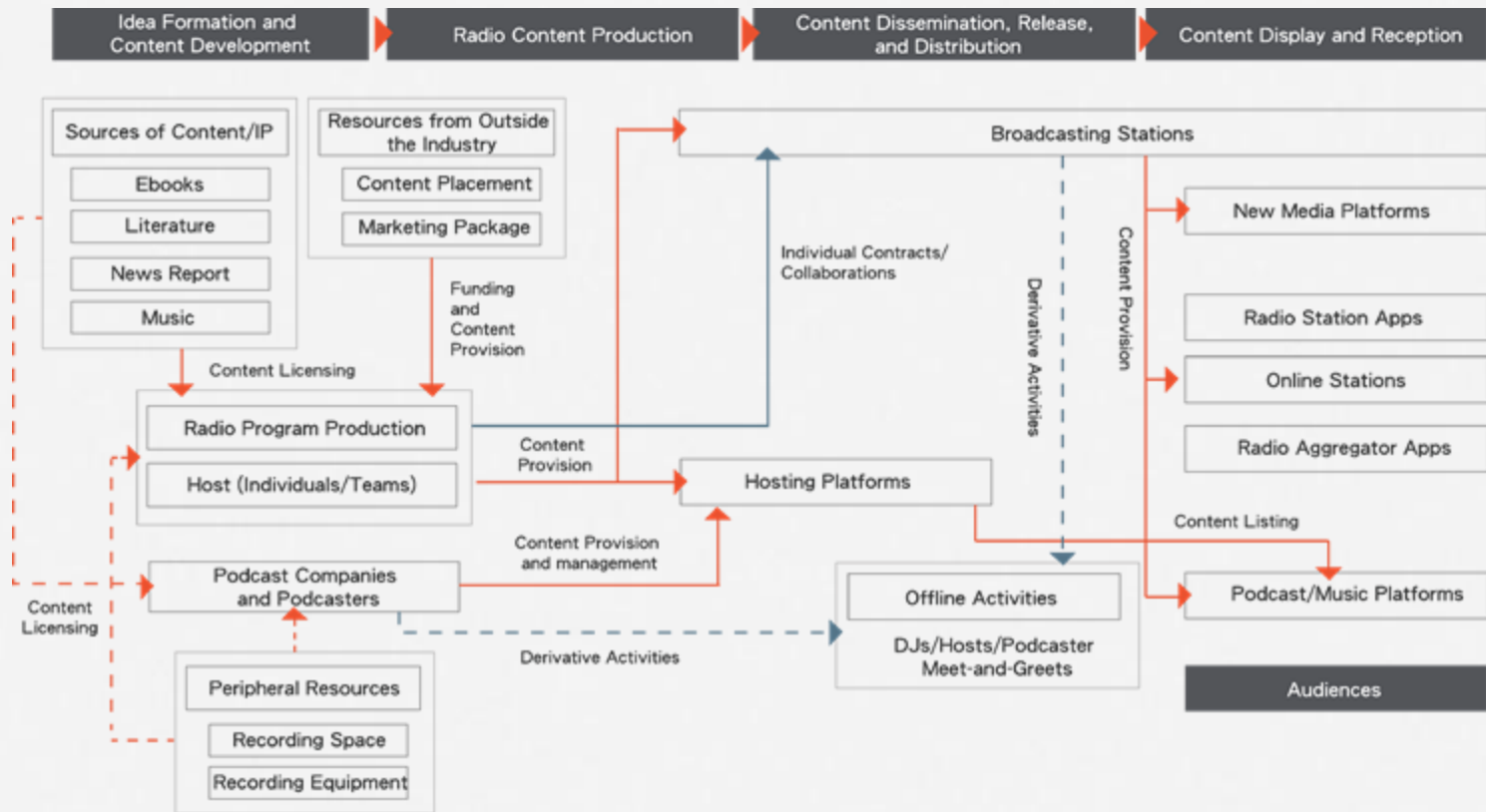


2022

# Key Data of Radio and Podcast Industry in Taiwan

# Taiwan's Radio and Podcast Industry Map

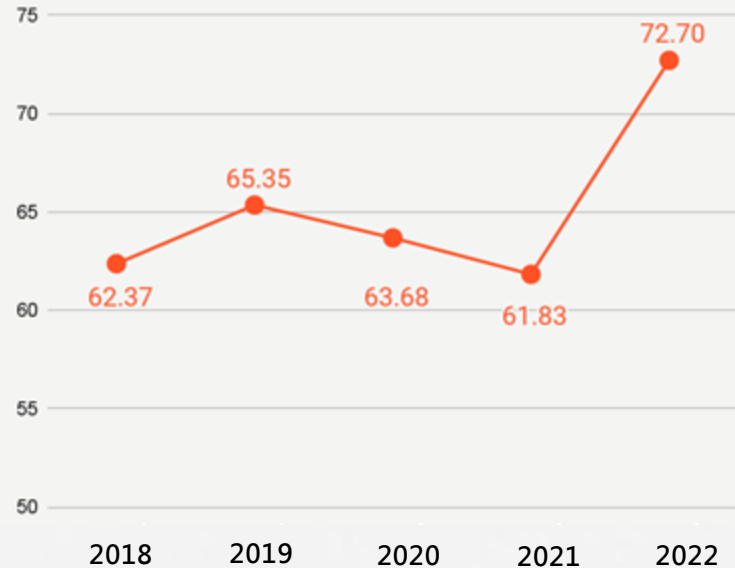


# Revenue of Taiwan's Radio Industry

- In 2022, the total revenue of Taiwan's radio industry grew to **NT\$7.27 billion**, representing a **17.58%** increase compared to 2021.
- As the pandemic subsides, the radio program production and distribution industry has clearly rebounded; non-operating income from the sale of goods and courses through radio programs has driven revenue growth.
- As for radio stations, the advertising revenue allocated by agents has only seen slight growth. However, many broadcasters have independently secured commercial advertisements. With the post-pandemic recovery of local advertisements, this trend has driven the overall growth of the radio industry's revenue.

Revenue of Taiwan's Radio Industry  
from 2018 to 2022

Unit: NT\$100 million



Note: The figures provided in this report are rounded. If individual data points are summed directly, there may be slight discrepancies with the original statistical data, but these do not affect the interpretation of the overall trend.

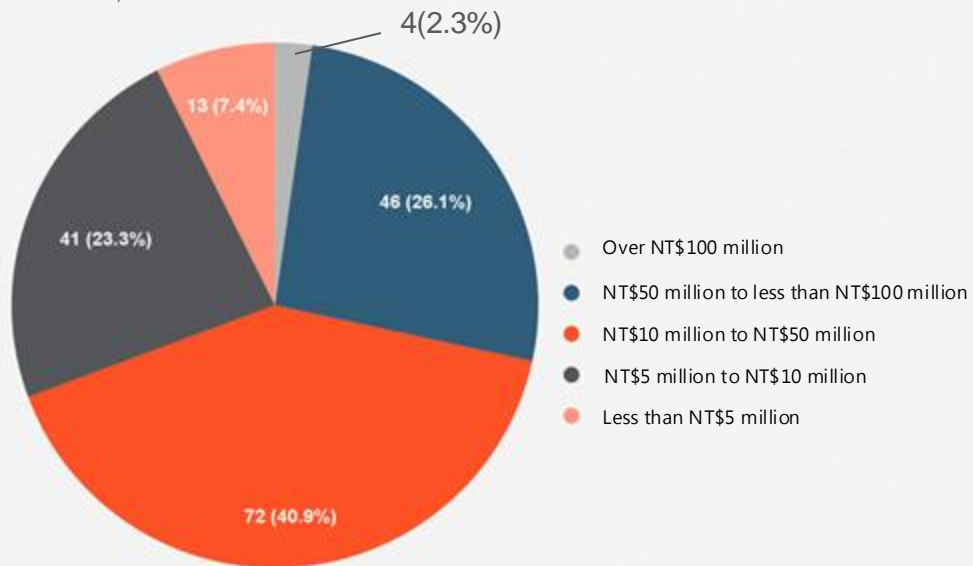
Source: Estimated by this survey.

# Capital Scales of Taiwan's Radio Stations in 2022

- In 2022, the capital scales of Taiwan's radio stations were primarily concentrated in the range of NT\$10 million to less than NT\$50 million, accounting for 40.91%. The next largest range was NT\$50 million to less than NT\$100 million, accounting for 26.14%.
- The Broadcasting Corporation of China (BCC) was the only company with a capital of more than NT\$1 billion.

Capital Scales of Taiwan's Radio Stations in 2022

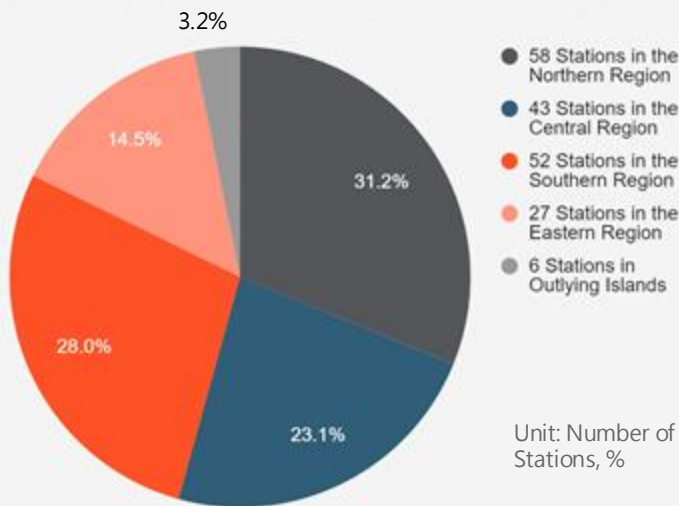
Unit: Number of  
Businesses, %



Source: Summarized from business registration data of the Ministry of Economic Affairs (excluding public radio stations).

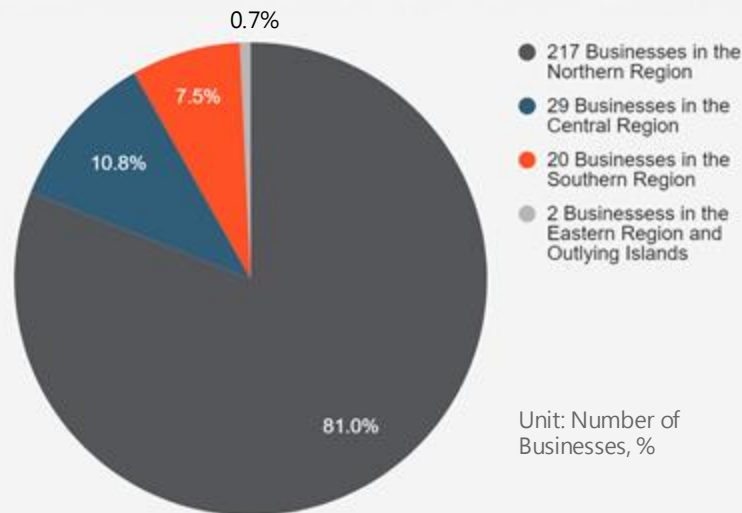
# Regional Distribution of Taiwan's Radio Stations and Radio Program Production and Distribution Industry

Regional Distribution of Taiwan's Radio Stations in 2022



The majority of radio stations were located in the northern and southern regions of Taiwan, while radio program productions were mainly active in the northern region.

Regional Distribution of Taiwan's Radio Program Production and Distribution Industry in 2022

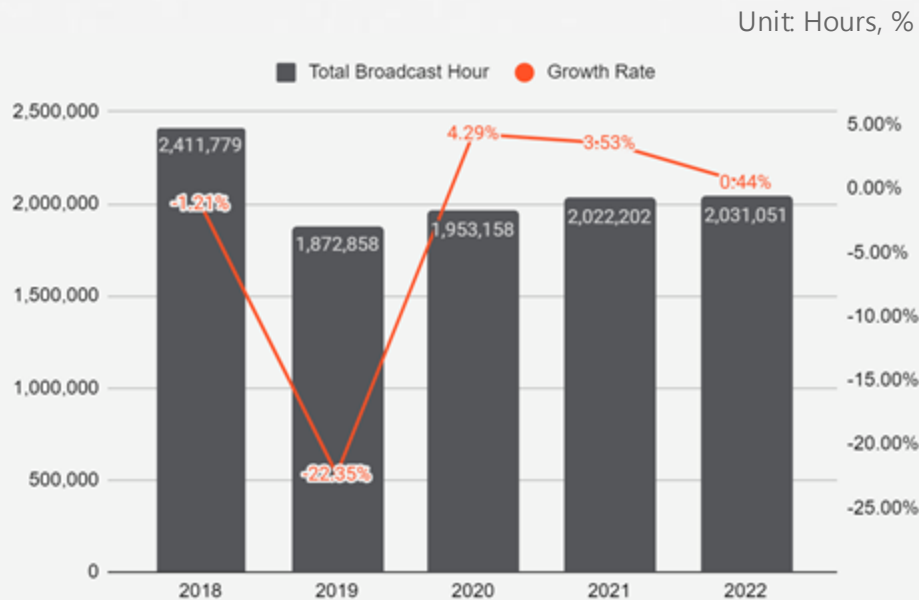


Source: Data from the National Communication Commission (NCC), Fiscal Information Agency, Ministry of Finance (FIA)

# Total Broadcast Hours of Taiwan's Radio Stations in 2022.

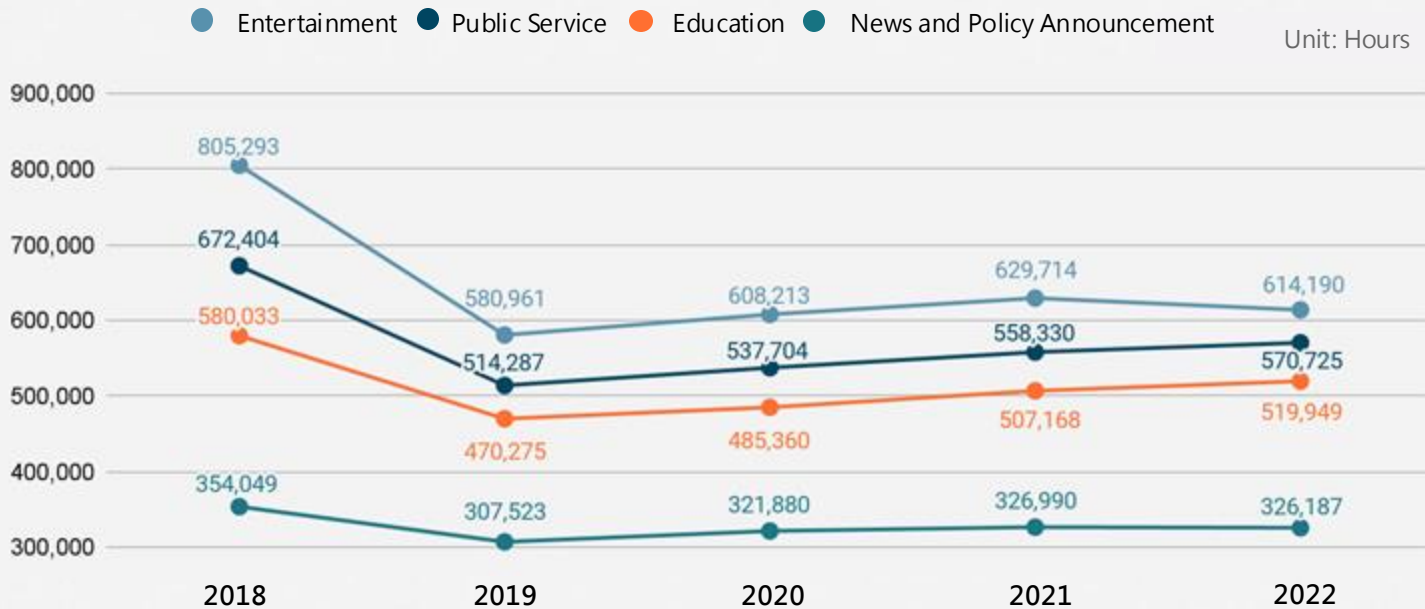
- In 2022, the total broadcast time of 186 radio stations in Taiwan was 2,031,051 hours, an increase of 0.44% compared to 2021.
- The slight increase in total broadcast time was attributed to the gradual launch of 15 radio stations from the 11th batch of licensing.
- Of the 15 newly licensed radio companies, seven joined a broadcast network.

Hours of Programs Broadcast by Taiwan's Radio Stations from 2018 to 2022



Source: Radio station program hours provided by the NCC and organized by this survey.

# Various Types of Radio Programs in Taiwan and Their Broadcast Hours in 2022



Source: Radio station program hours provided by the NCC and organized by this survey.

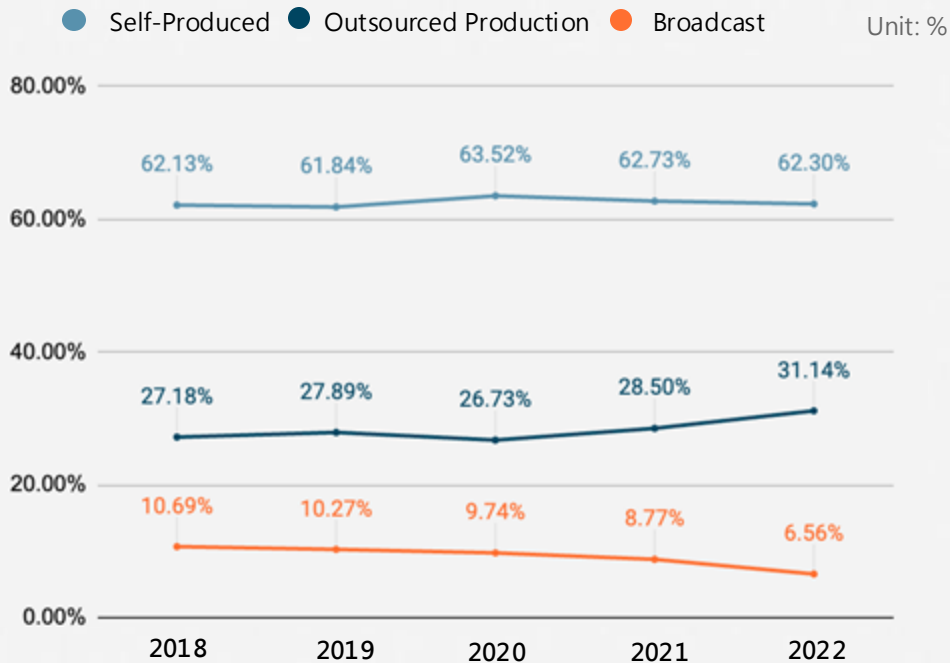
Note: According to the Enforcement Rules of the Radio and Television Act, news programs are those based on factual news reporting, commentary, or other forms. News and policy announcements refer to those that introduce government measures and achievements. Education programs include those that provide information and knowledge in the natural sciences, humanities, and social sciences with the goal of improving learning opportunities and cultivating cultural literacy. Public service programs encompass broadcasting weather reports, time announcements, emergency notifications, public safety updates, and other significant public interest issues as a social service obligation. Entertainment programs refer to performance programs with entertainment content other than the aforementioned types of content.



# Percentage of Programs Produced by Radio Stations in 2022

- In 2022, the majority of program production sources for radio stations in Taiwan were **self-produced content**, accounting for over 60%.
- The increase in the proportion of programs from **outsourced productions** in 2022 was mainly due to the increase in personnel and content production costs.

Source of Taiwan's Radio Program Production from 2019 to 2022 by Percentage of Broadcast



Source: Radio station program hours provided by the NCC and organized by this survey study.



# Broadcast Language of Radio Programs in 2022

- In 2022, the majority of radio programs were in "Taiwanese Hokkien," accounting for 59.27% of the total broadcast time, a slight increase compared to 2021.
- The newly added radio stations mostly feature content in Taiwanese Hokkien.

Ratio of Languages Used by Radio Programs in Taiwan from 2018 to 2022

Unit: %

	Mandarin	Taiwanese Hokkien	Taiwanese Hakka	Taiwanese Indigenous Languages	Other Dialects	English	Other Foreign Languages
2018	28.61%	65.37%	2.75%	1.21%	0.08%	1.02%	0.96%
2019	35.48%	56.62%	3.87%	1.47%	0.10%	1.48%	0.97%
2020	34.99%	57.50%	3.75%	1.39%	0.13%	1.32%	0.92%
2021	33.59%	59.02%	3.66%	1.37%	0.13%	1.29%	0.94%
2022	33.41%	59.27%	3.67%	1.35%	0.14%	1.23%	0.93%

Source: "Statistics on the Broadcast Hours of Programs in Taiwanese Hokkien, Hakka, and Indigenous Languages in Broadcasting and Television Businesses" released by the NCC. The language categories of the programs are self-identified and reported by the operators for compilation and statistics by the NCC.

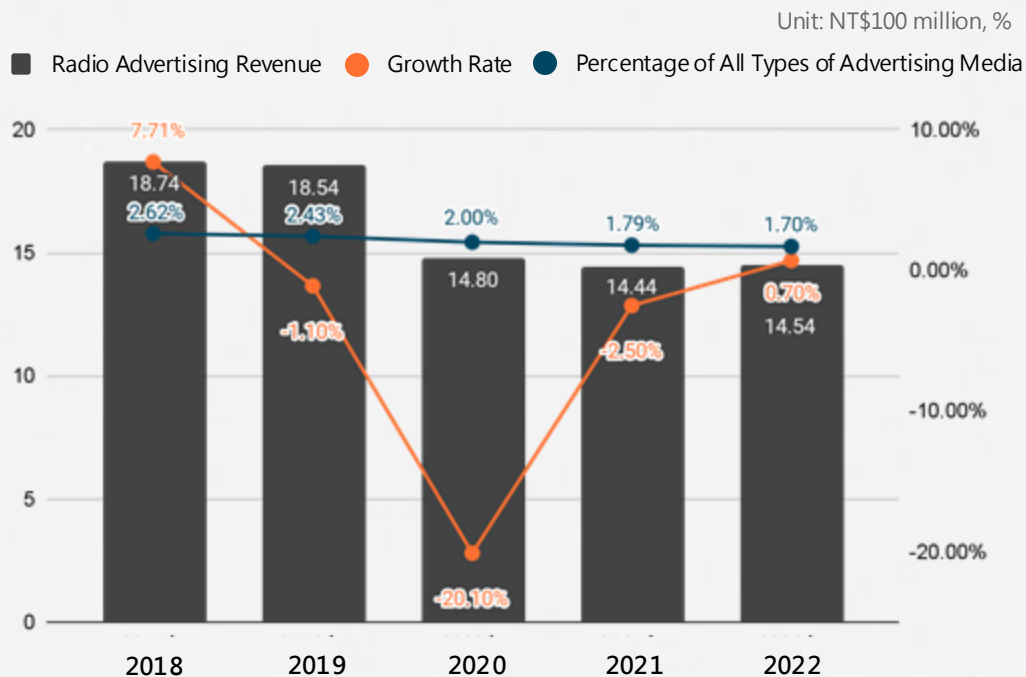


# Advertising Revenue of the Radio Industry in 2022

- During the pandemic, advertising revenue for Taiwanese broadcast media noticeably declined, resulting in a decreased share of total media advertising revenue.
- In 2022, as the pandemic eased, the overall trend of growing advertising volume drove a slight increase in radio advertising.

Source: *Media Book* compiled by Nielsen Ad Intel and Media Agency Association (MAA), Taiwan Digital Media and Marketing Association (DMA)

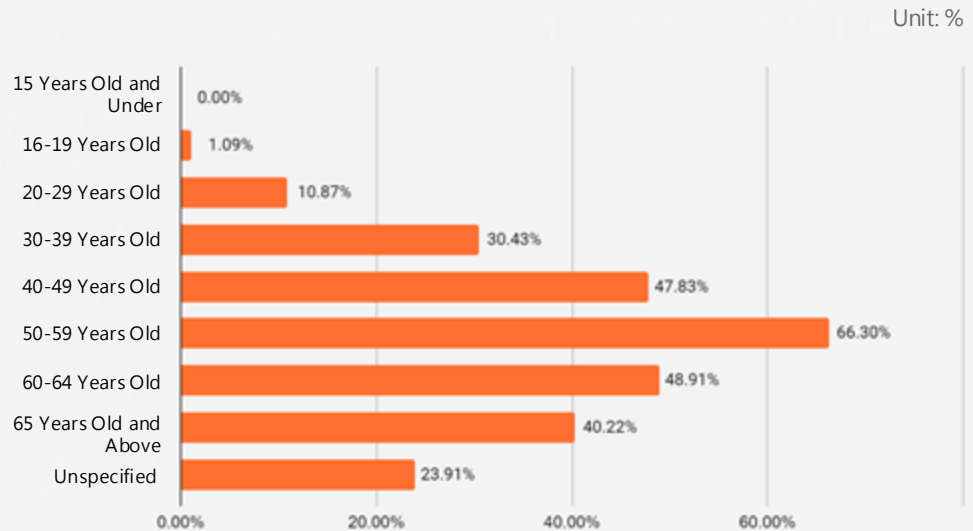
Revenue, Growth Rate and the Proportion of Radio Advertising Against All Types of Advertising-Media from 2018 to 2022



# Overview of Radio Station Target Audience in Taiwan

- After determining their target audience, radio stations produce program types and content that meet their needs.
- Based on the intended audience profile of Taiwan's radio stations, the majority of listeners are over 40, with the largest number falling between the 50-59 and 60-64 age groups. Prior to the advent of digital media, this age group of listeners was already accustomed to listening to the radio; however, 23.91% of radio stations have an unspecified target demographic in terms of age.

Radio Station Target Audience by Age Group

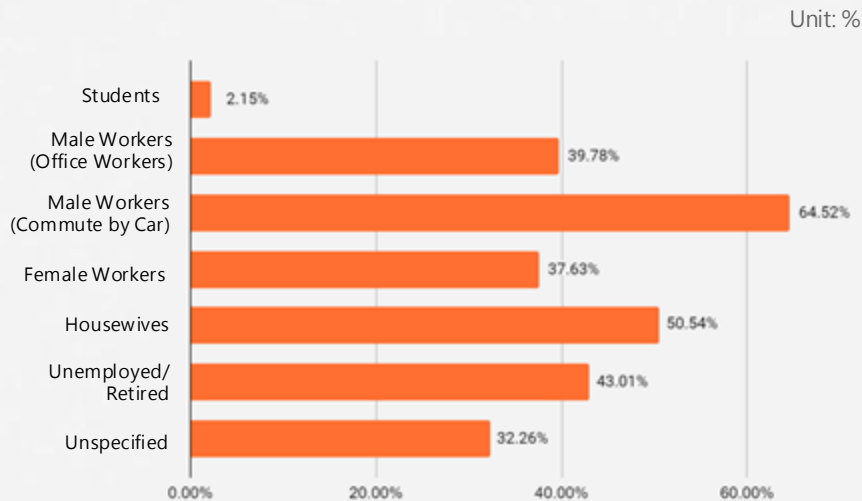


Multiple selections were allowed. The data was calculated by the number of times an option was selected/the number of valid survey responses from a particular class of operators.  
Source: Organized by this survey.

# Overview of Radio Station Target Audience in Taiwan

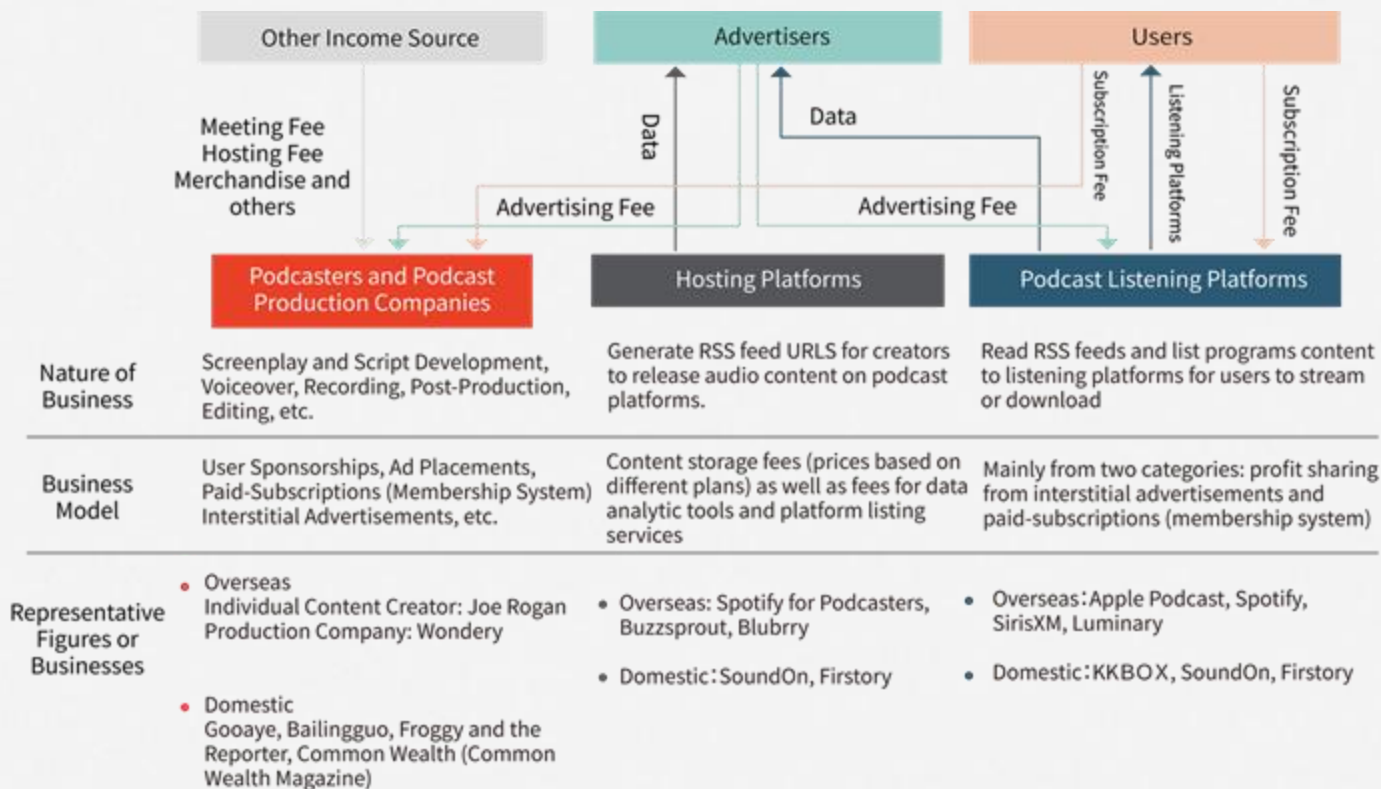
- In terms of occupation-based target audiences, Taiwanese radio stations primarily targeted men who work as drivers, such as taxi and truck drivers, accounting for 64.52%, followed by housewives at 50.54%. The proportion of other occupational groups did not exceed 50%.
- Compared to 2021, only the proportions of operators targeting students and unspecified categories decreased, while all others grew. Additionally, we observed that in this diverse entertainment age, the digital natives no longer served as the target audience for radio listening. Moreover, due to the phenomenon of audience segmentation, radio operators began to focus on specific target audiences and plan their program content accordingly, which also led to a decrease in the proportion of unspecified categories.

### Radio Station Target Audience by Occupation



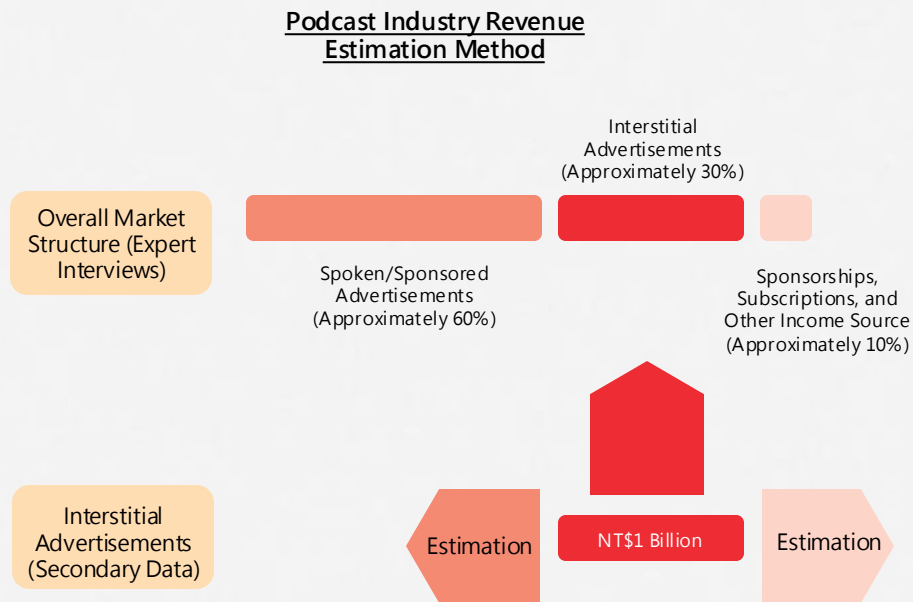
Note: Multiple selections were allowed. The data was calculated by the number of times an option was selected/the number of valid survey responses from a particular class of operators.  
Source: Organized by this survey.

# Taiwan's Podcast Industry Map



# Overview of Taiwan's Podcast Market

- According to Taiwan's main hosting service provider, SoundOn's 2022 Sound Economy Report, the estimated podcast advertising market in Taiwan was approximately NT\$1 billion, based on the average unit price and number of advertising orders. According to interviews with podcast industry operators, the industry's three primary sources of income were spoken/sponsored advertisements, interstitial advertisements, and subscriptions plus other income, with a revenue-structure ratio of 6:3:1. In 2022, the estimated revenue from the podcast industry was NT\$3.33 billion.



Source: Illustrated by this survey.

# Data on the Total Number of Podcasts, Active Programs, and New Programs in 2022

- In 2022, the total number of traditional Chinese programs was **21,586**, an **increase of 30.33%** compared to 2021.

- In 2022, the number of active programs (those that had not stopped updating within 90 days) was 6,672, accounting for 30.91%, an increase of 26.53% compared to 2021. The number of new programs in 2022 was 4,566, a decrease of 40.25% compared to 2021.

- Programs that stopped updating within 90 days accounted for 69.09%, of which 85.13% had fewer than 15 episodes. Excluding programs that stopped updating within 90 days, the program lifespan was 15.28 months, higher than the 10.88 months in 2021. These programs also increased in length, with the median program length (the midpoint of all program lengths) growing from 19.95 minutes to 27.80 minutes.

Source: Data collected and analyzed from the internet, citing travel blogger and podcaster "JL Talks."

	2020	2021	2022
<b>Total number of podcast programs</b> (Unit: number of programs)	5,316	16,563 (Grew by 211.57%)	21,586 (Grew by 30.33%)
<b>Active programs</b> (Unit: number of programs)	-	5,351	6,672 (Grew by 26.53%)
<b>New programs</b> (Unit: number of programs)	7,232	7,642 (Grew by 5.67%)	4,566 (Decreased by 40.25%)
<b>Percentage of programs that have stopped updating within 90 days</b> (Unit: percentage)	-	53.24%	69.09%
<b>Average lifespan of programs</b> (Unit: months)	-	10.88	15.28
<b>Average length of programs</b> (Units: minutes)	-	19.95	27.80

Note: The data was collected from the list of popular podcasts among users in Taiwan on Apple Podcasts, focusing on Traditional Chinese podcast programs. Domestic programs account for over 70% of the data.

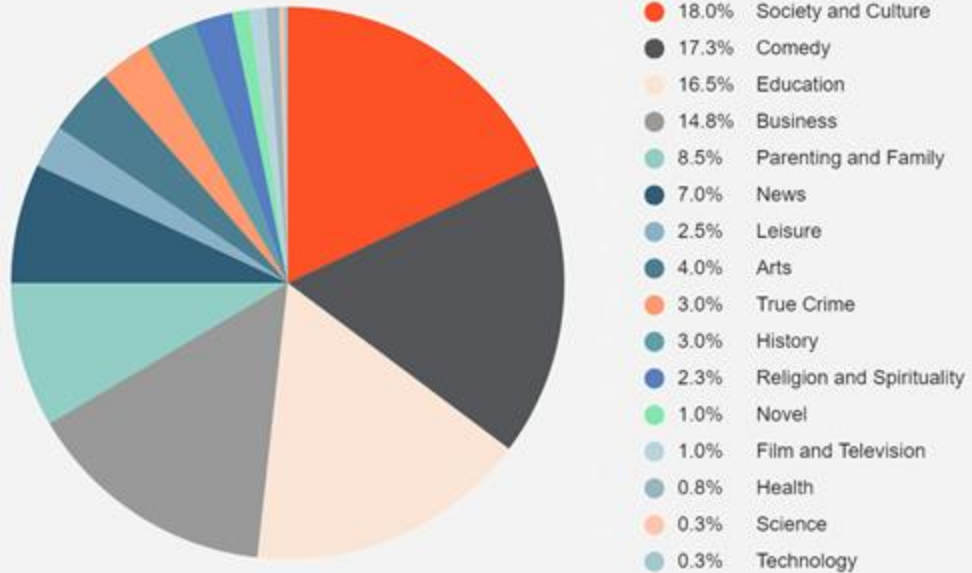
# Taiwan's Top 100 Programs by Genre

- The statistics for the top 100 Taiwanese programs by program genre are as follows:
  - Society and culture
  - Comedy
  - Education
  - Business
  - Parenting and family
  - News

Note: According to data sampled from 600 Mandarin programs by Taiwan's major hosting provider, Firstory, nearly 50% of the listeners used Apple Podcasts. Therefore, Apple Podcasts serves as the primary data source for the inventory.

Top 100 Apple Podcasts in Taiwan by Program Genre

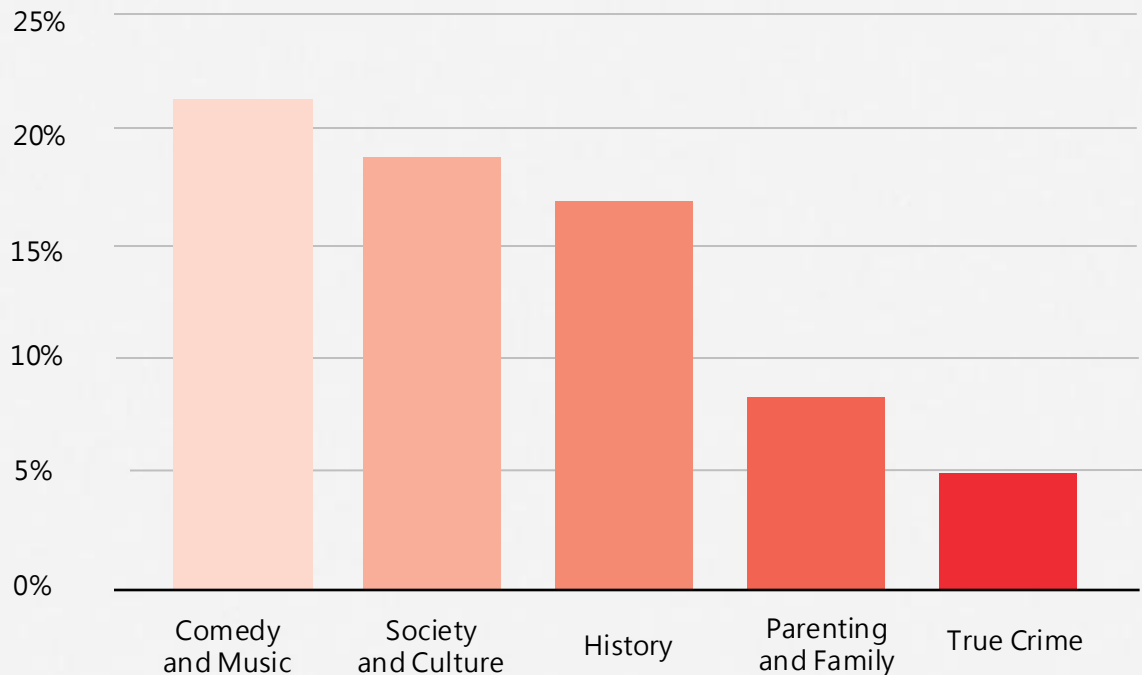
Unit: %



Note: We collected data for the top 100 programs in Taiwan over a four-week period in April 2023. The algorithm used was not publicly disclosed but was primarily based on metrics such as listening time, subscription count, and completion rate, rather than solely on listening count or listening



## The Five Types of Programs that Most Commonly Received Sponsorships in 2022 According to SoundOn



Source: Excerpted from SoundOn's 2022 Sound Economy Report: <https://www.soundon.fm/2022-data-report>



# Podcast Industry Vertical Integration

- Taiwanese hosting service providers, in addition to offering playback functions on platforms, have also actively expanded into content production in recent years. For example, SoundOn launched various content creation models, including original productions and commissioned productions. In the former model, the SoundOn team led and curated the original productions, inviting creators to act as hosts. This model's collaboration method was based on hosting fees and other advertisement profit sharing, while the copyright remained with SoundOn. The latter model had program content commissioned by creators, with the SoundOn team assisting in production and broadcast, while program copyright remained with the creator.
- Firstory, however, opted for using related data and marketing resources to increase creators' exposure and income streams. For example, it provided different levels of services according to various cases, including personal website design, data analysis, and external resource integration (such as using KKBOX's music embedding, subtitle function, comment integration, and Spotify data matching). Furthermore, Firstory entered the Japanese market in 2022; its progression is noteworthy.
- Due to the rapid development of the podcast industry, podcast advertising has become a major marketing strategy for businesses. Both SoundOn and Firstory provide commercial content creation-related services for businesses.



# Taiwanese Podcast Platform

Taiwanese podcast platforms consisted mainly of independent broadcasting platforms, such as Baobao and SoundOn, and music streaming platforms, such as KKBOX and MixerBox, that entered the industry. The first two aforementioned platforms offer their own hosting service, while KKBOX and Firstory jointly invested in Firstory's hosting platform to upload program content. Additionally, Firstory has shifted its business focus to providing hosting management services.

Podcasts can be listened to through the domestic independent broadcasting platforms Baobao and SoundOn, both of which provide hosting and management services and can be freely downloaded. Each platform has its own unique capabilities. For instance, Baobao implemented the RSS feed function to facilitate user uploads to other platforms, while SoundOn integrated the Clubhouse app function to enable hosts and listeners to interact freely, thereby preventing the podcast program from functioning as a one-way information provider.

The music streaming platforms KKBOX and MixerBox, which entered the podcasting business, can also be freely downloaded. Firstory is a joint investor in KKBOX's hosting infrastructure. Creators who utilize Firstory's hosting services have their programs automatically uploaded to KKBOX. As mentioned before, the dynamic interstitial advertisement function launched in May 2022 allows creators to expand their income stream. Additionally, KKBOX implemented the subtitle search function, enabling users to not only listen to podcasts but also search for and read them. At the same time, KKBOX offers the music embedding feature, which allows creators to legally integrate music into their programs and expand their content. The emerging MixerBox app offers a comment and thumbs-up feature for each podcast episode. Additionally, MixerBox functions as a multimedia platform that evaluates audience preferences by analyzing their preferred videos and songs.

Furthermore, in recent years, telecommunication companies have also branched into the podcast industry. For example, Chunghwa Telecom launched iListen, a comprehensive audio platform that provided a one-stop service for audiobook and exclusive podcast program listening. Existing telecom customers can enjoy special promotions and exclusive membership access, giving them pay-per-view options for additional audio services. Lastly, the platform uses a click-to-profit model to strengthen partnerships with creators.

In early 2022, Taiwan Mobile invested in SoundOn, creating a new podcast section under its MyMusic music platform. MyMusic will automatically upload podcasts launched on SoundOn, aiming to offer audiences the latest and most popular programs, thereby establishing a comprehensive one-stop audio service.

However, as of October 2023, KKBOX is officially available on all of Taiwan Mobile's channels thanks to their strategic alliance. SoundOn responded in November of the same year to terminate all services related to MyMusic starting on December 25, 2023, effectively ending the hosting collaboration and synchronized update function between the two platforms.

Taiwan Mobile has also decided to assist in strengthening the partnership between SoundOn and KKBOX as a form of continued collaboration; Taiwan Mobile's TAmelia will also continue to venture on other audio-related businesses, such as audio advertising, with SoundOn.



## Comparisons Between Domestic Podcast Platforms

Platform	BaaBao	SoundOn	KKBOX	MixerBox*	iListen	MyMusic**
Download and Listen	Free	Free	Free	Free	Free	Free
Hosting and Managing Platform	○	○	Collaboration with Firstory	-	-	Collaboration with SoundOn
Special Functions	<ul style="list-style-type: none"> <li>Uses RSS feed to upload to other platforms.</li> <li>Provides different playlists based on holiday and occasion.</li> </ul>	Utilizes the interaction model of the Clubhouse app, providing a chatting function for hosts and audiences	<ul style="list-style-type: none"> <li>Provides the subtitle function, allowing audiences to read podcasts.</li> <li>Creators can legally embed music in their programs.</li> </ul>	<ul style="list-style-type: none"> <li>A multimedia platform that saves audiences' playlists and favorite videos for insights into user preferences.</li> <li>Each episode has a comment and thumbs-up function that users can freely utilize.</li> </ul>	<ul style="list-style-type: none"> <li>Comprehensive audio platform.</li> <li>The platform supports 4G/5G broadcasts and also provides a "Wi-Fi playback only" function.</li> </ul>	<ul style="list-style-type: none"> <li>Multimedia platform.</li> <li>SoundOn's program can be automatically launched on MyMusic.</li> </ul>
Podcast Program Genre	Film and Television, Music, Health, News, Technology, Finance, Psychology and Spirituality	Parenting, Entertainment, True Crime, Sex Education, Psychology and Spirituality, Sports	Business, Technology, Finance, Health, News, Parenting, True Crime	Society and Culture, News, Comedy and Music, Arts, Leisure, Novel	Novel (Audiobooks), News, Healthcare	Family, Talk Shows, Learning, Finance, News

## Notes:

1. \*MixerBox's founder is Taiwanese, hence the platform is listed here.

2. \*\*Acquired by KKBOX's parent company, KKCompany Technologies, all users are merged under KKBOX. Reference URL:

<https://www.bnext.com.tw/article/76755/taiwan-mobile-co-mymusic-kkbox>

Source: Organized by this survey.

