

102 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

本研究透過「電話訪問調查」瞭解臺北市有線電視裝機率、臺北市有線電視系統業者服務品質、臺北市有線電視系統收視戶的收視情形及滿意度（含節目重播情形）、臺北市有線電視公用頻道之節目收視情形及滿意度、臺北市數位有線電視推廣方式、裝機率、收視情形及滿意度；並透過「神秘客調查」瞭解臺北市有線電視系統業者服務品質；另外，針對有線電視一般收視戶、有線電視家庭決策者收視戶、數位有線電視收視戶、系統業者及專家學者等，舉辦「焦點座談會」，期透過質化資料來輔助電話調查的結果，以瞭解臺北市有線電視系統業者的服務品質，以及收視戶對業者提供之服務的滿意度。

根據臺北市民電話訪問調查結果推估，臺北市有線電視裝機率為 76.7%，收視戶戶數約 783,104 戶。而收視戶滿意度是以收訊品質、頻道服務、節目品質（含重播情形）、客戶服務（含接聽率）、維修服務（含到修率）、收視費用與形式及社區服務 7 大面向進行調查。

收訊品質方面，最近一年內，有 94.8% 的收視戶表示有線電視畫質清楚，但 50.0% 曾經發生過斷訊，32.8% 家中有線電視曾發生頻道更動，58.4% 曾經碰到廣告時音量突然變大聲，29.2% 表示看過商業訊息的跑馬燈。

頻道服務方面，最近一年內，有 62.0% 的收視戶有注意到公共服務訊息的跑馬燈，61.1% 的收視戶認為目前有線電視提供頻道數量偏多，72.3% 的收視戶滿意目前業者所提供的頻道種類。

節目品質（含重播情形）方面，最近一年內，有 65.4% 的收視戶滿意業者提供的節目品質，86.0% 的收視戶覺得目前節目重播情形偏多，而有 56.6% 的收視戶覺得電影類型重播的比例最高。

客戶服務（含接聽率）方面，最近一年內，有 27.4%的收視戶曾撥打電話至有線電視系統業者客戶服務中心，曾撥打電話至客服中心的收視戶中，有 72.9%的收視戶最近一年內撥打電話至有線電視系統業者是因為有線電視故障，85.9%的收視戶對於客服人員接聽電話的速度感到滿意，86.4%的收視戶對於客服人員的服務態度感到滿意，77.8%的收視戶對於客服人員的問題處理能力感到滿意。

維修服務（含到修率）方面，最近一年內，有 18.7%的收視戶曾要求業者派員進行維修，曾接受過維修的收視戶中，有 53.3%最近一年要求業者派員維修的事項為「一直看不到節目」，有 53.6%是在通知客服中心的 24 小時內接受維修，85.2%的收視戶對工程人員的服務態度感到滿意，85.7%的收視戶對工程人員的維修能力感到滿意。

收視費用及形式方面，有 16.4%的收視戶每月支付有線電視費用為主管機關新公告的收費標準(495 元/月)，僅 5.1%收視戶每月支付有線電視費用低於 495 元，有 47.4%收視戶每月支付之有線電視費用超過 495 元；此外有 61.7%的收視戶認為現行收費價格偏貴，而多數收視戶的繳費周期為季繳，佔 30.5%，有 68.7%的收視戶是到便利商店繳費。

社區服務方面，最近一年內，系統業者的自製頻道，有 15.3%的收視戶曾看過有線電視地方自製頻道，曾看過有線電視地方自製頻道的收視戶中，有 50.6%對地方自製頻道的節目內容感到滿意。

公用頻道方面，14.1%收視戶在提示公用頻道的定義後，表示知道公用頻道，其中 70.5%曾看過公用頻道，看過公用頻道中，有 58.2%對公用頻道的內容感到滿意，但僅 14.9%的收視戶表示未來願意提供自製影帶至公用頻道播出。

針對數位有線電視收視現況來看，36.6%的收視戶目前家中可收看數位有線電視，有 32.0%的數位有線電視收視戶是透過電話人員行銷安裝數位有線電視，有 10.2%的數位有線電視收視戶家中有購買頻道套餐服務，32.8%的數位有線電視收視戶每天收看數位有線電視。

數位有線電視的滿意度方面，68.7%的收視戶滿意目前業者所提供的數位有線電視頻道種類，有 71.9%的收視戶滿意業者提供的數位有線頻道節目品質，75.9%對於有線數位電視所提供的整體服務感到滿意，18.4%感到不滿意，其中不滿意的原因包括：節目內容(37.6%)、節目數量(32.3%)、費用太貴(23.0%)、收訊品質(20.7%)等因素為主。

數位電視未來使用意願方面，63.4%的收視戶目前家中尚未申裝數位機上盒，其不願意申裝的原因以目前的節目數量已經足夠為主(48.6%)，但有30.7%的收視戶傾向願意申裝數位機上盒。

有線電視業者的整體滿意度方面，76.6%的收視戶對業者感到滿意，20.3%感到不滿意，其中不滿意的原因包括：節目內容不夠多元(41.3%)、價格太貴(34.7%)、節目內容重播(19.7%)等因素為主，另外有94.5%的收視戶表示未來願意繼續收看有線電視。

本研究透過神秘客電話訪問、神秘客現場測試瞭解有線電視系統的客服人員及工程人員的服務品質。

在神秘客電話訪問中，以中嘉(86.6分)的客服人員所得平均分數最高。由各評比面向來看，中嘉在接聽電話速度、告知姓名、禮貌性用語、服務態度等面向的表現皆優於其他業者。

現場抽測結果中，亦以中嘉工程人員的總分平均為93.1分較高，凱擘為89.0分，獨立系統聯維、寶福則在74.9分左右，顯示大部分業者所派工程人員皆可在24小時內到府維修，在技術層面亦達收視戶所要求標準，評分較低的部分主要為派員速度，為日後須改進的目標。

在收視戶座談會的部分，一般收視戶表示7、80台之後的頻道較常發生畫面模糊情形；頻道服務方面，收視戶認為頻道種類可再增加，包括國際性、教育性或純音樂性頻道；節目重播情形方面，部分收視戶認為，節目重播可服務未能即時收看首播的觀眾；但仍有收視戶表示無法接受重播；客服與維修工程人員方面，收視戶認為客服電話接聽速度有待加強，處理問題亦仍以制式化回答為主，部分工程人員維修服務態度亦須改善。在未來安裝數位機上盒的意願方面，收視戶多半仍持觀望態度，除了認為收視習慣已經固定，或是已經透過其他管道例如MOD收看電視之外，未來預期須付費收看高畫質頻道及未能了解安裝數位機上盒和優點為尚未安裝數位機上盒的原因。

數位有線電視收視戶表示，目前多半透過業者電話行銷、到府拜訪或維修時順帶安裝數位機上盒為主，裝設後對於畫質、頻道類型及電子節目表感到滿意；但目前操作數位機上盒的情形，多半認為遙控器按鈕多而複雜，且未能整合，而機上盒本身體積較大，未能符合家中裝潢擺設，建議未來各家業者之硬體設備整合，並新增子母畫面、視訊及增加互動功能。

業者針對本年度調查結果回應，目前因須達成政府設定之數位化目標，藉由客服推廣增加達成率，致使整體接聽率下滑；在公用頻道推廣部分，業者認為目前民眾託播意願較低的原因在於目前數位匯流增加近用的管道，且受限於拍攝器材與影片音樂版權問題；在數位機上盒推廣部分，業者建議政府須與業者共同推廣數位化，協助輔導業者推廣。

專家學者解讀今年度調查結果，認為有線電視已逐漸有替代性平台產生，為未來有線電視發展的隱憂，數位有線電視發展部分，數位機上盒硬體及操作介面須更人性化，增加可用性及易用性，方能提升民眾使用意願；公用頻道發展方面，建議思考數位匯流趨勢下公用頻道的發展性。

對於主管機關國家通訊傳播委員會，建議引領推廣有線電視數位化優點，並統一數位機上盒硬體規格，提升數位機上盒裝機率；對於臺北市政府觀光傳播局，建議對於業者的客戶服務電話接聽率與加強客服人員教育訓練，提升解決收視戶問題的能力；推廣數位有線電視方面，建議於公共場所定點持續推廣，讓民眾有試用的機會，並輔導業者同步推廣數位有線電視。

Abstract

This research is to understand, via telephone survey, the basic information about the operation and market feedbacks of cable TV services in Taipei, including the penetration rate, the service quality and the level of subscriber's satisfaction (program replays included), the TAM (Television Audience Measurement) and audience satisfaction level of Taipei public access channel, the promotion, installation rate, TAM, and customer satisfaction level of Taipei digital cable TV service. The method of mystery shopper is also adopted to check the real quality of service of cable TV service providers throughout Taipei. Moreover, a focus seminar is held for regular cable TV subscribers, Digital TV subscribers, system providers and scholars. The focus seminar aims to support qualitative results with quantitative data, in order to understand the quality of Taipei Cable TV services and the satisfaction level of audiences.

According to the result of telephone surveys on Taipei residents, the penetration rate of cable TV in Taipei is 76.7%, with approximately 783,104 subscribers. The subscribers' satisfaction level is evaluated in seven aspects: 1. the attitude of customer service personnel, including the telephone receiving rate; 2. cable TV channel services; 3. the quality of reception; 4. the quality of program, including replays; 5. the maintenance service, including the rate of house calls; 6. the subscription fee and payment method; 7. Community service.

In terms of the service attitude, 27.4% of the subscribers have called the service line of cable TV system providers in the past year. Among which 72.9% called due to malfunctions. 85.9% of the callers are satisfied with the short waiting time, 86.4% are satisfied with the attitude of customer service personnel, and 77.8% are satisfied with the problem solving ability of the customer service.

When it comes to the channel service, in the past year 62.0% of the subscribers have noticed the scrolling text of public service announcements; on the other hand, 61.1% of the subscribers are satisfied with the variety of channels provided by the cable companies.

As for the quality of reception, in the past year 94.8% of the subscribers indicated the reception quality of TV is clear, but 50.0% of the subscribers have encountered incidents of broken reception. 32.8% of the subscribers

encountered channel reassignments. 29.2% found sudden volume-ups during commercials. 61.1% consider the number of provided channels too many.

As far as the quality of program, including replays, is concerned, 65.4% of the subscribers are satisfied with the quality of TV programs in the past year. 86.0% of the subscribers think that there are too many replays, among which 56.6% think that the movie category is the worst.

As for the maintenance service, including the rate of house calls, 18.7% of the subscribers have requested house calls, and 53.3% of them did so because they “can’t see anything on TV.” 85.2% of the customers are satisfied with the service attitude of dispatched engineers, and 85.7% are satisfied with their repairing capability.

In the aspect of subscription fee and payment method, 16.4% of the subscribers pay their TV bills according to the new rate, \$495/month, and only 5.1% of the subscribers pay lower rates. 47.4% of the subscribers pay over \$495/month, and 61.7% consider this rate overpriced. 30.5% choose to pay quarterly, and 68.7% of the subscribers pay their bills through the bill service in a convenience store.

As far as the community service is concerned, as far as self-produced channels by the system providers are concerned, 15.3% of the subscribers have watched channels produced by local cable TV system providers. 50.6% of the subscribers are satisfied with the programs.

In terms of the public access channel, after given the definition, 14.1% of the subscribers confirmed their knowledge of the channel, 70.5% of which have watched the public access channel, and 58.2% of them are satisfied with the contents. However, only 14.9% of the citizens are willing to provide their own video clips to be broadcasted on this channel.

As for the TAM of digital cable TV, 36.6% of the subscribers are capable to watching digital TV channels at home, and 32.0% of the subscribers installed digital cable TV box because of Telemarketing. 65.45% of the subscribers have actually watched the digital cable TV programs at home. 32.8% watch the digital cable TV channels every day.

When it comes to the satisfaction level of digital cable TV, 68.7% of the

subscribers are satisfied with the quality of programs. 75.9% are satisfied with the overall service, while 18.4% are not. The causes of dissatisfaction include the contents of the programs (37.6%), the number of channels (32.3%), the high price (23.0%), and the quality of reception (20.7%).

This study aims to understand customer service representatives and engineering staffs working for wire television cable system, and to explore their service quality through telephone interviews and real tests on the spot with mystery shoppers.

From the telephone interviews, the customer service' s average grade earned from CNS showed the highest. The grade was 86.6 points. From the overall aspects, the pick-up speed of the phone, name response, polite expression, and service attitude are all superior to other enterprises.

The result of present inspection showed that the item of engineering staff in CNS was 93.1 grades, the highest average grades in total. Kbro got 89.0 grades. Both NetWave and Power Full cable television companies got 74.9 grades. This result suggested that most of the engineering staffs can do on-site repair in 24 hours and meet every television subscriber' s requirements for technical aspect. The main reason of lower grades focused on the assignation speed of engineering staff. It must be improved for further development.

Regarding to the symposium held for television subscribers, general television subscribers reported that the screen looks vague when the television is switched after seventy or eighty channels. About the channel service, television subscribers suggested the variety of television channels can be added, inclusive of international channels, educational channels, and pure musical channels. For the replay programs, some television subscribers regarded that the replay programs can make up those audiences who cannot watch premiere programs; however, there are some television subscribers who cannot bear replay programs. Concerning customer service and repair engineering, television subscribers thought that the telephone pick-up speed needs to be improved because of the way of formal reply, and some engineers' attitudes are required to increase. For the willingness of digital set-top box installation, television subscribers took wait-and-see attitude. Those television subscribers may have fixed viewing habit, may watch television with MOD through other methods, may expect to be charged for high definition television in the future, and may not understand the

merits of digital set-top box installation.

The wire television subscribers pointed out that the digital set-top box is mostly promoted and installed through telephone introduction, on-site visit, or on-site repair. After installation, those subscribers were satisfied with its television definition, channel variety, and electronic program guide. However, the remote control is complicated and not integrated. In addition, the digital set-top box itself is larger and cannot match the furniture design. It was suggested that the enterprises shall integrate all of the hardware devices together, add picture-in-picture (PiP) function, support webcam video, and add interactive function.

About the result of year-end inspection, the enterprise claimed that to reach the target of digitalization set by government, enterprise is required to promote customer service. To do this, the general telephone pick-up percentage decreases. For public access channel promotion, the enterprise explained that at present access has been added to digital convergence, and limited camera devices and digital music rights are also issues. Regarding digital set-top box, the enterprise proposed that the government shall promote digitalization with the enterprise together.

From scholars' point of view, other platforms gradually substitute for wire television. It is the hidden worry for the development of wire television. About digital wire television development, no matter hardware device or operating interface of the digital set-top box, they all shall be enhanced to increase the willingness for people by improving workability and ease of use. For public access channel promotion, it was recommended to consider the development of public access channel under digital convergence trend.

For the competent authority, National Communication Committee, it was suggested to strengthen advantages of digitalized cable television and unify hardware specification of digital set-top box for popularizing the installation of digital set-top box. For Department of Information and Tourism, Taipei City Government, enterprise's customer service of telephone pick-up speed and educational training shall be improved to solve television subscribers' questions. Concerning digital wire television development, it was suggested to make people have a trial and use digital wire television at fixed public locations. Simultaneously, the enterprise shall promote digital wire television as well.