dramas could be viewed in Hong Kong through OTT platforms.

Singapore

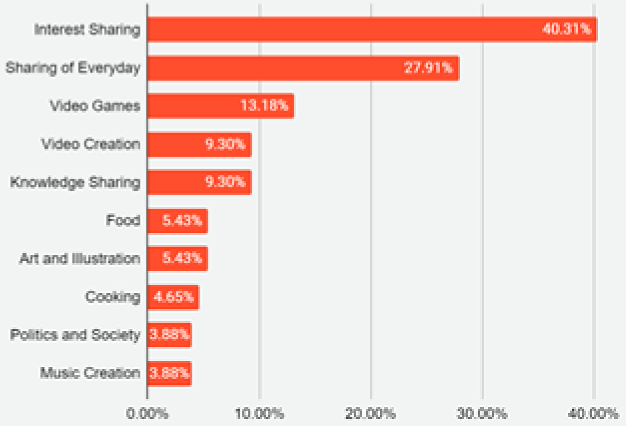
10 dramas were broadcast on TV channels, mainly on Singtel TV Jia Le Channel in the local area; additionally, at least 16 dramas were available for viewing through OTT platforms.

Notes:

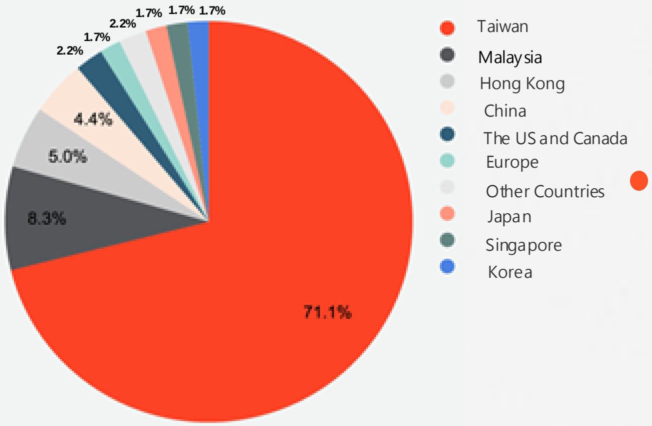
- According to the data from the State Administration of Press, Publication, Radio, Film, and Television of the People's Republic of China, no Taiwanese drama programs were introduced on Chinese satellite TV channels in 2022. The frequency of updates for related data in 2023 is different from before, and the 2022 list of foreign dramas approved for OTT platform broadcast is temporarily not publicly announced. Therefore, this page cannot include information on the broadcast of new Taiwanese dramas in Mainland China.
- This statistic does not include the overseas services of Da Ai TV or the now-defunct Vidol platform.

Distribution of Influential YouTube Channels in Taiwan by Region and Content Type

Top 10 Content Types of Taiwanese Channels



Nationality Distribution of the Top 200 Influential Channels



- The nationality distribution of the top 200 most influential YouTube channels in Taiwan is as follows: Taiwan (71.11%), Malaysia (8.33%), Hong Kong (5.00%), and China (4.44%).
- Taiwanese YouTube channels are diverse in content, with the most common being interest sharing (40.31%), followed by sharing of everyday experiences (27.91%) , and video games (13.18%).

Source: Organized by this survey study.
Notes:

- The OpView social reputation database presents the influence rank, which ranks YouTube channel followers from highest to lowest, and selects the top 200 channels for statistical analysis. The OpView social reputation database's influence calculation method comprehensively calculates the average number of posts, likes, comments, and shares for channels primarily focused on individuals. The statistical period was from January to March 2022.
- After excluding official channels of record companies, entertainment celebrities, and news channels, the sample size for the top 200 influential channels was N=180, with N=128 for Taiwanese channels.
- We classify the content types of the OpView social reputation database based on the regularly posted content of each channel, not on what each individual channel declared. Since some channels have relatively diverse content types and cover a wide array of topics, individual channels usually have multiple tags. This survey counted the frequencies and only presented the top 10 most common types.