

摘要

本研究透過「電話調查」瞭解臺北市民眾收視習慣、臺北市有線電視裝機情形、臺北市有線電視系統收視戶轉換情形、臺北市有線電視系統收視戶的收視情形及滿意度、臺北市有線電視公用頻道收看率、臺北市數位有線電視裝機率、使用情形及滿意度與對臺北市有線電視現行收費看法等；並透過「神秘客調查」瞭解臺北市有線電視系統業者之服務品質；另針對有線電視一般收視戶、有轉換經驗收視戶、專家學者，辦理「焦點座談會」以及與臺北市有線電視系統經營業者進行「深度訪談」，期透過質化資料輔助電話調查結果，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服務的滿意度。以下針對本研究調查結果逐一闡述主要發現。

一、臺北市民眾收視習慣與有線電視裝機情形

本次電訪調查中，共計成功訪問到了 4,061 位臺北市民，在其他平臺收看電視節目部分，以「數位無線電視」的比例較高，占 53.3%；其次為「手機或平板上網」(45.5%)、「用電腦上網」(41.5%)等，相較於 104 年的調查結果，在使用其他平台收看電視的比例皆有上升；而其中有 3,171 位受訪民眾表示家中有安裝有線電視；住宅收視戶戶數的計算方式為：母體戶數*裝機率。而在其統計量 $p=0.781$ ，95%信心水準，抽樣誤差為 $\pm 1.3\%$ 下，推估臺北市市民有線電視住宅裝機率為 76.8%~79.4%之間，收視戶戶數為 802,255~828,832 戶之間。

二、臺北市有線電視系統收視戶轉換情形與原因

在轉換有線電視業者經驗部分，有 8.5%的受訪民眾表示有轉換過有線電視業者，而在 270 位有轉換過業者的受訪民眾中，轉換的原因以「費率較便宜」的比例較高，占 43.1%，其次為「寬頻上網和網路電視的套裝優惠服務」(12.3%)、「服務比較好」(10.6%)等；在座談會中的與會民眾也多反應其轉換因素仍以收費金額便宜為主要原因。

三、臺北市有線電視系統收視戶的收視情形及滿意度

在電視節目收視情形部分，受訪民眾以收看「新聞類」的比例較高，占 66.8%，其次為「綜合類」(42.9%)、「電影類」(21.0%)等。而在收看電視時段與頻率上，則有 65.0%表示「不分平假日」皆會收看電視；有 73.2%表示「每天」會收看電

視，其中在「下午 6 點~晚上 9 點」收看電視的比例較高，占 78.9%。

在收訊情形部分，93.0%的受訪民眾認為家中有線電視畫面清晰。相較於 104 年的調查結果，認為清楚的比例上升了 1.7 個百分點，然有座談會的與會民眾認為與 MOD 收視相較，有線電視機上盒畫質相對仍不佳；在斷訊頻率部分，則有 67.3% 表示過去一年內家中曾發生斷訊情形，座談會中也有與會民眾反應偶爾近期內常遇到會有斷訊、畫面出現雪花的情況以及颱風天訊號相對來說較不穩定。

在節目內容與品質部分，有 61.0%的受訪民眾表示對家中有線電視的節目內容與品質感到滿意，然相較於 104 年的調查結果，感到滿意的比例下降了 2.8 個百分點。在節目重播情形，有 57.9%的受訪民眾認為家中有線電視節目重播情形偏多，相較於 104 年的調查結果，認為重播情形偏多的受訪民眾下降了 11.4 個百分點，但在座談會中，仍有與會民眾反應重複播放頻率過高以致於對業者所提供的節目品質滿意度評價降低。

四、臺北市有線電視系統業者服務品質

在有線電視客戶服務部分，有 36.0%的受訪民眾表示過去一年曾致電客服中心。而在 1,141 位撥打過有線電視客服電話的受訪民眾中，詢問客服人員問題以「有線電視訊號異常」的比例較高，占 78.9%；在客服人員接聽速度部分，有 70.2%的受訪民眾表示對客服人員接聽速度感到滿意，然相較於 104 年的調查結果，感到滿意的比例下降了 3.8 個百分點，且在電話禮貌測試中，針對接聽速度面向得分較其他面向低，業者尤須針對此面向進行加強。在客服人員處理問題能力部分，有 77.3%的受訪民眾表示對客服人員處理問題能力感到滿意，在座談會中的與會民眾對客服人員的處理問題能力也多給予正面評價。在客服人員服務態度部分，有 85.7%的受訪民眾對客服人員服務態度感到滿意，然相較於 104 年的調查結果，對於客服人員服務態度感到滿意的比例下降了 2.2 個百分點。

在有線電視維修服務部分，有 30.4%的受訪民眾表示過去一年內曾經有請業者來維修的經驗，且相較於 104 年的調查結果，有維修過的比例上升了 3.1 個百分點；而在 963 位過去一年曾因為家中有線電視故障請業者到府維修的受訪民眾中，以「有線電視斷訊」的比例較高，占 49.5%，其次為「畫面不清楚/雜訊干擾」(27.0%)，「機上盒故障問題」(16.1%)等。在維修人員到府維修時間方面，以「2 小時內」的比例較高，占 32.1%，其次為「超過 12 不到 24 小時」(22.5%)、「超過 24 不到 48 小時」(9.8%)等，而透過現場維修人員測試部分可發現，有線電視業者在派員維修速度上的表現獲得肯定，惟在準時性與主動表明身分上，仍有改進

的空間。在維修能力部分，則有 86.6% 的受訪民眾對現場維修人員的維修能力感到滿意；維修人員服務態度部分則有 90.5% 的受訪者感到滿意。

五、有線電視現行收費看法

在收視費用調查部分，有 27.9% 的受訪民眾表示知道有線電視業者基本頻道收視費用是每月每戶 495 元，而在認為每月合理的收費金額則是落在「300-400 元以內」的比例較高，占 31.2%，平均而言在 340 元左右；另外針對分組付費部分，座談會中的與會民眾普遍表示對於未來分組付費若無法「降低收視費」，那寧願維持目前吃到飽的收視方式，而不希望收視費用往上增加，顯示目前的「向上分組」政策走向，並不為消費者接受；反觀有線電視業者則全數支持維持目前一百多台「吃到飽」約 500 元左右的費率，並「向上分組」，也就是透過其他增加頻道的組合方式，向消費者多收取收視費用；專家學者部分則有建議採單頻單買制，惟在如何訂價上仍有待定奪。

六、臺北市有線電視公用頻道

在臺北市有線電視公用頻道部分，有 13.2% 的受訪民眾表示有看過公用頻道，相較於 104 年的調查結果，有看過公用頻道的比例下降了 16.5 個百分點。而在 420 位有看過公用頻道的受訪民眾中，有 61.7% 的受訪民眾對公用頻道感到滿意，相較於 104 年的調查結果，對公用頻道感到滿意的比例下降了 16.8 個百分點。

七、臺北市有線電視數位化與整體滿意度

在有線電視數位化部分，有 33.9% 的受訪民眾表示自己家中有線電視類比訊號已經被關閉；27.8% 表示還沒有；另有 38.3% 未表態。進一步調查後發現，有 85.8% 的受訪民眾表示有安裝有線電視數位機上盒，相較於 104 年的調查結果，安裝數位有線電視的比例上升了 12.6 個百分點。而在 334 位沒有安裝有線電視數位機上盒的受訪民眾中，目前未安裝數位機上盒的原因以「基本頻道已足夠收看」的比例較高，占 34.3%，其次為「操作不方便」(10.6%)、「不願多花錢」(10.3%) 等。針對 2,721 位家中有安裝有線電視數位機上盒的受訪民眾進行調查發現，家中安裝一台數位機上盒的比例較高，占 55.8%，而實際使用的數量也以一台為主，占 58.8%，然相較於 104 年的調查結果，安裝一台機上盒的比例下降了 28.5 個百分點，安裝兩臺的則上升了 18.6 個百分點。

另外針對 2,721 位家中有數位機上盒的受訪民眾進行詢問後發現，有 70.7% 對遙控器的使用便利性感到滿意，但在座談會中，有與會民眾表示家中年長者在

操作上不便利，容易在操作轉臺時變更到機上盒原有之設定，另外在機上盒與遙控器設置上認為較占空間，且對於機器過熱的情形感到有疑慮；另在數位機上盒的附加功能使用中，以使用過「電子節目表」的比例較高，占 4.0%，其次為「錄影功能」(2.8%)、「隨選影片」(2.6%)等，顯示受訪民眾仍多以單純收看電視為主。

在有線電視整體服務部分，以認為與去年「差不多」的比例較高，占 71.4%，然相較於 104 年的調查結果，受訪民眾對於整體服務滿意度認為「較去年好」比例上升了 2.6 個百分點，認為「差不多」的比例則下降了 5.1 個百分點，顯示受訪民眾對於整體服務給予正向評價的上升了。

八、政策建議

公用頻道作為一個媒體近用的媒介，而臺北市民眾在公用頻道的收視比例上仍偏低，在此建議臺北有線電視業者與政府間能合作辦理相關競賽等活動以促進公用頻道之收視率；而為了因應 NCC 有線電視全面數位化之政策，除建議業者積極主動提供相關優惠與機上盒更新外，也仰賴政府加強數位化之宣導，盡速達成此目標，同時業者也應在推動數位化過程中維持訊號穩定性，另在服務品質面如客服接聽速度、工程人員工作態度上與節目品質都是應持續關注與提升之項目，藉以提升民眾整體的滿意度。

有關有線電視分組付費政策推動方式上則有賴政府擔任民眾與業者和 NCC 間溝通之橋梁，如實反映各方情況供 NCC 之參見；費率審查面項上則需綜合各方情形、審慎評量，做出最佳決議。業者則應因應整體收視環境之轉變與北都之加入提供更多元服務內容。

Abstract

The research via ‘telephone survey’ aims to understand Taipei citizens’ habits for the cable TV installation rate, cable TV system subscribers’ subscribing transition experiences in Taipei, cable TV system subscribers’ subscribing experiences and satisfaction in Taipei, the public access channel’s digital TV viewing rate, cable TV system digital set-top boxes’ installation rate, usage and satisfaction and users’ opinions about existed charging fees policy.

What’s more, the research also uses penetrate mysterious shopper survey to understand the service quality of the providers for cable TV in Taipei; we hold three focus group seminars, one for general TV subscribers, another for subscribers with transiting experiences and the other for expert scholars, and an in-depth interview for cable TV operators in Taipei to complement quantitate telephone survey results. With above four methods we hope to solidly understand the quality of Taipei cable TV system services, and the audience’ satisfaction level. Main discoveries are as followed:

I. The people subscribing habits and cable TV installation in Taipei

Based on telephone survey, 4,061 Taipei citizens are successfully interviewed. Respondents say that they also use other ways to watch programs. 53.3% use wireless digital TV, 45.5% use internet via cellphones and tablets, 41.5% use computers; as compared to year 2015 survey results, above counterpart ratios increase. 3,171 of targeted sample subscribe cable TV; therefore the estimated cable TV set-top boxes installation ratio in households equals to Taipei household population multiplies estimated set-top boxes installation ratio. We estimate that cable TV set-top boxes installation ratio in households is 78.1% by a sampling error of $\pm 1.3\%$ with a confidence interval of 95%. The cable TV set-top boxes installation ratio in households is about 76.8%~79.4%, revealing about 802,225~828,832 subscribers.

II. Cable TV Subscribers transition experiences and reasons in Taipei

In cable TV changing providers experience parts, 8.5% say they have transited their programs providers. 270 transition viewers say that cheaper charging fees is the main reason (43.1%), 12.3% say the main reason is for the better service and 10.6% say for

special price packages in both internet and Cable TV. The results can also see in symposium while interviewers say cheaper charging fees is the main reason to transit.

III. Cable TV system subscribers' subscribing experiences and satisfaction level in Taipei

About the genre rank on Cable TV, news rank first (66.8%), variety rank second (42.9%), movies rank third (21.0%). About viewing time and frequency, 65.0% say they watch TV both in weekdays and weekends. 73.2% say they watch TV every day and their major viewing time is from 6pm to 9pm (78.9%).

In information situation part, 93.0% subscribers consider that pictures is clear by watching programs via cable TV, which increases 1.7% to the year 2015 survey counterpart; however, interviewers in symposium think pictures in cable TV are less much clear than MOD. In break down frequency ratio, 67.3% say their cable TV broken down at least once last year. The results can also see in symposium while interviewers experienced similar break-downs especially in bad weather days.

IV. Cable TV system operators' service quality in Taipei

In cable TV customer service part, 36.0% show that they have phoned to cable TV service center last year. 1,141 subscribers had called up cable TV personnel, about 78.9% asking personnel questions on cable TV unusual signal. 70.2% of subscribers consider satisfied with speed in receiving calls, which falls 3.8% as compare to the counterpart in the year 2015 survey results. In testing telephone politeness, speed in receiving calls grade is lower than the others, which suggests the personnel must improve on it. The results can also see in symposium while interviewers had awful phone calls experiences. 77.3% subscribers consider satisfied with personnel members competence in coping with questions. 85.7% subscribers consider satisfied with personnel service attitude, which though falls 2.2% as compare to the counterpart in the year 2015 survey results.

In cable TV repair service, 30.4% subscribers say they have asked on-site repair service last year, which increases 3.1% as compared to the counterpart in the year 2015 survey results. 963 interviewers who had repairing experience last year say the top reason for signal interruption (49.5%), the second one is for cable TV unclear signal or

info disturbance (27.0%), and the third one is for set up boxes breakdown problems(16.1%). In on-site maintenance technicians arriving span, 32.1% are within 2hours, 22.5% are over 12 but not 24 hours, and 9.8% are over 24 but not up to 48 hours. It is found that 86.6% subscribers satisfy about on-site maintenance technicians' professional competence. About 90.5% satisfy maintenance technicians' attitude.

V. Opinions in cable TV existing charging fees' policy

In existing charging fees policy, 27.9% of subscribers know the maximum subscribing fees for basic channels falls in NT495 per month, and 31.2% consider reasonable fees within NT300- NT399. The average fee is NT340 per month.

About opinions in tiered pricing policy, most interviewers in symposium say that if future maximum price couldn't anchor under existing price, they would prefer to maintain existing unlimited viewing way rather than future tired pricing policy possible to increase the fees. The result displays the customers cannot accept tired pricing policy which plans to anchor above existing maximum price. The result echoes MSO overwhelmed attitudes towards backing up existing unlimited viewing way while receiving about NT500. They also back up anchoring above existing maximum price via providing other tiered channels' groups aiming to receiving more fees from customers. A few experts suggest a la carte while not deciding pricing policy.

VI. Channel 3 awareness and satisfaction in Taipei

13.2% of subscribers had watched public access channel (channel 3), which decreases 16.5% as compared to the counterpart in the year 2015 survey result. For 420 subscribers whom had watched the public access channel, 61.7% feel satisfied, which decreases 16.8% as compared to the counterpart in the year 2015 survey results.

VII. Cable TV digitalization and overall satisfaction in Taipei

About digitalization prevalence, 33.9% say their analog signal via cable TV had been cut. 27.8% say their analog signal is still sending. 38.3% don't comment. For further survey analysis, 85.8% say they had installed set-top boxes, which increases 12.6% as compared to the counterpart in the year 2015 survey results. 334 interviewers don't install set-top boxes because of enough channels' needs (34.3%), inconvenient usage design for set-top boxes (10.6%) and unwilling to purchase more fees (10.3%). 2,721

interviewers say they installed one set-top boxes (55.8%) and actually use one set-top box to watch TV (58.8%), which decreases 28.5% as compared to the counterpart in the year 2015 survey results. Percentage soars 18.6% in 2 STB installation as compared to the counterpart in the year 2015 survey results.

For further analysis to 2,721 interviewers who had installed set-top boxes, 70.7% feel satisfied with remote controls' usage convenience; however, interviewers in symposium think remote controls are user-unfriendly towards the elderly because of unexpected changes from the original setting when tuning in. What's more, interviewers feel set-top boxes and remote controls cumbersome and concern about machine overheated. About usage in additional functions in digital cable TV, the electronic program guide ranks first (4.0%), PVR ranks second (2.8%) and VOD ranks third (2.6%), which indicates that citizens merely watch TV.

For overall satisfaction about the quality of service, 71.4% feel same compared to last year, which decreases 5.1% as compared to the counterpart in the year 2015 survey while 2.6% increasing percentage in better feelings compared to last year. The result reveals that interviewers evaluate more positive than last year.

VIII. Suggestions

The Public access channel can be the bridge for media access, although the percentage of Taipei citizens watching programs on public access channel remains low. It is suggested that system operators in Taipei can cooperate with the authorities to hold activities such as competitions to promote Channel 3 viewing rate. Moreover, to address amending Article 48 in Cable Radio and Television Act, it is also suggested that system operators shall actively provide incentives such as special prices' terms and set-top boxes renewal plans. The related authorities also shall intensively promote the digitalization policy to accelerate achieving the policy goal. Meanwhile, the system operators shall keep signal maintenance during the transition term as well. Additionally, system operators shall eye on and improve on service quality in speed in receiving calls in customers' service center, technicians' job attitudes and programs' quality to increase citizens' overall satisfaction.

About promoting future tiered pricing policy in cable TV, it is suggested that the Department of Information and Tourism shall bridge Taipei citizens, system operators and NCC by frankly providing authentic opinions and situations to NCC. About fee review, the Department of Information and Tourism shall consider comprehensive repertoires, evaluate deliberately and make best decision. System operators shall adapt to changeable industries including TaipeiNet Inc. entering in Taipei by providing varied service content.