

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情形、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、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、分組付費、跨區經營；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、數位有線電視收視戶、多元收視戶、熟悉有線電視產業之專家學者、以及臺北市有線電視系統經營者，辦理「焦點團體座談會」，期透過質化資料來輔助電話調查的結果，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。

本次研究調查顯示臺北市有線電視住宅裝機率為 72.8%，收視戶戶數為 757,197 戶。相較 103 年度調查結果，裝機率下降了 5.8 個百分點。在其他平臺收視習慣中，43.0%收視戶表示使用「數位無線電視」收看節目、40.1%使用「電腦上網收看節目或影音內容」、39.4%使用「手機或平板電腦上網收看節目或影音內容」、22.6%使用「中華電信 MOD」。相較 103 年調查結果，使用電腦、手機或平板電腦及網路電視盒收看電視的比例均上升，分別上升了 12.7、6.7 及 3.4 個百分點。

此外，在 1,100 位 MOD 收視戶中，41.5%收視戶表示每天使用 MOD 收看電視；選擇安裝 MOD 收看電視的原因，39.5%收視戶表示為「電話、寬頻上網和 MOD 電視的套裝優惠服務」；常使用的 MOD 功能與服務中，73.5%收視戶表示為「電視頻道」；MOD 整體服務部分，65.9%收視戶表示對 MOD 的整體服務感到滿意，其中 38.8%係因收視畫面品質較好而感到滿意。

在 1,918 位使用手機或平板電腦的收視戶中，39.8%收視戶表示每天使用手機或平板電腦收看電視；選擇使用手機或平板電腦收看電視的原因，53.9%收視戶表示為「收視方便」；26.3%收視戶表示較常使用手機或平板電腦收看的節目或影片類型為「韓劇」。

在有線電視裝設現況方面，臺北市有線電視住宅裝機率為 72.8%，

而 893 位家中未裝設有線電視民眾中，在未安裝有線電視的原因，有 32.4% 表示「無收看电视習慣」、18.7% 表示「已安裝 MOD」、16.4% 表示「費用太貴」。

收訊品質方面，91.3% 收視戶認為有線電視收看畫面清楚，較 103 年上升 2.1 個百分點，其中麗冠有線電視收視戶認為清楚的比例逐年下降；67.4% 收視戶表示近一年來曾發生過斷訊，有斷訊經驗的比例逐年上升，其中 103 年後的比例皆逾六成；節目品質(含重播情形)方面，有 63.8% 收視戶表示滿意業者提供的節目品質，其中寶福有線電視收視戶表示滿意的比例逐年下降，而 69.3% 收視戶認為目前節目重播情形偏多，比例逐年下降；頻道服務方面，58.6% 收視戶認為目前頻道數量偏多。

服務態度(含接聽率)方面，近一年來，有 37.7% 的收視戶曾撥打電話至有線電視系統業者客戶服務中心，103 年後有撥打客服經驗的比例均高於三成，其中大安文山、萬象、聯維有線電視收視戶有撥打經驗的比例逐年上升；1,316 位有撥打客服經驗收視戶詢問客服人員的問題，61.3% 的收視戶表示為「有線電視故障問題」，但比例逐年下降；在接聽速度滿意度看法上，有 74.0% 的收視戶表示滿意，其中陽明山、新台北有線電視收視戶滿意的比例逐年上升，而麗冠、聯維、寶福有線電視收視戶滿意的比例則逐年下降；78.0% 對客服人員處理問題的能力表示滿意，其中陽明山、大安文山有線電視收視戶滿意的比例逐年上升，而新台北、金頻道、萬象、聯維有線電視收視戶滿意的比例則逐年下降；88.0% 對客服人員服務態度表示滿意，滿意的比例逐年上升，其中陽明山、金頻道、萬象有線電視收視戶滿意的比例逐年上升，而麗冠有線電視收視戶滿意的比例則逐年下降。

維修服務(含到修率)方面，近一年來，有 27.3% 的收視戶曾要求業者派員維修，有維修經驗的比例逐年上升；在 953 位有維修經驗的收視戶維修原因中，有 57.4% 的收視戶係因「有線電視斷訊問題」要求業者派員維修；在維修速度的看法上，有 60.8% 收視戶表示是在通知客服中心的 24 小時內接受維修，等待時間在「超過 24 不到 48 小時」與「超過 48 小時」的比例均逐年下降，其中陽明山、新台北、麗冠、長德、萬象有線電視收視戶在 24 小時內接受維修的比例逐年上升，惟金頻道有線電視收視戶在超過 48 小時才接受維修的比例逐年上升；88.1% 收視戶對維修人員處理維修能力表示滿意，其中長德、

萬象有線電視收視戶滿意的比例逐年上升，陽明山、聯維有線電視收視戶滿意的比例則逐年下降；90.3%收視戶對維修人員服務態度表示滿意，其中金頻道有線電視收視戶滿意的比例逐年上升。

收視費用及形式方面，有 50.0%的收視戶認為臺北市政府審定的有線電視基本頻道收視費用(495 元/月)合理、44.1%認為不合理，認為合理的比例較去年下降 7.2 個百分點；在收視戶期望的有線電視每月收費價格部分，平均為 294.1 元，其中 57.4%的收視戶認為合理費用為 300 元至未滿 400 元，平均為 294.1 元，認為應為 300 元者共有 712 人，人數最多，所以眾數為 300 元。

公用頻道方面，29.7%表示曾收看過公用頻道，其中 25.5%的收視戶對節目內容感到滿意，4.2%對節目內容感到不滿意；社區服務方面，有 35.6%的收視戶曾看過有線電視地方自製頻道，其中 29.4%對節目內容表示滿意，6.2%對節目內容表示不滿意。

針對政府推動有線電視全面數位化之知曉度方面，69.9%收視戶表示知道；從數位有線電視裝設現況來看，73.2%的收視戶目前家中可收看數位有線電視，有安裝數位有線電視的比例逐年上升；而 24.0%未安裝數位有線電視的收視戶中，表示未申裝的原因以「基本頻道已足夠收看」(28.5%)、「很少看電視」(12.6%)、「不願多花錢」(12.0%)為主，其中表示不願意多花錢的比例逐年上升。

數位有線電視裝設方面，84.3%收視戶表示家中有 1 臺電視已裝設數位機上盒，僅安裝 1 臺的比例逐年下降，而安裝 2 臺與 4 臺以上的比例均逐年上升；67.9%的數位收視戶對裝機人員到府裝設時的解說內容表示清楚；在數位有線電視頻道服務與節目品質方面，89.1%表示使用過數位頻道的功能，69.3%的數位收視戶對數位有線電視的選台器使用便利性表示滿意，滿意的比例較去年上升了 8.4 個百分點；67.3%的數位收視戶對數位頻道的節目品質表示滿意，滿意的比例逐年下降，其中陽明山、麗冠、寶福有線電視收視戶表示滿意的比例亦逐年下降，惟萬象有線電視收視戶表示滿意的比例逐年上升；10.1%的數位收視戶表示有加購額外提供的付費服務。

有線電視業者的整體滿意度方面，15.1%認為業者提供的服務較去年好，認為差不多的比例較去年上升了 29.4 個百分點；在有線電視數位化相關議題方面，60.4%的收視戶贊成未來有線電視採取分組

付費方式，贊成的比例較去年上升了 9.6 個百分點；民眾對於基本頻道組數量的看法，其中認為應有 10 至 29 個的收視戶最多，占 21.4%，平均為 46.3 個，認為應為 30 個者共有 384 人，人數最多，所以眾數為 30 個頻道；而對基本頻道合理費用的看法，以 300 元至未滿 400 元者最多，占 25.7%，平均為 300.8 元，認為應為 300 元者共有 756 人，人數最多，所以眾數為 300 元；在額外加購付費頻道組的意願部分，有 28.3% 的收視戶表示願意額外加購，願意的比例較去年下降了 16.1 個百分點，在願意加購者中，32.6% 認為加購的合理費用為 100 元至未滿 200 元，平均為 181.3 元，認為應為 100 個者共有 258 人，人數最多，所以眾數為 100 元。另外，若未來新業者加入，有 49.5% 的收視戶表示有意願轉換為新業者，29.0% 的收視戶表示沒有意願，願意的比例較去年下降了 16.1 個百分點。

在有線電視客戶服務上，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服務人員的服務品質。在神秘客電話訪問中，以凱擘(89 分)的客服人員所得平均分數最高。由各評比面向來看，獨立系統寶福、聯維的接聽速度(9.1 分)、禮貌用語(9.8 分)與服務態度(8.6 分)平均分數優於其他業者，中嘉在告知姓名(9.7 分)、平均分數優於其他業者，凱擘在禮貌用語(9.8 分)、專業能力(9.6 分)與服務態度(8.6 分)平均分數優於其他業者。

現場抽測結果中，以凱擘工程服務人員的總分平均為 92.4 分最高，中嘉在 87.3 分，獨立系統則聯維、寶福為 74.3 分，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要求標準，由各評比面向來看，主要以表明身分及服裝儀容部分，為日後需改進的目標。

在一般收視戶座談會部分，收視戶表示在收看有線電視時，偶爾有發生雜訊干擾現象；節目重播情形方面，以新聞頻道、戲劇頻道、電影頻道及政論節目的重播情形較嚴重，據焦點座談會與會的有線電視收視戶表示，對於安裝資訊不瞭解是民眾未安裝數位機上盒的因素之一。

數位有線電視收視戶表示，對全面數位化的瞭解來自新聞報導，多透過業者電話行銷進行數位機上盒的裝設，裝設後對於畫質、頻道類型感到滿意；但目前裝設數位機上盒的情形，認為裝機人員在多元

功能說明不清楚，建議未來各家業者訓練裝機人員主動推廣數位服務功能，以及提供簡易閱讀的圖文操作說明。

多元收視戶表示以有線電視收視的節目類型以新聞、戲劇為主，而有線電視的優勢為頻道數量多，但相較其他平臺，畫質較差、廣告插播嚴重、數位機上盒遙控器設計不佳，建議未來各家業者改善收訊品質，以及提供更多元的頻道選擇與收費模式。

專家學者認為目前有線電視發展瓶頸，主要來自多元收視平臺的競爭，有線電視主管機關應針對多元收視平臺的盜版加強管制與打擊，建立合理的版權市場機制，業者也應致力於技術與內容的轉型、與網路媒體做區隔，維持其節目的獨特性與原創性；在公用頻道與自製頻道的營運方式，不該為爭取政府補助而製作節目，可考慮撤除自製頻道，專注於公用頻道的營運，重建業者形象；在數位有線電視發展方面，分組付費不該為降價而降價，應著重提升內容品質才能加強競爭力；在跨區經營議題上，高門檻的 MG 權利金拉高新進業者的經營成本，恐對新系統業者之永續經營不利。

業者針對本年度調查結果回應，在客戶抱怨部分多為數位化後使用方式改變、不熟悉操作介面，已加強操作說明的訓練；在自製頻道方面，希望能加強民眾參與度、推廣媒體近用權；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；在未來有線電視發展部分，建議由政府制訂基本頻道，才有規劃分組付費與套餐的依歸。

對主管機關國家通訊傳播委員會，在數位匯流趨勢下，作為數位化引領的有線電視產業，建議應推廣有線電視數位化優點，並統一各區數位機上盒硬體規格，加速數位機上盒裝機率，未來有線電視數位議題如分組付費、跨區經營等；對臺北市政府觀光傳播局，建議對於業者的客戶服務與加強服務人員數位化服務處理的教育訓練。

Abstract

The research via telephone survey is to understand the installation rate situation of cable TV in Taipei, including the service quality of the provider cable TV system in Taipei, the public channel programs, the condition and satisfaction of cable TV in Taipei. Promoting a digital cable TV service ways on installation rate, TV subscribers situation and satisfaction, payment by groups, to extend an operation across a district; And also penetrate mysterious shopper survey to understand the service quality of the provider for cable TV system in Taipei; Additionally, in accordance with general TV subscribers, the digital cable TV subscribers, subscribers varied an expert familiar with cable TV production, and also with the cable TV system operator. Performing focus seminar aims to penetrate qualitative message to support telephone survey results, in order to understand the quality of Taipei cable TV system services, and also the satisfaction level of audience.

Based on time research indicate that residence cable TV in Taipei city installation rate is 72.8%, households numbering of 757,197 subscribers. In other common level viewer habits, 43.0% of subscribers indicate using wireless digital in watching TV programs, 40.1% use internet in computer watching programs or content voice image, 39.4% use cellphone or Flat-Typed computer watching program or content voice image, 22.6% use Chung Hwa Telecom (MOD). Comparing with year 103 research results in using computer, cellphone or flat-typed computer and internet TV box watching TV the ration level increase up to 12.7, 6.7 and 3.4% points.

Aside with the 1,100 MOD subscribers, 41.5% subscribers shows daily using and watching MOD, the reason to choose installing MOD in watching. 39.5% subscribers indicating for “telephone, broad channel internet and an ensemble MOD TV preferential service”; usually use MOD function and service, 73.5% subscribers indicating for “TV channel”; Part of whole MOD service, 65.9% subscribers show

satisfaction in the whole MOD service, among 38.8% systems cause the full length and breadth of pictures are better and yet feel satisfy.

In 1,918 subscribers use cellphone or flat-typed computer, 39.8% subscribers indicate daily use cellphone or flat-typed computer watching TV; 53.9% subscribers indicating for “Convenient to watch TV”; 26.3% subscribers indicate using cellphone or flat-typed computer watching TV or a motion picture types simplified form of Korean Drama.

In accordance with the cable TV installation at the present situation, Taipei city residence cable TV installation rate is 72.8%, comparing with year 103 survey result, installation decrease to 5.8% points, the reason in not yet installation cable TV at home, 32.4% shows “No habit in watching TV”, 18.7% shows “install MOD already”, 16.4% shows “MOD fees too dear”.

As for the quality in gathering information, 91.3% of subscribers consider that by watching with cable TV pictures is clear, as compare to year 103 increase to 2.1% points. Among Li Guan cable TV subscribers consider that clear picture level decrease annually, 67.4% subscribers indicate that in recent year, broken information happened, there’s a broken information experience increase annually. In year after 103 the ratio increase high about six percent, program quality (including replay situation), 63.8% subscribers are satisfied with the quality of TV programs offered by the provider. Among Pau Fu cable TV subscribers satisfaction ratio decrease annually. Nevertheless subscribers think that present replay program situation are too many, ratio decrease annually. 58.6% subscribers consider that numbers of TV channels provided a lot lately.

In terms of the service attitude (including reception rate), a year lately, 37.7% of the subscribers had called the service center. After year 103 the experience in dialing customer service the ratio increases three per cent. Among Tah An Wun San, Wan Shang, Lian Wei cable TV subscribers got dialing experienced the ratio annually increase; inquiring customer service personnel questions, 61.3% subscribers shows “cable

TV breakdown problem”, but ratio annually decrease; In reception speed way satisfaction, 74.0% subscribers are satisfied. Among Yang Ming San, New Taipei cable TV subscribers satisfaction ratio annually increase, and yet Li Guan, Lian Wei, Pau Fuh cable TV subscribers satisfaction ratio annually decrease too; 78.0% are satisfied with the ability of the customer service personnel handling questionnaire. Among Yang Ming San, Tah An Wun San cable TV subscribers satisfaction the ratio annually increase, but New Taipei city, Zhin Pihm Tau, Wan shan, Lian Wei cable TV subscribers satisfaction the ratio however decrease; 88.0% are satisfied with the attitude of the customer service personnel, the satisfaction ratio annually increase. Among Yang Ming San, Zhin Pihm Tau, Wan Shang cable TV subscribers the ratio annually increase, but Lih Guan cable TV subscribers satisfaction the ratio however annually decrease.

As for the repair service (including home repair rate), nearly a year, 27.3% of the subscribers ask provider to send a good repair personnel. Having maintenance experienced the ratio annually increase; reason within handling a good repair, 57.4% of the subscribers system due to “cable TV reception disconnected problem” asking provider to send a good repair personnel; in viewpoint of repair speed, there are 60.8% subscribers shows repair maintenance is within 24 hours upon the notice to customer service center, waiting time “exceeding 24 hrs. not up to 48 hrs.” and “exceeding 48hrs.” the ratio level annually decrease. Among Yang Ming Zan, New Taipei, Lih Guan, Zchang The, Wan Shang cable TV subscribers accept within 24 hours repairing the rate annually increase. Only Zhin Phin Tau cable TV subscribers accept exceeding 48 hours repair maintenance the ratio annually increase; 88.1% subscribers are satisfied with their repairing capability. Among Zhan The, Wan Shang cable TV subscribers satisfaction the ratio annually increase, Yang Ming San, Lian Wei cable TV satisfaction the ratio however annually decrease; 90.3% subscribers satisfaction ratio annually increase.

In the aspect of subscription fee and payment method, 50.0% of the subscribers consider that Taipei city government authorizing cable TV the basic channel subscription fee (495/month) is reasonable. 44.1% consider

that it's unreasonable. Considering reasonable price the ratio compared with last year is 7.2% lower; Average in the part of cable TV hoping monthly price 294.1 dollars. 57.4% subscribers consider that price 300~400 dollars is reasonable.

In terms of the public access channel, 29.7% has seen public channel before. Among 25.5% of the subscribers feel satisfied with the contents of the program, 42% are not satisfied; subject to community services; 35.6% of the subscribers had watch cable TV self-made own channel, 6.2% shows not satisfied with the content of the program.

In accordance with the government pushing all cable TV digitalized 69.9% subscribers shows they know; from digital TV installation present look, 73.2% subscribers presently can watch by digital cable TV at home, digital cable TV installation ratio annually increase, nevertheless 24.0% of the subscribers do not install, the reason consider on not installing "Basic channel is enough to watch" 28.5% "seldom watch TV" 12.6% "don't want to spend much money", ratio increase annually for not wanting to spend much money.

Subject to Digital cable TV installation, 84.3% subscribers installing a digital set-top box for a TV at home, for only one TV installation ratio annually for 2 to 4 TV's installment; 67.9% digital subscribers with regards to the installing personnel explanation consider clear; for digital cable TV channel service and program quality, 89.1% using digital channel function, 69.3% of digital subscribers with regards to cable TV using set-up box are satisfied for the convenient quality, satisfaction ratio increase higher for 8.4%, 67.3% of the digital subscribers are satisfied with the digital channels program quality, satisfaction ratio annually decrease, among Yang Ming San, Lih Guan, Pau Fuh cable TV subscribers satisfy ratio annually decrease. Only Wan Shang cable TV subscribers ratio annually increase; 10.1% of the digital subscribers got offer for extra additional purchase pay service.

When it comes to the satisfaction level of cable TV, 15.1% provider consider offering service is better than last year, considering almost the

same increase to 29.4% than last year, subject to related topic on digital cable TV, 60.4% subscribers agree to take payment dividing into groups in future, agreed ratio increase to 9.6% than last year; In view of people basic channel watchers groups number, consider that 10~29 subscribers is the most occupy 21.4% but in view for basic channels reasonable costs, the most is 300~400 dollars occupy 25.7%; In extra additional purchase pay channel group part inclination, 28.3% of the subscribers wish for extra additional purchase, wishing ratio decrease lower than last year for 16.1%, among person wishing for additional purchase, 32.6% consider that additional purchase cost of 100 to 200 dollars is reasonable. Besides, if new provider join in future, there are 49.5% of the subscribers incline to change for new provider, 29.0% of the subscribers indicate no inclination, wishing ratio decrease for 16.1% lower than last year.

From the cable TV customer service, the research pass through mysterious guest interview, mysterious guest on spot test understand cable TV system's customer service personnel and engineering service personnel service quality. With the mysterious guest telephone interview, Khai Pih customer service personnel got the highest grade of 89. Facing from every judgement, independent system Pau Fuh, Lian Weu reception speed got grade of (9.1), Politeness (9.8) and service attitude (8.6) average grade excellent than others, Chung Jia in notifying name got grade of (97), average grade best than others. Khai Pih pdteness language got grade of (9.8), professionalism power (9.6) and service attitude (8.6) average grade best than others.

On the spot test results, Khai pih engineering service personnel got the highest average grade of 92.4, Chung Jia in 87.3, independent system however Lian Wei, Pau Fuh got 74.3, indicate that most provider engineering personnel send all accepting home repairing within 24 hrs. For techniques also reach the subscribers wish by facing every judgement. Mostly by indicating one's status and dress appearance part, objectives for improvement day after day.

Regarding the symposium held for TV subscribers, TV subscribers reported that the screen looks vague occasionally; subject to reply

program, news channel, drama channel, movie channel and comments about politics replayed program situation are more serious, according to focal point symposium and meeting cable TV subscribers, regarding installation information people don't understand the merits of digital set-up box installation.

Digital cable TV subscribers shows that the whole digitalization understanding comes from news report, promoted set-up box is mostly and installed thru telephone introduction with regards to design quality after installing feel satisfied with the channel category; But installing digital set-up box at present, consider that installing personnel at pluralism power explanation is not clear, suggest future provider trained installing personnel to initiatively propagate digital service and also offer simple easy reading the picture clarification and operation.

Pluralism TV subscribers consider that cable TV subscribers for the category program mainly for news, drama, however cable TV best channel are abundant but compare with other level channel, picture quality are more worst, seriously on inserting commercial play, digital set-up box remote control incessantly design, suggest that future provider improve TV information reception quality, and also offer more pluralism for channel choosing and fees collecting model.

Professional scholar's consider the present development for present cable TV, mainly comes from bottleneck pluralism level viewer competition, the chief of cable TV organizer in accordance with the pluralism level viewer must strengthenly control and strike a blow against the pirated edition. To establish reasonable copyright market institution, provider must devote techniques and content on turn pattern with division medium on internet, maintaining unique and original quality program. In public channel and self-made channel's operation way, must not strive for government help and self-made program, can think over to abolish self-made channel, concentrate on public channel's operation. Rebuild provider image, subject to digital cable TV development payment by group must not decrease price and decrease price, must again increase content quality improve competitive power; in the topic to go beyond

district business, An illustrious family's MG rights pull up new provider business profit, afraid that the provider new system long run business is unsuccessful.

About the result of year-end inspection, customers partly complain most on changing the way of using digitalization unfamiliar with the operation aid. Had strengthen operation explanation training; in part of self-made channel, provider request government needs to popularize digitalization together with the provider. Assisting provider to popularize; partly in future cable TV development suggested from government to institute basic channel, certainly plan payment dividing into groups and comply with payment by dividing groups and buffet.

For the institution in charge of, National Communication Committee, digitalization flow down into a trend, conducting digitalization lead to a cable TV industry, request must popularize cable TV digitalization preferential; unify hardware specification of digital set-top box accelerating the installation rate of digital set-up box. Digital cable TV topic like the payment dividing into groups, to go beyond district etc. for Taipei city government sightseeing media bureau, suggest provider's customer service and strengthen service personnel digitalize service dealing with educational training.