CONSUMER AWARENESS AND SATISFACTION SURVEY 2018

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EXECUTIVE SUMMARY

Consumer Awareness & Satisfaction Survey (CASS) 2018 is a perception survey commissioned by the Infocomm Media Development Authority of Singapore (IMDA). The survey is in its sixth cycle following earlier rounds conducted in 2003, 2005, 2007, 2010 and 2014. Its objectives are to assess the level of public awareness towards telecommunications and media policies as well as to understand consumers' satisfaction with the telecommunications and media services in Singapore.

The adoption rates of key telecommunications services – fixed broadband, mobile telephone and mobile data have continued to increase, with the exception of fixed line telephone which has been on a declining trend since 2005. Fixed broadband (2014: 84.4%, 2018: 92.0%), mobile telephone (2014: 93.9%, 2018: 96.5%), and mobile data (2014: 65.3%, 2018: 83.8%) penetration continued the upward trend observed over the past surveys.

Payphone usage continued to decline sharply since 2005 (2014: 8.4%, 2018: 4.5%), while adoption of international roaming services rose after a drop in 2014 (2014: 40.6%, 2018: 46.0%). Bundled services achieved close to 70% of subscription rate with broadband and fixed line being the top two commonly subscribed services. The usage of Wireless@SG has doubled from 20.8% in 2014 to 43.5% in 2018.

Consumer satisfaction with key telecommunication services remained generally high. Consumers were most satisfied with the quality of services, followed by variety of services available and price competitiveness for the key telecommunications services. Consumers were also satisfied with the coverage of mobile telephone and mobile data in all areas, except in underground tunnels.

INTRODUCTION

The Consumer Awareness and Satisfaction Survey 2018 (CASS 2018) aims to measure and track changes in the perception of selected telecommunication services in Singapore. Local consumers were asked about their awareness, and subscription to or usage patterns of the telecommunication services. In addition, they were also asked about their satisfaction with the services that they had recently used, specifically regarding the quality of service, price competitiveness of the service, variety of services presently available in the market, and customer service rendered by the service providers.

CASS 2018 is the sixth edition of the survey conducted by IMDA since the full liberalisation of the Singapore telecommunication market in 2000. The last CASS survey was conducted in 2014. Comparisons with the previous survey findings are provided where available and appropriate.

The scope of the telecommunication services surveyed includes:

A. Fixed Line Telephone
B. Mobile Voice and Message
C. Fixed Broadband
D. Mobile Data
E. International Roaming
F. Payphone
G. Bundled Service
H. Wireless@SG Service
I. Customer Care Services

Feedback on all telecommunication service providers was received during the survey, but due to the small sample sizes, some results may not be reported in this report.

SURVEY METHODOLOGY

A total of 1,502 individuals, from households all across Singapore, were interviewed door-to-door between 15 March 2018 to 17 May 2018. The selection of the 1,502 individuals was conducted using a two-stage stratified design:

a) a sample of 1,800 households was selected from the Household Sampling Frame maintained by the Singapore Department of Statistics; and
b) from each sampled household, an individual was randomly selected for the survey.

To be eligible for the survey, the individual had to be a Singapore Citizen or Singapore PR, aged 18 and above, and a resident of the sampled household. The final sample is representative of Singapore population.

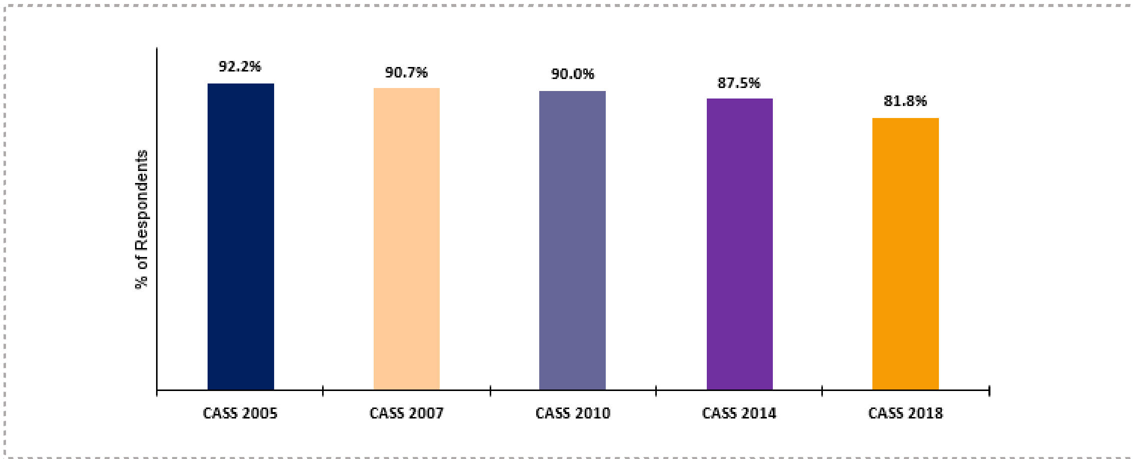
SURVEY FINDINGS

1 FIXED LINE TELEPHONE SERVICES

1.1 Subscription to Fixed Line Telephone Services

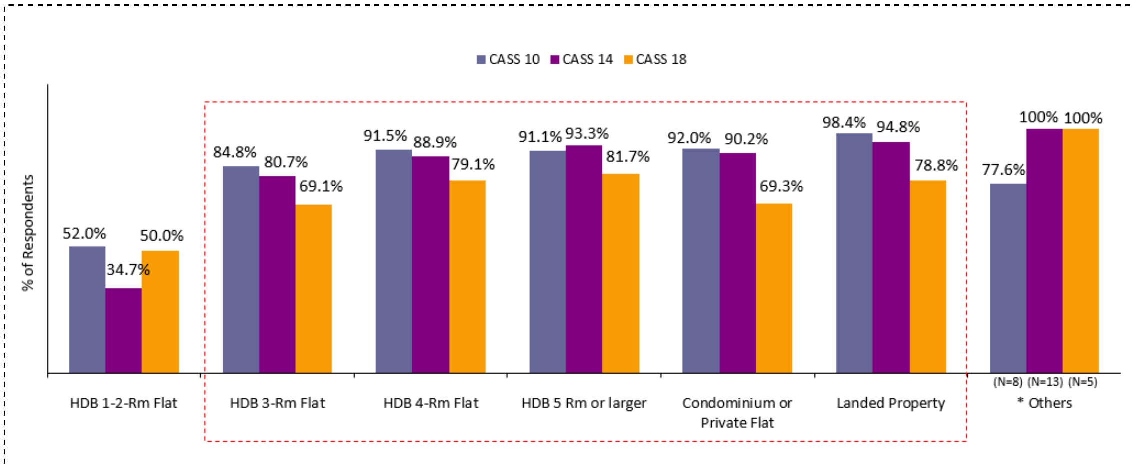
Subscription to fixed line telephone services declined gradually over the last 13 years. Nevertheless, the subscription amongst the respondents remained high at 81.8% (Figure 1-1).

Figure 1-1 : Fixed Line Telephone Subscription



Subscription to fixed line telephone dropped across all housing types, except for respondents who stayed in HDB 1-2 room flats and others (Figure 1-2).

Figure 1-2 : Fixed Line Telephone Subscription by Housing Type

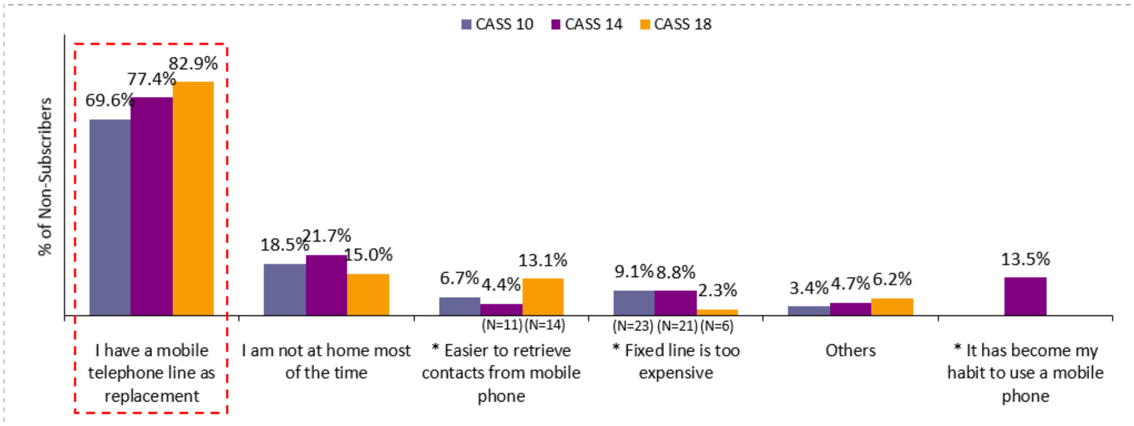


** Due to small sample sizes, data has to be interpreted with caution.*

1.2 Reasons for Non-subscription to Fixed Line Telephone Services

Among the respondents who did not subscribe to a fixed line telephone, the main reason was that their mobile telephone was a replacement for fixed line telephone (Figure 1-3). This was followed by respondents not being home to answer any calls (15.0%) and the lack of contact retrieval feature in fixed line telephone devices (13.1%).

Figure 1-3 : Reasons for Not Subscribing to Fixed Line Telephone Services

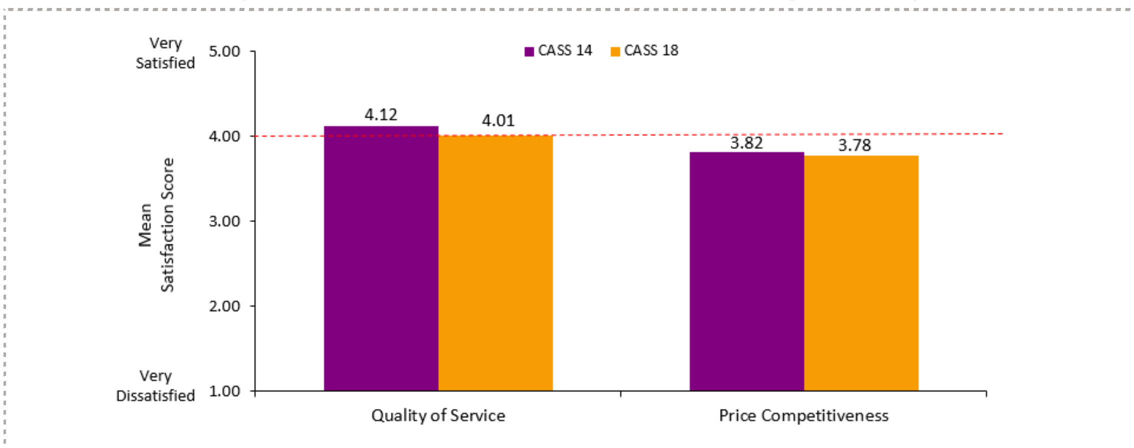


** Due to small sample sizes, data has to be interpreted with caution.*

1.3 Satisfaction with Fixed Line Telephone Services

Fixed line telephone subscribers remained satisfied with the service, despite a 0.11-point drop in their satisfaction score on the quality of service and a slight decrease in satisfaction score on the price competitiveness (Figure 1-4).

Figure 1-4 : Satisfaction with Fixed Line Telephone Services (Mean Score)

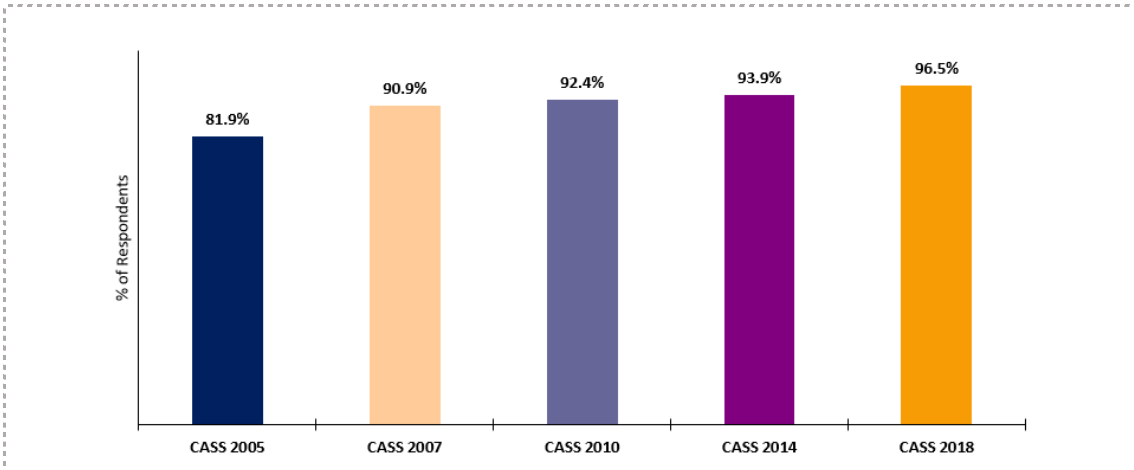


2 MOBILE VOICE AND MESSAGE SERVICES[1]

2.1 Subscription to Mobile Voice and Message Services

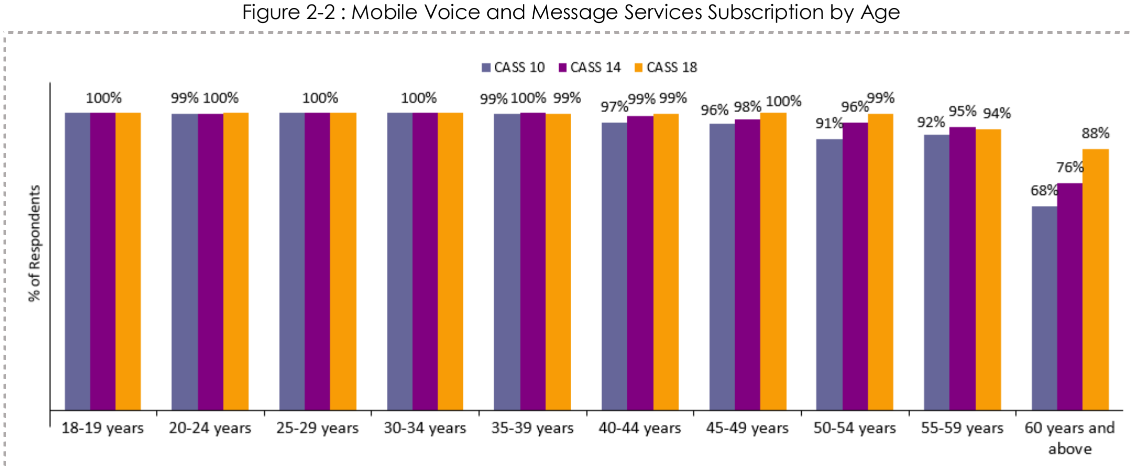
After a sharp increase in the subscription[2] to mobile voice and message services from 2005 to 2007, the subscription rate has increased gradually over the years. In 2018, 96.5% of the respondents subscribed to mobile voice and message services (Figure 2-1).

Figure 2-1 : Mobile Voice and Message Services Subscription



The subscription to mobile voice and message services was close to 100% for all ages in 2018, except for those aged 55 and above. Even though the subscription was the lowest for those aged 60 and above, this group nevertheless saw a 12 percentage points increase in subscription rate from 76% in 2014 to 88% in 2018 (Figure 2-2).

Figure 2-2 : Mobile Voice and Message Services Subscription by Age

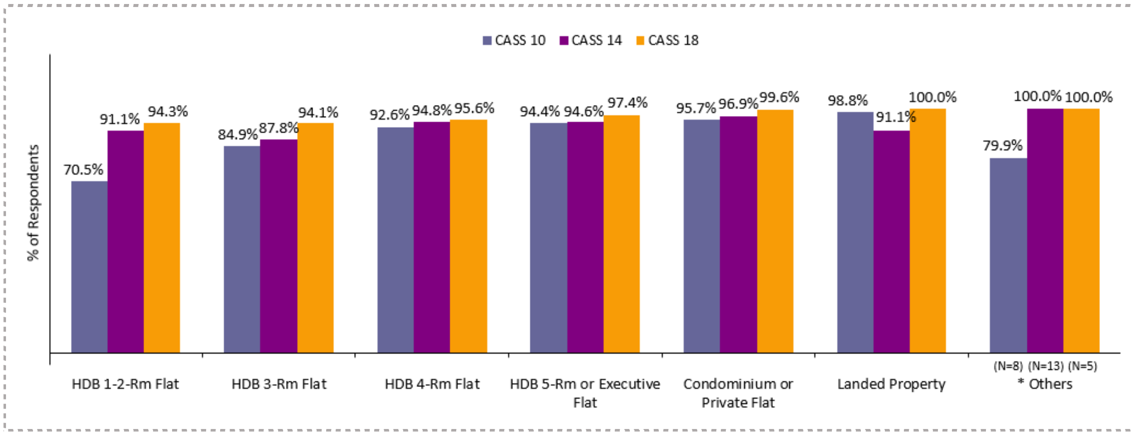


[1] Mobile voice and message services refer to the services offered by mobile service providers for consumers to make voice calls or send short messages (i.e., SMSes) via their mobile phones. This was previously termed as 'mobile telephone' in previous CASS reports.

[2] Mobile voice and message subscription is by respondent, rather than by number of lines. As such, the subscription rates will not exceed 100% in this survey.

The subscription rate to mobile voice and message was consistently high across all housing types, at 94.1% or above. Nonetheless, there was an increase in mobile voice and message subscriptions across all house types, except for respondents who stayed in other types of housing (Figure 2-3).

Figure 2-3 : Mobile Voice and Message Services Subscription by Housing Type

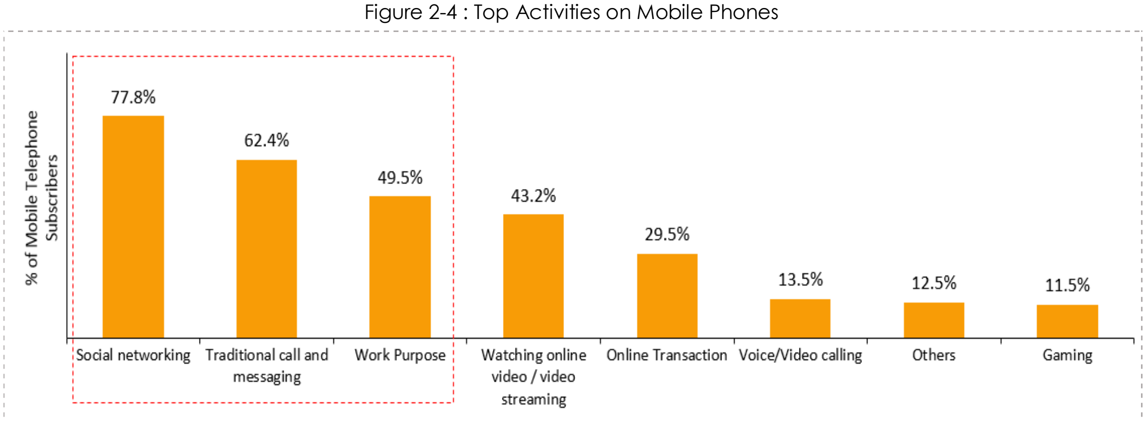


** Due to small sample sizes, data has to be interpreted with caution.*

2.2 Top Activities on Mobile Phones

Respondents spent most of their time on their mobile phones engaging in social networking (77.8%), followed by making traditional call and messaging (62.4%) and for work (49.5%) (Figure 2-4).

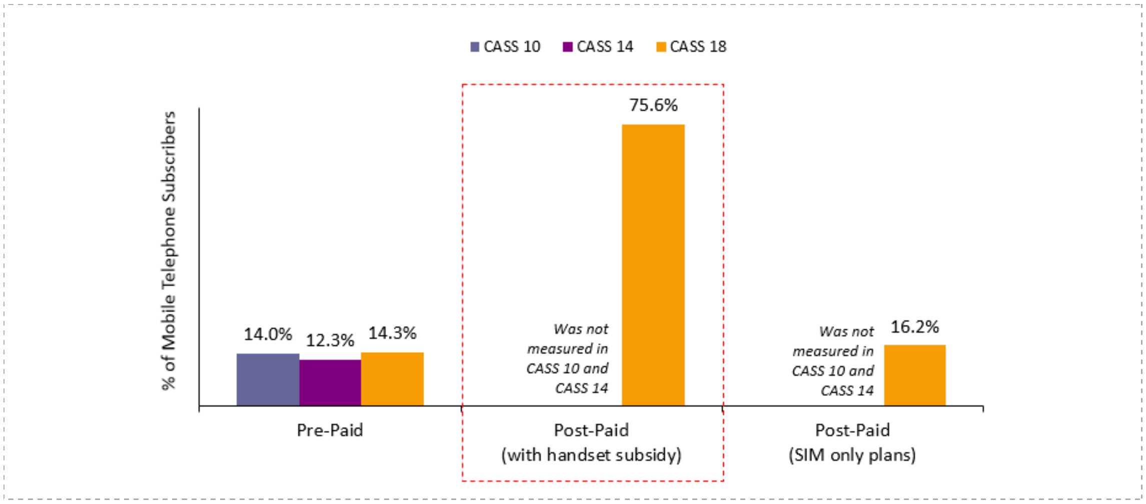
Figure 2-4 : Top Activities on Mobile Phones



2.3 Types of Mobile Voice and Message Plans

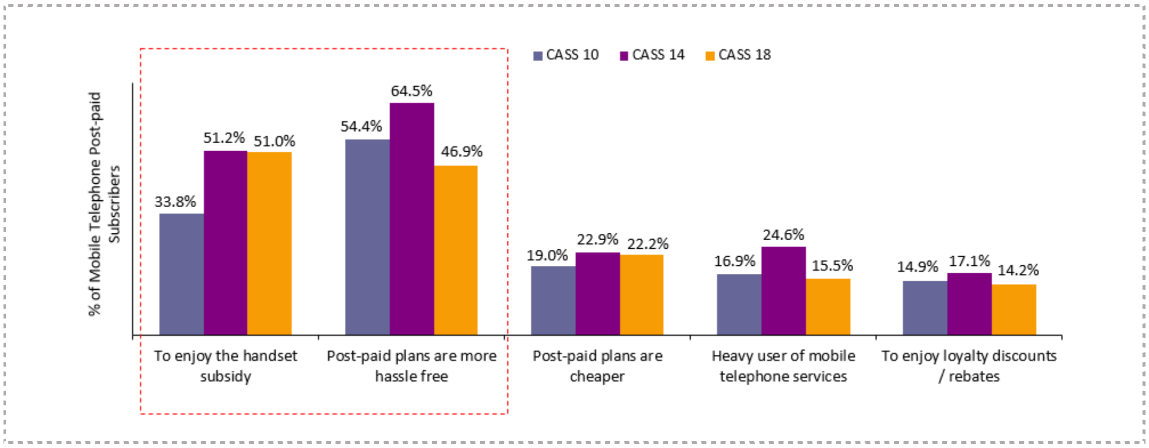
Majority of respondents subscribed to post-paid mobile plan with handset subsidy, while a much smaller proportion of respondents subscribed to pre-paid mobile plan (14.3%) and SIM only plan (16.2%), as shown in Figure 2-6.

Figure 2-5 : Types of Mobile Plans



Unsurprisingly, the top reason for subscribing to post-paid mobile plans was to enjoy the handset subsidy (51.0%), and the second reason was that such plan was perceived to be hassle-free (Figure 2-6).

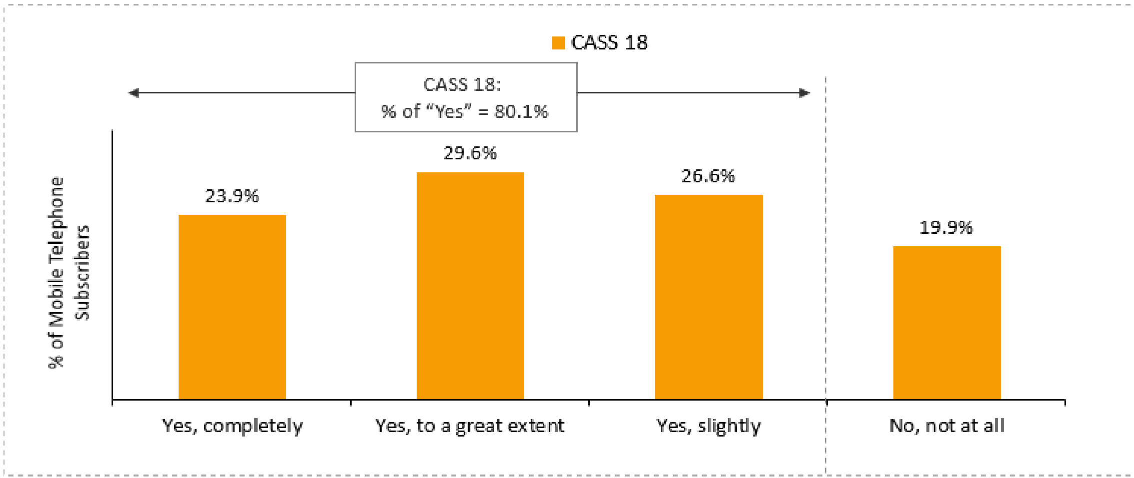
Figure 2-6 : Reasons for Subscribing to Post-paid Mobile Plans



2.4 Ability to Replace Mobile Voice Call and Message Services

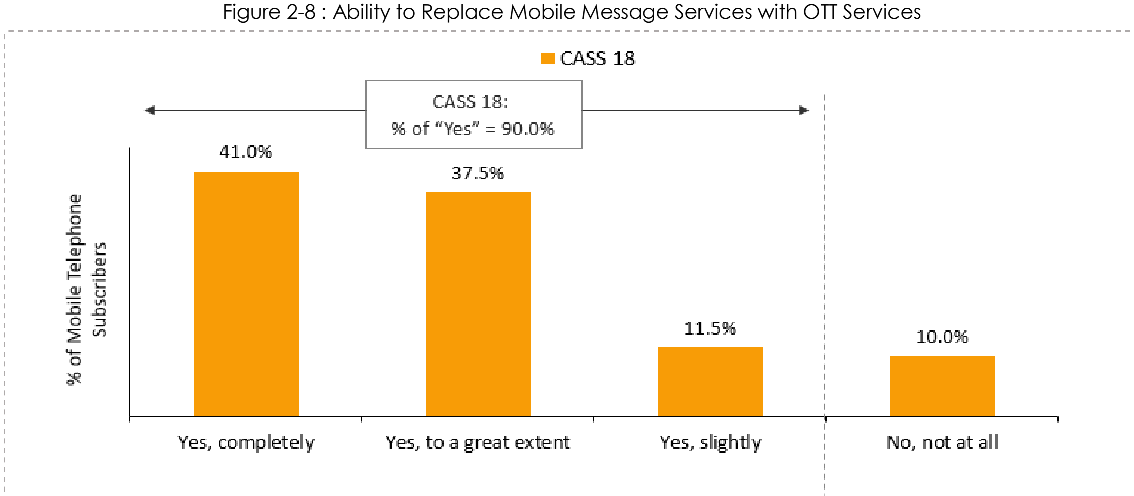
Close to 1 in 5 of the respondents, who were mobile voice and message subscribers, felt that they could not replace mobile voice call services with similar over-the-top (OTT) services[3] (Figure 2-7).

Figure 2-7 : Ability to Replace Mobile Voice Call Services with OTT Services



In comparison, only 1 in 10 of the mobile voice and message services subscribers felt they could not replace mobile message services with similar OTT services (Figure 2-8).

Figure 2-8 : Ability to Replace Mobile Message Services with OTT Services

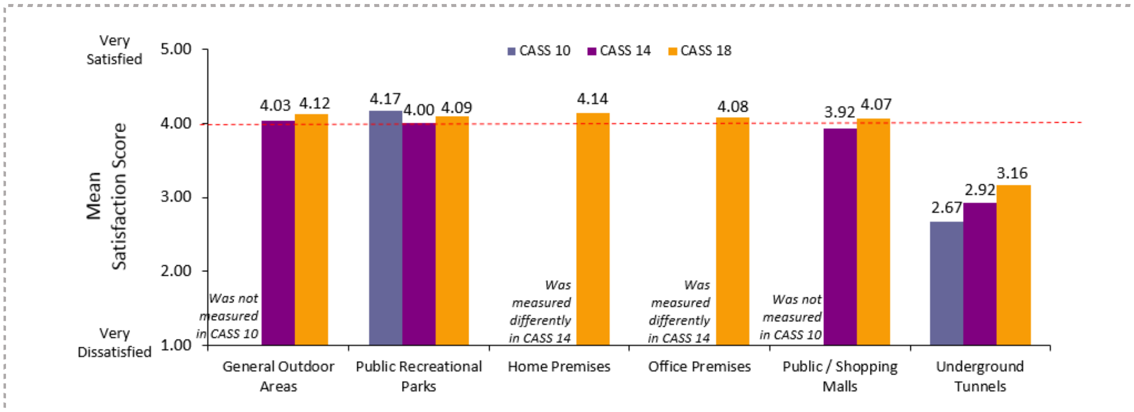


[3] Some examples of OTT services for mobile calls and messaging are Skype, WhatsApp, Telegram and WeChat.

2.5 Satisfaction with Mobile Voice and Message Services

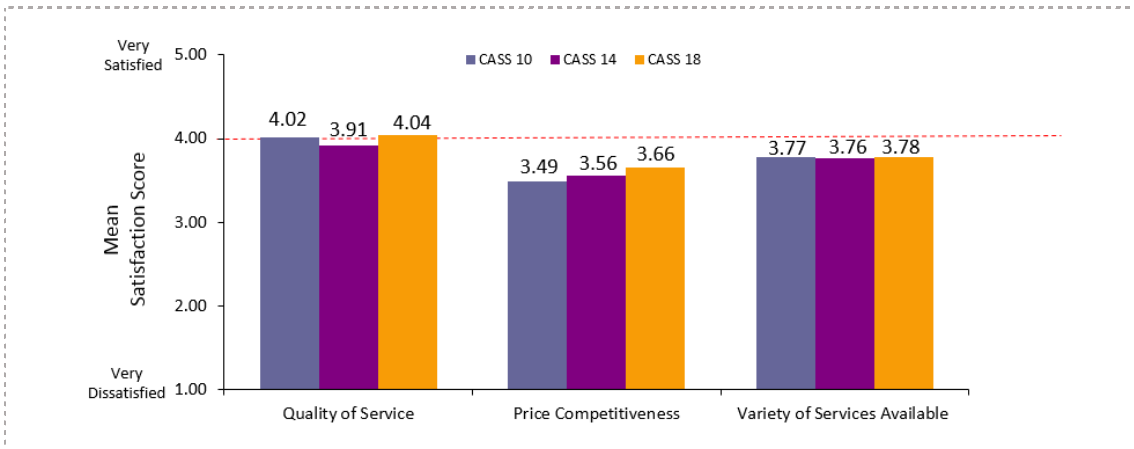
Satisfaction with the coverage of mobile voice and message services in underground tunnels remained the lowest, while the satisfaction scores for coverage in other areas were minimally 4-point. Nonetheless, the satisfaction with coverage in underground tunnels increased to 3.16-point as compared to 2.92-point in 2014 (Figure 2-9).

Figure 2-9 : Satisfaction with Mobile Voice and Message Services Coverage (Mean Score)



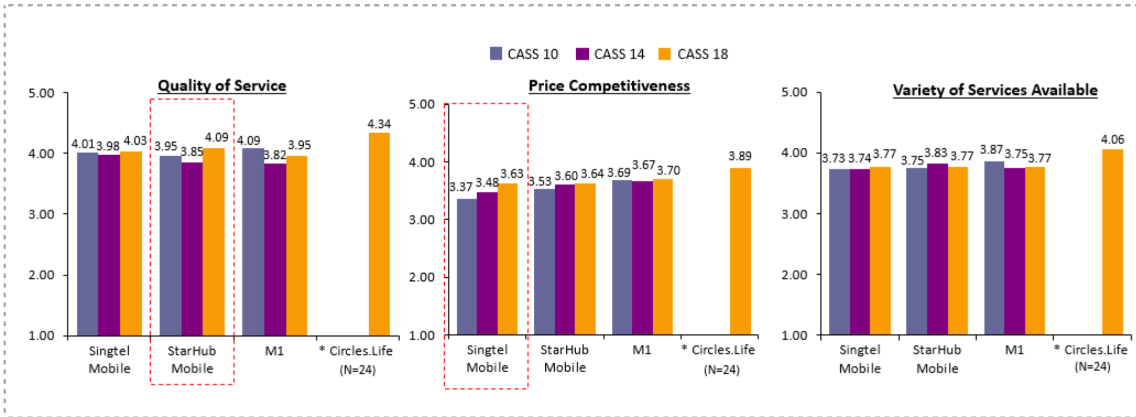
The mean score for quality of service and price competitiveness of mobile call and message services saw an increase to 4.04-point and 3.66-point respectively in 2018, whereas the satisfaction with variety of services available remained fairly consistent at 3.7-point since 2010 (Figure 2-10).

Figure 2-10 : Satisfaction with Mobile Voice and Message Services (Mean Score)



As shown in Figure 2-11, StarHub Mobile saw a large increase in its satisfaction mean score for quality of mobile voice and message services in 2018, whereas Singtel Mobile and M1 saw a smaller increase in their mean scores. Singtel Mobile also saw a large increase in its mean score for price competitiveness. Overall, the satisfaction levels for variety of services available were fairly consistent across services providers, including for Circles.Life which entered the market in recent years.

Figure 2-11 : Satisfaction with Mobile Voice and Message Services (Mean Scores by Service Provider)



** Due to small sample sizes, data has to be interpreted with caution.*

3 FIXED BROADBAND SERVICES

3.1 Subscription to Fixed Broadband Services

Subscription[4] to fixed broadband service continued to increase over the past 13 years, with 92.0% of respondents subscribed to fixed broadband in 2018 (Figure 3-1).

Figure 3-1 : Fixed Broadband Services Subscription

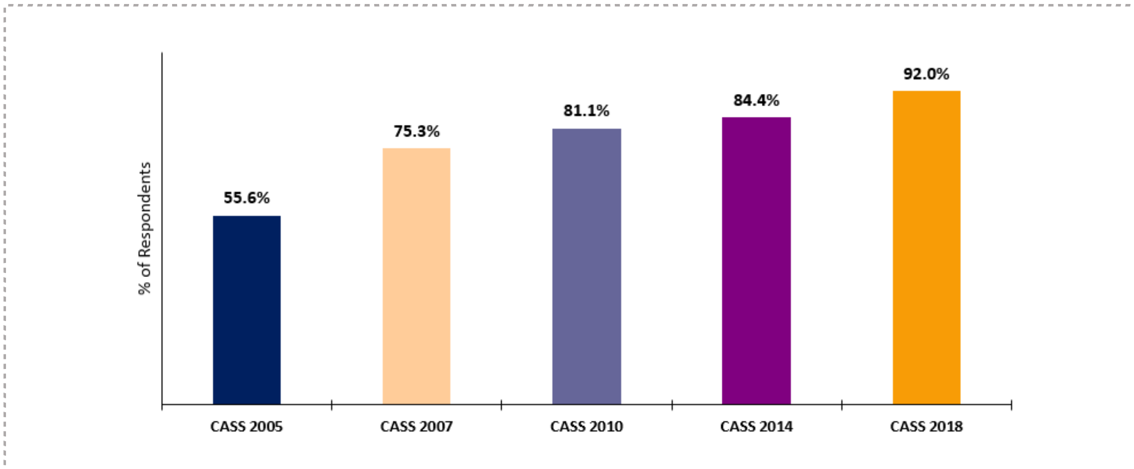
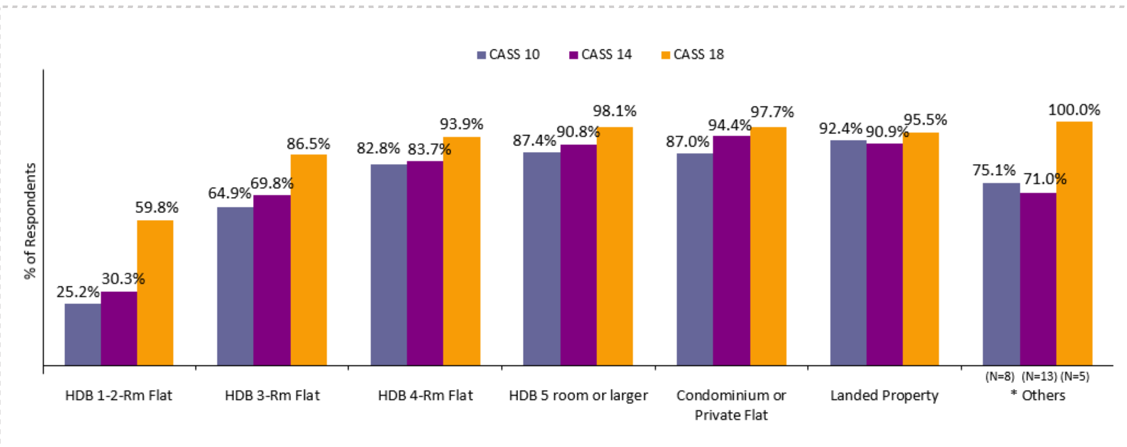


Figure 3-2 provides the breakdown of fixed broadband subscription by housing type. In 2018, the subscription to fixed broadband services increased across all housing types. Even though the subscription rate was the lowest amongst those who stayed in HDB 1-2 room flats, this group saw the largest increase from 30% in 2014 to 59.8% in 2018 (Figure 3-2).

Figure 3-2 : Fixed Broadband Services Subscription by Housing Type

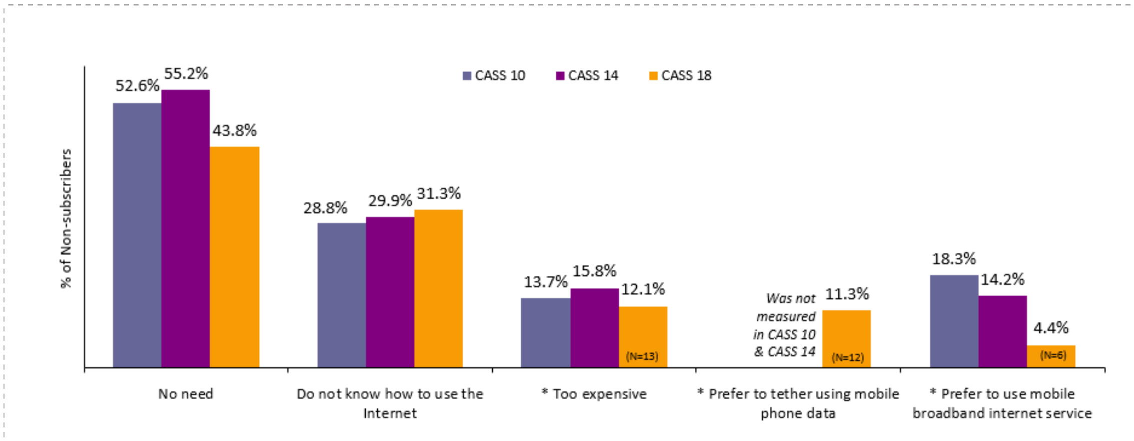


** Due to small sample sizes, data has to be interpreted with caution.*

[4] Fixed Broadband subscription is by respondent, rather than by number of lines. Hence, subscription rates will not exceed 100% in this survey.

Among respondents who did not subscribe to fixed broadband services, their reasons for not doing so remained fairly consistent with those reported in previous surveys. A majority cited a lack of need (43.8%) as the top reason, and this was followed by not knowing how to use the Internet (31.3%), and high cost of fixed broadband subscription (12.1%) (Figure 3-3).

Figure 3-3 : Reasons for Not Subscribing to Fixed Broadband Services

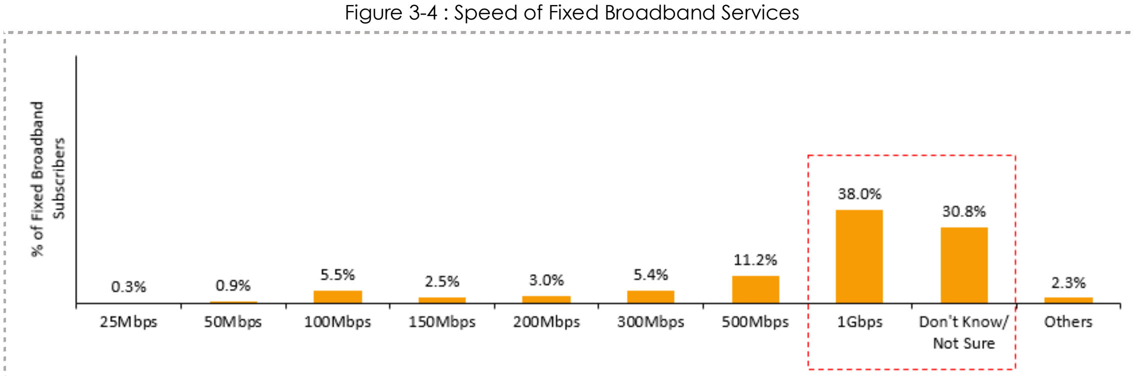


** Due to small sample sizes, data has to be interpreted with caution.*

3.2 Speed and Usage of Fixed Broadband Services

The most common fixed broadband speed subscribed by respondents (38.0%) in 2018 was 1Gbps. There was also a smaller proportion of respondents (30.8%) who were unsure of their fixed broadband speed when surveyed[5] (Figure 3-4).

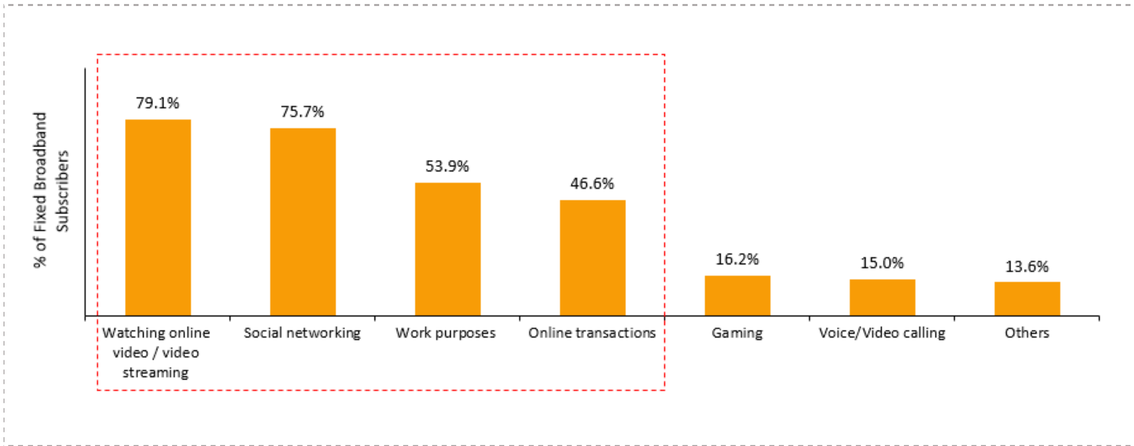
Figure 3-4 : Speed of Fixed Broadband Services



[5] Some respondents may not be subscribers of the home broadband service.

When asked about the internet activities they engaged in when using their fixed broadband, 79.1% of the respondents reported watching online videos, followed by 75.7% on social networking, 53.9% for work purposes, and 46.6% for online transactions (Figure 3-5).

Figure 3-5 : Top Internet Activities Using Fixed Broadband

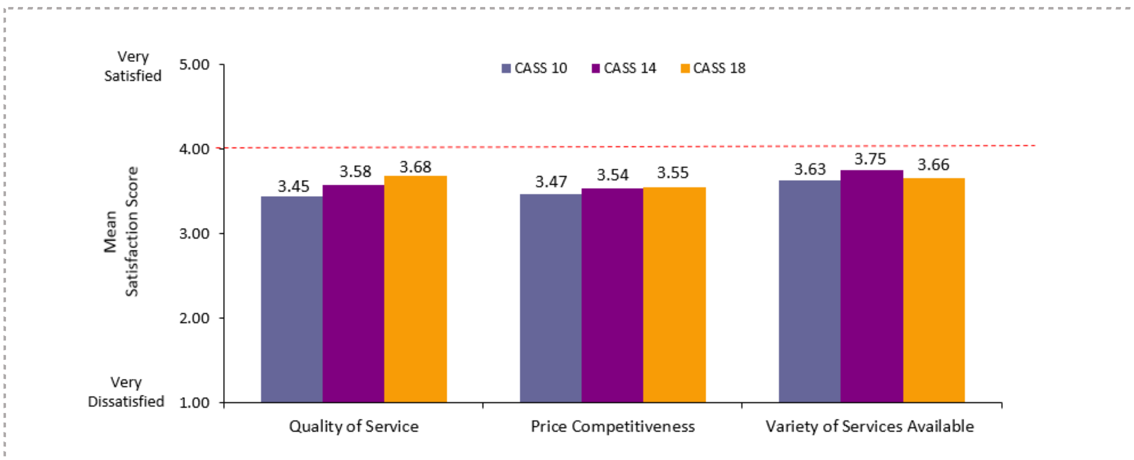


** Due to small sample sizes, data has to be interpreted with caution.*

3.3 Satisfaction with Fixed Broadband Services

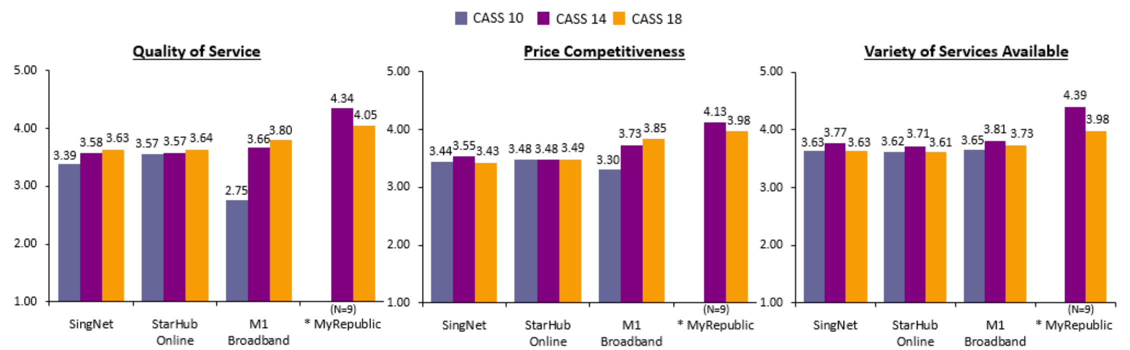
Mean score for satisfaction with quality of fixed broadband service increased in 2018, whereas the mean score for satisfaction with variety of services available decreased when compared to 2014. The satisfaction with price competitiveness remained fairly consistent (Figure 3-6).

Figure 3-6 : Satisfaction with Fixed Broadband Services (Mean Score)



The satisfaction with variety of services available deceased in 2018 for all the service providers, consistent with the drop noted in Figure 3-6. The drop was larger for SingNet, and in addition, the service provider also saw a decrease in its satisfaction mean score for price competitiveness. On the other hand, M1 Broadband saw a slight increase in the satisfaction scores for quality of service and price competitiveness. StarHub Online's mean scores for quality of service and price competitiveness remained consistent with 2014 scores (Figure 3-7).

Figure 3-7 : Satisfaction with Fixed Broadband Services (Mean Score by Service Provider)



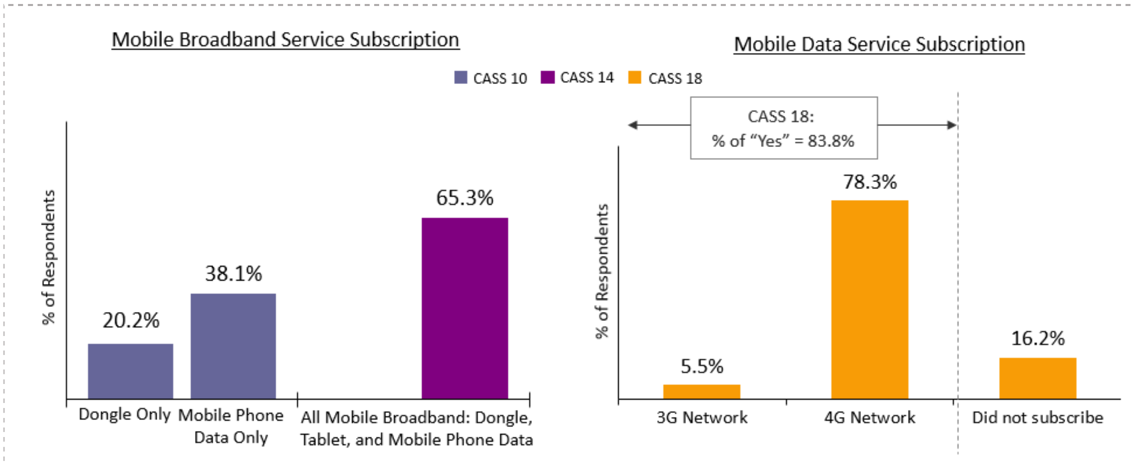
** Due to small sample sizes, data has to be interpreted with caution.*

4 MOBILE DATA SERVICES[6][7]

4.1 Subscription to Mobile Data Services

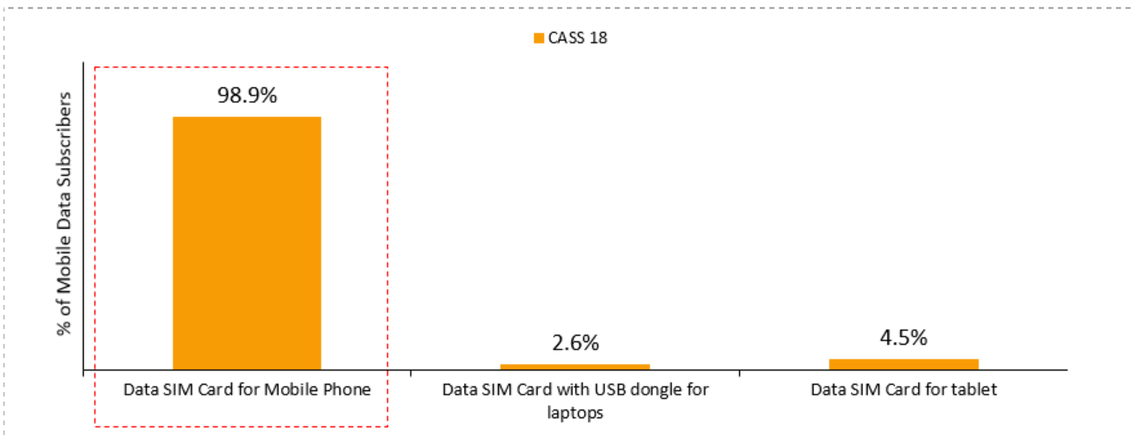
Close to 84% of respondents subscribed to mobile data[8] on their mobile phones, with 78.3% of them under the 4G mobile network (Figure 4-1). A breakdown of subscription by age and by housing type is provided in Figure 4-3 and Figure 4-4 respectively.

Figure 4-1 : Mobile Data Services Subscription



Majority of mobile data subscribers subscribed to data SIM card for their mobile phones, while a small proportion between 2% to 5% used it for USB dongle and tablets, as shown in Figure 4-2.

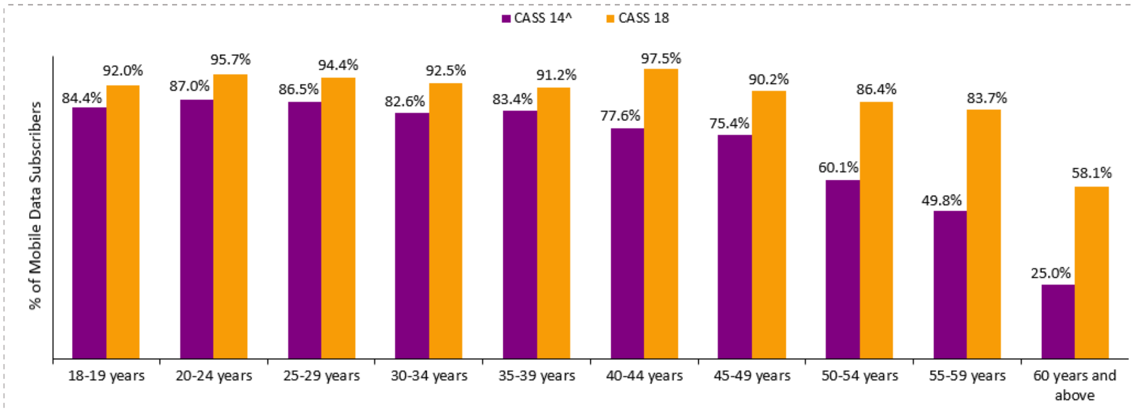
Figure 4-2 : Types of Mobile Data Services



[6] Mobile data services refer to the 3G/4G services offered by mobile service providers for internet access services or other data applications (e.g. Facebook, WhatsApp, Banking Apps) on mobile devices such as a laptop, tablet, or smart phone. Mobile data is not Wi-Fi. Examples of mobile data services include data SIM card for mobile phones and tablets, as well as USB dongle for mobile internet access.
[7] Significance testing was not done for the results reported in Chapter 4 due to the change in questions asked in 2014 (Mobile Broadband) and 2018 (Mobile Data).
[8] Mobile data subscription is by respondent, rather than by number of lines/ devices. Hence, the subscription rates will not exceed 100% in this survey.

The mobile data services subscription rate was above 90% for respondents aged 18-49 years old in 2018, and above 83% for those aged 50 and 59. Though the subscription was lowest amongst the respondents aged 60 and above, it has nonetheless doubled to 58.1% in 2018 from 25.0% in 2014 (Figure 4-3).

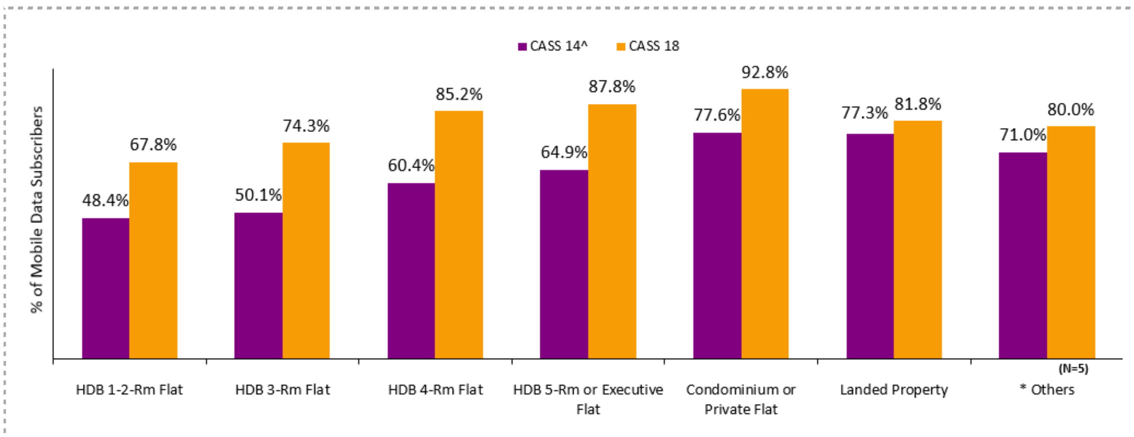
Figure 4-3 : Mobile Data Services Subscription by Age



^ This aspect was asked differently (2014: Mobile Broadband, 2018: Mobile Data), hence a direct comparison cannot be made.

Subscription to mobile data services increased across all housing types in 2018, and the highest was those staying in condominiums, and the lowest was those staying in HDB 1-2 room flats (Figure 4-4).

Figure 4-4 : Mobile Data Services Subscription by Housing Type

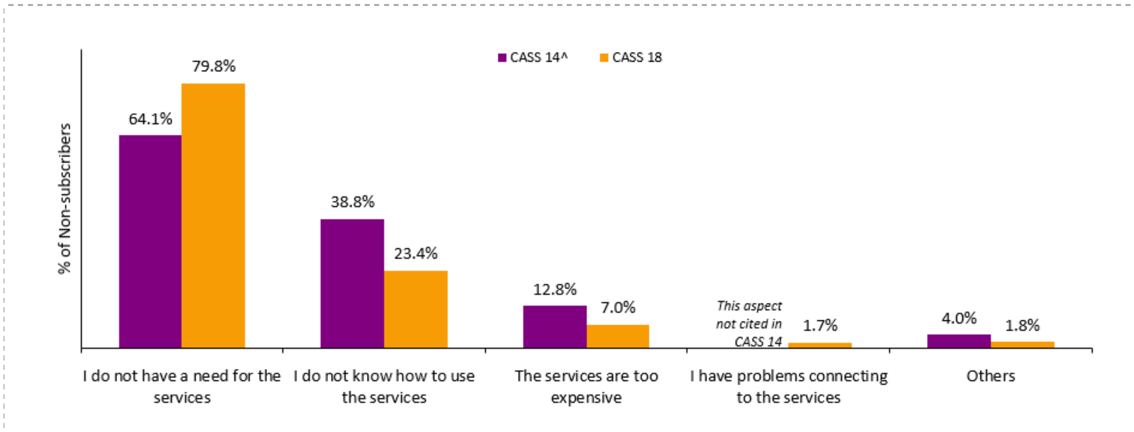


^ This aspect was asked differently (2014: Mobile Broadband, 2018: Mobile Data), hence a direct comparison cannot be made.

** Due to small sample sizes, data has to be interpreted with caution.*

Among respondents who did not subscribe to mobile data services, almost 80% of them cited not having a need for the service as the top reason, and this was followed by not knowing how to use the service (23.4%). Only 7% cited high cost to be their reason for not subscribing to the service (Figure 4-5).

Figure 4-5 : Reasons for Not Subscribing to Mobile Data Services

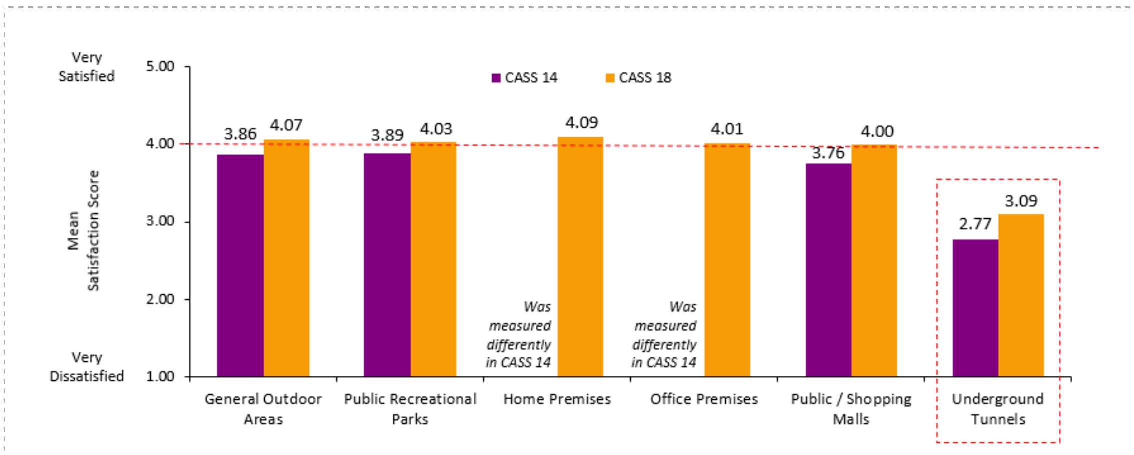


^ This aspect was asked differently (2014: Mobile Broadband, 2018: Mobile Data), hence a direct comparison cannot be made.

4.2 Satisfaction with Mobile Data Services

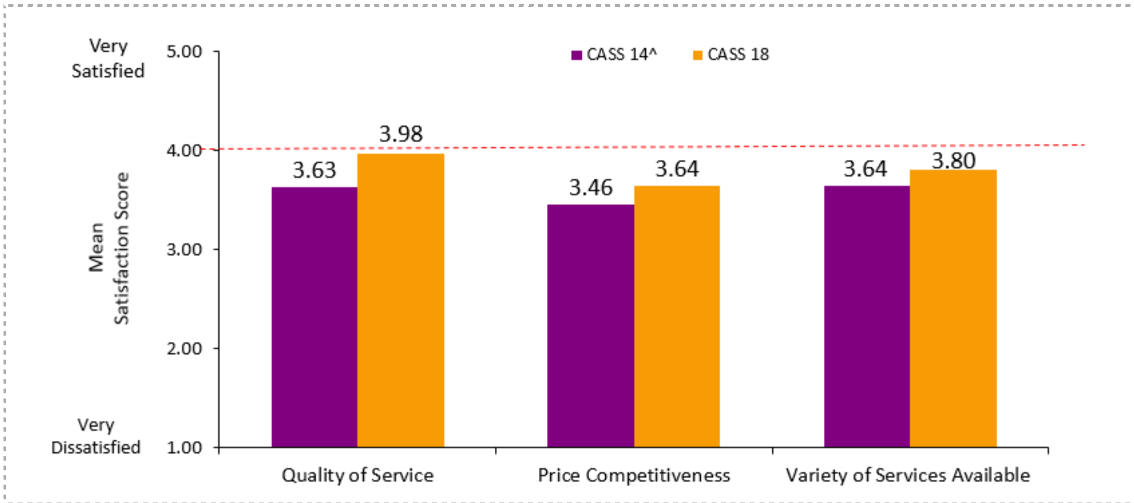
Satisfaction with the coverage of mobile data in various locations were minimally at 4-point, except in underground tunnels, despite an improvement to 3.09-point in 2018 from 2.77-point in 2014 (Figure 4-6).

Figure 4-6 : Satisfaction with Mobile Data Coverage (Mean Score)



Respondents were least satisfied with the price competitiveness of mobile data services, when compared to their satisfaction level with the quality of service and the variety of services available (Figure 4-7).

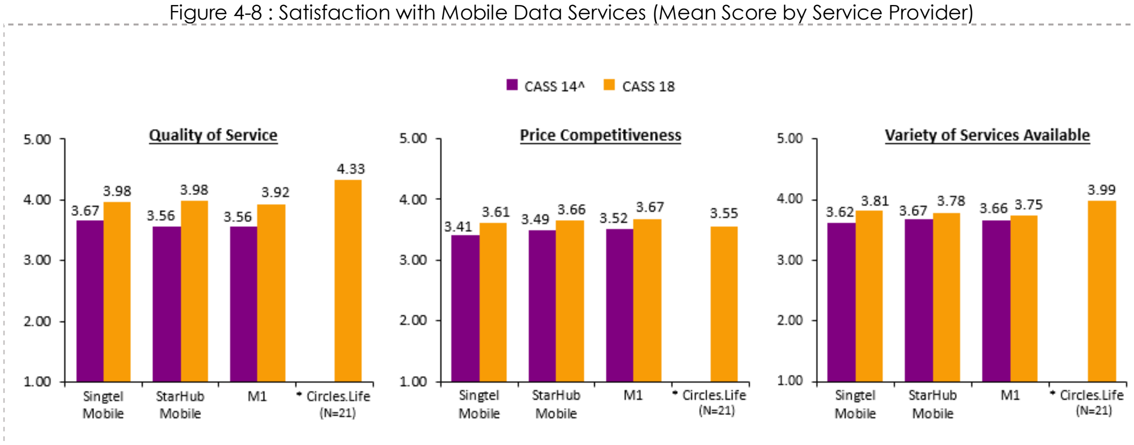
Figure 4-7 : Satisfaction with Mobile Data Services (Mean Score)



^ This aspect was asked differently (2014: Mobile Broadband, 2018: Mobile Data), hence a direct comparison cannot be made.

Satisfaction levels across all 3 aspects (i.e. quality of service, price competitiveness and variety of services available) of mobile data services increased, and were fairly consistent across all the service providers (Figure 4-8).

Figure 4-8 : Satisfaction with Mobile Data Services (Mean Score by Service Provider)



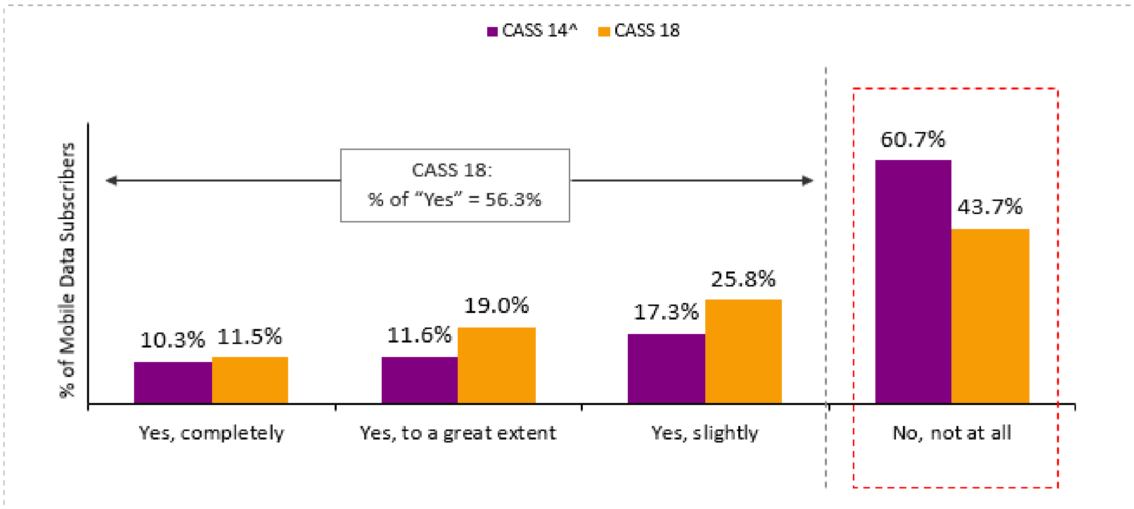
^ This aspect was asked differently (2014: Mobile Broadband, 2018: Mobile Data), hence a direct comparison cannot be made.

** Due to small sample sizes, data has to be interpreted with caution.*

4.3 Ability to Replace Fixed Line Broadband Services

Less than half of respondents (43.7%) with mobile data subscriptions felt that they could not replace their fixed broadband with mobile data. Only 11.5% reported they could completely replace fixed broadband for mobile data services (Figure 4-9).

Figure 4-9 : Ability to Replace Fixed Broadband with Mobile Data Services

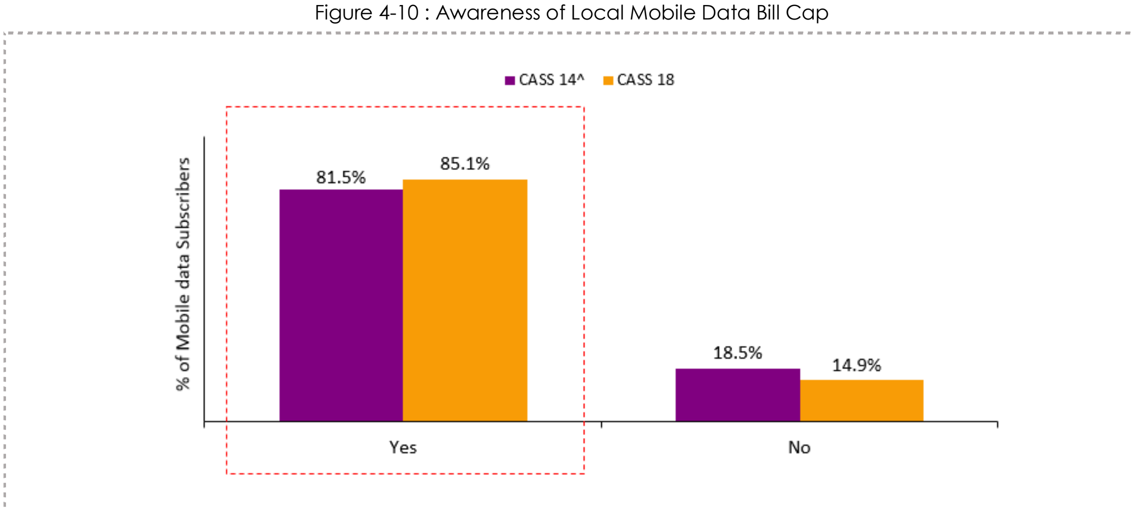


^ This aspect was asked differently (2014: Mobile Broadband, 2018: Mobile Data), hence a direct comparison cannot be made.

4.4 Awareness of Data Usage Bill Cap and Excess Data Usage Charges

On awareness of local data bill cap, 85.1% of mobile data subscribers were aware of the bill cap which was applicable to their mobile data services. This was a 3.6 percentage points increase from 81.5% in 2014 (Figure 4-10).

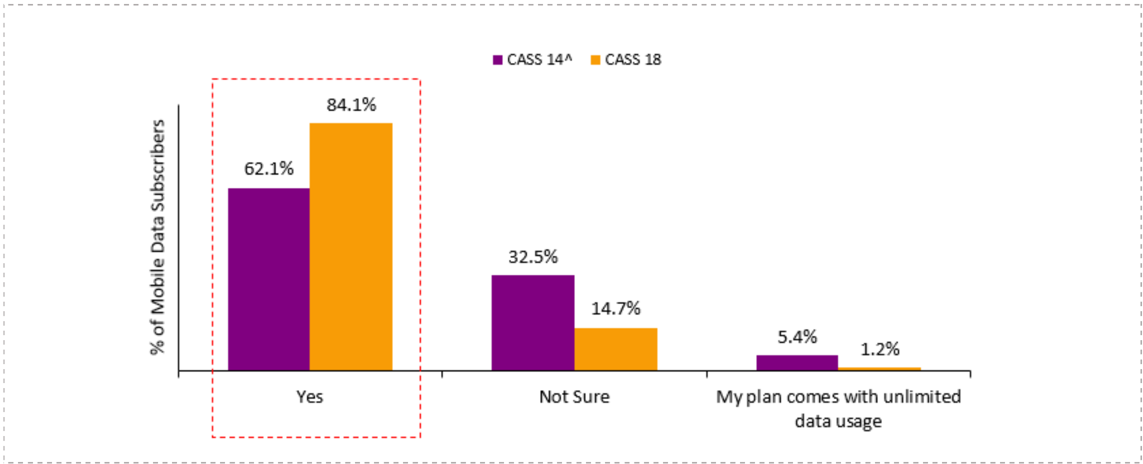
Figure 4-10 : Awareness of Local Mobile Data Bill Cap



^ This aspect was asked differently (2014: Mobile Broadband, 2018: Mobile Data), hence a direct comparison cannot be made.

Similarly on excess data usage charge, 84.1% of mobile data subscribers were aware of it, and it was an increase from 62.1% in 2014, as shown in Figure 4-11.

Figure 4-11 : Awareness of Excess Data Usage Charges



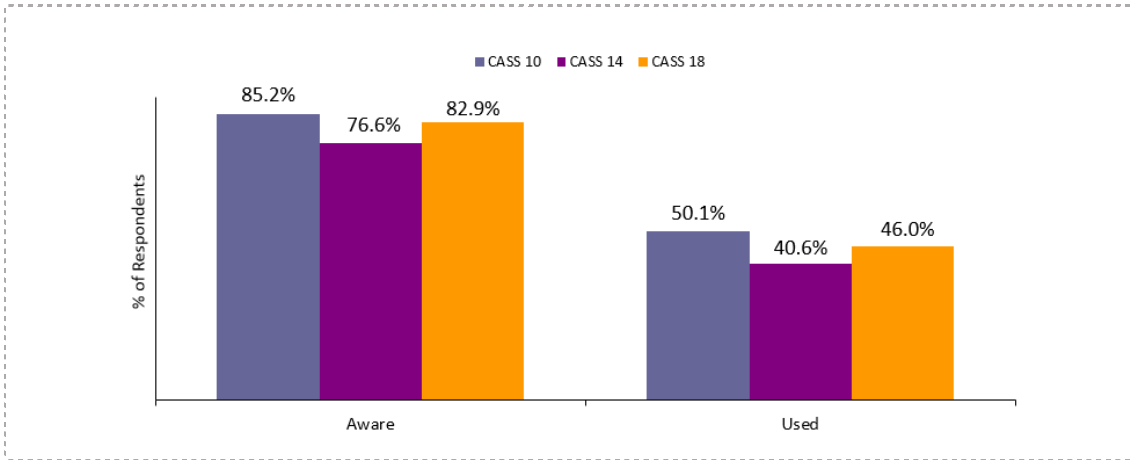
^ This aspect was asked differently (2014: Mobile Broadband, 2018: Mobile Data), hence a direct comparison cannot be made.

5 INTERNATIONAL ROAMING[9]

5.1 Awareness and Usage of International Roaming Services

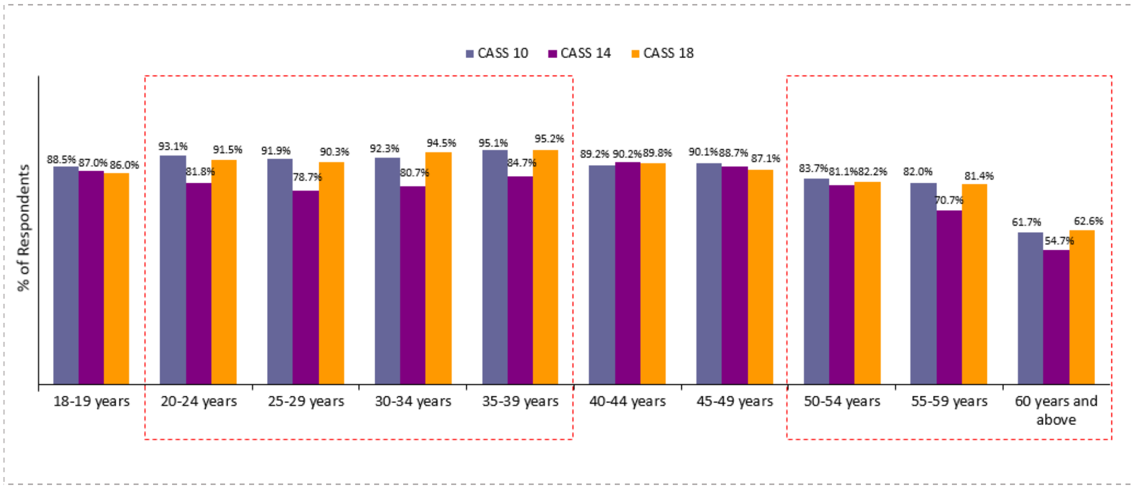
After a drop in 2014, respondents' awareness and usage of international roaming services increased to 82.9% to and 46.0% respectively in 2018 (Figure 5-1).

Figure 5-1 : Awareness and Usage of International Roaming Services



The awareness of international roaming services also increased for respondents aged 20-39 as well as for those aged 50 and above (Figure 5-2).

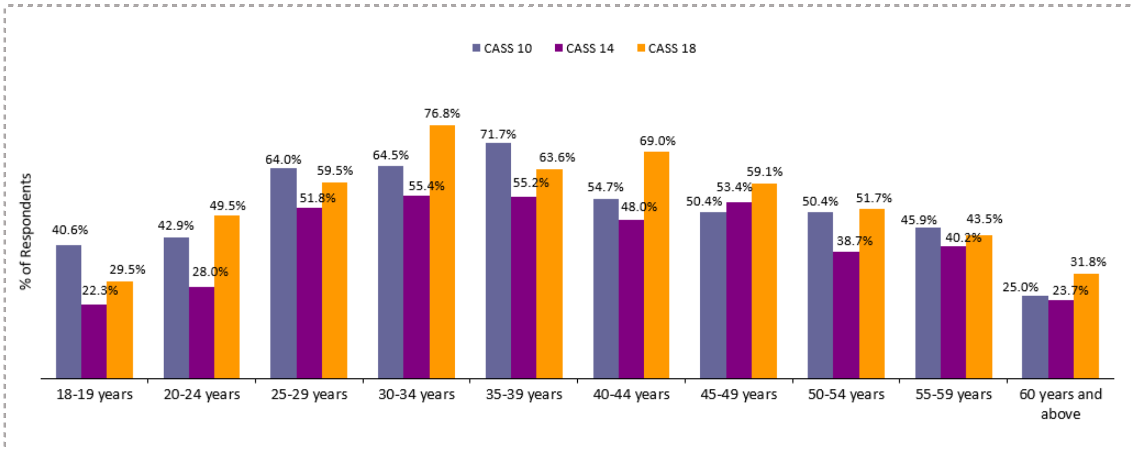
Figure 5-2 : Awareness of International Roaming Services by Age



[9] International roaming is a service that allows consumers to use their existing mobile numbers and mobile phones to make and receive calls, as well as send and receive SMS and data (including MMS, emails and internet access) at the prevailing international rates charged by their local mobile service providers for the overseas countries which they are travelling to.

Similarly, the usage of international roaming services increased across all ages, and the largest increase was seen by those aged 20-24, 30-34, 40-44, 50-54, and 60 and above (Figure 5-3).

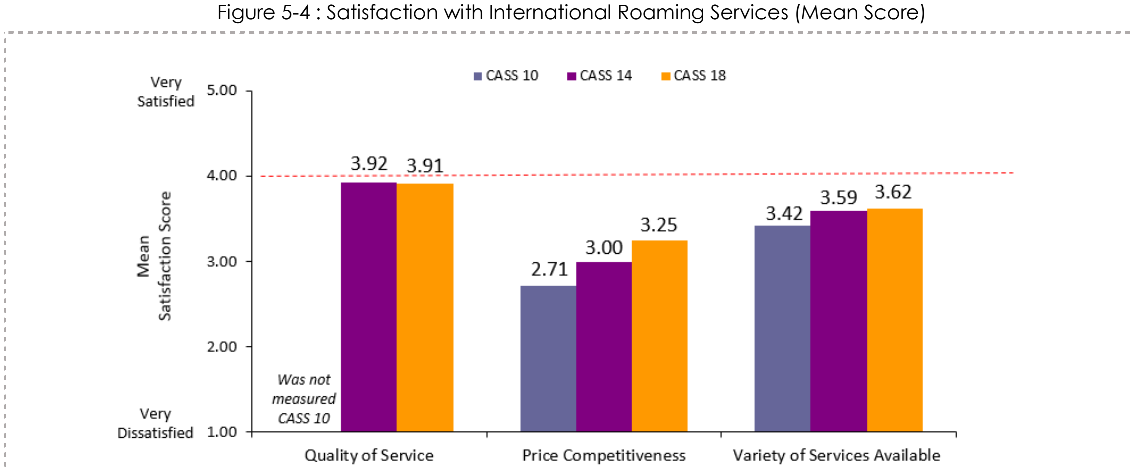
Figure 5-3 : Usage of International Roaming Services by Age



5.2 Satisfaction with International Roaming Services

In 2018, the mean score for price competitiveness of international roaming services increased to 3.25-point from 3.00-point in 2014. The mean scores for the quality of service and the variety of services available were consistent with 2014, with the mean score for service quality highest at 3.91-point, across the three categories that measured satisfaction (Figure 5-4).

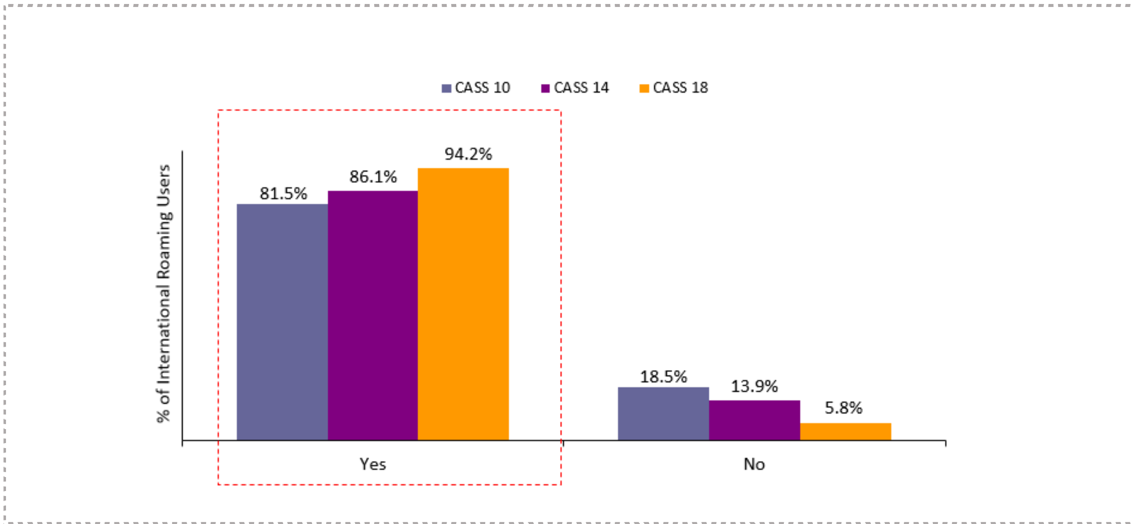
Figure 5-4 : Satisfaction with International Roaming Services (Mean Score)



5.3 Awareness of Alternatives to and Preferred Arrangement of International Roaming Services

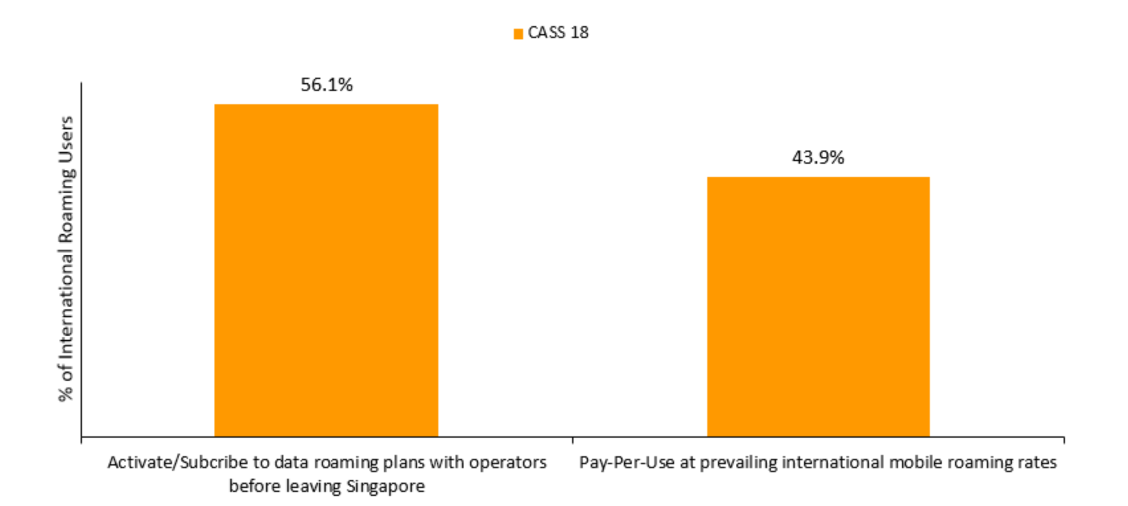
Awareness of international roaming alternatives increased to 94.2% in 2018 (Figure 5-5).

Figure 5-5 : Awareness of Alternatives to International Roaming Services



More than half of the respondents (56.1%) preferred to activate data roaming plans with their mobile service providers before the start their overseas travel (Figure 5-6).

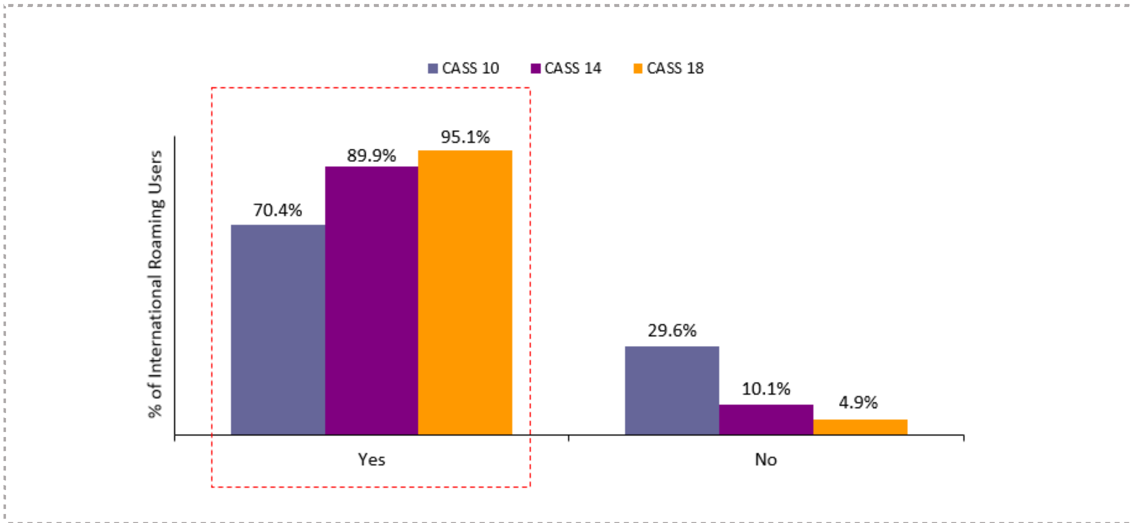
Figure 5-6 : Preferred International Roaming Services Arrangement



5.4 Awareness of Data Roaming Disabling Service and Data Roaming Cap

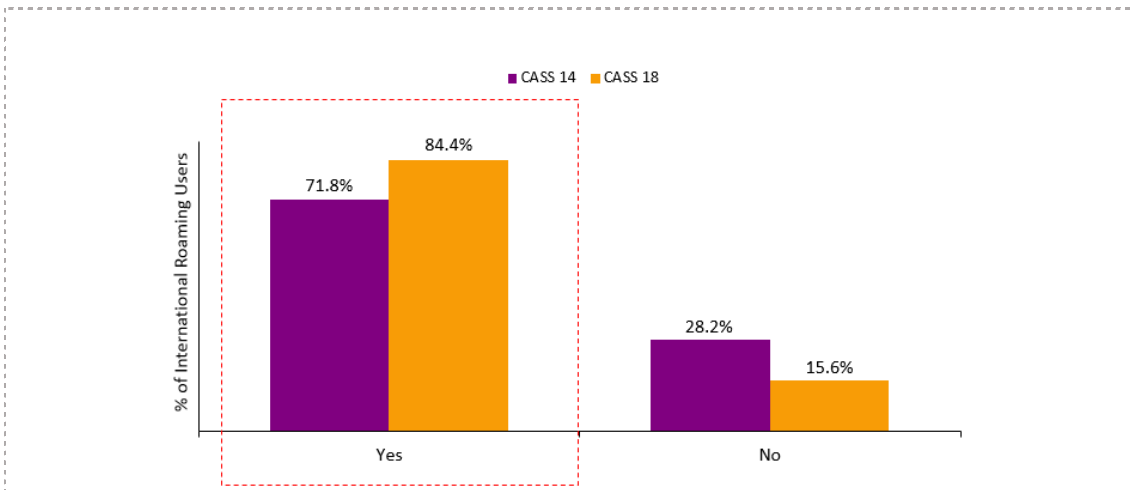
As shown in Figure 5-7, more respondents were aware that they can disable international data roaming services in 2018 than in 2014 and 2010.

Figure 5-7 : Awareness of Ability to Disable International Data Roaming Service



More respondents were also aware that they can activate a data roaming cap to prevent bill shock in 2018 (Figure 5-8).

Figure 5-8 : Awareness of Ability to Activate Data Roaming Cap Service

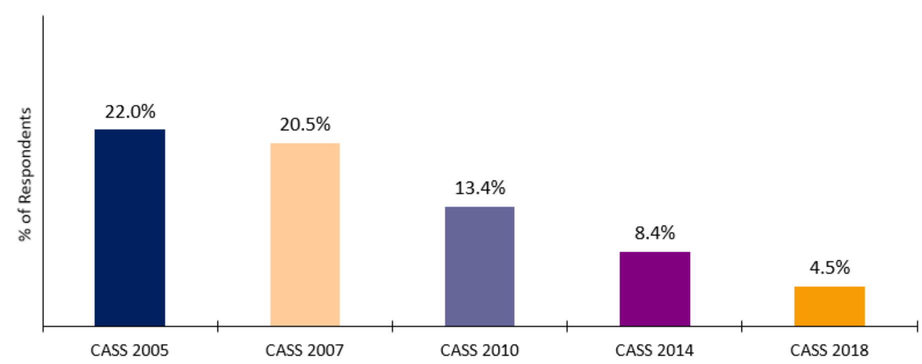


6 PAYPHONE SERVICES

6.1 Usage of Payphone Services

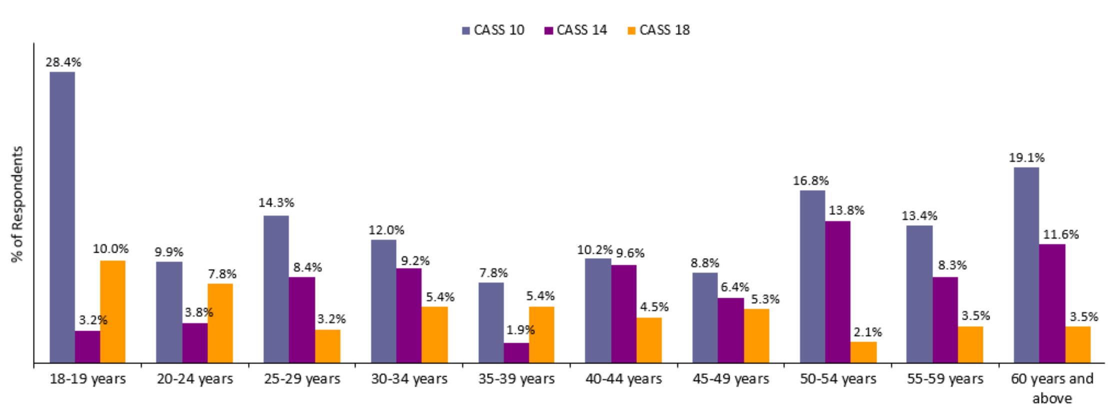
Payphone usage continued to decline from 8.4% in 2014 to 4.5% in 2018, a sharp fall from 22.0% in 2005 (Figure 6-1).

Figure 6-1 : Usage of Payphone Services



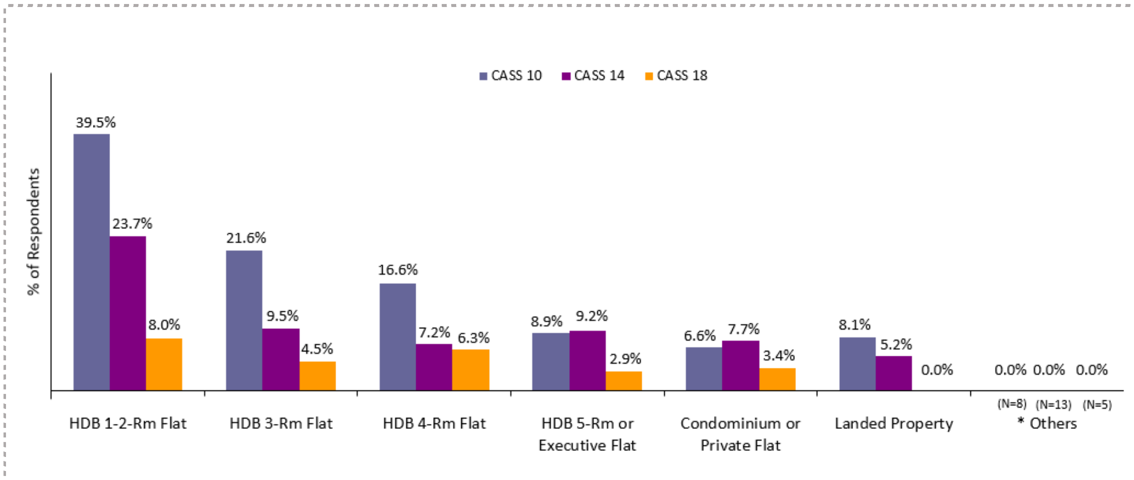
The usage of payphones declined across all ages, except for those aged 18 to 24 and 35 to 39 years old. On the other hand, respondents aged 50 to 54 years old, and 60 and above saw the largest decrease in their usage of payphones (Figure 6-2). The drop in payphone usage corresponded to an increased mobile call and voice services subscription by this age group, as seen in Figure 2-2.

Figure 6-2 : Usage of Payphone Services by Age



Likewise, the usage of payphones continued to decline across all housing types, and the respondents who stayed in 1-2-room HDB flats saw the largest decline (Figure 6-3).

Figure 6-3 : Usage of Payphone Services by Housing Type

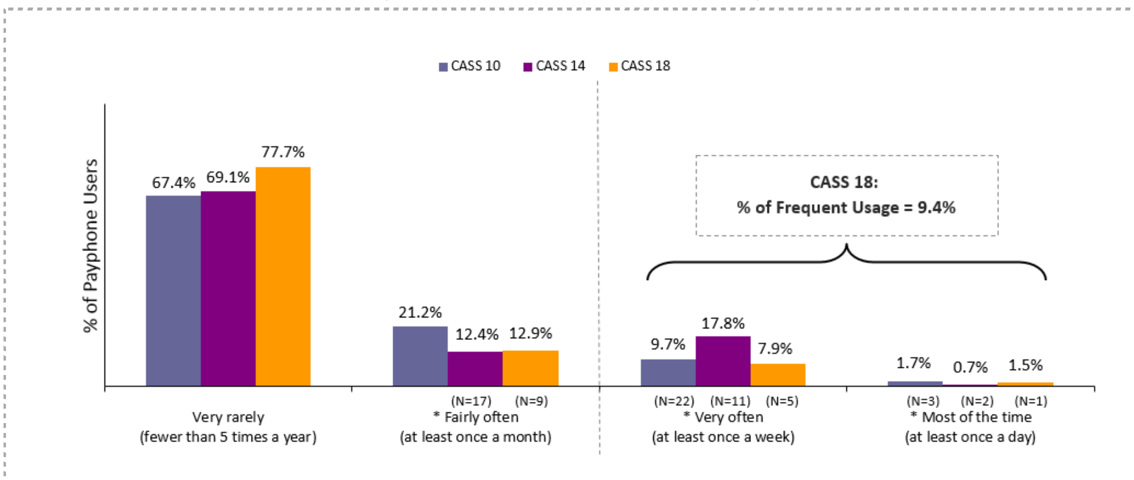


** Due to small sample sizes, data has to be interpreted with caution.*

6.2 Frequency of Payphone Usage

The frequency of payphone usage remained consistently low, with the service used fewer than 5 times in a year by 77% of the respondents. Only 9.4% of respondents reported using the payphones at least once a week (Figure 6-4).

Figure 6-4 : Frequency of Payphone Usage



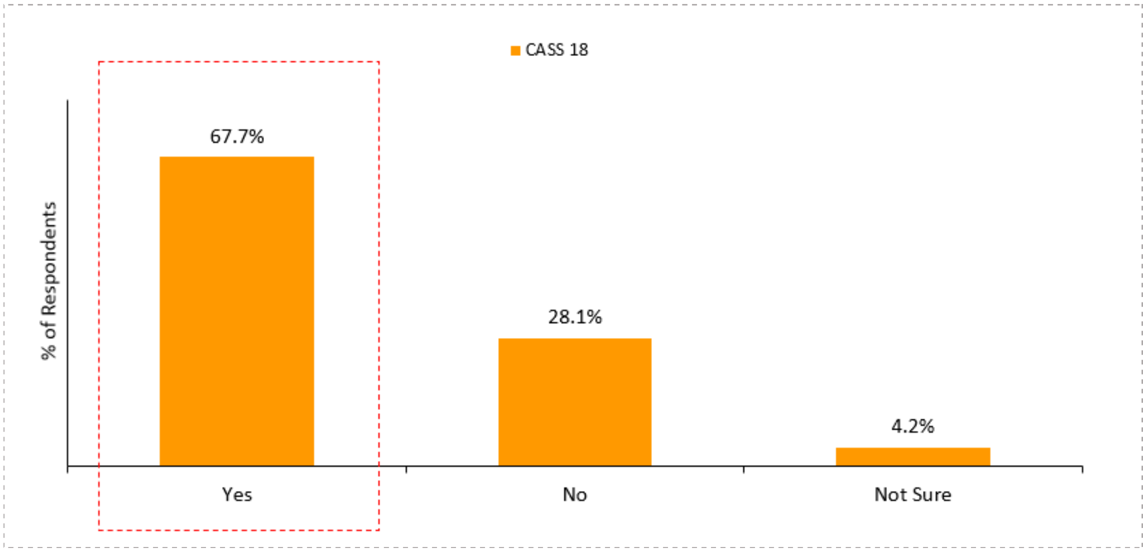
** Due to small sample sizes, data has to be interpreted with caution.*

7 BUNDLED SERVICES[10]

7.1 Subscription to Bundled Services

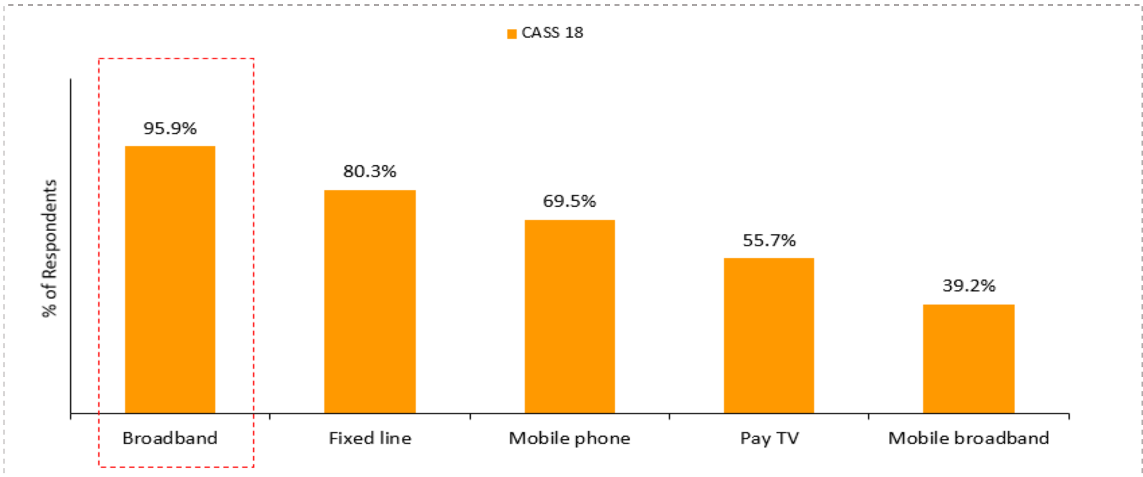
Close to 68% of respondents subscribed to bundled services from the same service providers (Figure 7-1).

Figure 7-1 : Subscription to Bundle Services



The most commonly subscribed services in a bundle were broadband (95.9%), followed by fixed line telephone (80.3%) and mobile phone (69.5%), as shown in Figure 7-2.

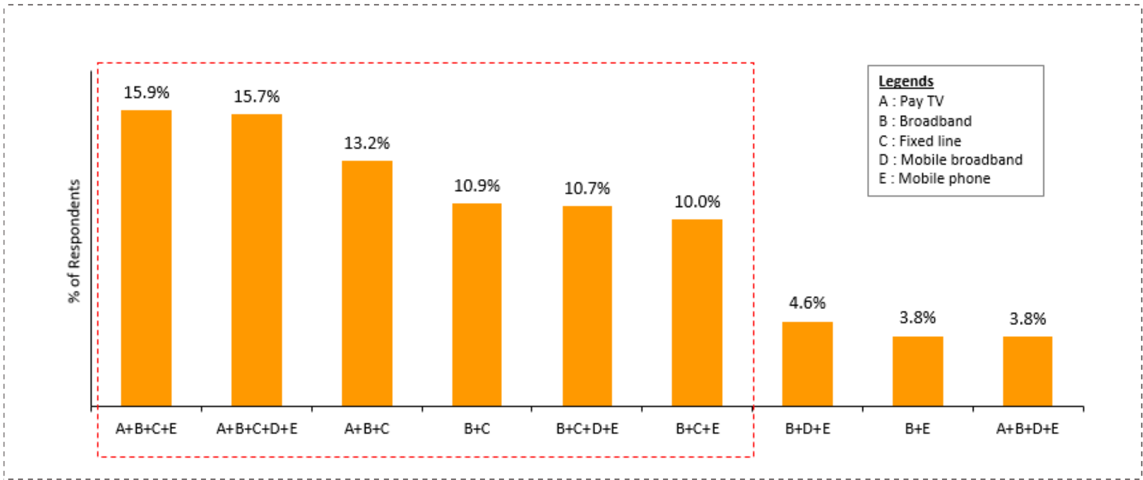
Figure 7-2 : Types of Services Subscribed to in a Bundle



[10] Bundled services refer to packages containing two or more services (e.g. fixed line, mobile broadband or pay TV) from the same service provider sold at a lower price than if they were subscribed to separately.

Three in 4 of respondents (76.4%) subscribed to broadband and fixed line telephone services in their bundles. The top common bundle, subscribed by close to 16% of respondents, comprised pay TV, broadband, fixed line telephone and mobile telephone services from the same service provider. A close second common bundle comprising pay TV and all telecommunication services (broadband, fixed line telephone, mobile broadband and mobile telephone), was subscribed by 15.7% of respondents (Figure 7-3).

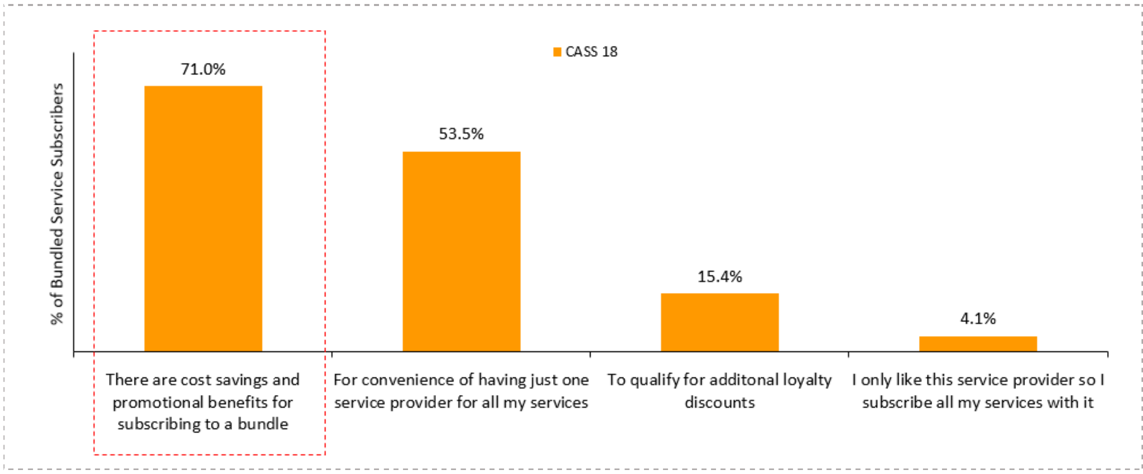
Figure 7-3 : Common Bundle of Services



7.2 Reasons for Subscribing to Bundled Services

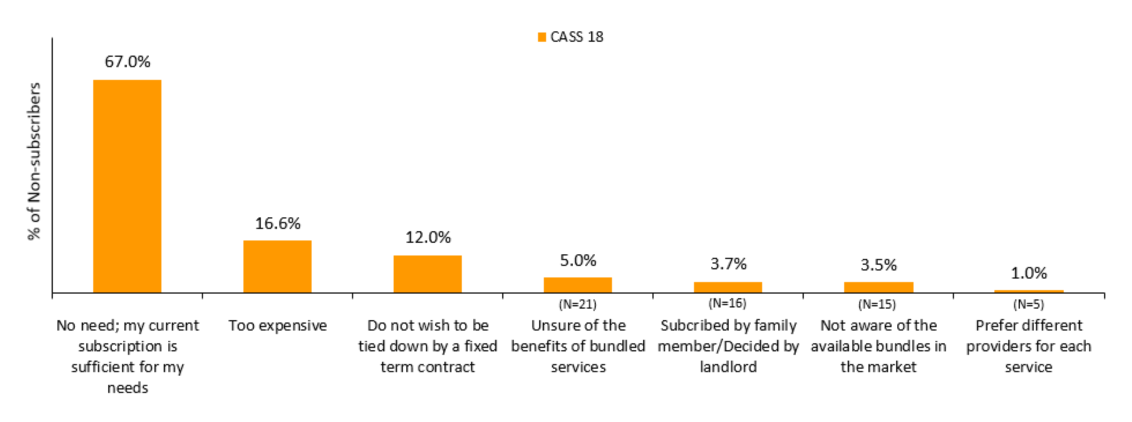
Majority of the respondents cited cost savings and promotional benefits as the top reason for subscribing to bundled services (71.0%), and the second reason was the convenience of having just one service provider for the different services (53.5%) (Figure 7-4).

Figure 7-4 : Reasons for Subscribing to Bundled Services



For respondents who did not subscribe to any bundled services, their main reason was the lack of need to sign up for such a bundle. That bundled services were expensive (16.6%) and respondents not wanting to be tied down by a fixed term contract (12.0%) were the distant second and third reasons reported by the respondents (Figure 7-5).

Figure 7-5 : Reasons for Not Subscribing to Bundled Services

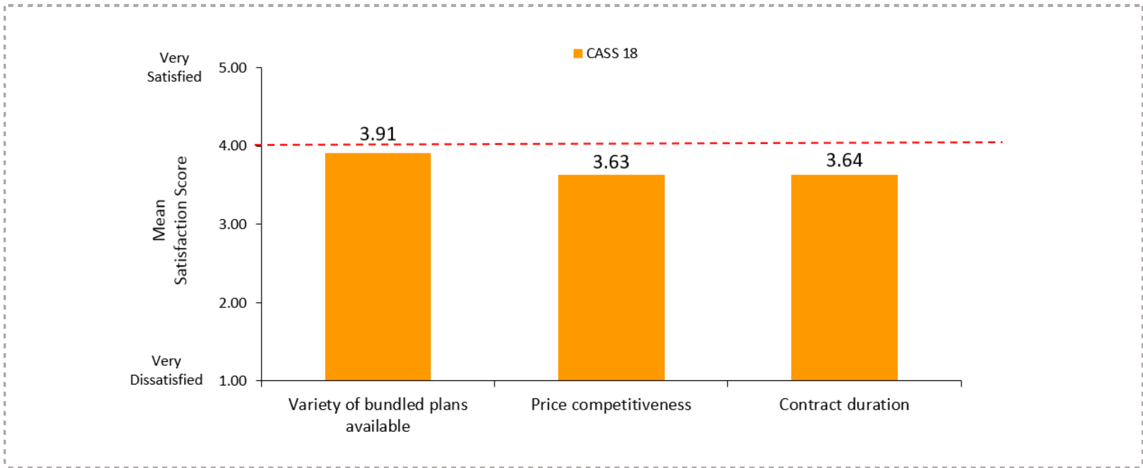


** Due to small sample sizes, data has to be interpreted with caution.*

7.3 Satisfaction with Bundled Services

Respondents' satisfaction with the variety of bundled plans available was higher than their reported satisfaction with price competitiveness and contract duration (Figure 7-6).

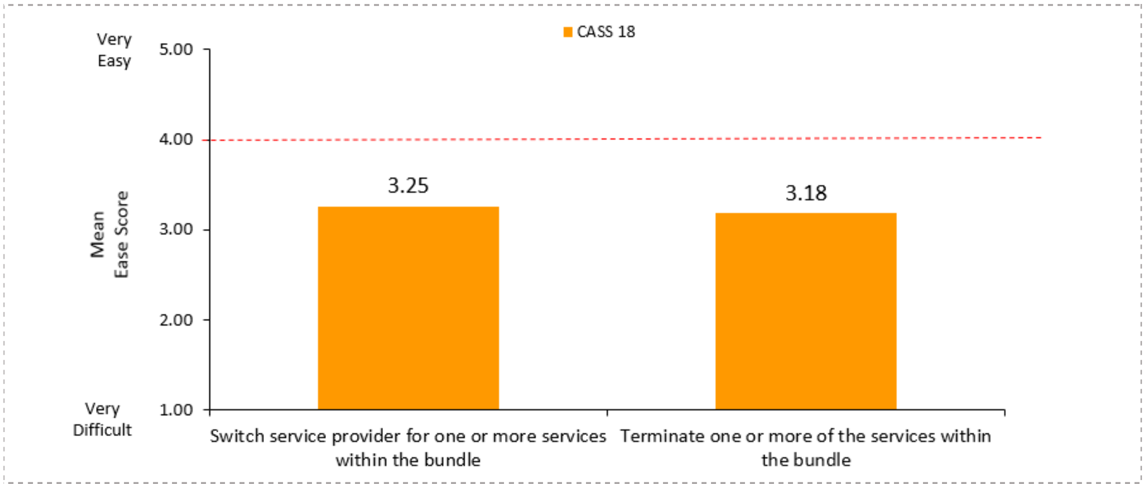
Figure 7-6 : Satisfaction with Bundled Services (Mean Score)



7.4 Ease with Switching Service Providers or Terminating Services in a Bundle

When it came to the ease with switching service providers or terminating any one of the services in a bundle, the respondents reported both to be slightly easy to do so (Figure 7-7).

Figure 7-7 : Ease of Switching Service Providers or Terminating Services in a Bundle

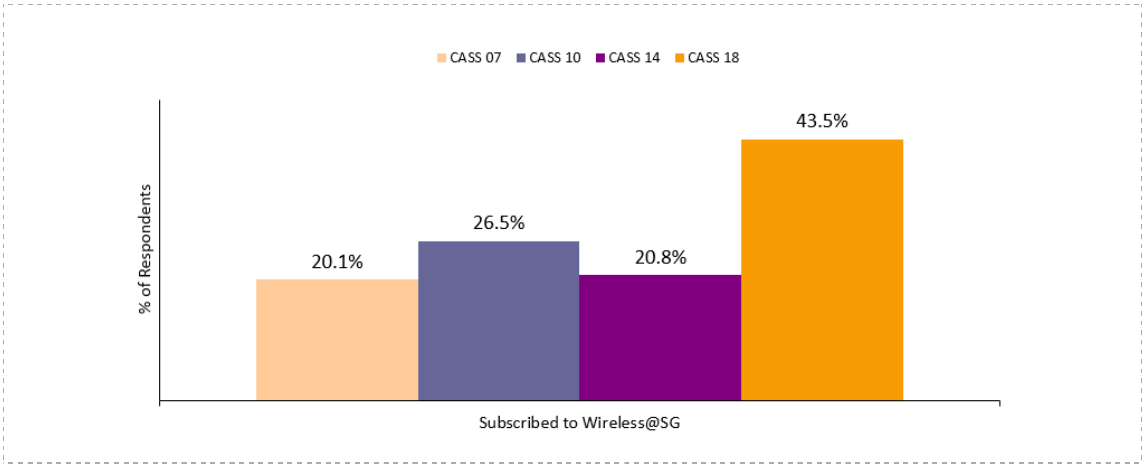


8 WIRELESS@SG SERVICE

8.1 Subscription to Wireless@SG

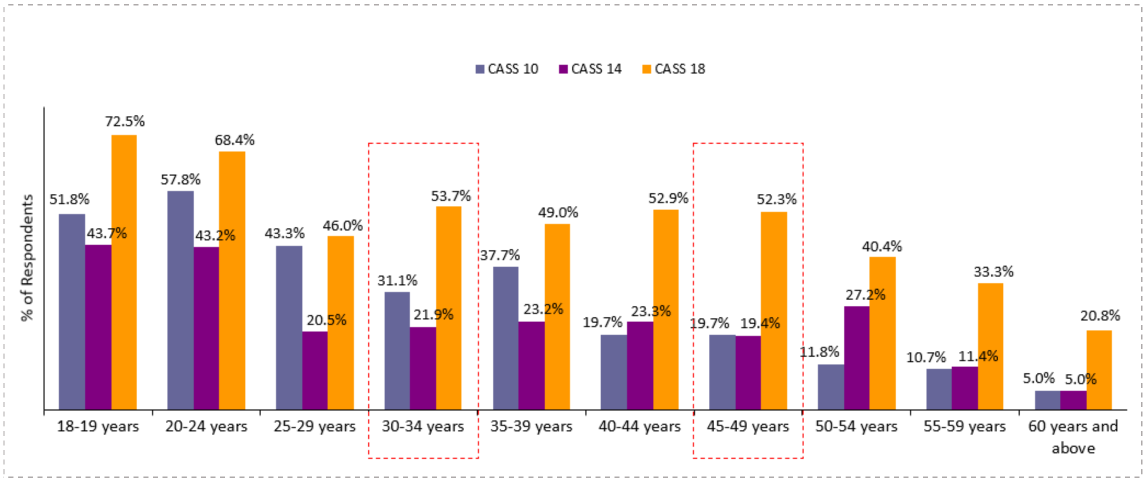
Subscription to Wireless@SG increased to 43.5% in 2018 as compared to 20.8% in 2014 (Figure 8-1).

Figure 8-1 : Wireless@SG Subscription



Subscription to Wireless@SG service increased across all ages, with the largest increase amongst those aged 30-34 and 45-49 years old (Figure 8-2).

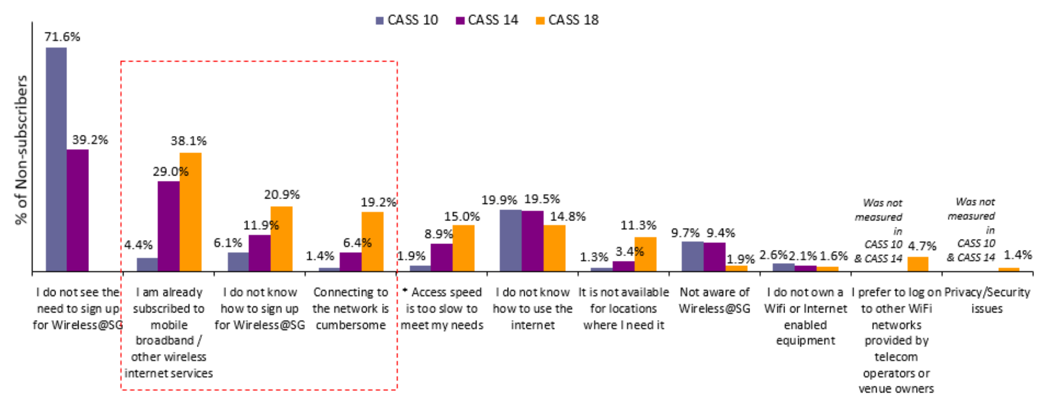
Figure 8-2 : Wireless@SG Subscription by Age



8.2 Reasons for Not Subscribing to Wireless@SG Service

The top reason for not subscribing to Wireless@SG service was that the respondents were already subscribed to mobile broadband or other wireless internet services (38.1%). A fifth of respondents were still unware of how to sign up for the Wireless@SG service and another 19.2% found it cumbersome to connect to the Wireless@SG network (Figure 8-3).

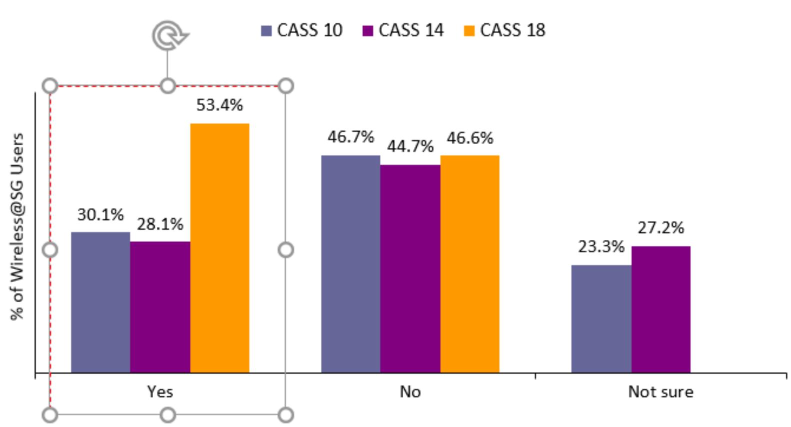
Figure 8-3 : Reasons for Not Subscribing to Wireless@SG Service



8.3 Wireless@SG App

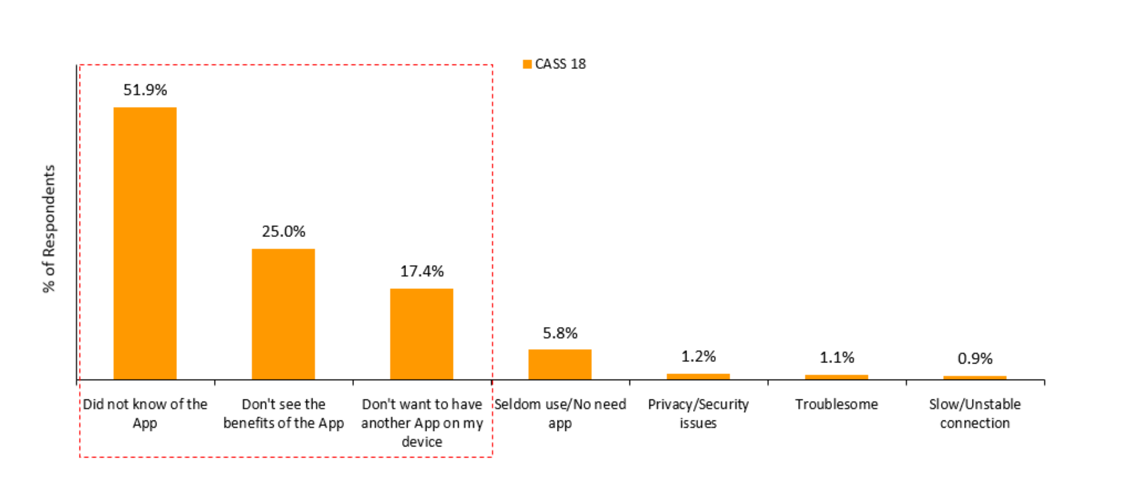
Over half of the respondents (53.4%) downloaded the Wireless@SG App. This was an increase of 25 percentage points from 28.1% in 2014 (Figure 8-4).

Figure 8-4 : Download of Wireless@SG App



For the respondents who did not download the Wireless@SG App, the three top reasons were that they did not know of the App (51.9%), followed by a quarter who did not see the benefits of using the App, and another 17.4% who did not want to install another app into their mobile devices (Figure 8-5).

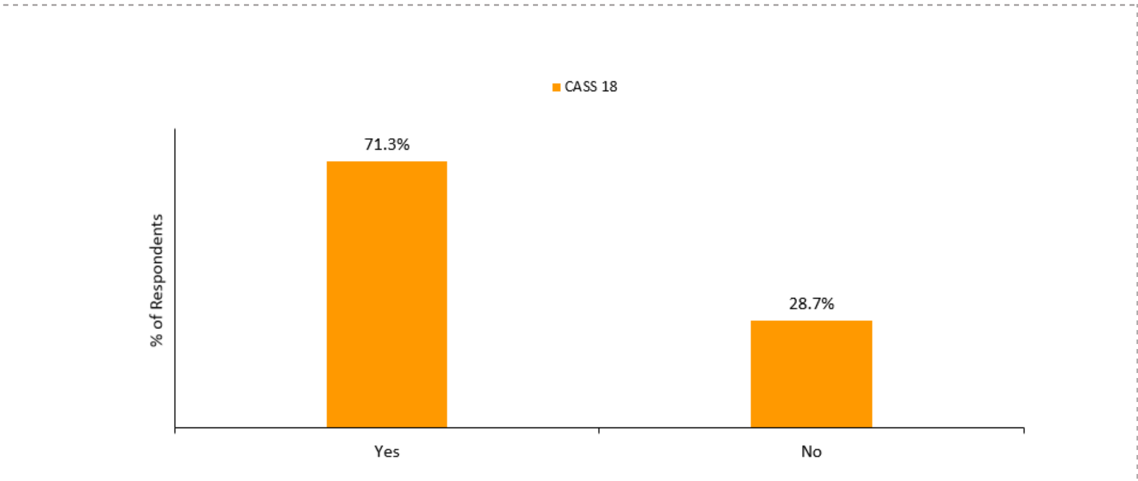
Figure 8-5 : Reasons for Not Downloading the Wireless@SG App



8.4 Wireless@SG New Login

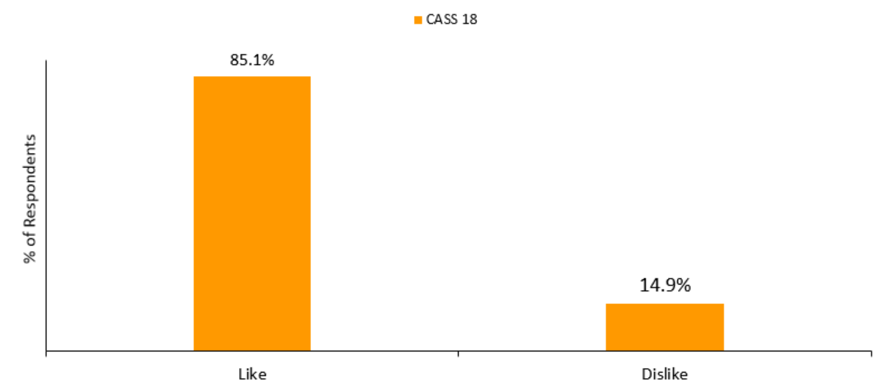
Besides using the Wireless@SG App, majority of respondents were aware of the new login access to Wireless@SG by using their mobile number and a one-time password via the web browser (Figure 8-6).

Figure 8-6 : Awareness of New Login Access of Wireless@SG Service



Amongst the respondents who were aware of the new login experience, 85.1% also liked the new login experience (Figure 8-7).

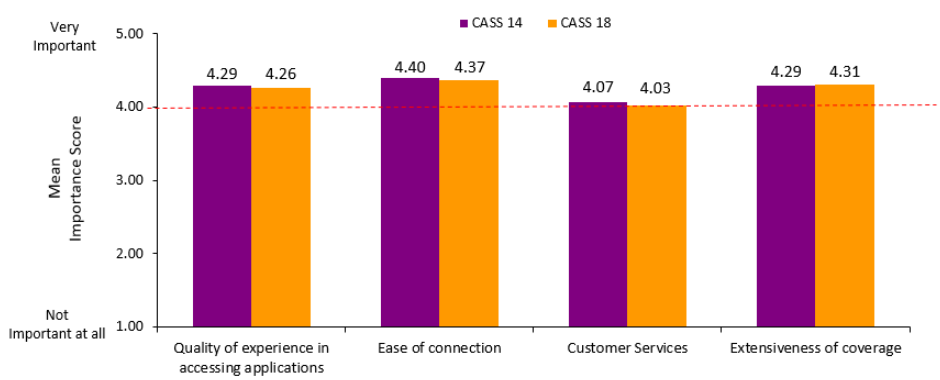
Figure 8-7 : New Login Experience of Wireless@SG Service



8.5 Factors Affecting Satisfaction with Wireless@SG Service

Respondents rated 4-point on all aspects of Wireless@SG service, namely the quality of experience in accessing the App, the ease of connection, the customer services, and the extensiveness of coverage, to be important in affecting their overall experience of using Wireless@SG (Figure 8-8).

Figure 8-8 : Important Aspects of Wireless@SG Service (Mean Score)



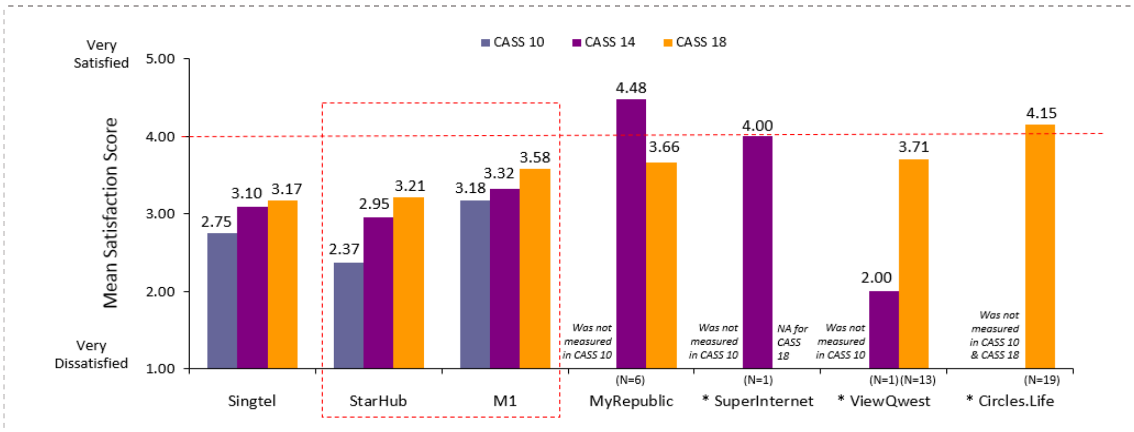
9 CUSTOMER CARE SERVICES

9.1 Satisfaction with Operators' Customer Care Services

Overall, respondents were least satisfied with the hotline waiting time and the time taken to resolve complaints by Singtel, and the competency of customer service officers from StarHub.

Nevertheless, the satisfaction with hotline waiting time for the three major service providers (Singtel, StarHub and M1) continued to improve since 2010, of which the increase was larger for StarHub and M1. ViewQwest also saw an increase in its reported satisfaction with hotline waiting time from 2.00-point in 2014 to 3.71-point in 2018. On the other hand, the satisfaction with hotline waiting time for MyRepublic decreased by 0.82-point from 4.48-point in 2014 to 3.66-point in 2018 (Figure 9-1).

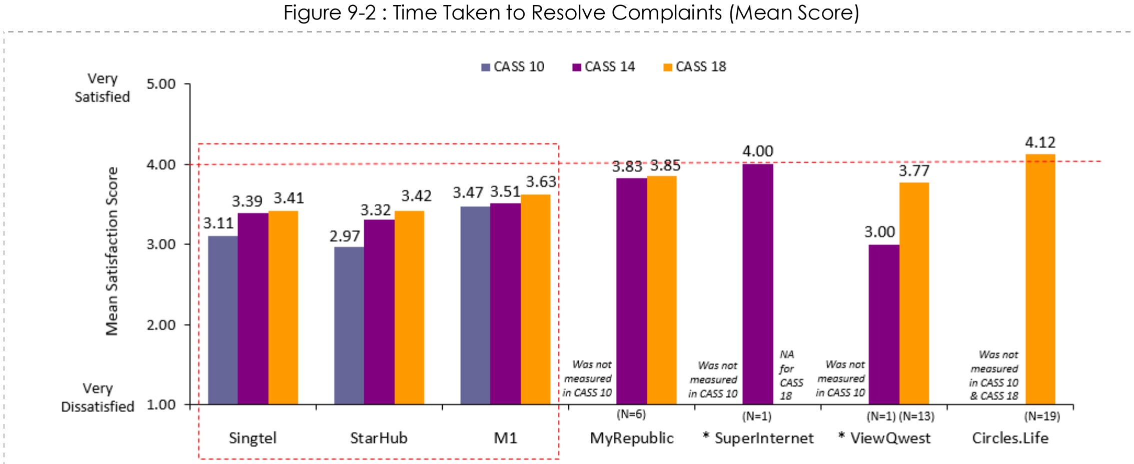
Figure 9-1 : Hotline Waiting Time to speak to a Customer Service Officer (Mean Score)



** Due to small sample sizes, data has to be interpreted with caution.*

All service providers saw an increase in respondents' reported satisfaction with the time taken to resolve complaints in 2018, as shown in Figure 9-2.

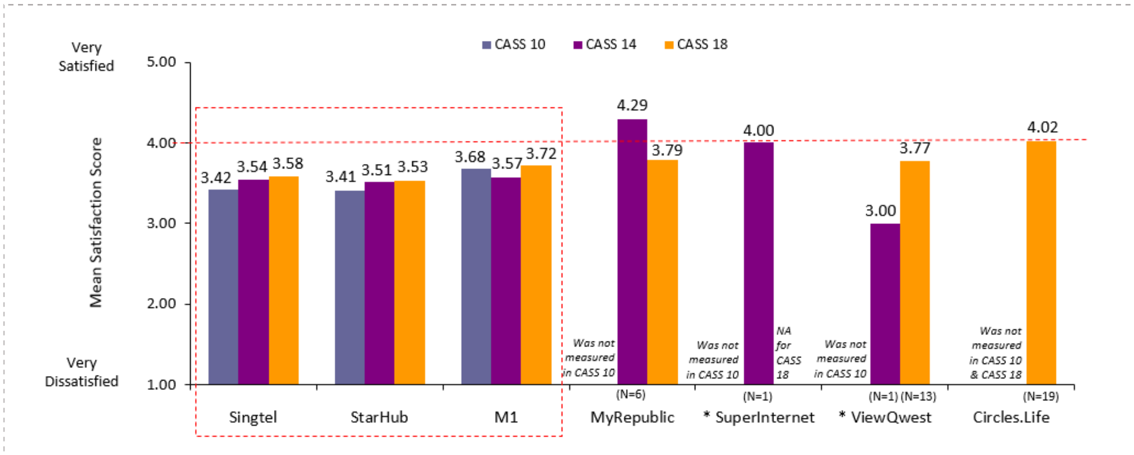
Figure 9-2 : Time Taken to Resolve Complaints (Mean Score)



** Due to small sample sizes, data has to be interpreted with caution.*

Similarly, all service providers saw an increase in respondents' reported satisfaction with the competency of customer service officers in 2018, except for MyRepublic which saw a decline in its satisfaction mean score to 3.79-point. Amongst the three major service providers, M1 improved the most in 2018 (3.72-point) from a decrease in 2014 (3.57-point) (Figure 9-3).

Figure 9-3 : Competency of Customer Service Officer (Mean Score)



** Due to small sample sizes, data has to be interpreted with caution.*

9.2 Suggestions for Improvement

As with previous years, most respondents (30.9%) suggested a reduction in hotline waiting time amongst other suggestions to improve customer care, albeit a slight decrease from 2014 (32.6%) (Figure 9-4). The slight increase in suggested improvements to competency and product knowledge of customer service officers as well as sincerity, politeness and interpersonal skills of customer service officers suggested an underlying increase in expectation of the quality of customer care by respondents.

Figure 9-4 : Customer Care – Suggestions / Improvements