

100 年度臺北市有線電視系統業者 服務品質暨收視戶滿意度調查研究

摘要

本研究之調查目的，為瞭解臺北市有線電視裝機率，及收視戶對臺北市現有 9 家有線電視系統經營者服務滿意度，以作為臺北市政府審議 101 年度有線電視收視費用之參考。調查以量化研究(電話訪問)分析臺北市收視戶的意見趨向，並輔以收視戶、業者、學者專家質化研究(焦點團體討論會)，以及神秘客電話／顧客端訪查方式，深入解讀並驗證量化研究的結果，以提供臺北市政府觀光傳播局兼具廣度與深度的研究發現。

臺北市有線電視的裝機率為 83.7%，推估出臺北市有線電視收視戶總戶數約為 822,969 戶。與國家通訊傳播委員會 100 年第二季的訂戶數(624,163 戶)比，多出 198,806 戶。(詳見附錄 VII 附表 1)

臺北市 9 家有線電視系統業者的收視戶，對目前有線電視頻道的節目品質滿意度為 65.0%，收視戶對目前有線電視頻道的節目種類滿意度為 68.3%，顯示收視戶對頻道服務部分，滿意度都不太理想。(詳見附錄 VII 附表 7~8)

臺北市有線電視的公用頻道，收視戶知道的比例(17.4%)不足兩成；知道公用頻道的收視戶中，有 24.1%從來沒看過公用頻道，有 47.6%過去兩星期都沒看過公用頻道。知道公用頻道的收視戶中，僅有 0.3%的收視戶過去一年中曾經提供自己拍攝的錄影帶或節目給公用頻道播出；全部的收視戶中，也僅有 4.9%的收視戶表示，有興趣提供自己拍攝的錄影帶或節目給公用頻道播出。(詳見附錄 VII 附表 9~12)

9家系統業者的收視戶中，有16.8%的比例知道有線電視自製頻道；知道自製頻道的收視戶中，有23.1%從來沒看過自製頻道，有50.7%過去兩星期都沒看過自製頻道。知道自製頻道的收視戶有41.4%對自製頻道的節目表示滿意，20.5%表示不滿意。(詳見附錄 VII 附表 13~15)

針對有線電視的收視品質，85.3%的收視戶對「畫面清楚程度」表示滿意，71.8%的收視戶表示過去一年內家中有線電視曾經出現過「斷訊」(每一台都看不到)的情形，38.8%的收視戶表示過去一年曾出現過「有些台的頻道號碼變來變去」，61.6%的收視戶家中有線電視出現過「轉台時節目聲音忽然變大變小」，67.4%的收視戶家中有線電視曾經出現過「節目結束進入廣告時聲音忽然變大」的情形，56.5%的收視戶家中有線電視曾發生過「廣告蓋台」現象，47.5%的收視戶家中有線電視曾出現過「系統業者商業廣告跑馬燈」。關於「廣告蓋台」與「系統業者商業廣告跑馬燈」的高比例，主要原因應出自於一般民眾難以根據法規條件予以客觀判斷所致。至於「系統業者商業廣告跑馬燈」部分，問卷中針對螢幕上方或下方的跑馬燈資訊詢問，而不是僅針對上方詢問，因此，此百分比有高估現象。(詳見附錄 VII 附表 16~22)

針對有線電視系統業者的電話客戶服務部份，27.1%的收視戶在過去一年內有打電話給系統業者的客服熱線諮詢或請求服務；有電話客服經驗的收視戶中，19.7%的收視戶都有在平日下班時間或週末假日打電話去時沒人接聽的情形，10.8%的收視戶有遇到週末假日打電話去時是語音答錄請留言的情形。80.2%有電話客服經驗的收視戶對「電話服務人員接聽電話速度」表示滿意，對「電話服務人員服務態度」表示滿意的有87.8%，對「電話服務人員回答問題或解決問題能力」的滿意度為79.7%。(詳見附錄 VII 附表 23~27)

16.9%的收視戶在過去一年曾有請有線電視系統業者到府維修的經驗；有到府維修經驗的收視戶中，22.1%曾經遇到服務人員在接到收視戶電話通知後，超過24小時才到府維修的情形，對「服務人員服務態度」表示滿意的有91.8%，89.2%有到府維修經驗的收視戶對「服務人員維修能力」表示滿意。(詳見附錄 VII 附表 28~32)

對家中有線電視每個月交的費用，56.8%的收視戶覺得貴，35.3%覺得差不多。整體來說，75.3%的有線電視收視戶對系統業者各方面的服務表示滿意，21.3%的收視戶表示不滿意。(詳見附錄 VII 附表 34、37)

在數位有線電視方面，14.1%的收視戶有安裝數位機上盒，其中，59.4%對安裝數位機上盒後的整體表現表示滿意，20.3%表示不滿意。沒有安裝數位機上盒的收視戶中，13.7%表示未來願意考慮安裝。全部收視戶中，16.2%已安裝了中華電信 MOD，滿意度為 52.9%，還沒安裝中華電信 MOD 的收視戶中有 11.3%未來可能考慮安裝。全部收視戶中，3.9%已安裝了網樂通，滿意度為 55.7%，還沒安裝網樂通的收視戶中有 9.2%未來可能考慮安裝。(詳見附錄 VII 附表 41~58)

本研究結論肯定系統業者在客戶服務方面的優秀表現，也建議系統業者在頻道服務／收視品質上的改進建議，並建議以針對高忠誠度收視戶與季繳／半年繳／一年繳收視戶較優惠方案，淡化收視戶對收費貴的負面印象，還應對公用頻道與數位機上盒做更多的推廣。本研究結論中也肯定臺北市政府觀光傳播局嚴格管理監督系統業者的效果，同時建議未來如何在頻道服務／收視品質／推廣工作方面，強化監督系統業者確實落實各項工作，最後也建議臺北市政府觀光傳播局，以政府角色，主動推廣數位有線電視與公用頻道。

Abstract

The research goals of this project are to understand TaipeiCity's penetration rate and subscribers' satisfaction level with 9 cable TV system providers, respectively. And, research findings will be used as references for the evaluation on 2012 cable TV fees of Taipei City Government. Quantitative research method (telephone interviewing) has been adopted to analyze opinion trends of Taipei City cable TV subscribers. Qualitative research method (Focus Group Discussion) has also been adopted for subscribers, cable system provides and scholars/experts. In addition, both telephone mystery shoppers and on-site mystery shoppers are included to interpret, confirm results of quantitative research for Department of Information and Tourism, Taipei City Government. These findings cover both angles on broadness and in-depth.

Taipei City cable TV penetration rate is 83.7%. By which, the estimated total number of Taipei City cable TV subscribers is 822,969 households. Compared with the number of 624,163 households of Taipei City cable TV subscribers, announced by NCC for Q2 of 2011, there are 198,806 extra households (See Table 1 of Appendix VII).

The overall subscribers' satisfaction level of 9 cable TV system providers with the program quality is 65.0%. And, subscribers' satisfaction level with the variety of cable TV programs is 68.3%. Both numbers reflect relatively dissatisfied subscribers in terms of cable TV channel services (See Tables 7~8 of Appendix VII).

In Taipei City, 17.4% of subscribers are aware of Public Access Channels (PAC). Among them, 24.1% have never watched PAC, while 47.6% did not watch PAC during the past 2 weeks. Among those subscribers who are aware of PAC, only 0.3% had provided home-produced video tapes or programs to PAC. On the other hand, among all subscribers, only 4.9% express interest to offer home-produced video tapes or programs to PAC (See Tables 9~12 of Appendix VII).

Among subscribers of 9 system providers, 16.8% are aware of channels produced by system provider. Among those who are aware of, 23.1% have never watched channels produced by system provider, while 50.7% say did not watch channels produced by system provider during

last 2 weeks. For those who are aware of channels produced by system provider, 41.4% express satisfaction with programs of channels produced by system provider, while 20.5% are dissatisfied (See Tables 13~15 of Appendix VII).

On reception quality of cable TV, 85.3% subscribers are satisfied with signal quality, 71.8% express experiences of signal interruption during the last year, 38.8% express experiences of channel rearrangement during the last year, 61.6% experience unstable audio volume between channels, 67.4% say they have experiences of unstable audio volume before delivering commercials, 56.5% have experiences of illegal commercials over regular programs, while 47.5% have experiences of commercial flash of system providers. For “illegal commercials over regular programs”, many viewers have difficulties to judge if it is legal or not based on relevant regulations. As for “commercial flash of system providers”, the questionnaire asks about commercial flash on top or bottom of screen instead of only on top of screen, which causes higher percentages than what should be (See Tables 16~22 of Appendix VII).

On telephone customer service quality of cable TV system providers, 27.1% did call service hotline of cable TV system providers asking for consulting or service. Among those who have experiences with telephone customer service, 19.7% have experienced no answer during non-office hours of weekdays or weekends/holidays, while 10.8% experience answering machine during weekends/holidays. Among those who have had experiences with telephone customer service, 80.2% are satisfied with the speed of customer service staff to answer phone calls, 87.8% are satisfied with the attitude of telephone customer service staff, while 79.7% are satisfied with telephone customer service staff’s ability answering questions or solving problems (See Tables 23~27 of Appendix VII).

16.9% subscribers have experiences asking for home maintenance services from cable TV system providers. Among those who have asked for home maintenance services, 22.1% did experience service staff to drop by after more than 24 hours since phone calls. 91.8% are satisfied with the attitude of customer service staff, 89.2% are satisfied with the ability of customer service staff (See Tables 28~32 of Appendix VII).

On monthly payment of cable TV, 56.8% of subscribers say the

payment is expensive, 35.3% say it is OK. Overall speaking, 75.3% subscribers are satisfied with overall services provided by cable TV system providers, 21.3% are dissatisfied (See Table 34, 37 of Appendix VII).

On digital cable TV, 14.1% subscribers have installed set-top box, among them, 59.4% are satisfied with the overall performance after installation, while 20.3% are dissatisfied. Among subscribers who have not installed set-top box, 13.7% express willingness to install in the future. 16.2% subscribers have installed Chunghwa Telecom MOD, among them, 52.9% are satisfied with performance of Chunghwa Telecom MOD. Among subscribers who have not installed Chunghwa Telecom MOD, 11.3% say they might consider installing in the future. 3.9% subscribers have installed Next TV, among them, 55.7% say they are satisfied with performance of Next TV. 9.2% of subscribers who have not installed Next TV express willingness to install in the future (See Table 41~58 of Appendix VII).

In the conclusions, research results confirm the system providers' good performance on customer services, recommend system providers how to improve services on program quality and reception quality. Recommendations to system providers also include providing better discount to subscribers who are more loyal or pay fees by season, bi-annual or annual terms in order to get less negative impressions on cable TV fees. The final conclusions also confirm that Department of Information and Tourism, Taipei City Government has done good jobs on supervising system providers to provide good customer services. In the recommendations, how Department of Information and Tourism, Taipei City Government should supervise system providers to improve program quality, reception quality and promotions are included. The research also suggests Department of Information and Tourism, Taipei City Government to promote digital cable TV and PAC from the point of view of government.