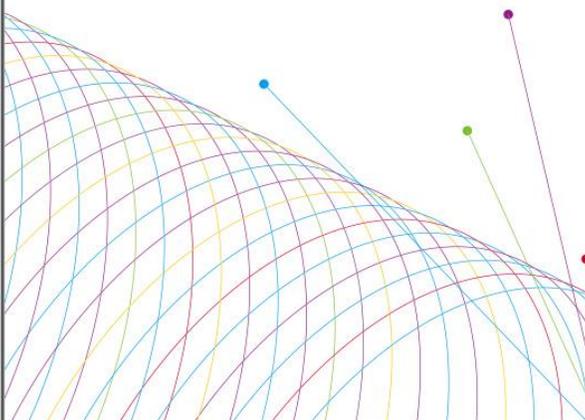
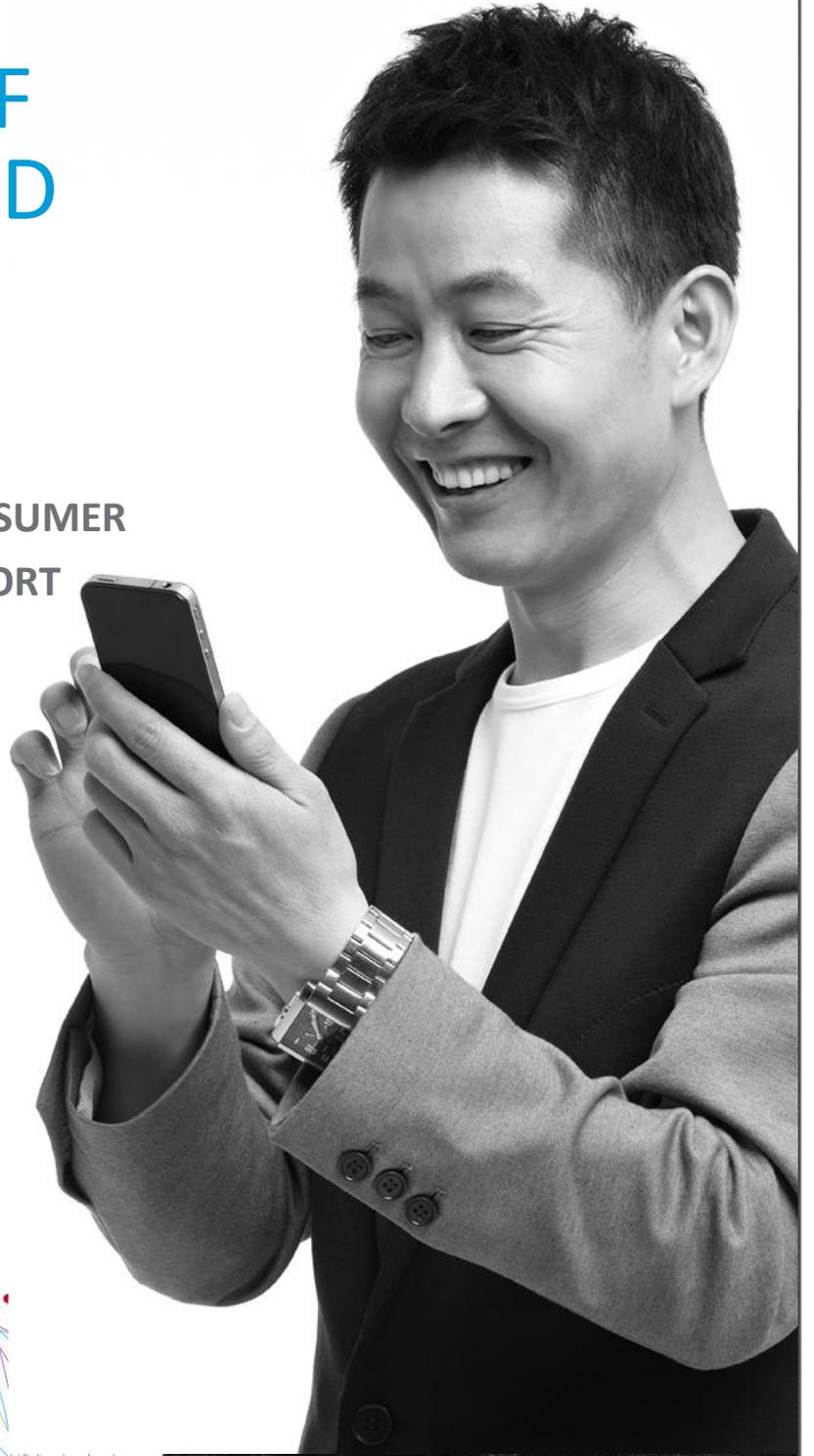


nielsen

AN UNCOMMON SENSE  
OF THE CONSUMER™

# THE DAWN OF THE EXTENDED SCREEN IN TAIWAN

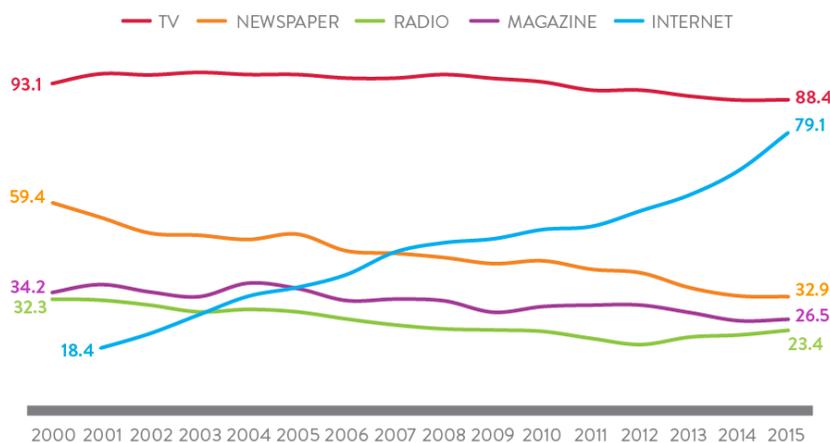
2015 NIELSEN TAIWAN CONSUMER  
MEDIA CONSUMPTION REPORT



Eighty-eight percent of consumers in Taiwan aged 12 to 65 spend their time watching TV, according to the Nielsen Taiwan 2015 Media Index. TV still has the highest penetration among the five major media channels (TV, newspapers, magazines, radio and internet), and consumers in Taiwan spent an average of 2 hours and 42 minutes watching TV last year, an 8 minute decrease from last year.

### INTERNET PENETRATION CONTINUES STRONG GROWTH

2000-2015 main media penetration % (aged 12-65)



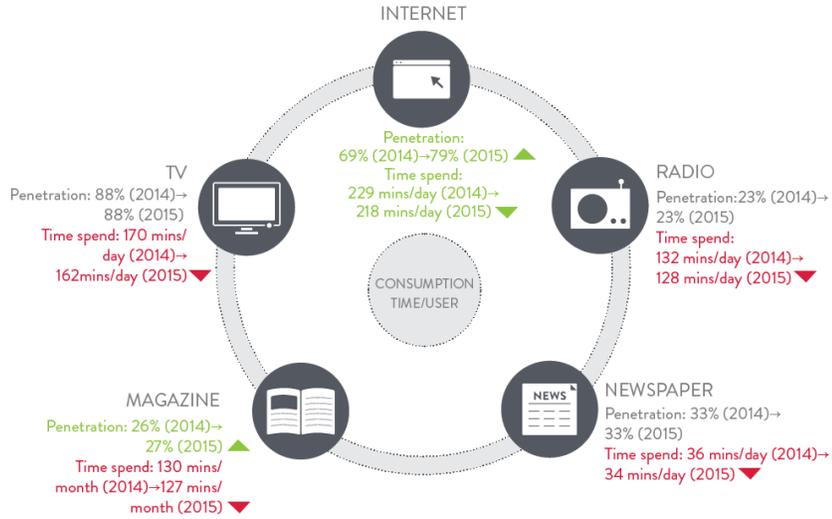
Source: Nielsen Media Index

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The Internet is now the second-largest media channel, as penetration grew 10 percentage points to 79% from last year. That is, four-in-five consumers aged from 12 to 65 are now online. Interestingly, the Internet is now the most used media channel among consumers aged 12 to 39, with 95% online penetration. It has also become the second-most used (behind TV) among Baby Boomers (consumers aged 50 to 65), with 47% online penetration.

Taiwanese consumers now spend an average of 3 hours and 38 minutes online every day. Though Taiwanese netizens spent 11 minutes less online than they did in 2014, they still invest more than one full day per week (over 25 hours) online. The decrease in the amount of time spent online is attributable to the higher penetration of consumers aged 50-65, who currently spend less time on the Internet. In other words, as the Internet becomes more ubiquitous with older consumers, the average time online across all consumers will rise.

## THE INTERNET PENETRATION CONTINUES TO RISE

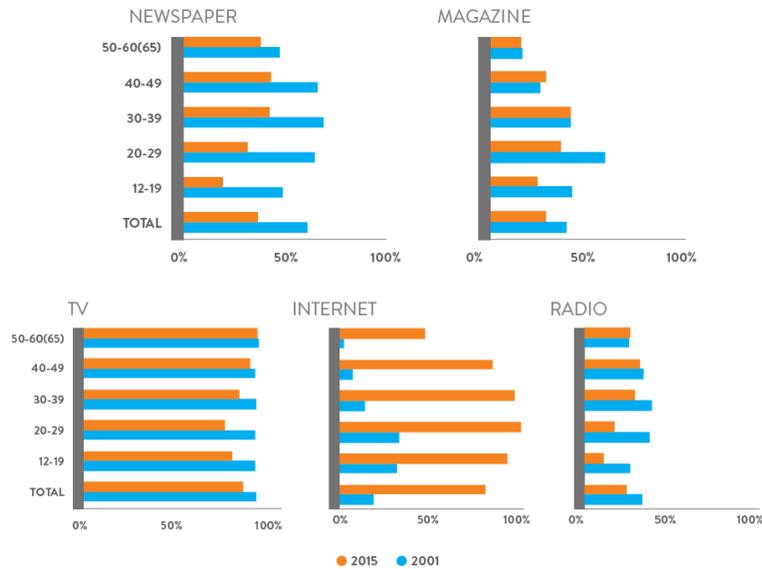


Source: Nielsen Media Index, Life Index, NetWatch (2010, 2014, 2015)  
 Target: Consumers listing main media, aged 12-65 years

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## INTERNET IS SECOND ONLY TO TV FOR BABY BOOMERS WHILE TV BECOMES SECOND SCREEN FOR AGED 12-39 CONSUMERS

Audience profile changes by media



Note: Target respondents for year 2001 is aged 50-60 and for year 2015 is age 50-65  
 Source: Nielsen Media Index

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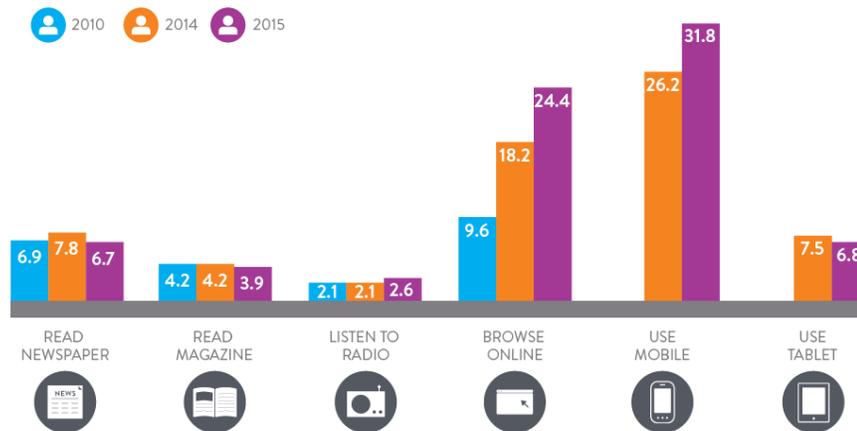
While the Internet continues to grow in importance, TV still attracts more eyes than any other medium. What are the most popular TV program types for Taiwan's TV audience? According to Nielsen TV Audience Measurement, consumers spend 33% of their viewing time watching news programs, more than any other type of program. The consumption level is noteworthy, considering that news programs account for just 22% of total broadcasting content.

Variety shows account for the second-most broadcasted show type, with 19% of the broadcasting time, but variety shows account for just 16% of consumers' viewing time. Comparatively, shows in the drama category account for 24% of consumers' viewing time.

Like media-hungry consumers elsewhere, Taiwanese TV audiences like to engage with second screens while watching their favorite programming. In fact, almost one-quarter (24%) of Taiwanese TV viewers surf the Internet while watching TV, up 6 percentage points from last year. Also, more than three-in-10 consumers engage with their mobile phones while watching TV, a 6-percentage-point increase from 2014.

## MULTI-TASKING IS THE NEW NORMAL

Concurrent Activities when Watching TV (%)



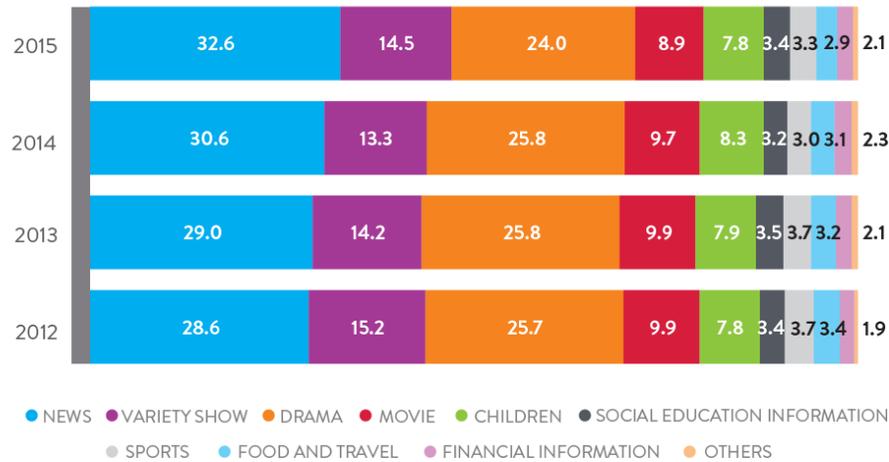
\*"use mobile" and "use tablet" are newly added options for 2014

Source: Nielsen Media Index, Life Index, NetWatch (2010, 2014, 2015)

Target: TV audiences aged 12-65 years

## NEWS AND VARIETY SHOWS ARE CAPTURING TV AUDIENCES

2012/01/01-2015/12/31 TV rating share by program types % (aged 4+)



Source: Nielsen TV Audience Measurement

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With the growth of smartphones and other connected devices like tablets, multi-screen behavior is becoming the “new normal” among Taiwanese TV audiences. This trend will mandate that marketers will need to master their messaging strategies across these extended screens in order to capture audiences where they’re most engaged. Content is still the fundamental key to success. However, advertisers will need to understand how to fully leverage extended screens opportunity in order to maximize the effectiveness of their content to truly engage today’s connected consumer.

### About the Nielsen 2015 Media Index

The findings in this survey are based on an annual study, Nielsen Media Index. Nielsen Media Index is to understand consumers’ media behavior and this survey was conducted since 1998. The 2015 Media Index polled 10,000 respondents aged 12-65. Among those 10,000 respondents, 7,500 were face-to-face interviewed and 2,500 were via online. A probability sample of equivalent size would have a margin of error of  $\pm 0.98\%$ .

## ABOUT NIELSEN

Nielsen Holdings plc (NYSE: NLSN) is a global performance management company that provides a comprehensive understanding of what consumers Watch and Buy. Nielsen's Watch segment provides media and advertising clients with Total Audience measurement services across all devices where content—video, audio and text—is consumed. The Buy segment offers consumer packaged goods manufacturers and retailers the industry's only global view of retail performance measurement. By integrating information from its Watch and Buy segments and other data sources, Nielsen provides its clients with both world-class measurement as well as analytics that help improve performance. Nielsen, an S&P 500 company, has operations in over 100 countries that cover more than 90% of the world's population. For more information, visit [www.nielsen.com](http://www.nielsen.com).