CONSUMER AWARENESS AND SATISFACTION SURVEY 2014

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INTRODUCTION

The Consumer Awareness and Satisfaction Survey 2014 (CASS 2014) is a study that aims to measure and track shifts in the perception of selected telecommunication services in Singapore. Local consumers were asked about their awareness, as well as subscription or usage patterns, of the telecommunication services. In addition, they were queried on their satisfaction with the services that they had used, specifically in terms of the quality of service, price competitiveness of the service offerings, variety of services available given the range of products and services currently offered in the market, and customer service rendered by the service providers.

CASS 2014 is the fifth survey carried out by IDA since the full liberalisation of the Singapore telecommunication market in year 2000. The last survey was conducted in 2010. Comparisons with the previous survey findings are provided where available and appropriate. New services such as mobile broadband Internet services are also included in this round of survey given their growing popularity.

The scope of the telecommunication services surveyed includes:

A. Fixed Line Telephone
B. Mobile Telephone
C. Fixed Broadband
D. Mobile Broadband
E. International Roaming
F. Payphone
G. Customer Care Services

Feedback on newer operators such as MyRepublic and ViewQwest was also received during the survey, but due to the small sample sizes, they are omitted in this report.

SURVEY METHODOLOGY

In total, 1,500 individuals from households all across Singapore were surveyed through door-to-door interviews between 26th December 2013 and 14th March 2014. The selection of the 1,500 individuals was conducted using a two-stage stratified design:

a) a sample of 1,500 households was selected from the Household Sampling Frame maintained by the Department of Statistics, and
b) from each sampled households, 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 household.

SURVEY FINDINGS

1 FIXED LINE TELEPHONE SERVICES

1.1 Subscription

Subscription to fixed line telephone services has declined over the last 9 years, with a significant drop in 2014. Nevertheless, subscription amongst the respondents remained high at 87.5% (Figure 1-1).

Figure 1-1 : Fixed Line Telephone Subscription

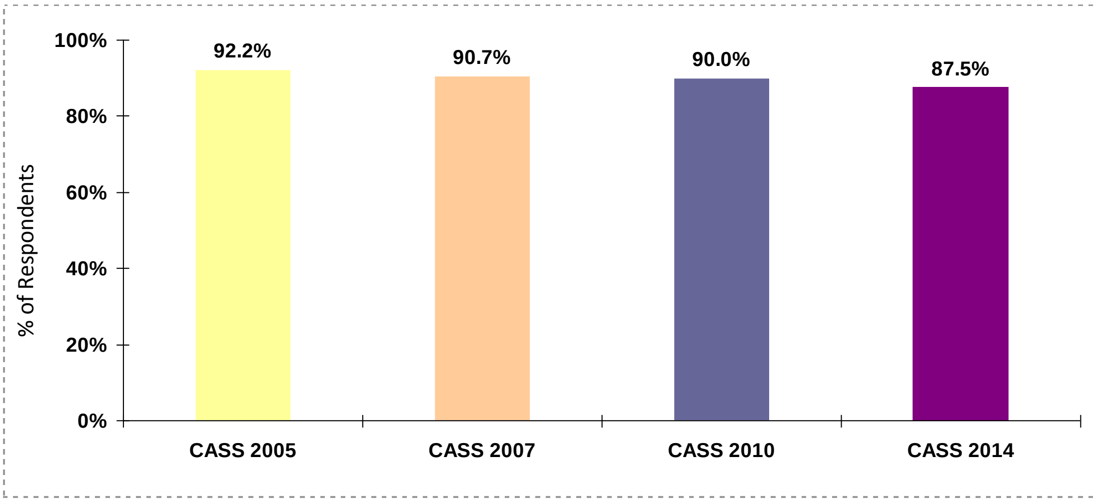
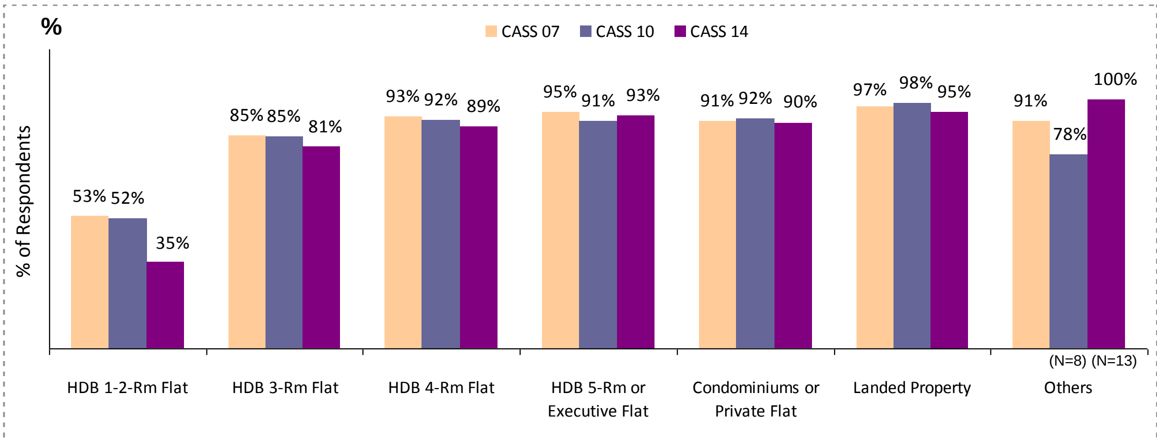


Figure 1-2 shows a breakdown of fixed line telephone subscription by housing type over the past 7 years. Subscription remained fairly consistent across most housing types since 2010 except among respondents staying in HDB 1-2 room flats, which saw a significant drop in fixed line telephone subscription (Figure 1-2).

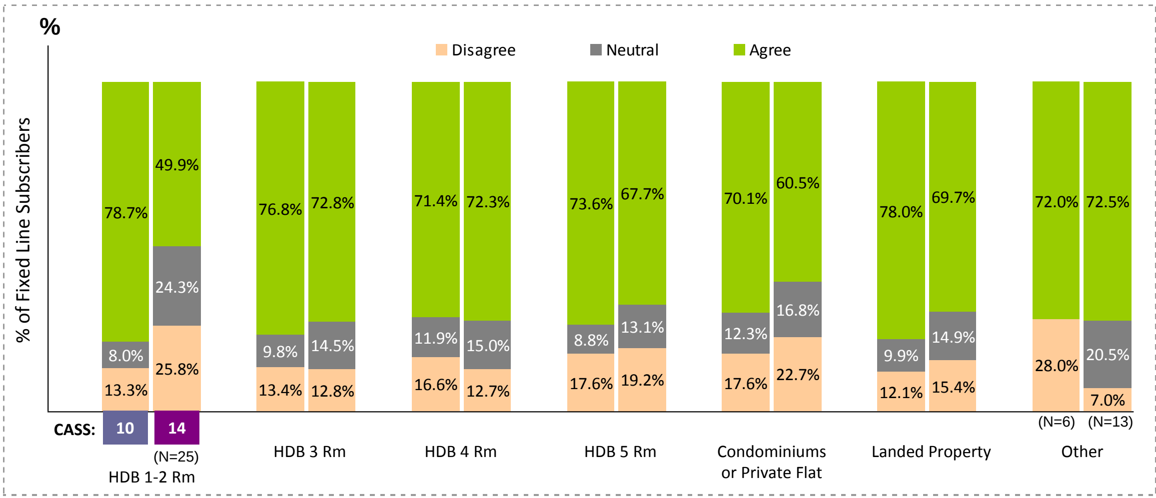
Figure 1-2 : Fixed Line Telephone Subscription by Housing Type



1.2 Attitude towards Fixed Line as a Necessity

Majority of respondents felt that fixed line telephone was still a necessity in their lives, although there was a slight reduction in this sentiment in 2014. As compared to 2010, respondents staying in HDB 1-2-room flats or condominiums were significantly less likely to agree that fixed line telephone was still a necessity in their lives, as shown in Figure 1-3.

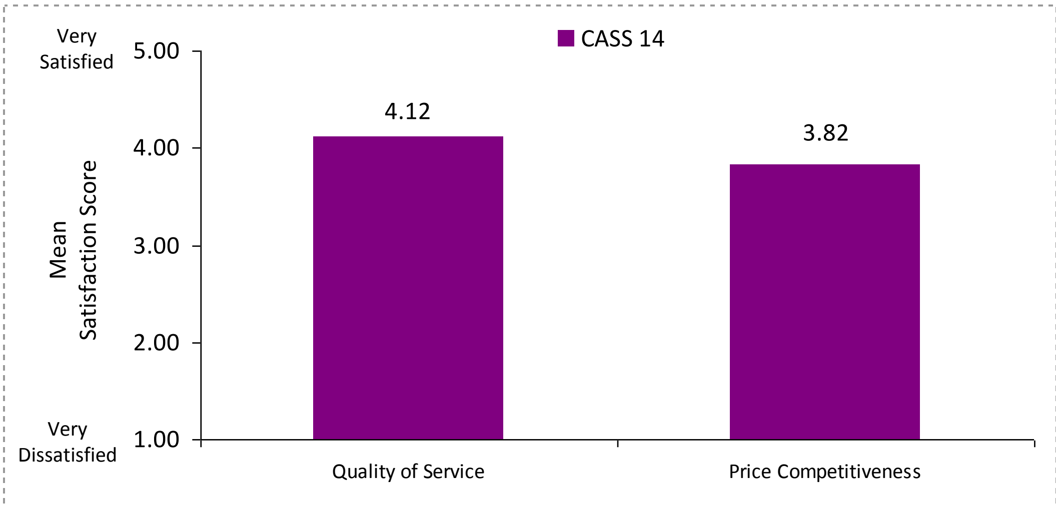
Figure 1-3 : Agreement on whether Fixed Line was still a Necessity by Housing Type



1.3 Satisfaction with Fixed Line Telephone Services

Fixed line telephone subscribers were generally satisfied with the service. They were mostly satisfied with the service quality, which achieved a mean satisfaction of 4.12. Also, satisfaction with price competitiveness was similarly high, scoring 3.82 (Figure 1-4).

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



2 MOBILE TELEPHONE SERVICES

2.1 Subscription

After a sharp increase from 2005 to 2007, the growth in mobile telephone subscription[1] has slowed down in the last 7 years, with 93.9% of respondents subscribed to mobile telephone services in 2014 (Figure 2-1).

Figure 2-1 : Mobile Telephone Services Subscription

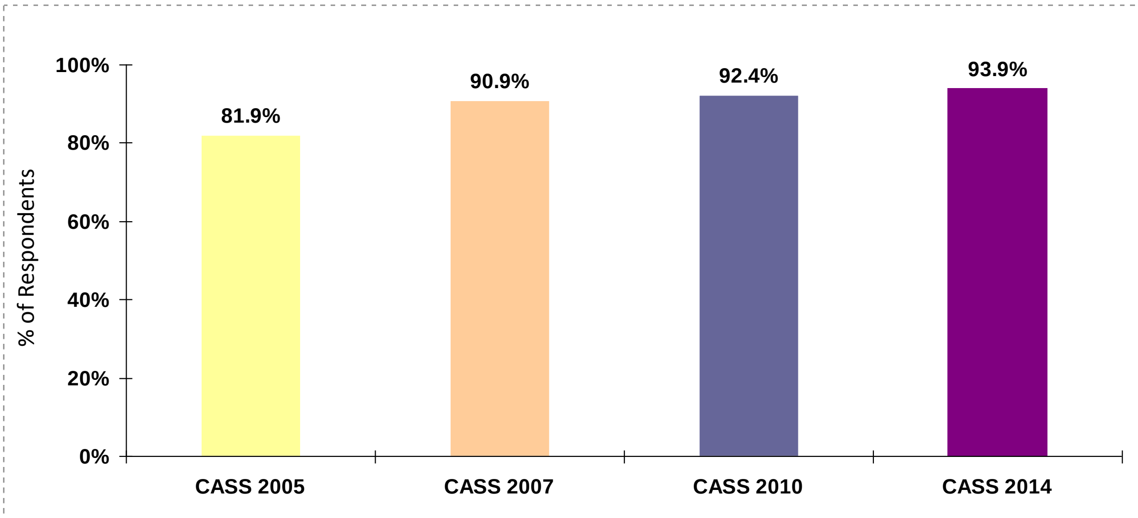
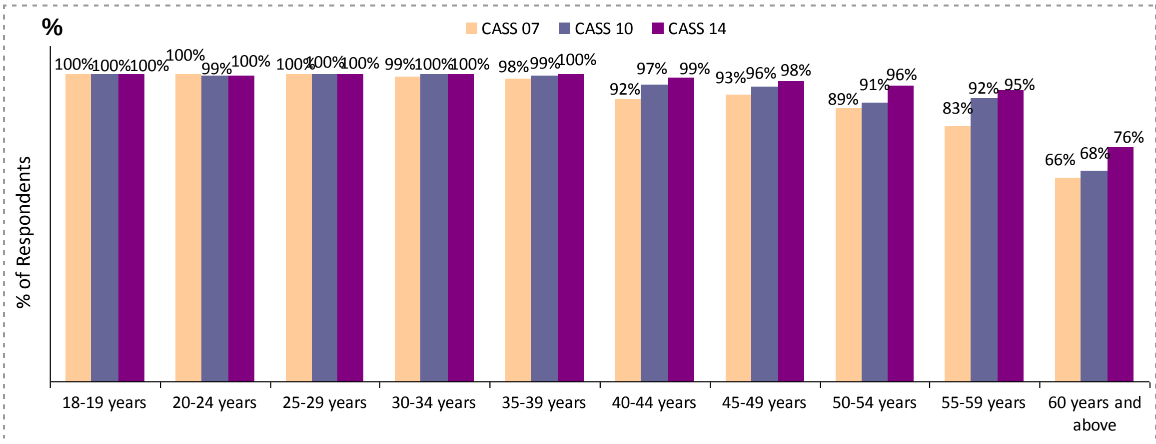


Figure 2-2 provides a breakdown of mobile telephone subscription by age over the past 7 years. Since 2007, subscription remained close to 100% for respondents below 40 years old. In addition, whilst subscription for those 40 years or older was not as high, it had continued to increase – in particular, compared to 2010, respondents 60 years or above had a significant increase from 68% to 76% (Figure 2-2).

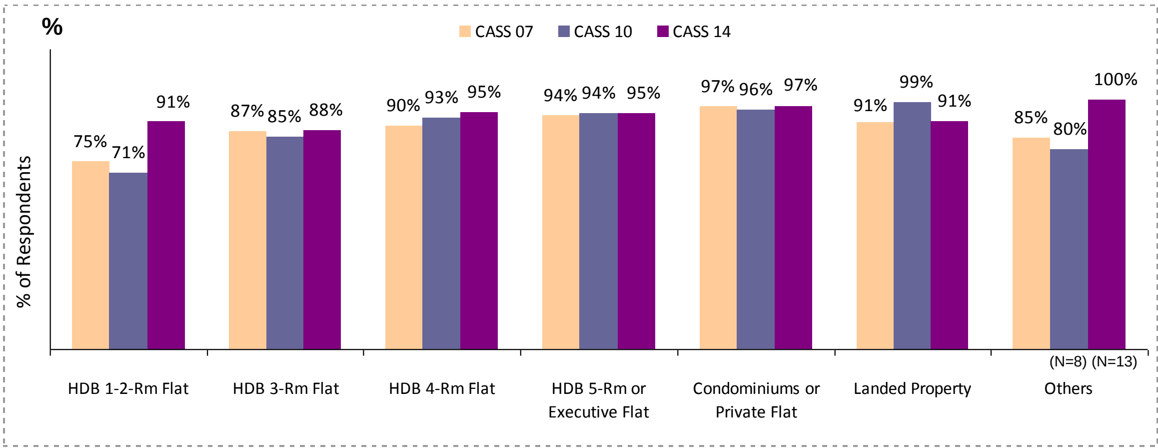
Figure 2-2 : Mobile Telephone Services Subscription by Age



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

Figure 2-3 shows the breakdown of subscription of mobile telephone by housing type. Compared to 2010, there was a significant increase in mobile telephone subscription among respondents who stayed in HDB 1-2 room flats and a significant decrease among those who stayed in landed property (Figure 2-3).

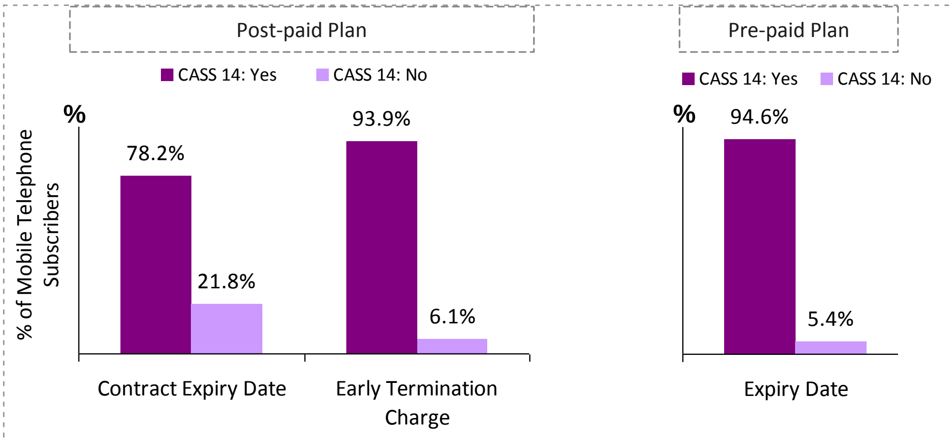
Figure 2-3 : Mobile Telephone Services Subscription by Housing Type



2.2 Awareness of Terms and Conditions

In general, mobile telephone subscribers displayed a high level of awareness regarding the terms of the service. Regardless of whether they were using post-paid or pre-paid plans, subscribers' awareness for each aspect exceeded 75% (Figure 2-4).

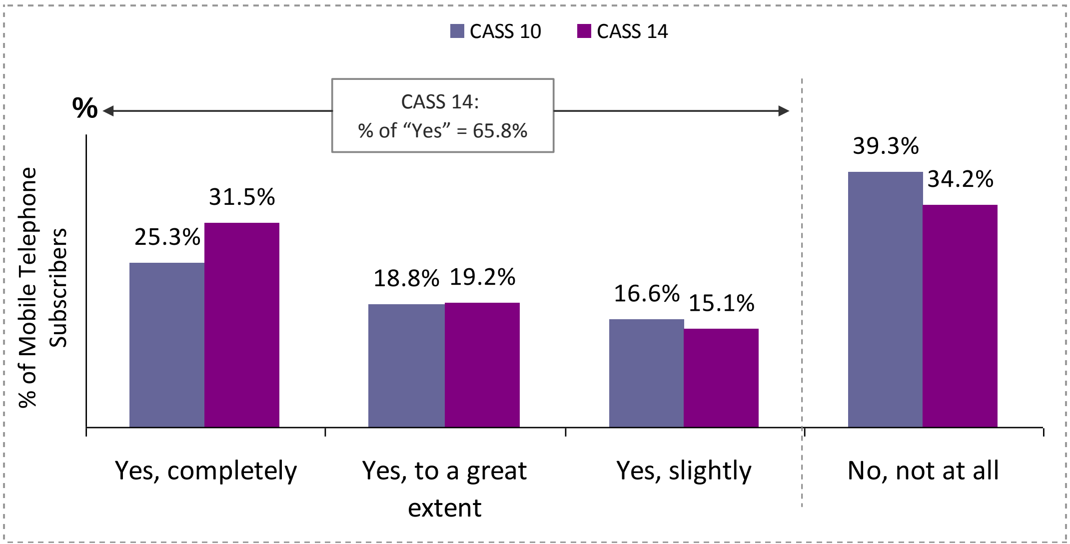
Figure 2-4 : Awareness of Terms and Conditions for Post-paid and Pre-paid plans



2.3 Ability to Replace Fixed Line Telephone Services

There was a substantial increase in respondents who felt that they could completely replace their fixed line telephone with mobile telephone, and, correspondingly, respondents who felt they could not replace their fixed line telephones declined significantly compared to 2010 (Figure 2-5).

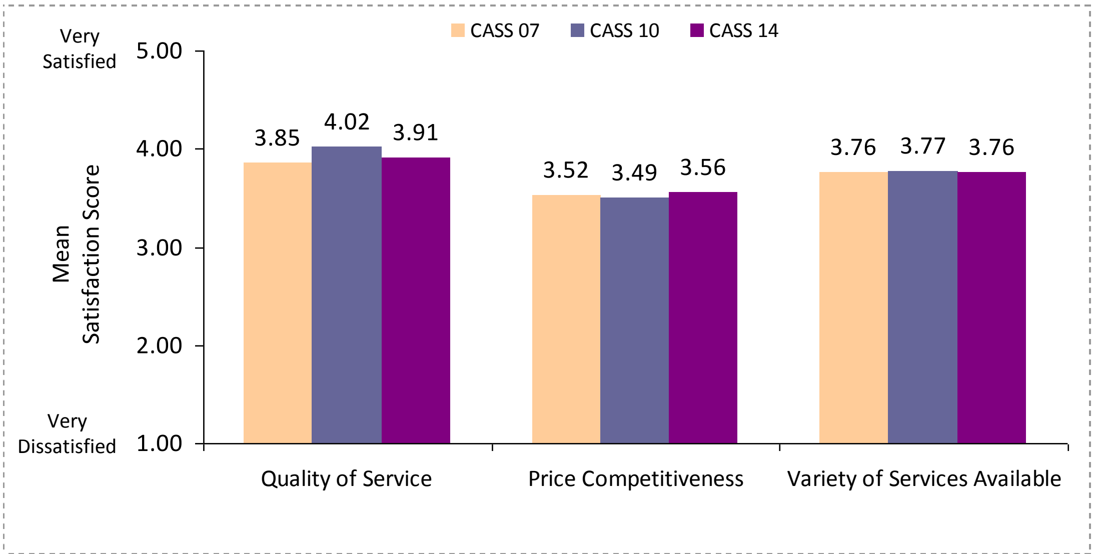
Figure 2-5 : Ability to replace Fixed Line with Mobile Telephone Services



2.4 Satisfaction with Mobile Telephone Services

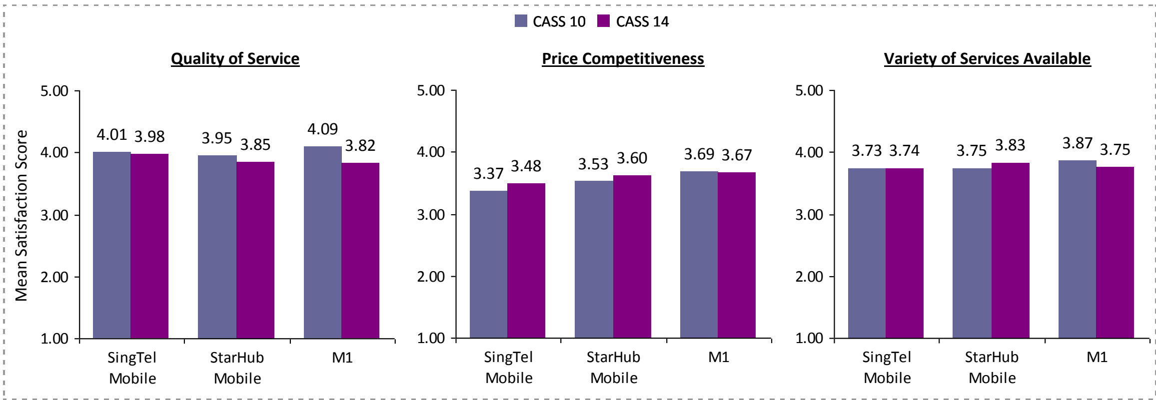
Respondents were mostly still satisfied with quality of service despite the significant decrease in mean score of satisfaction from 2010. On the other hand, satisfaction with price competitiveness and variety of services remained fairly consistent compared to 2010 (Figure 2-6).

Figure 2-6 : Satisfaction with Mobile Telephone Services (Mean Score)



Satisfaction with quality of service for M1 dropped significantly from 2010, while satisfaction with price competitiveness of SingTel increased significantly compared to 2010 (Figure 2-7).

Figure 2-7 : Satisfaction with Mobile Telephone Services (Mean Score by Service Provider)



3 FIXED BROADBAND SERVICES

3.1 Subscription

Subscription to fixed broadband service[2] continued to increase significantly over the past 9 years, with almost 85% of respondents subscribed to fixed broadband in 2014 (Figure 3-1).

Figure 3-1 : Fixed Broadband Services Subscription

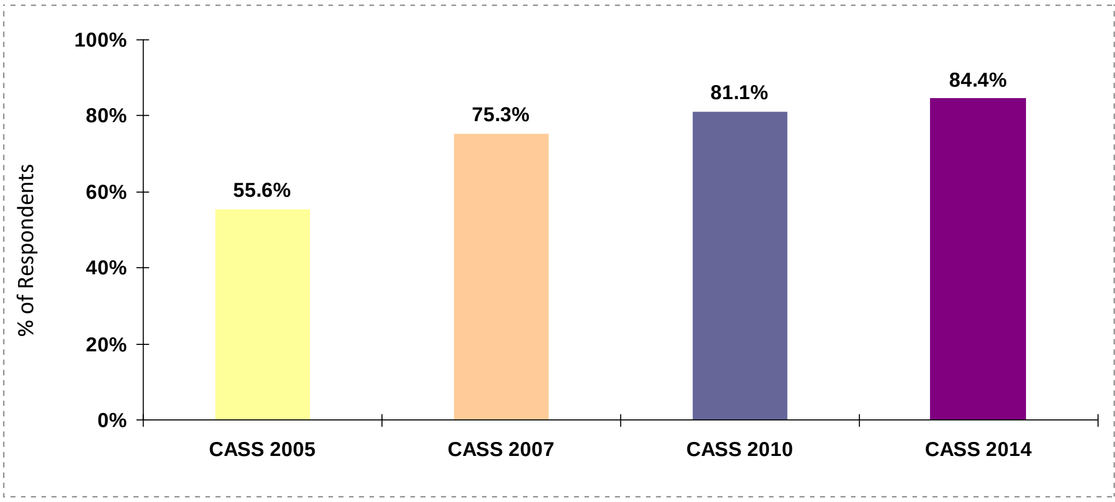
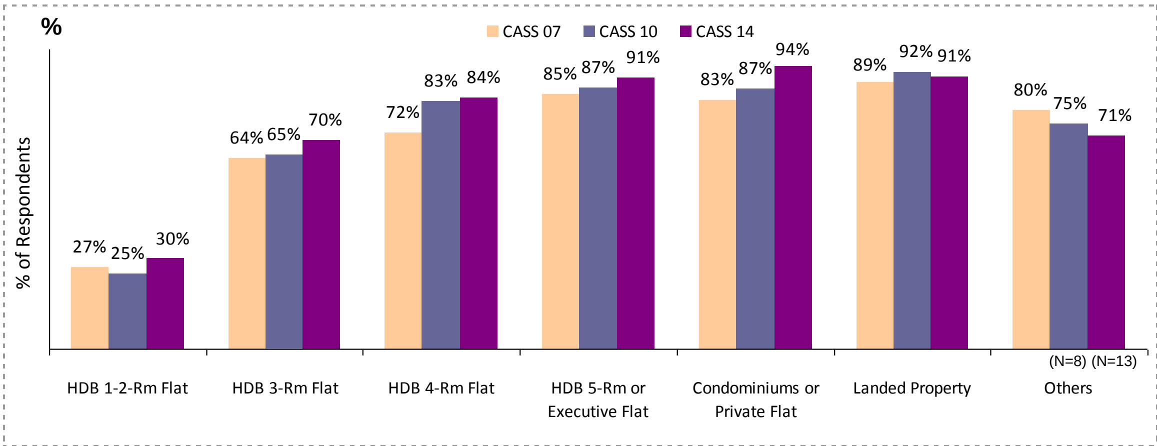


Figure 3-2 provides a breakdown of fixed broadband subscription by housing type. Subscription was observed to be highest among respondents staying in condominiums, which had increased substantially from 2010. On the other hand, subscription was lowest among those living in HDB 1-2 room flats (Figure 3-2).

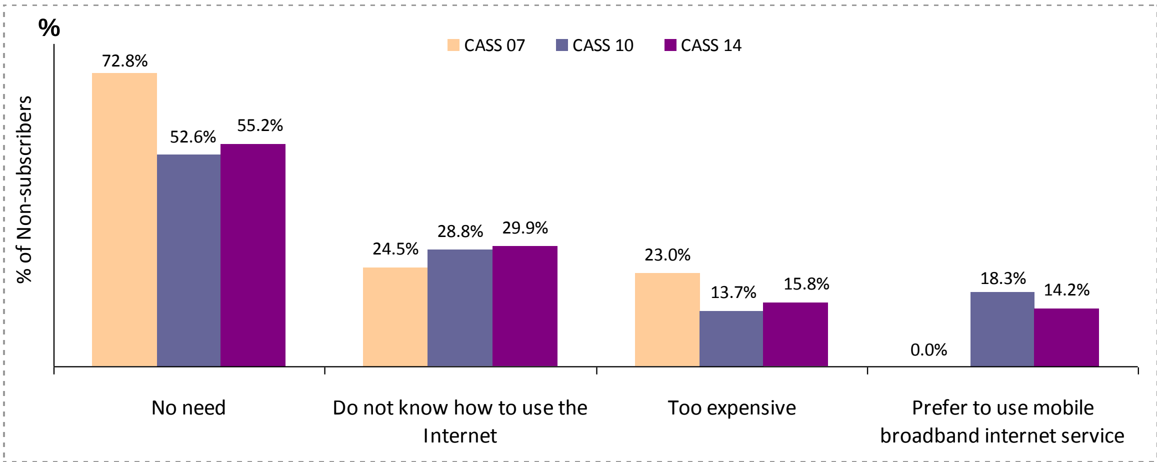
Figure 3-2 : Fixed Broadband Services Subscription by Housing Type



[2] 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, their reasons for doing so remained fairly consistent compared to 2010, with majority citing lack of need as the reason (Figure 3-3).

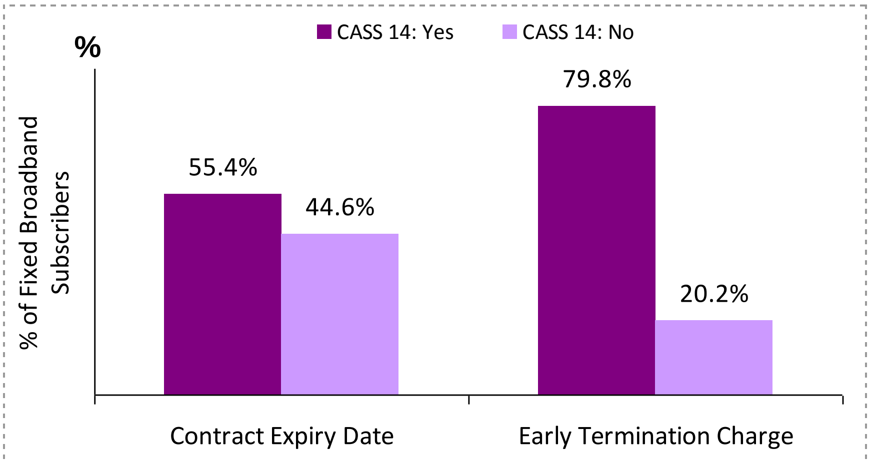
Figure 3-3 : Reasons for Not Subscribing to Fixed Broadband Service



3.2 Awareness of Terms and Conditions

Almost 80% of fixed broadband subscribers were aware of early termination charges, whereas only 55% knew about the expiry date of the service (Figure 3-4).

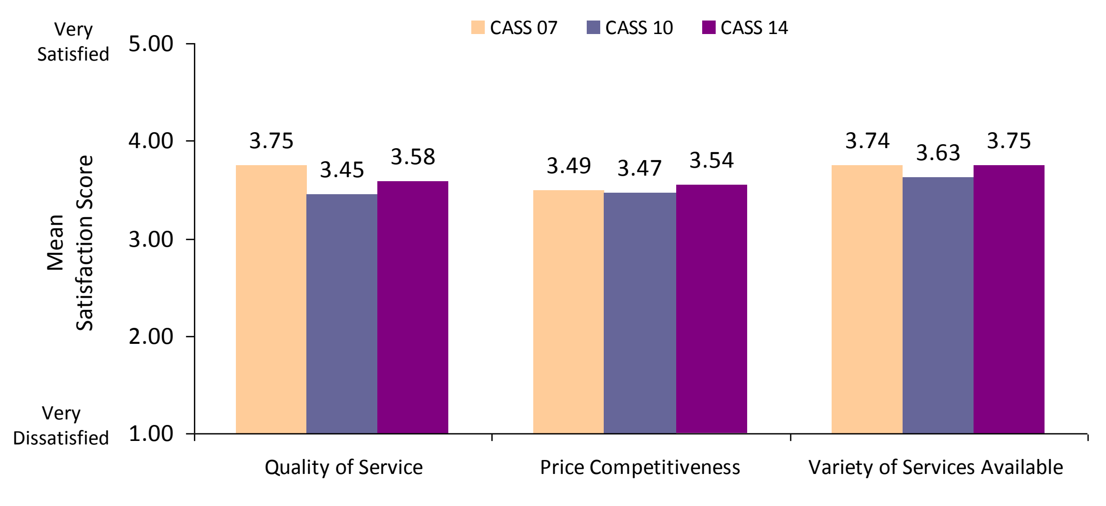
Figure 3-4 : Awareness of Terms and Conditions for Fixed Broadband Service



3.3 Satisfaction with Fixed Broadband

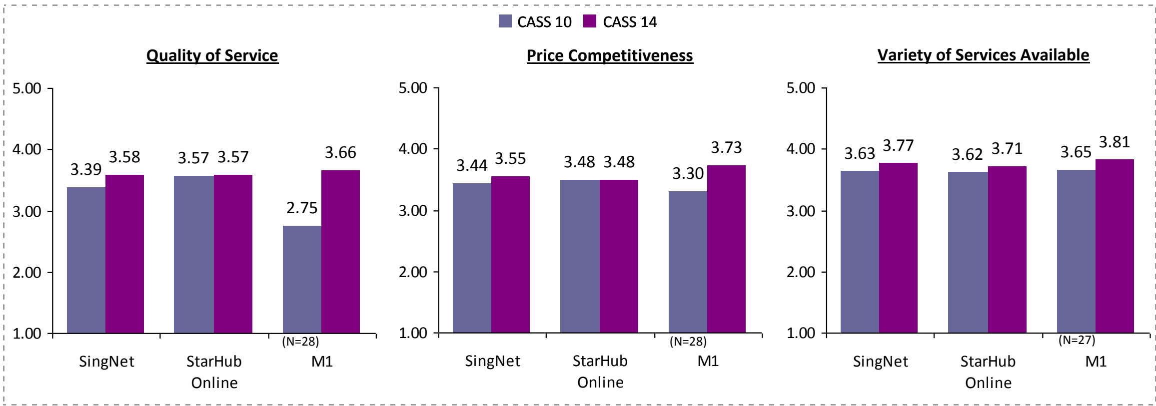
From 2010 to 2014, satisfaction with service quality and variety of fixed broadband increased significantly. Overall, close to 2 in 3 respondents expressed satisfaction with the 3 surveyed aspects of the service (Figure 3-5).

Figure 3-5 : Satisfaction with Fixed Broadband Services (Mean Score)



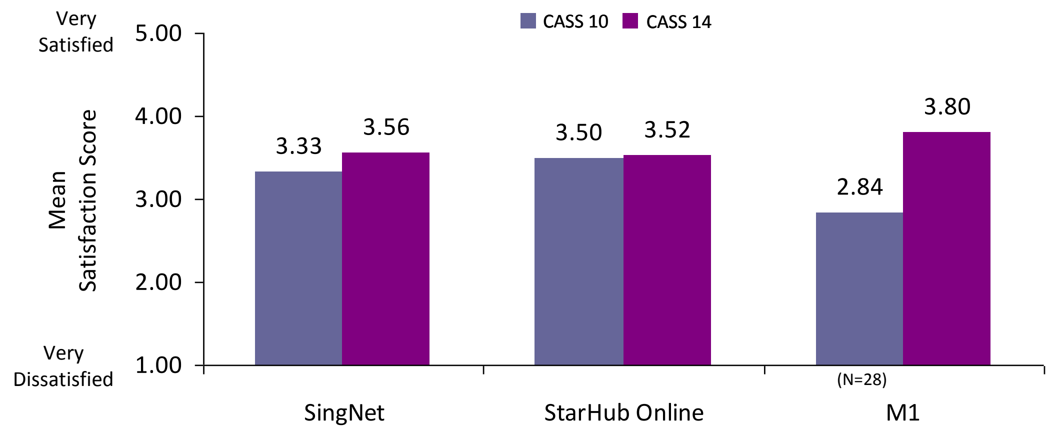
In 2014, satisfaction levels were broadly similar across the service providers. However, compared to 2010, SingNet saw significant increases in satisfaction with service quality and variety, while M1 had significant increases in satisfaction with service quality and price competitiveness (Figure 3-6).

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



In terms of satisfaction with the speed of their fixed broadband service, SingNet and M1 saw substantial increases in satisfaction scores compared to 2010 while StarHub's satisfaction score remained fairly consistent (Figure 3-7).

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

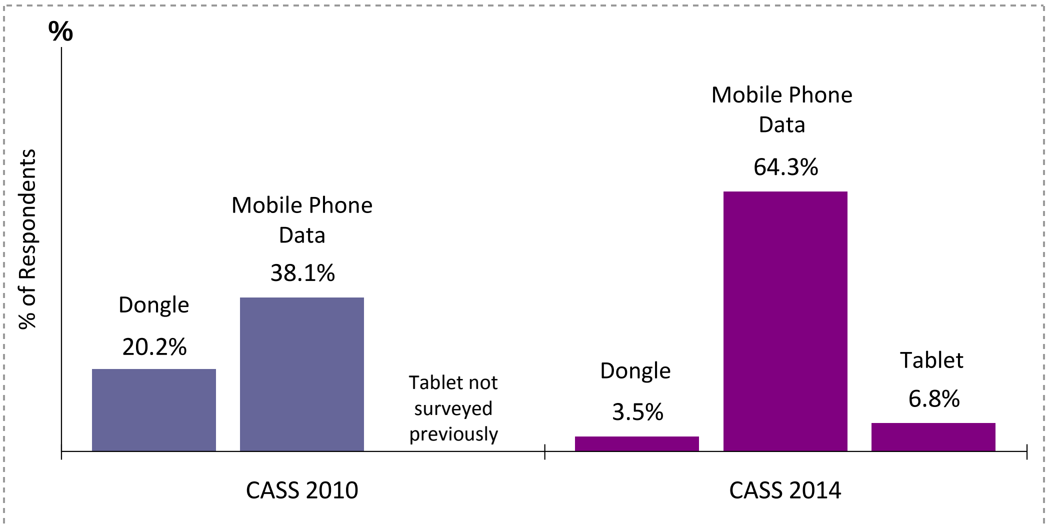


4 MOBILE BROADBAND SERVICES

4.1 Subscription

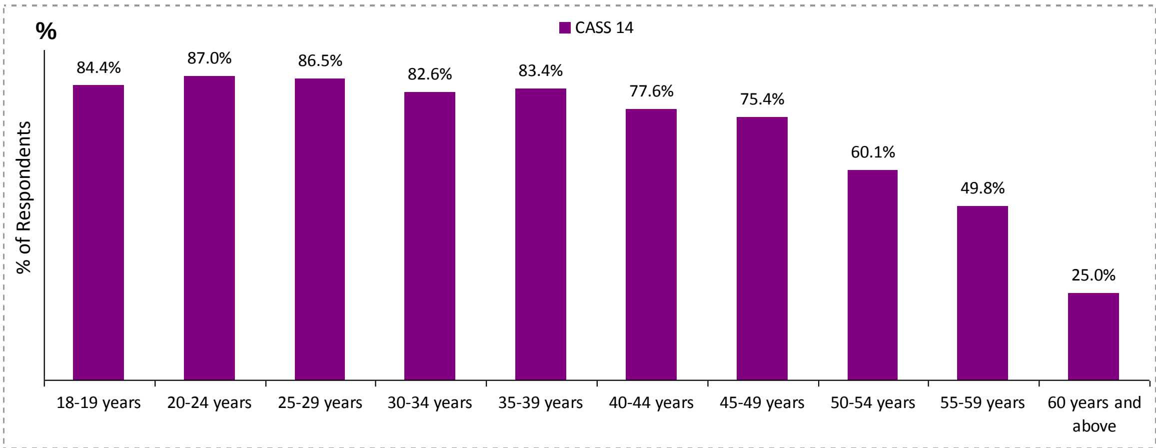
Subscription to mobile broadband services[3] was moderately high, with close to 65% of respondents subscribed to mobile broadband on mobile phone (Figure 4-1). A breakdown of subscription by age and by housing type is provided in Figure 4-2 and Figure 4-3 respectively.

Figure 4-1 : Mobile Broadband Services Subscription



Subscription to mobile broadband services was generally high amongst younger respondents – above 80% for those aged 18-39 years old. A fall in subscription was observed as the age of the respondents increased (Figure 4-2).

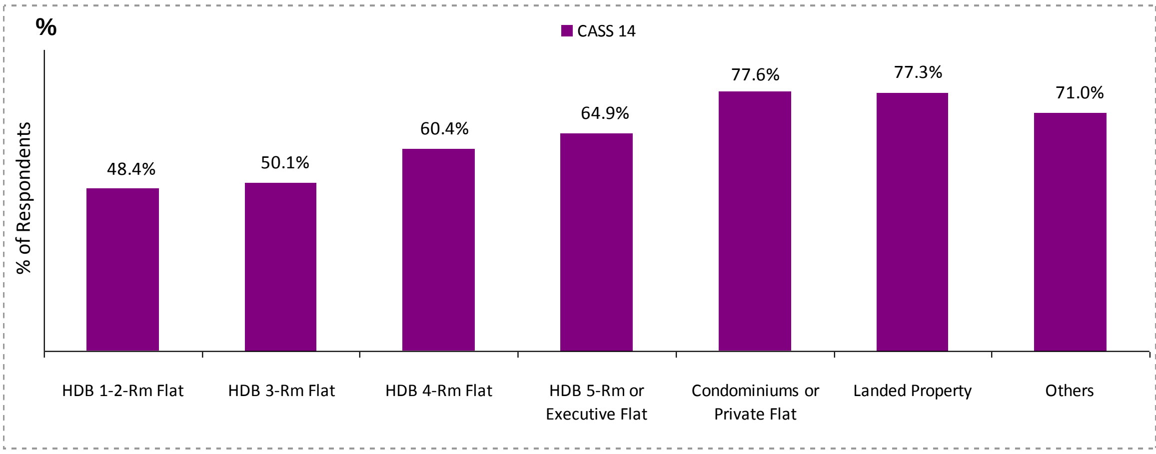
Figure 4-2 : Mobile Broadband Services Subscription by Age



[3] Subscription is by respondent, rather than by number of lines / devices. Hence, subscription rates will not exceed 100% in this survey.

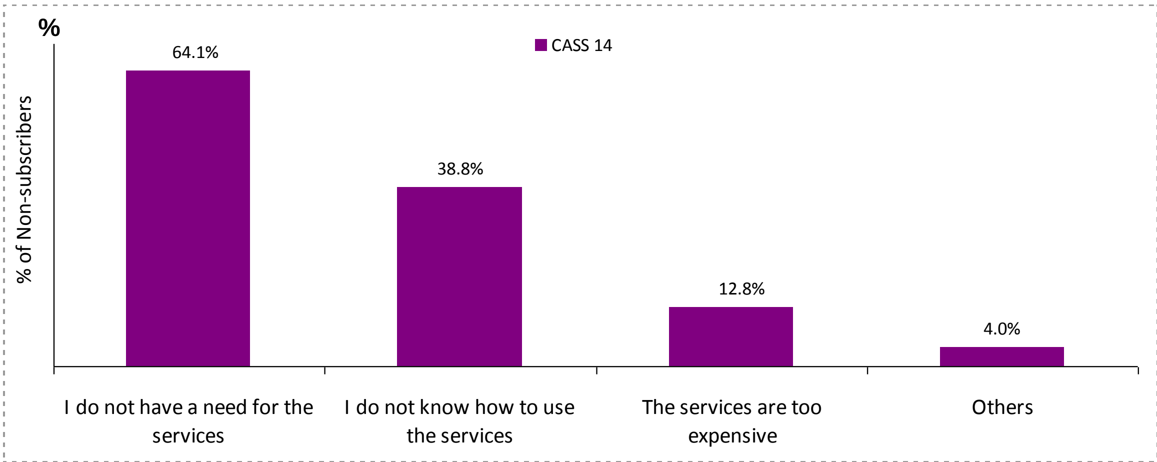
Subscription was highest among private property dwellers and generally lower for those staying in HDB 1- to 3-room flats (Figure 4-3)

Figure 4-3 : Mobile Broadband Services Subscription by Housing Type



Among respondents who did not subscribe to mobile broadband services, almost 2 in 3 cited not having a need for the service as the reason (Figure 4-4).

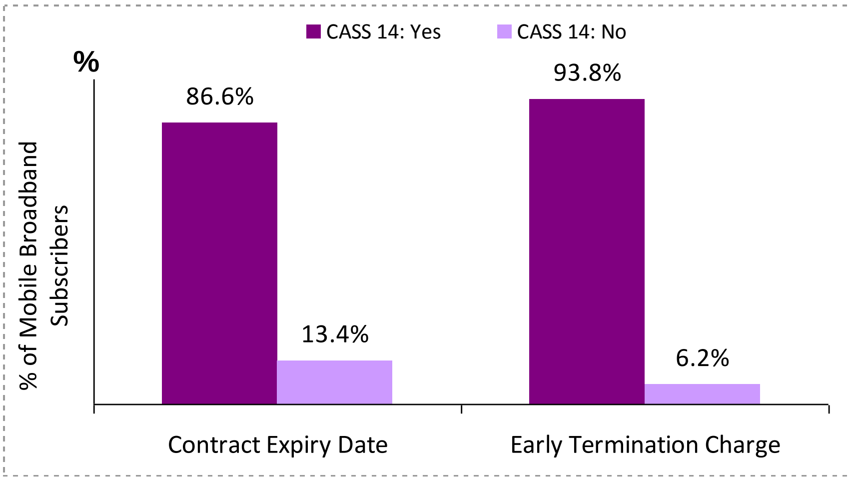
Figure 4-4 : Reasons for Not Subscribing to Mobile Broadband Service



4.2 Awareness of Terms and Conditions

More than 80% of mobile broadband subscribers were aware of the expiry date and early termination charge of the service (Figure 4-5).

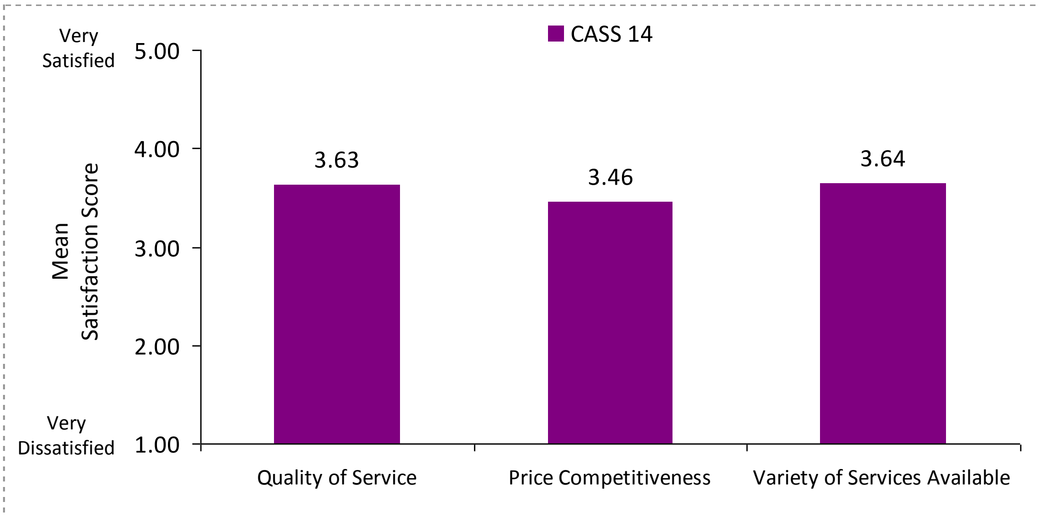
Figure 4-5 : Awareness of Terms and Conditions for Mobile Broadband Service



4.3 Satisfaction with Mobile Broadband

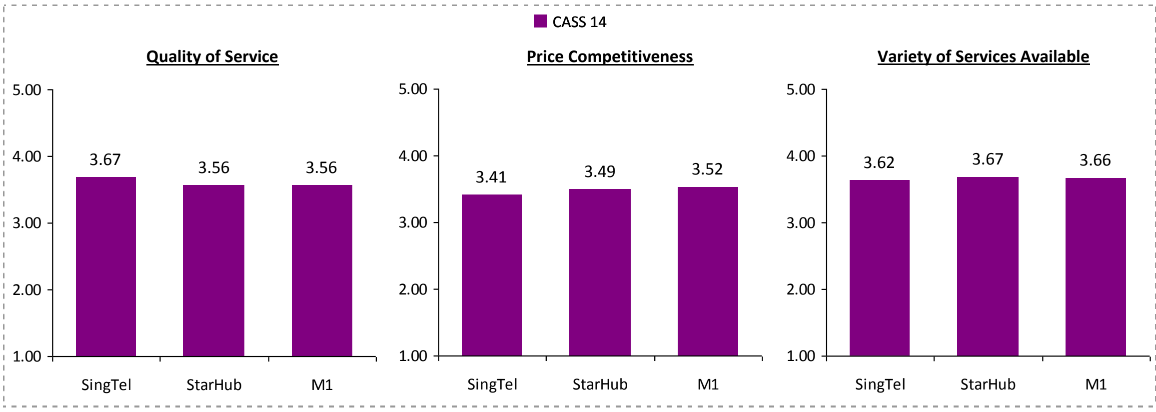
Respondents' satisfaction with price competitiveness of mobile broadband was lower as compared to the other 2 surveyed aspects, which both achieved mean scores of about 3.6 (Figure 4-6).

Figure 4-6 : Satisfaction with Mobile Broadband Services (Mean Score)



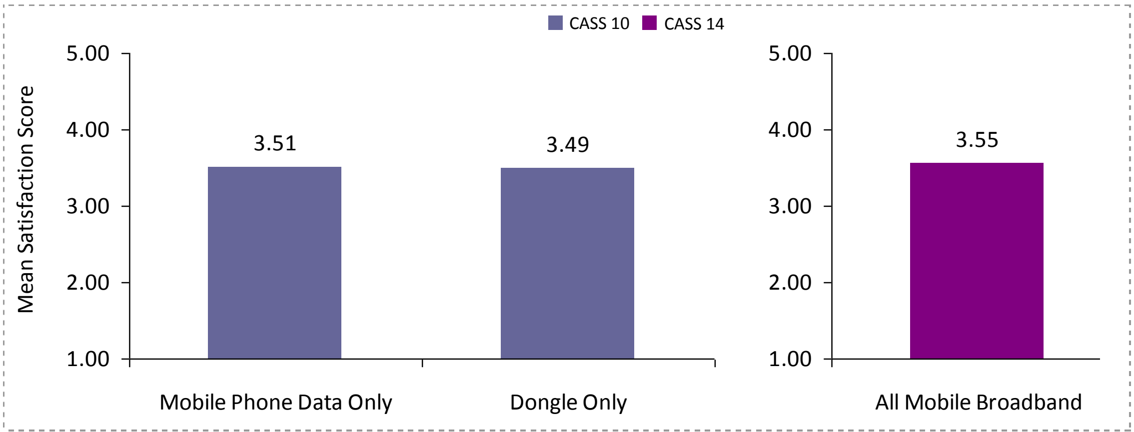
Satisfaction levels were fairly consistent across service providers, although SingTel scored slightly better than StarHub and M1 in service quality (Figure 4-7).

Figure 4-7 : Satisfaction with Mobile Broadband Services (Mean Score by Service Provider)



In 2014, about 2 in 3 respondents were satisfied with the experienced speed of their mobile broadband in comparison to what was advertised, achieving a mean score of 3.55 (Figure 4-8).

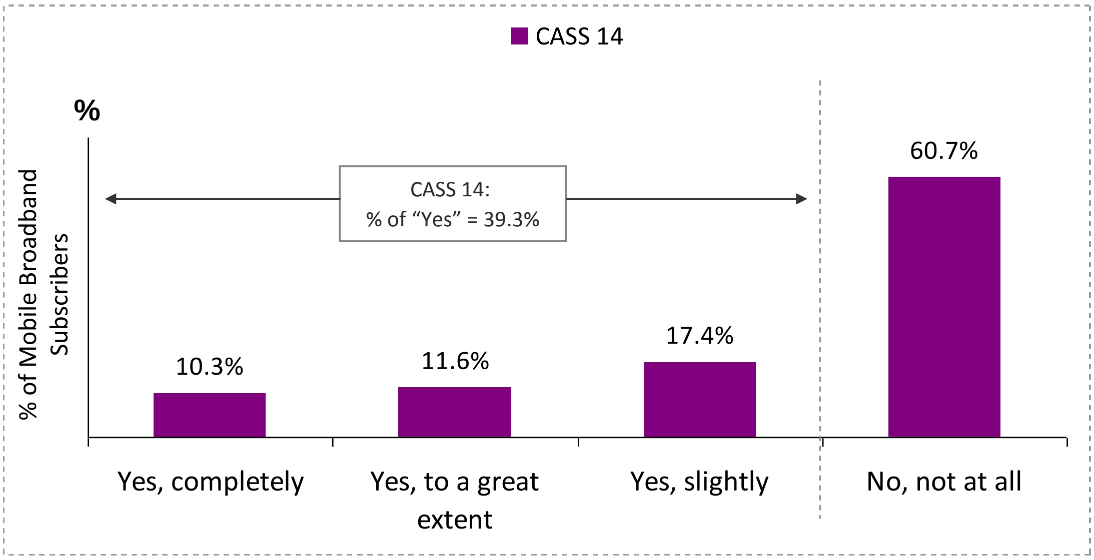
Figure 4-8 : Satisfaction with Mobile Broadband Speed (Mean Score)



4.4 Ability to Replace Fixed Line Broadband Services

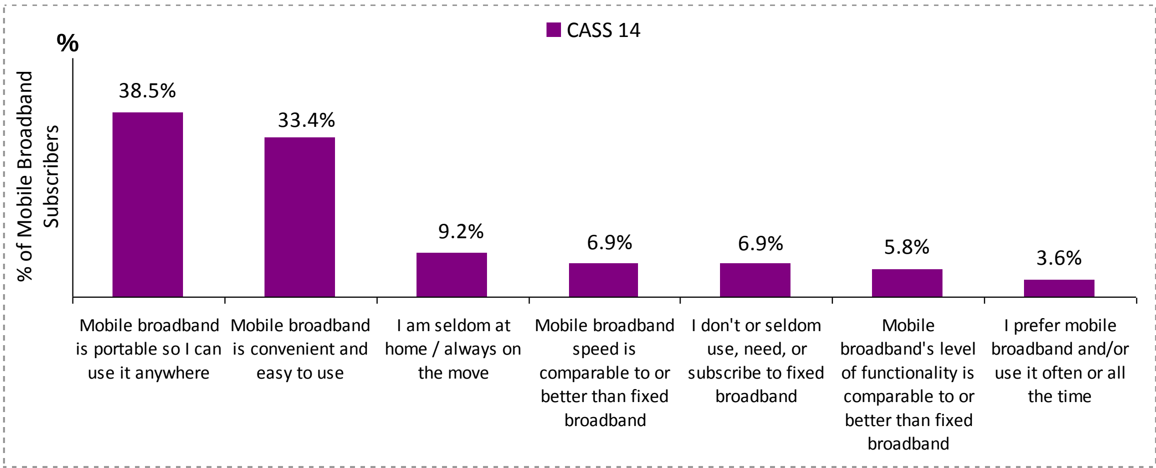
60.7% of mobile broadband subscribers felt that they could not replace fixed broadband with mobile broadband (Figure 4-9).

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



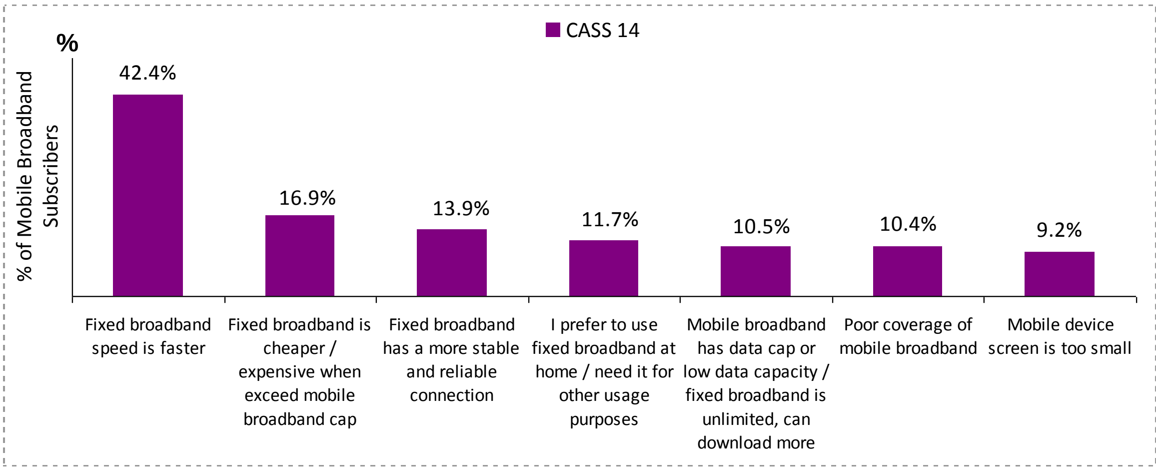
The most common reasons cited for being able to replace fixed broadband were the portability and convenience of using mobile broadband (Figure 4-10).

Figure 4-10 : Top Reasons for Being Able to replace Fixed Broadband Services



On the other hand, the faster speed of fixed broadband was the most cited reason for respondents' inability to replace their fixed with mobile broadband (Figure 4-11).

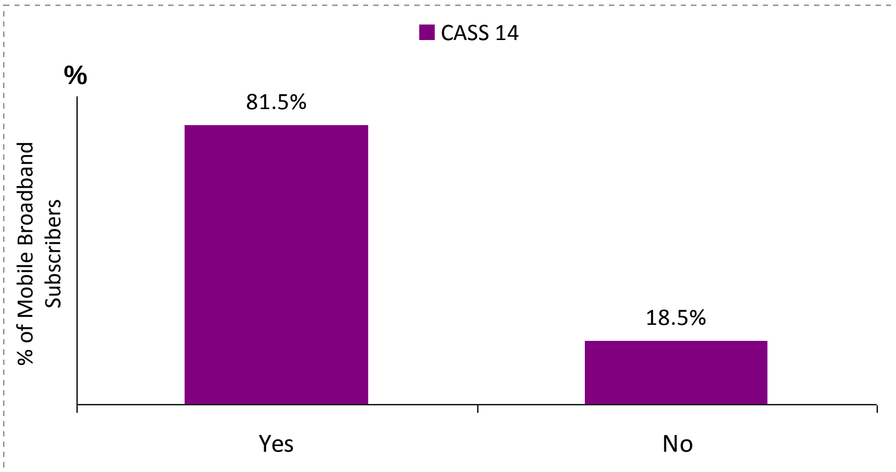
Figure 4-11 : Top Reasons for Not Being Able to replace Fixed Broadband Services



4.5 Data Usage Bill Cap

81.5% of mobile broadband subscribers were aware of the local data usage bill cap that was applicable to their mobile data services (Figure 4-12).

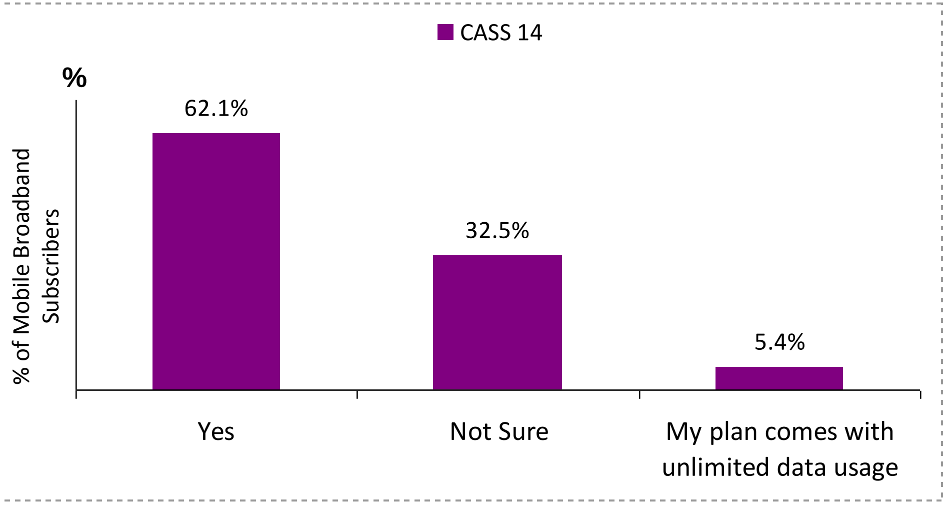
Figure 4-12 : Awareness of local data usage bill cap



4.6 Excess Data Usage Charges

62.1% of mobile broadband subscribers were aware of the amount that they would be charged for excess data usage on their mobile broadband plan. Also, only about 5% of all mobile broadband subscribers were subscribed to an unlimited data usage plan (Figure 4-13).

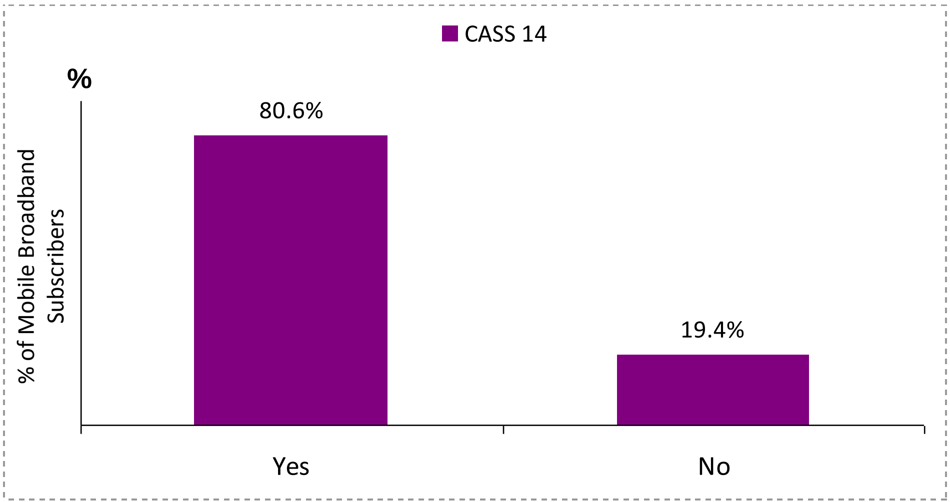
Figure 4-13 : Awareness of the amount charged for excess mobile broadband data usage



4.7 Switching to WIFI at Home

About 80% of mobile broadband subscribers indicated that, when at home, they would switch to using fixed broadband via WIFI for Internet access on their mobile devices instead of continuing to use mobile broadband (Figure 4-14).

Figure 4-14 : Do you switch to Fixed Broadband via WIFI on mobile devices when at home?

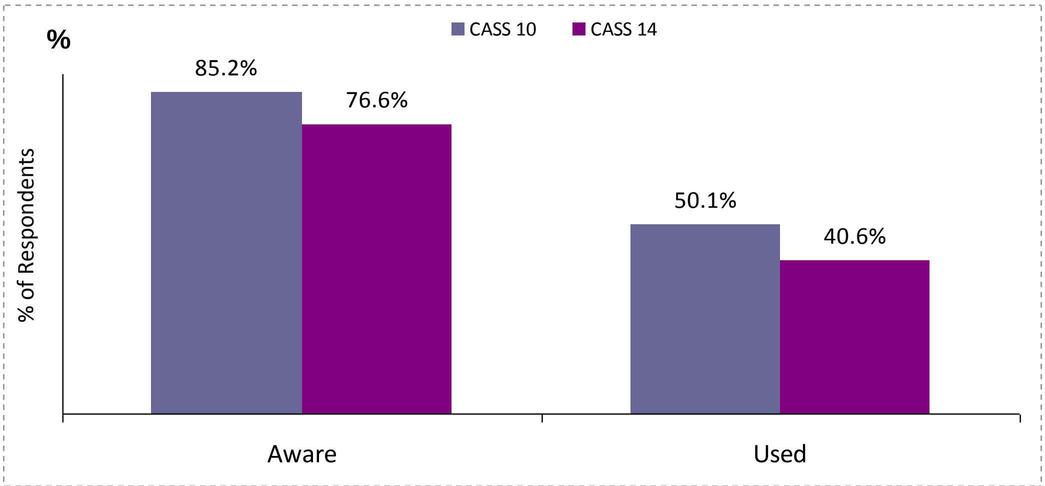


5 INTERNATIONAL ROAMING

5.1 Awareness and Usage

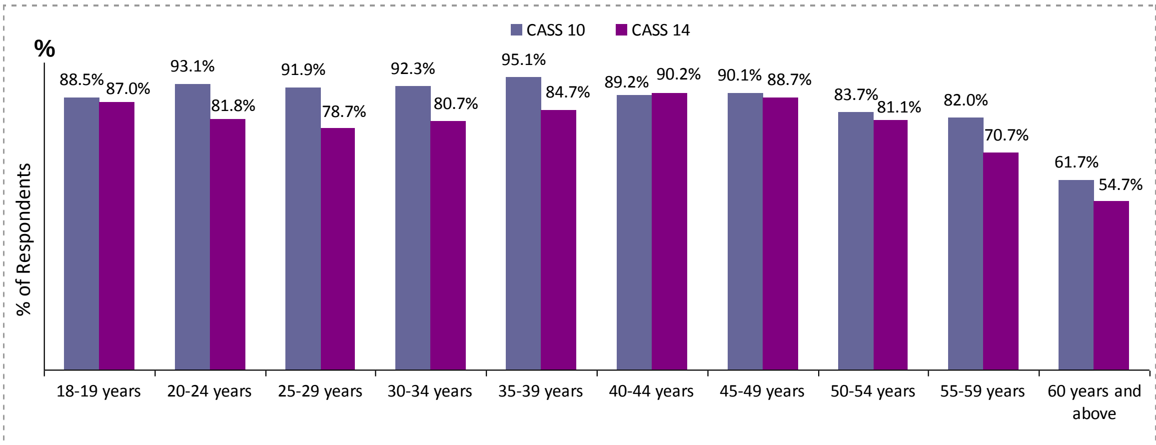
From 2010 to 2014, both respondents' awareness and usage of conventional roaming services such as roaming voice calls and SMSes declined. In 2014, about 3 in 4 respondents were aware of the service, and about 2 in 5 had used it in the past 1 year (Figure 5-1).

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



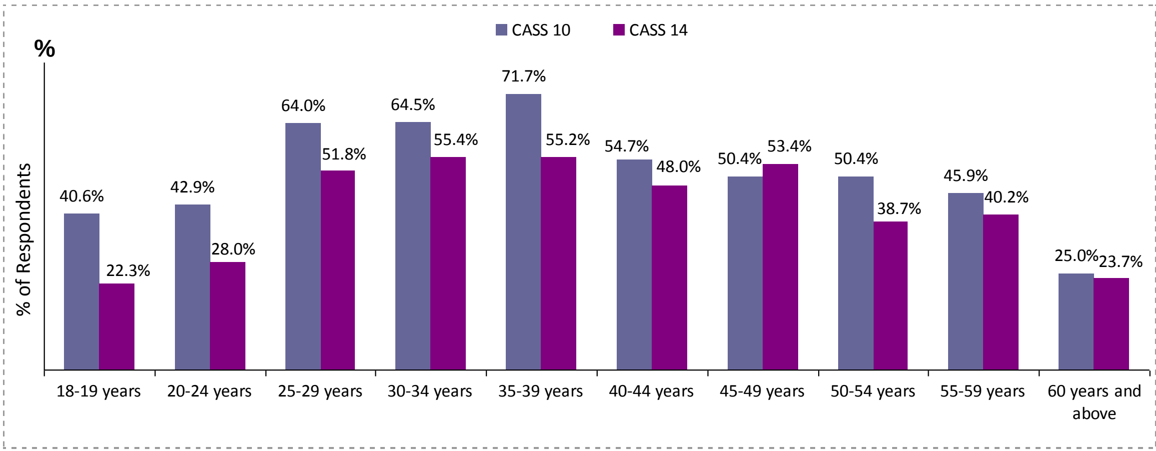
Awareness of conventional roaming services such as roaming voice calls and SMSes declined among respondents aged 20-39 and 55-59 years old (Figure 5-2).

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



In terms of usage of conventional roaming services such as roaming calls and SMSes, respondents aged 18 to 39 years old generally had large declines compared to 2010 (Figure 5-3).

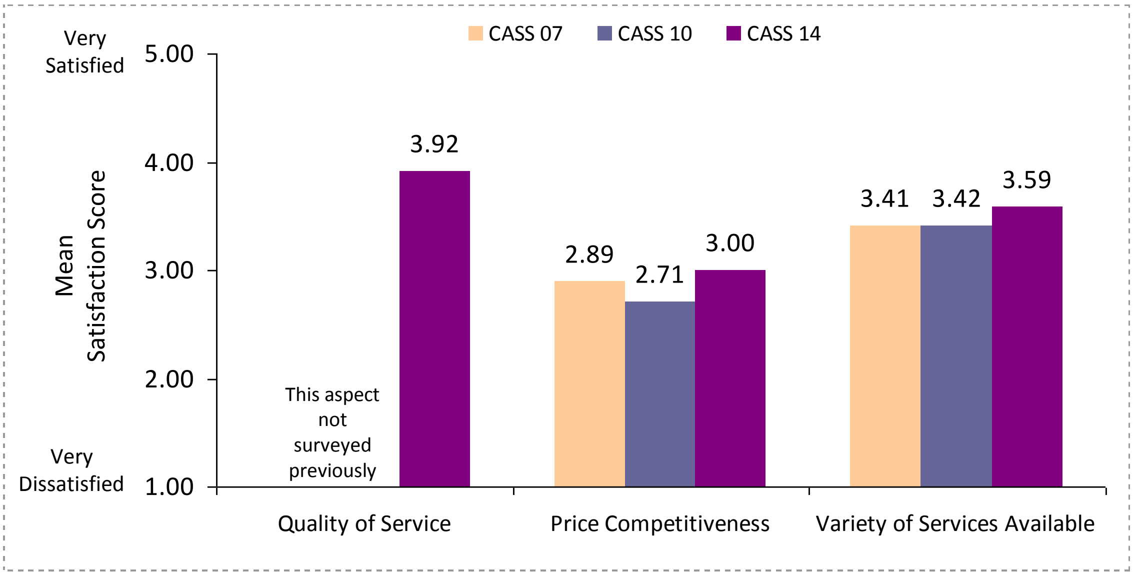
Figure 5-3 : Usage of Conventional Roaming Services by Age



5.2 Satisfaction with International Roaming

In 2014, mean scores for satisfaction with price competitiveness and service variety of international roaming increased significantly compared to 2010. Nevertheless, satisfaction mean score for service quality was highest at 3.92 (Figure 5-4).

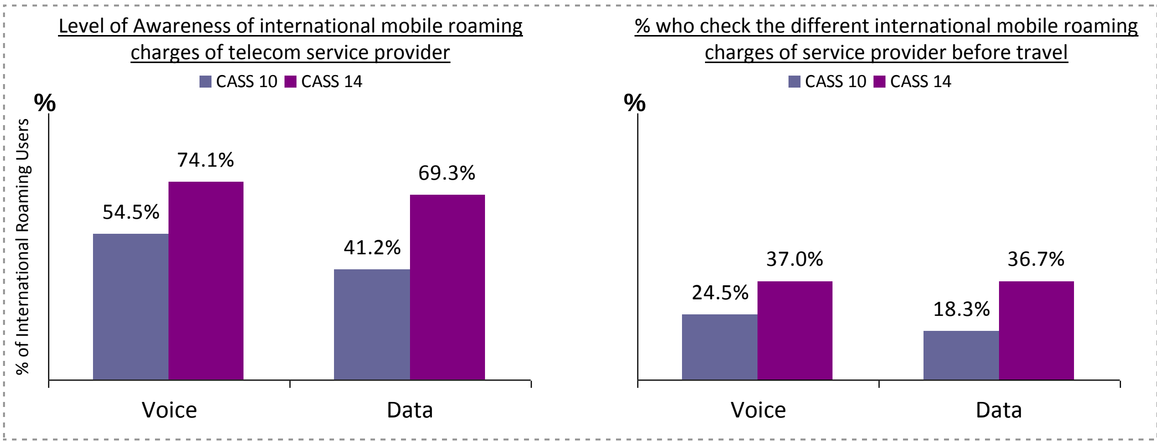
Figure 5-4 : Satisfaction with International Roaming (Mean Score)



5.3 Mobile Roaming Charges

In 2014, users of international roaming services were significantly more aware of the international mobile roaming charges for voice and data, and were also more likely to check the different charges before travelling (Figure 5-5).

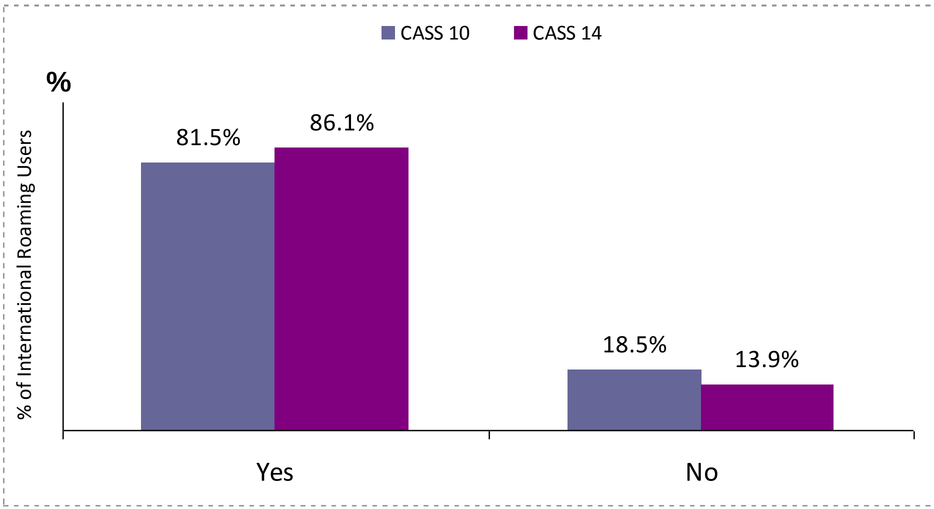
Figure 5-5 : Awareness of and Likelihood to Check International Mobile Roaming Charges



5.4 Alternatives to International Roaming

Awareness of international roaming alternatives remained high in 2014, and had also increased significantly from 81.5% in 2010 to 86.1% in 2014 (Figure 5-6).

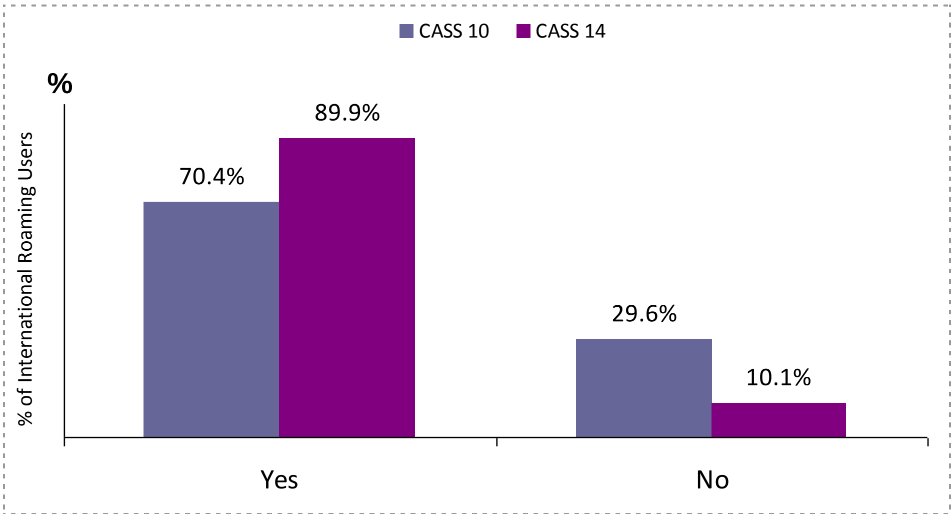
Figure 5-6 : Awareness of Alternatives to International Roaming



5.5 Data Roaming

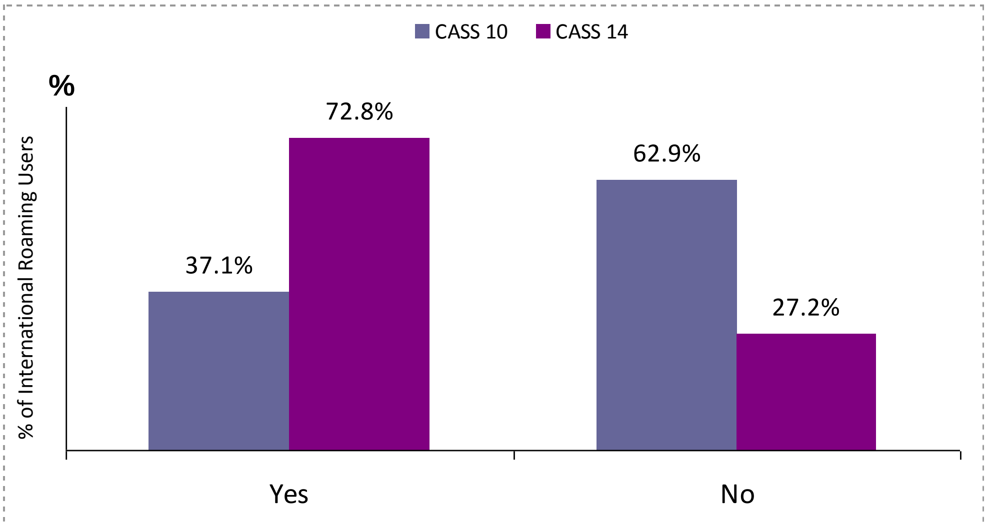
Showing a substantial increase compared to 2010, most respondents were aware that they could disable international data roaming service by manually switching it off or by contacting their service provider (Figure 5-7).

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



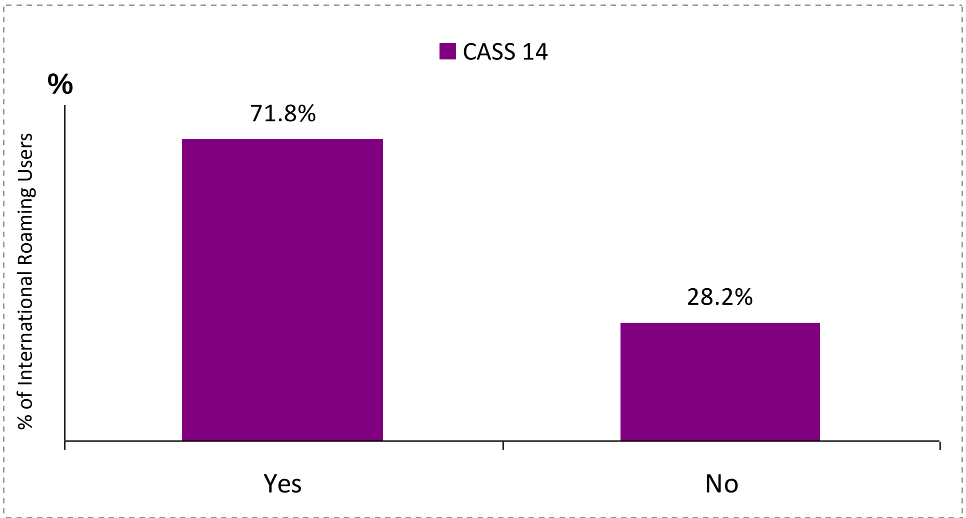
Respondents' awareness of data roaming plans with flat rates for fixed or unlimited data usage almost doubled in 2014 to 72.8%, a substantial increase compared to 2010 (Figure 5-8).

Figure 5-8 : Awareness of Data Roaming Plans with Flat Rates for Data Usage



More than 7 in 10 respondents were aware that they could contact their service provider to activate a data roaming cap so as to prevent bill shock (Figure 5-9)

Figure 5-9 : Awareness of Ability to Activate Data Roaming Cap

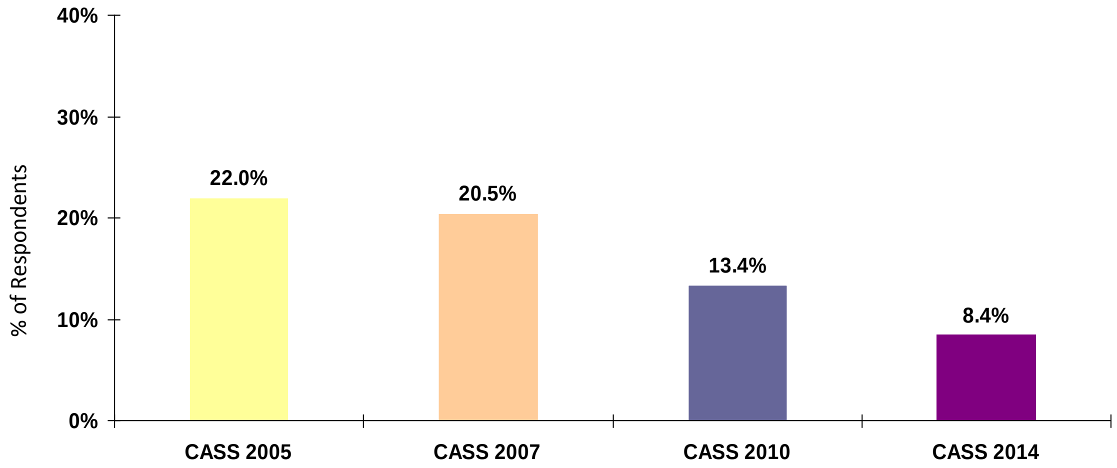


6 PAYPHONE SERVICES

6.1 Usage of Payphone Services

Usage of payphones had declined sharply over the past 9 years, falling from 22% in 2005 to 8.4% in 2014 (Figure 6-1).

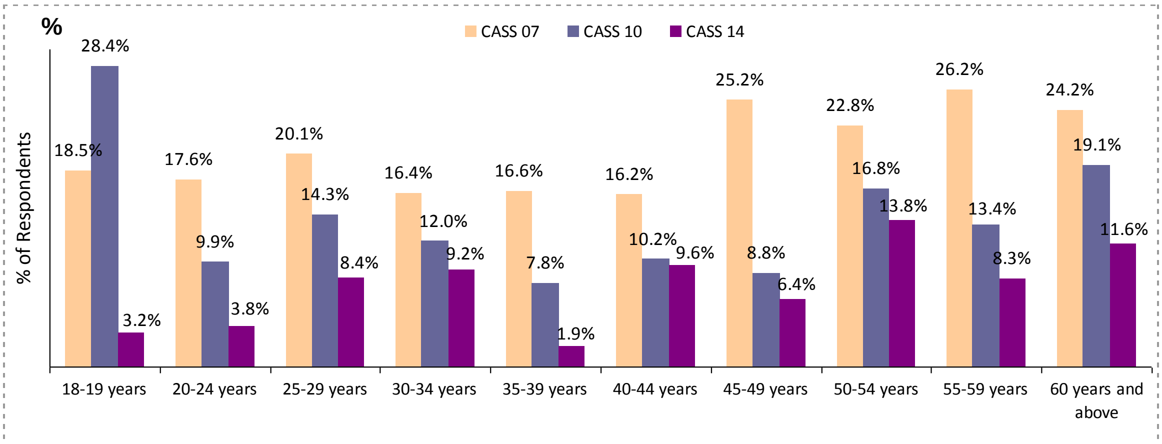
Figure 6-1 : Usage of Payphone Services



Note: 'Usage' = Usage of payphone services at least once in the last 6 months.

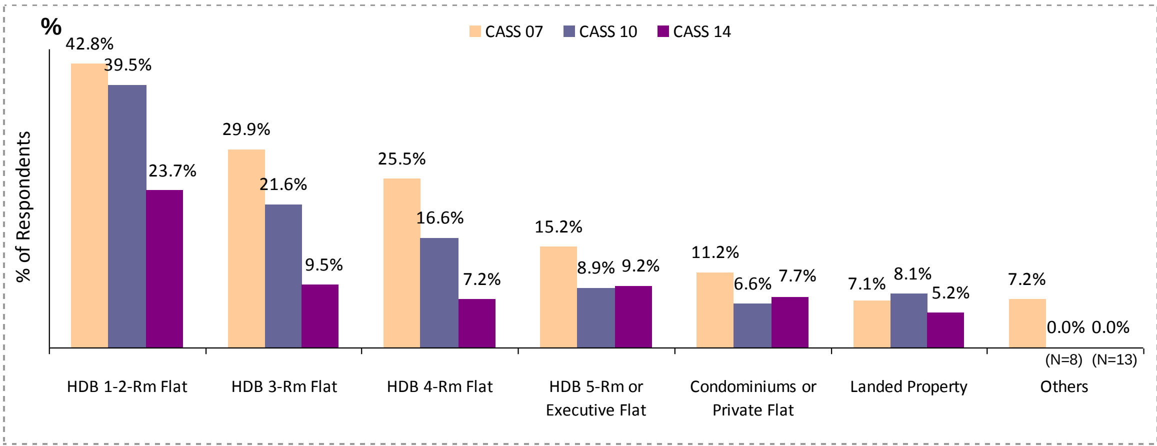
Across all age groups, usage of payphones had mostly declined over the past 7 years. However, usage among respondents aged 50 years old and above was still higher compared to other age ranges (Figure 6-2).

Figure 6-2 : Usage of Payphone Services by Age



There was a steep decline in payphone usage for respondents staying in HDB 1-2 Room, 3 Room, and 4 Room flats (Figure 6-3).

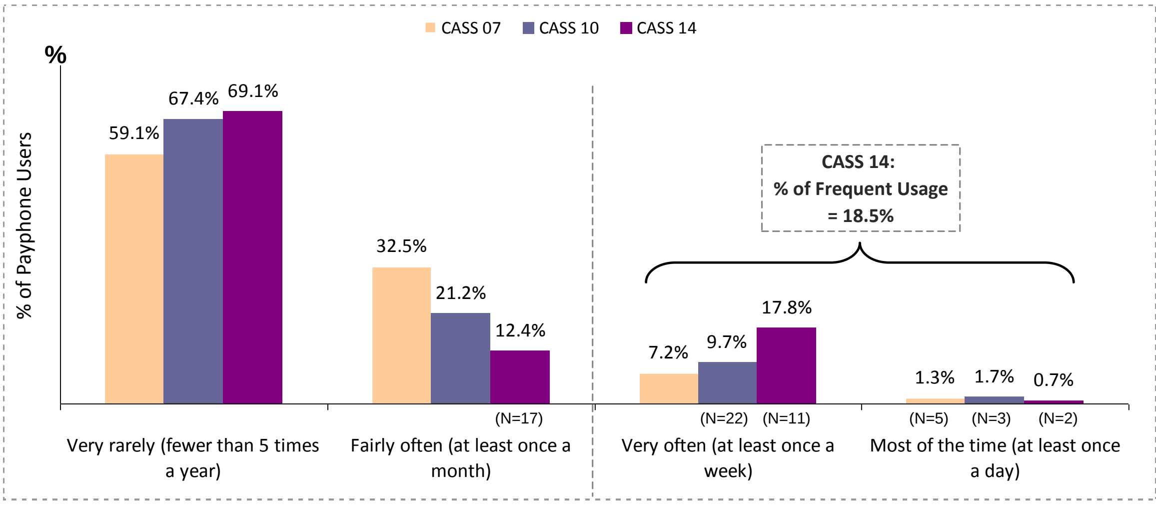
Figure 6-3 : Usage of Payphone Services by Housing Type



6.2 Frequency of Usage

Compared to 2010, frequency of payphone usage remained consistently low, with almost 70% of payphone users claiming to have used the service fewer than 5 times a year in 2014 (Figure 6-4).

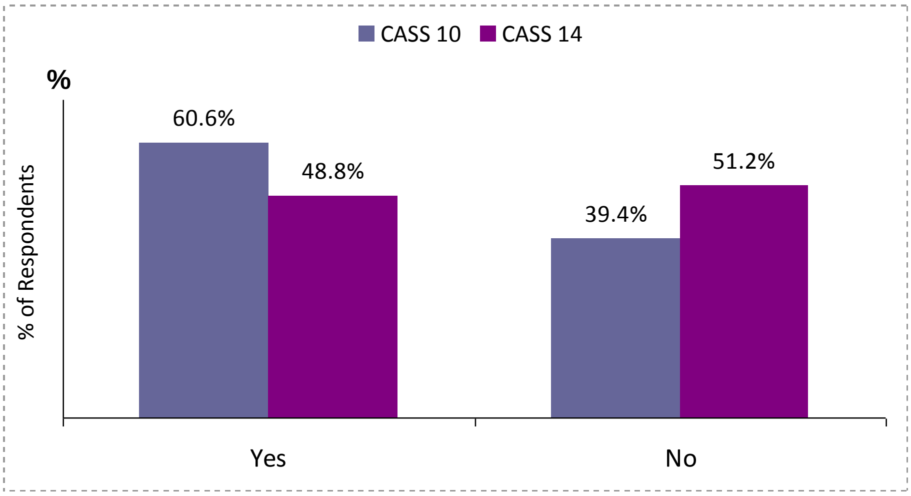
Figure 6-4 : Frequency of Payphone Usage



6.3 Attitude towards Payphone as a Necessity

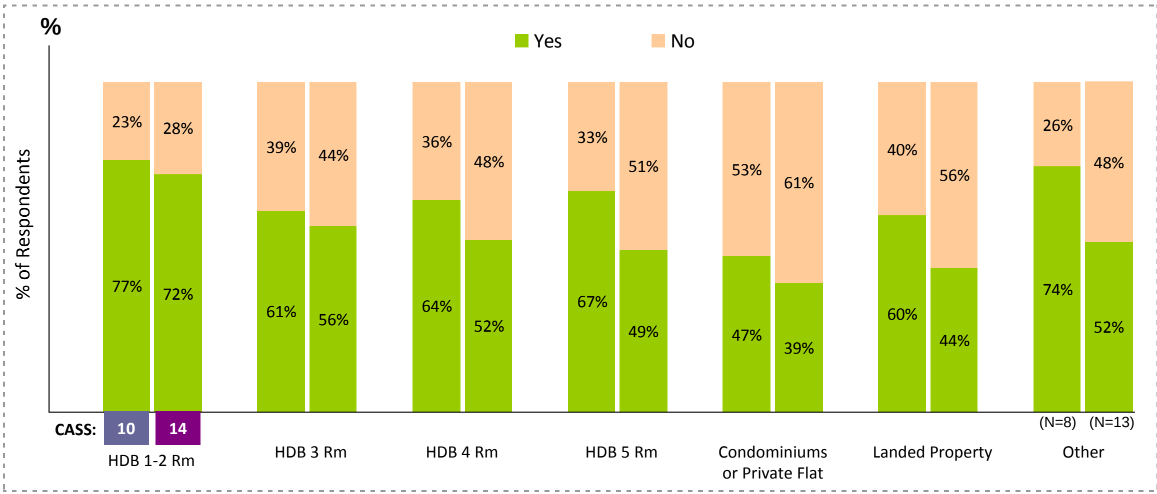
About half of respondents opined that payphones are no longer a necessity, a substantial increase compared to 2010 (Figure 6-5).

Figure 6-5 : Opinion on whether Payphone was Still a Necessity



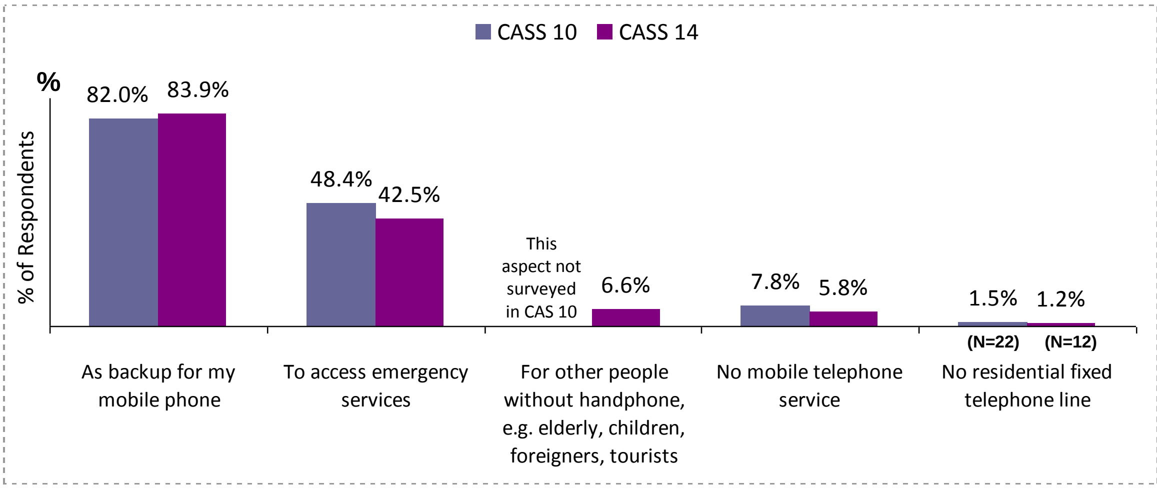
In a breakdown of opinions on payphones' necessity by housing type (Figure 6-6), respondents staying in HDB 4-room and 5-room flats as well as landed property were significantly less likely to feel that payphones were still necessary. However, a large majority of respondents staying in HDB 1-2-room flats, at slightly more than 70%, considered payphones to still be necessary.

Figure 6-6 : Opinion on whether Payphone was Still a Necessity by Housing Type



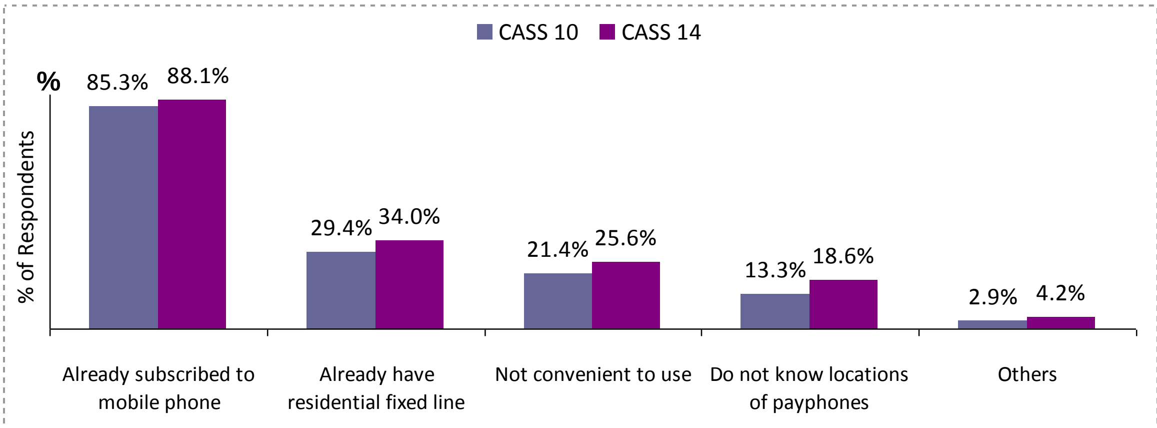
A majority (83.9%) of the respondents who felt that the payphone was still a necessary service cited payphones' function as a backup for unexpected situations as the main reason (Figure 6-7).

Figure 6-7 : Reasons for Payphones still being Necessary



On the other hand, respondents who thought that payphones were no longer necessary primarily cited already having a mobile phone as the reason; almost 90% of them gave this reason (Figure 6-8).

Figure 6-8 : Reasons for Payphones Not being Necessary



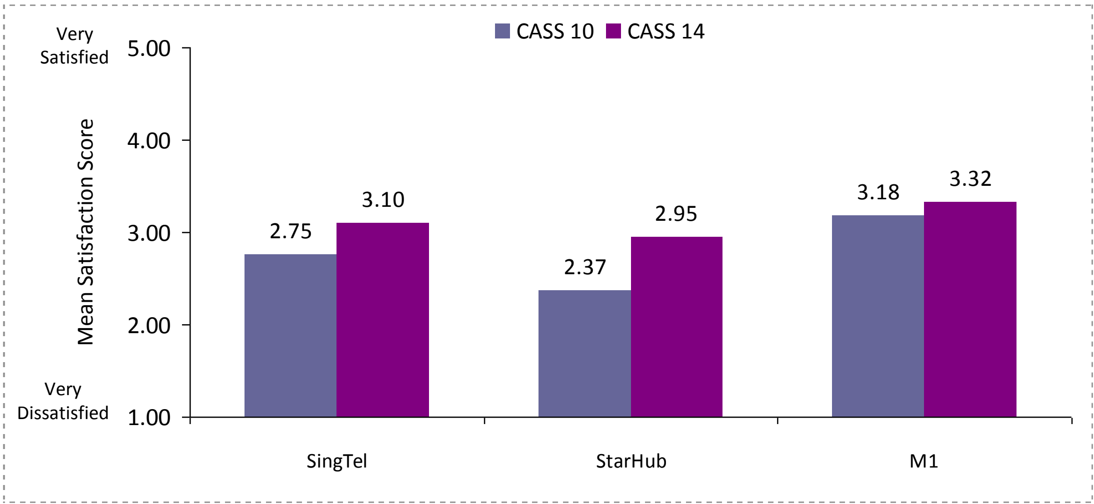
7 CUSTOMER CARE SERVICES

7.1 Satisfaction with Operators' Customer Care Services

For the three major operators (SingTel, StarHub, and M1), respondents were generally least satisfied with hotline waiting times, as compared to the other aspects of customer care (time taken to resolve complaints and competency of customer service officer).

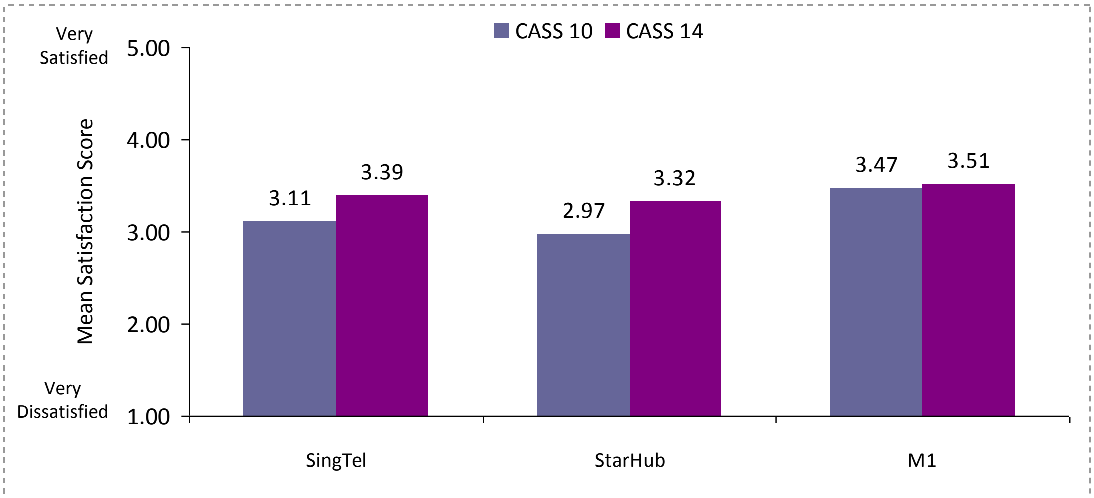
Nevertheless, satisfaction with hotline waiting times for the three major service providers had actually improved since 2010. This is evidenced in the significant increase in satisfaction levels (Figure 7-1).

Figure 7-1 : Hotline Waiting Time to speak to a Customer Service Officer (Mean Score)



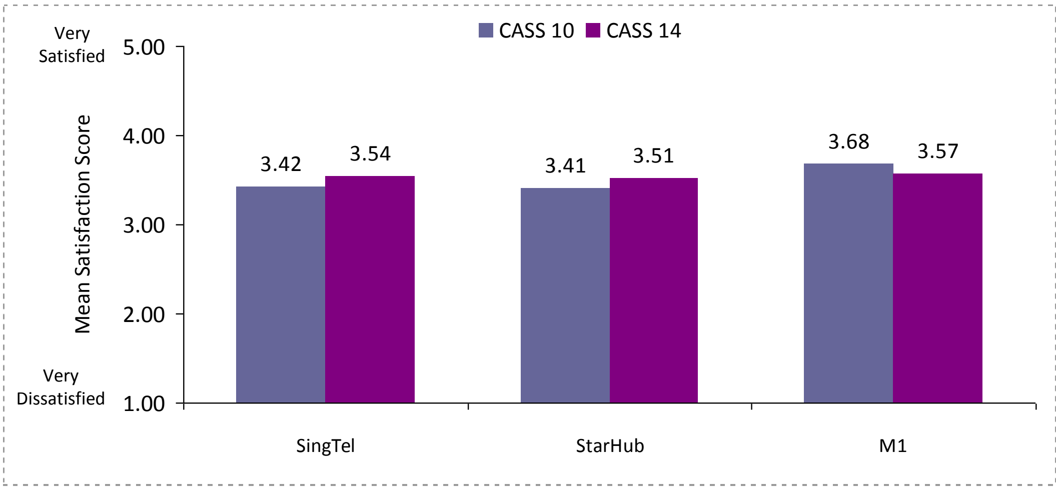
2014 saw substantial improvements in respondents' satisfaction with time taken to resolve complaints for SingTel and StarHub. Significant increases in the mean scores of satisfaction were observed (Figure 7-2).

Figure 7-2 : Time Taken to Resolve Complaint (Mean Score)



With regards to satisfaction with competency of customer service officers, SingTel enjoyed significant improvement in its satisfaction mean score compared to 2010; on the other hand, satisfaction levels for StarHub and M1 remained fairly consistent compared to 2010 (Figure 7-3).

Figure 7-3 : Competency of Customer Service Officer (Mean Score)



7.2 Suggestions for Improvement

When asked for areas where customer care services could be further improved, most respondents suggest a reduction in hotline waiting times, amongst other customer care improvements. It was still the primary suggestion despite a significant decrease compared to 2010 (Figure 7-4).

Figure 7-4 : Customer Care – Suggestions / Improvements