

台灣 5G 市場洞察

文 | Rebecca Kuo, 益普索專案經理

因應高頻寬，低延遲的未來發展，各大電信業者及手機業者紛紛推出產品及服務迎接 5G 時代的來臨：

隨著科技不斷進步，2020 年網路從 4G 全面進化到 5G，影響層面從教育、醫療、交通、娛樂，均因 5G 帶來不同的互動。面對 5G 的來臨及進入商用階段，因具傳輸速度比 4G 快 10 倍、高頻寬及低延遲等特性，有利發展物聯網、VR/AR、沉浸式遊戲、旅遊體驗等服務，可帶動高品質視聽娛樂、智慧旅遊、智慧醫療、智慧物聯網、智慧城市等加值創新應用，已成為我國相當重要前瞻發展之一。

目前台灣 5G 業者仍有需面臨的困境：

- 成本太高

頻譜普遍不足，讓電信業者必須砸大錢建設，但標到頻段後成本又無處消化，反映在消費者身上又拿來和 4G 比較，再者，5G 網路的特性為高速、低延遲，要讓民眾有感還必須擁有高密集度的基地台建設，連同維護所需成本皆極高，最終電信業者會難以負擔，造成 5G 電信資費相當高昂。

- 推出資費方案不符大眾消費習慣

過往許多業者用 499、399、99 吃到飽養大台灣消費者胃口，習慣以物美價廉且無限制的流量網路追劇、玩遊戲，事實上對業者來說傷害非常大，但被迫於市場競爭，不得不加入低價攻占市場的行列；如今要升級 5G，資費提高、消費者體驗差異度不高，無法促動消費者主動升級 5G，除非提出與現有網路應用上不同的殺手級應用，否則以現行模式推行 5G 實屬困難。或許政府應該積極介入協助，並發展企業級 5G 應用才是解決之道。

消費者對 5G 看法各有優缺點，但觀望程度居多：

Ipsos 透過專業的社群聆聽平台 Synthesio 觀察發現，大部分消費者認為缺頻、訊號不佳，支援手機少，對升級速度沒有明顯感受。網路上的看法包括：「覆蓋率也不夠」、「5G 現在訊號不太好 用了反而耗電」、「沒幾支手機可以用 5G」、「說真的 100m 和 20m，除了下載，感覺不出有差多少」。

此外，也有不少消費者認為 5G 的發展還不成熟，他們進而表示「5G 的連線穩定度，在 5A 網組沒全面施行之前，八成都是在跑 4G」、「現階段沒必要 過了兩三年和 4G 的差距出來了再說」。

然而，也有一些體驗過 5G 的消費者提出正面看法，他們說「家裡剛好收到 5G 訊號就換了，大概一個月用 30GB~100GB，比光世代 100M/40M 快。」、「公司每月有補助 1500 (5G 費用)，就直升入坑了 QQ」

未來 5G 世代，手機及電信廠商該如何方能得到青睞：

- 舉辦行銷活動增加產品曝光度

於台灣主要的 3C 討論平台操作行銷活動，例如三星於 Mobile 01 操作比基尼模特手機實拍與相機比較評測，創造出熱烈的討論聲量，讓品牌與消費者有更佳的互動與討論。此外，Ipsos 更在 Synthesio 平台觀察到 vivo 的社群聲量在旗艦店開幕活動時，各式優惠引起消費者注目，也因此有些民眾更期待大陸更多機種引進。

- 電信廠商推出 5G 試用上網卡，增加民眾使用 5G 意願

提出老客戶 5G 免費試用或門市試用，讓民眾漸漸了解 5G 的功能及使用場域，讓消費者親自體驗並提升對 5G 的認知。

最後，5G 基地台仍在擴建，未來會出現更多 5G 相關應用情境，如何讓消費者盡快適應 5G 速度及相關應用，則是電信、物聯網企業、手機大廠需持續追蹤的議題。

參考資料：

1. <https://reurl.cc/m9mGE1>
2. <https://reurl.cc/LdkpR4>
3. <https://buzzorange.com/2020/01/09/problem-of-taiwan-5g>
4. <https://cnews.com.tw/137200617a01/>

Ipsos 益普索市場研究

Ipsos是全球頂尖的專業市場調查研究機構，在全球九十個國家及地區設有分公司，在挖掘顧客經驗，執行品牌行銷調查，我們具有創新的思維與先進的科技。我們是世界頂尖企業執行長最信賴的企業顧問，我們也有熟悉各產業的專家協助測量、模擬和管理顧客與員工關係。

想了解更多資訊，請參考 <https://www.ipsos.com/en-tw/solution/overview#category3>

或洽詢我們的研究團隊

研究總監 Michelle Hsieh 謝惠玲

02 2701-7278 #111 Michelle.hsieh@ipsos.com

專案經理 Rebecca Kuo 郭孟欣

02 2701-7278 #120 Rebecca.Kuo@ipsos.com

5G era in Taiwan

Rebecca Kuo, Project Manager

For high bandwidth, and low latency, major telecom and mobile phone companies have designed and provided products for the coming 5G era.

Through the continuous improvement of science and technology, the network has evolved from 4G to 5G. 5G affects numerous industries including education, medical care, transportation, and entertainment. With the debut of 5G and the commercialization is imminent, 5G is at least 10 times faster than 4G, with greater bandwidth, and low latency, is beneficial for the development of services such as the Internet of Things, VR/AR, immersive games, and virtual travel experience. This can drive high-quality audiovisual entertainment, smart tourism, smart healthcare, Internet of Things, smart cities, and so on. These value-added innovative applications have become one of the most important forward-looking developments for our country.

The challenges facing 5G in Taiwan

- **Costly to deploy 5G**
Building a network is expensive since the lack of affordable bandwidth, which leads to increase the data plan. But consumers most likely will compare it with 4G unlimited data plan. Moreover, there must be enough 5G base stations to reflect the advantage of high speed and low latency. In addition to the highly maintenance fee of 5G results in unaffordable cost for network provider. As a result, telecom companies provide the high 5G data plan for consumers.
- **The 5G data plan does not correspond to mass consumption habits**
In recent years, network providers use NT\$499 unlimited data plan to expand the market share. Consumers are used to watching soap dramas and playing online games on the Internet with lower prices and unlimited data. In fact, it was a great harm to the telecom industry. Now network providers provide 5G data plan with higher price, no differentiation experience of 4G and 5G. It is not attractive to consumers. It also causes consumers unwilling to upgrade 5G data plan. Government should promote and actively assist to build up this ecosystem and develop the 5G business solutions.

Advantages and disadvantages of 5G

We utilize the professional social listening platform to collect consumers' feedback of 5G. The main disadvantages for 5G are: the Lack of bandwidth, poor signal, and limited options of mobile phones with 5G functionalities. The 5G network doesn't seem to be any faster. "The 5G coverage is not enough.", "The 5G signal is poor, and it increases the power consumption of the smart phone." "There are few 5G mobile phones." "Frankly speaking, I don't feel much difference between 100m and 20m, except for downloading."

At the same time, most consumers wait and see until 5G is ready for high quality. "Before the full implementation of the SA, 80% of 5G network works with 4G." "At this stage, we do not need 5G network. Two or three years later, if there's a major differentiation of the speed, then 5G should be considered."

In addition, some experienced consumers mention positive feedback on 5G network. "I changed to 5G network at home, using about 30GB~100GB a month, and the speed is faster than the 100M/40M of the fiber-optic network indeed." "Our company provides a monthly subsidy of NT 1,500 (for 5G data plan), and I like it. QQ."

What can 5G mobile phone providers and telecom companies do for 5G era?

- **Arrange 5G smart phone marketing activities to increase product exposure.**
With marketing activities be hold on the top 3C discussion forums in Taiwan. For example, to

evaluate the smart phone camera, Samsung posts a test in Mobile 01 to compare the lens of smart phones and camera with “bikini models”, resulting in highly interaction and discussion between consumers. Another example is Vivo, it became heated topics on the internet with the opening event of Vivo’s flagship store, and various discounts catch consumers’ eyes. Some people are looking forward to launching more 5G smart phone from the mainland.

- Telecom companies provide 5G trial internet to strengthen people’s willingness to use 5G: Propose a free trial of 5G to members, so the public can gradually understand the functions and the using scenario of 5G in order to increase consumers’ awareness.

In conclusion, 5G base stations still need to be build up, and more 5G-related scenarios will come out in the future. Telecom, Internet of Things, and mobile phone providers must keep focusing on how to adapt 5G speeds and related applications as soon as possible.

Reference:

1. <https://reurl.cc/m9mGE1>
2. <https://reurl.cc/LdkpR4>
3. <https://buzzorange.com/2020/01/09/problem-of-taiwan-5g>
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or contact our research team:

Michelle Hsieh, Research Director

02 2701-7278 ext.111 Michelle.hsieh@ipsos.com

Rebecca Kuo, Project Manager

02 2701-7278 ext. 120 Rebecca.kuo@ipsos.com