CONSUMER AWARENESS AND SATISFACTION SURVEY 2007

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INTRODUCTION

- The Consumer Awareness and Satisfaction Survey ("CASS 07") aims to measure consumers' awareness and usage of, and satisfaction with selected telecom services in Singapore. Consumers were asked for their satisfaction with the quality of telecom services they have used in terms of reliability and availability, variety of services available given the range of products and services currently offered in the market, price competitiveness of the various service offerings by service providers and customer service offered by the service operators.

- The CASS is a biennial survey, and the CASS 07 is the third one that IDA has conducted since full liberalisation of the Singapore telecommunication market in year 2000. Comparisons with the previous survey findings in 2005 are provided in this report where available and appropriate.

- The scope of telecom services surveyed includes: (a) Fixed Line Telephone Service; (b) Mobile Telephone Service (including International Roaming, 3G and Premium Rate services); (c) Broadband Internet Service (including Voice over Internet Protocol service); (d) Bundled Services; (e) Payphone Service; (f) Service 100 Directory Enquiry Service; and (g) Printed Directories Service.

SURVEY METHODOLOGY

- In total, 1,500 individuals were interviewed between 3 December 2007 and 11 March 2008. 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 these sampled households, an individual was randomly selected for the survey.

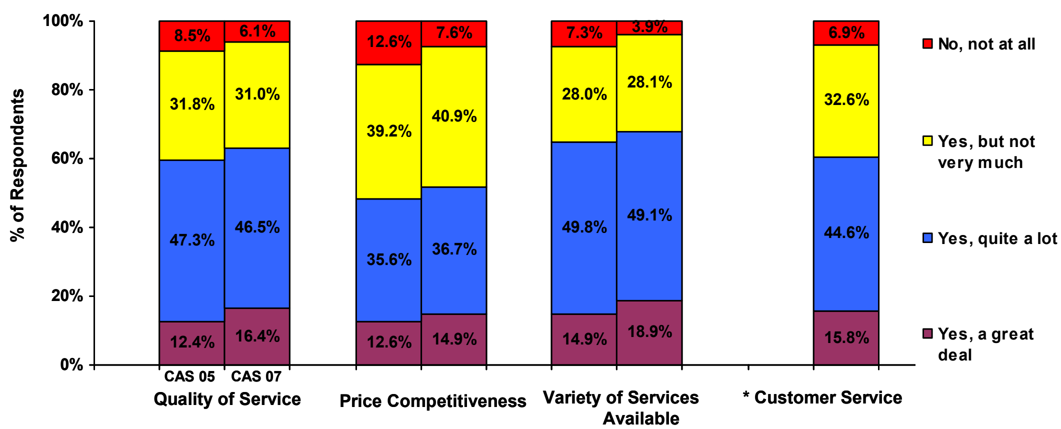
- To be eligible for the survey, the individual must be a Singapore Citizen or Singapore PR aged 18 years and above.

SURVEY FINDINGS

A PERCEIVED IMPROVEMENTS IN TELECOMMUNICATION SERVICES

Compared to 2005, there was a general improvement in consumers' perception of telecom services, across all the aspects measured, since full liberalisation of the Singapore telecommunication market in year 2000 (**Figure A1**).

Figure A1: Perceived Improvements in Telecommunication Services



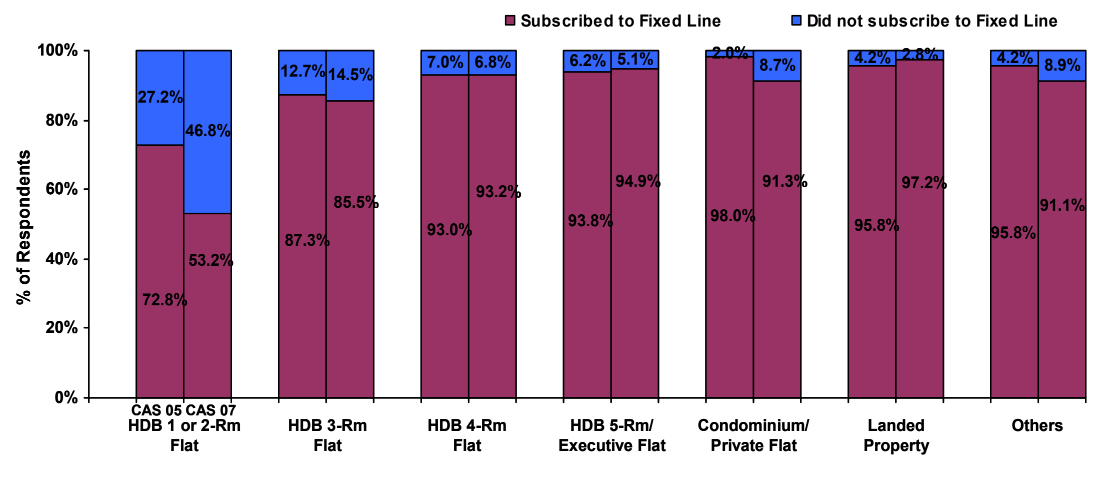
Base: Total resident population aged 18 years and above. *This aspect was not asked in CAS 2005.

B FIXED LINE TELEPHONE SERVICE

Subscription to Fixed Line Telephone Service

In general, there was a decrease in the subscription to fixed line telephone service across most housing types since 2005. However, this was most apparent among those who stayed in HDB 1 or 2-Rm Flats. **Figure B1** shows the breakdown of the subscription by housing type.

Figure B1: Subscription to Fixed Line Telephone Service by Housing Type

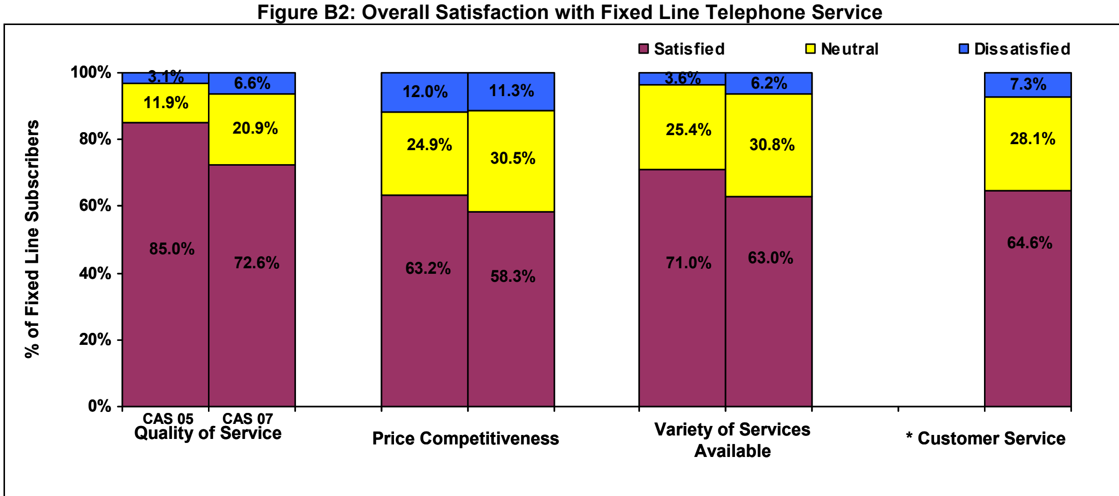


Base: Total resident population aged 18 years and above.

Satisfaction with Fixed Line Telephone Service

Respondents whose households subscribed to fixed line telephone service remained generally satisfied with the quality of service, variety of services, price competitiveness and quality of customer service experienced; however, satisfaction levels have decreased slightly since 2005. The breakdown of overall satisfaction across the four measured aspects is shown in **Figure B2**.

Figure B2: Overall Satisfaction with Fixed Line Telephone Service



Base: Total resident population aged 18 years and above who subscribed to fixed line telephone services. * This aspect was not asked in CASS 05.

C MOBILE TELEPHONE SERVICE

Subscription to Mobile Telephone Service

Subscription to mobile telephone service has generally increased since 2005. **Figure C1** and **Figure C2** provides a breakdown by age and housing type of mobile phone subscribers respectively, while **Figure C3** shows the breakdown by fixed telephone service subscription. As illustrated by **Figure C3**, there was a larger increase in mobile telephone subscription amongst non-fixed line subscribers than fixed line subscribers.

Figure C1: Subscription to Mobile Telephone Service by Age

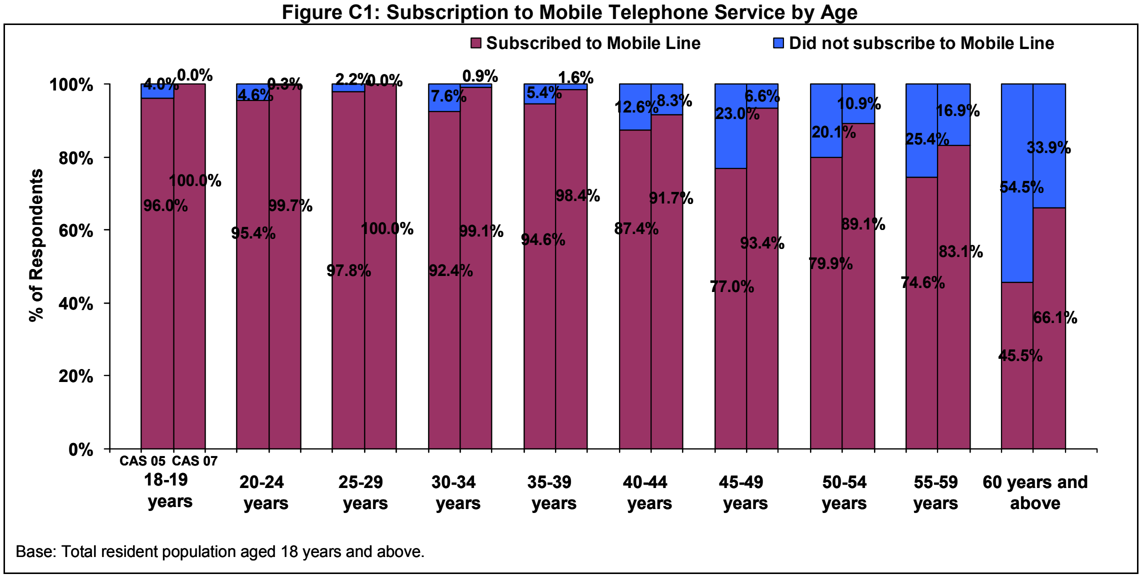


Figure C2: Subscription to Mobile Telephone Service by Housing Type

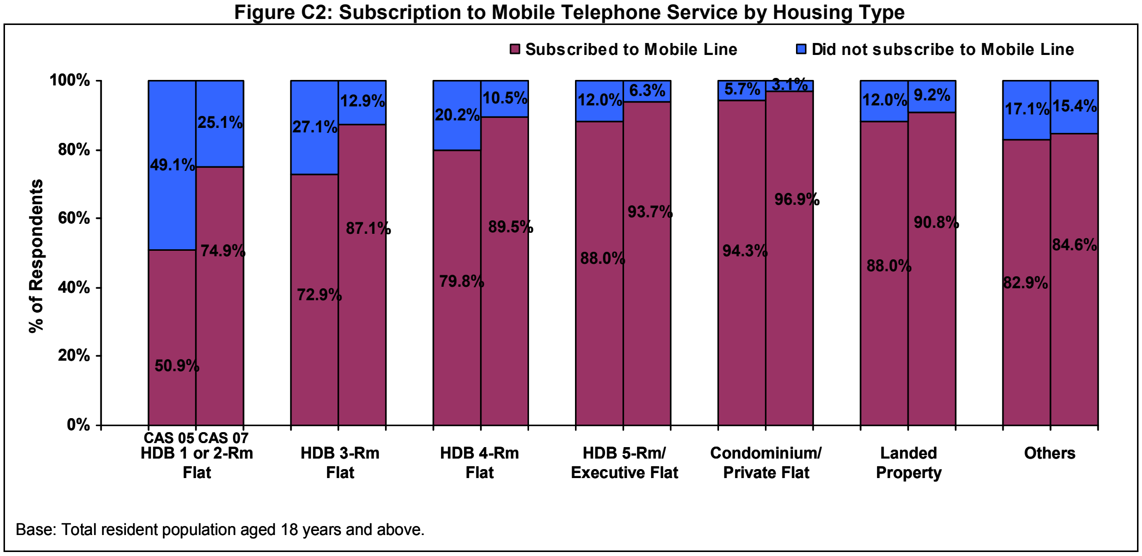
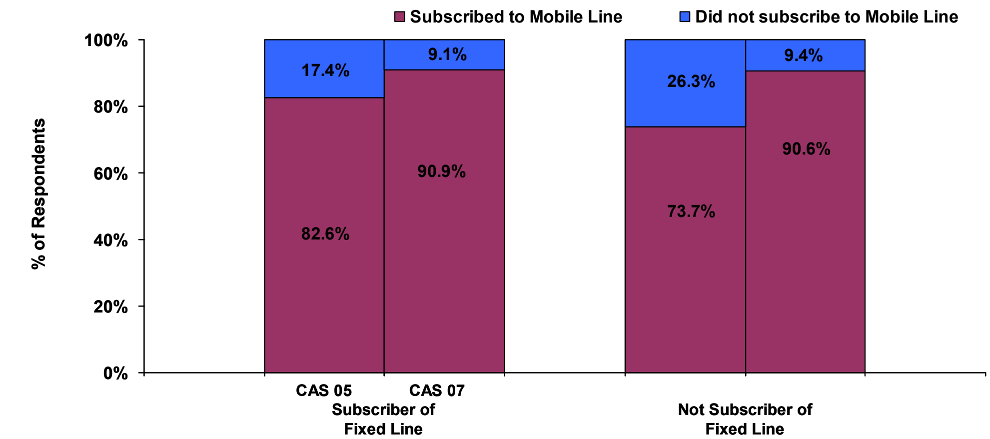


Figure C3: Subscription to Mobile Telephone Service by Subscription of Fixed Line Telephone Service

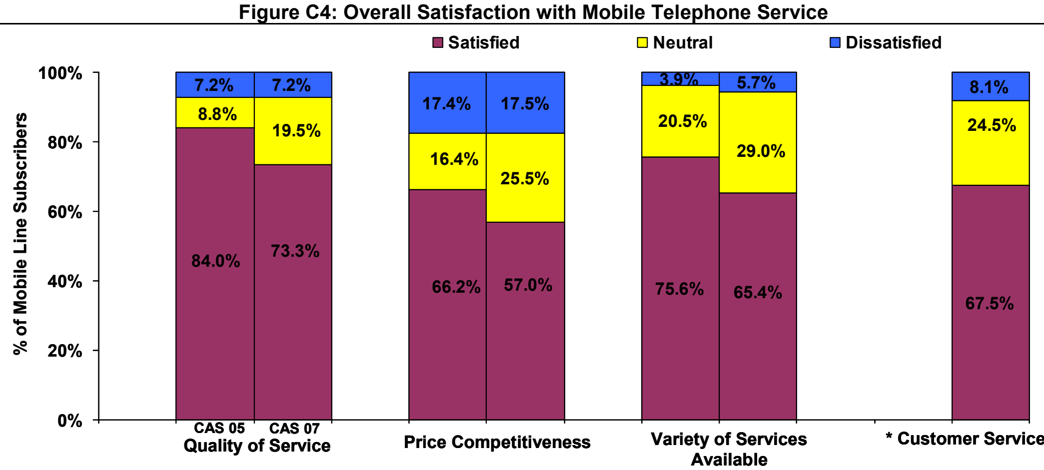


Base: Total resident population aged 18 years and above.

Satisfaction with Mobile Telephone Service

Subscribers of mobile telephone service were generally satisfied with the quality of service, variety of services available, price competitiveness and quality of customer service, although slight decreases in satisfaction level from 2005 were seen (**Figure C4**).

Figure C4: Overall Satisfaction with Mobile Telephone Service



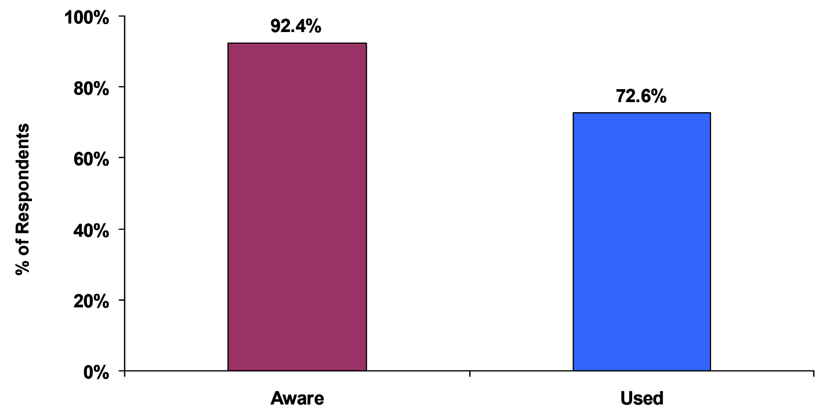
Base: Total resident population aged 18 years and above who subscribed to mobile telephone services. *This aspect was not asked in CASS 05.

D INTERNATIONAL ROAMING SERVICE

Awareness and Usage of International Roaming Service

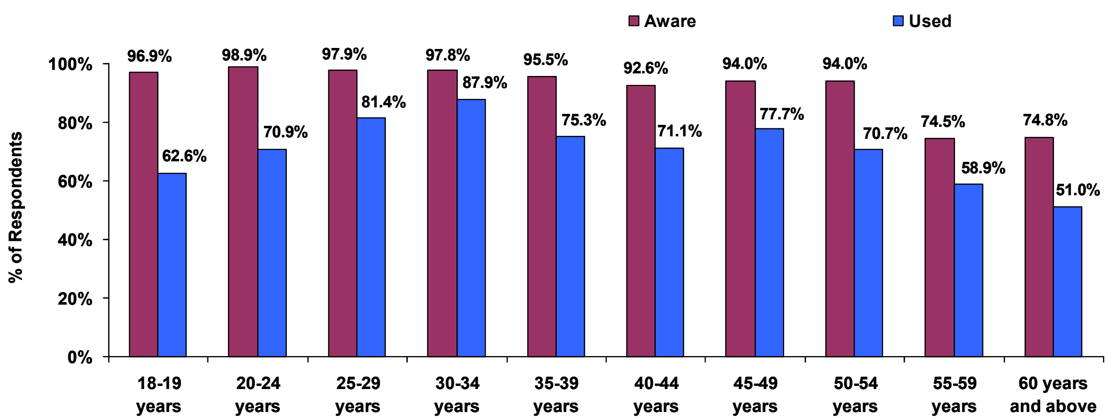
Awareness and usage of international roaming service were relatively high among those who traveled overseas within the past year, as shown in **Figure D1**. **Figure D2** and **Figure D3** provide the breakdown of usage of international roaming service by age and housing type respectively.

Figure D1: Overall Awareness and Usage of International Roaming Service



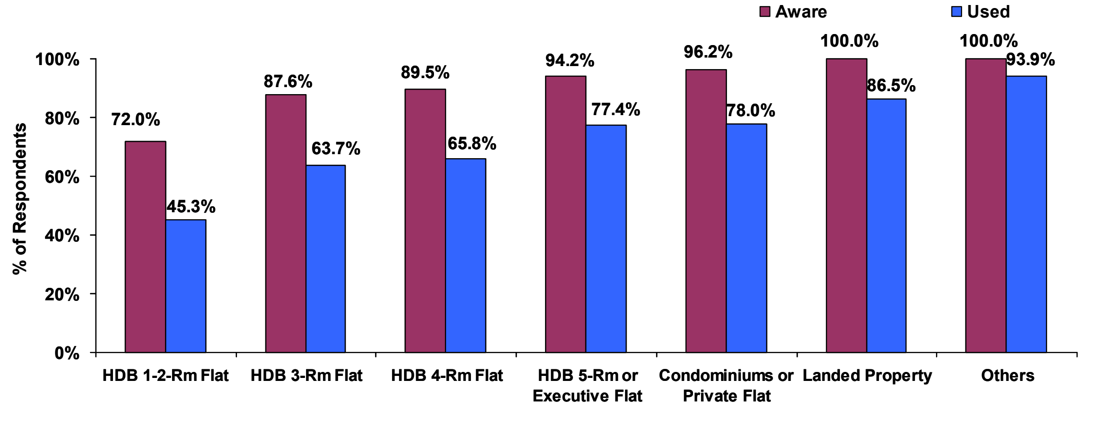
Base: Total resident population aged 18 years and above who travelled in the last 1 year. 'Usage' = Usage in the last 1 year.

Figure D2: Awareness and Usage of International Roaming Service by Age



Base: Total resident population aged 18 years and above who travelled in the last 1 year. 'Usage' = Usage in the last 1 year.

Figure D3: Awareness and Usage of International Roaming Service by Housing Type

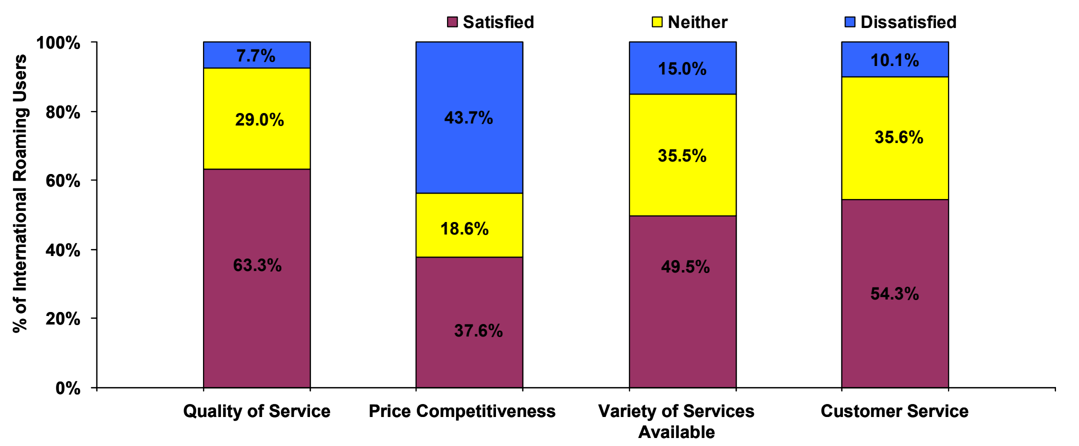


Base: Total resident population aged 18 years and above who travelled in the last 1 year. 'Usage' = Usage in the last 1 year.

Satisfaction with International Roaming Service

Generally, users were satisfied across the four measured aspects in relation to international roaming service (**Figure D4**).

Figure D4: Overall Satisfaction with International Roaming Service

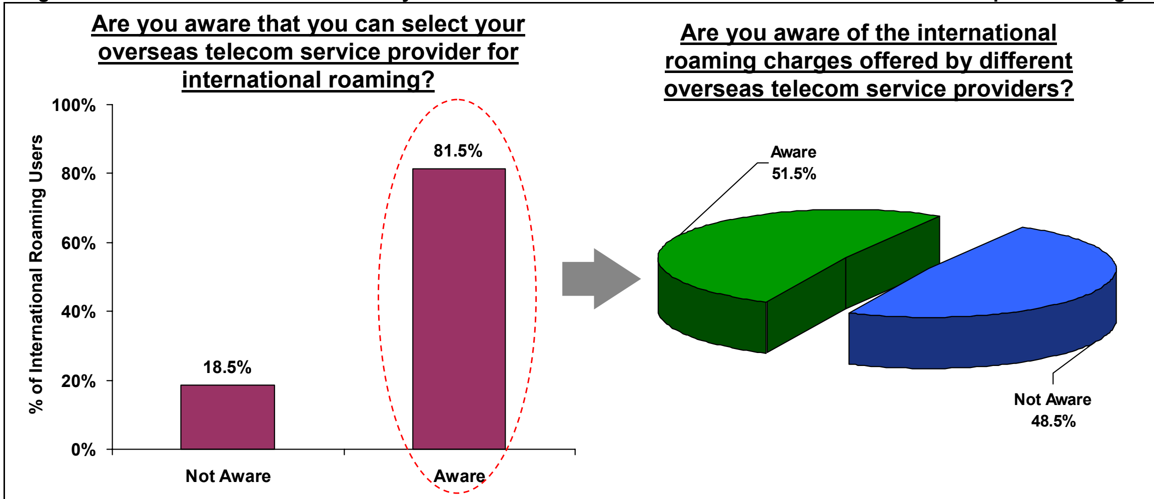


Base: Total resident population aged 18 years and above who used international roaming services.

Awareness of International Roaming Charges by Overseas Telecom Service Providers

More than 80% of those who used international roaming service in the last year were aware of the ability to select their overseas telecom service providers for international roaming; of these, slightly more than half were aware of the international roaming charges offered by different overseas telecom service providers (**Figure D5**).

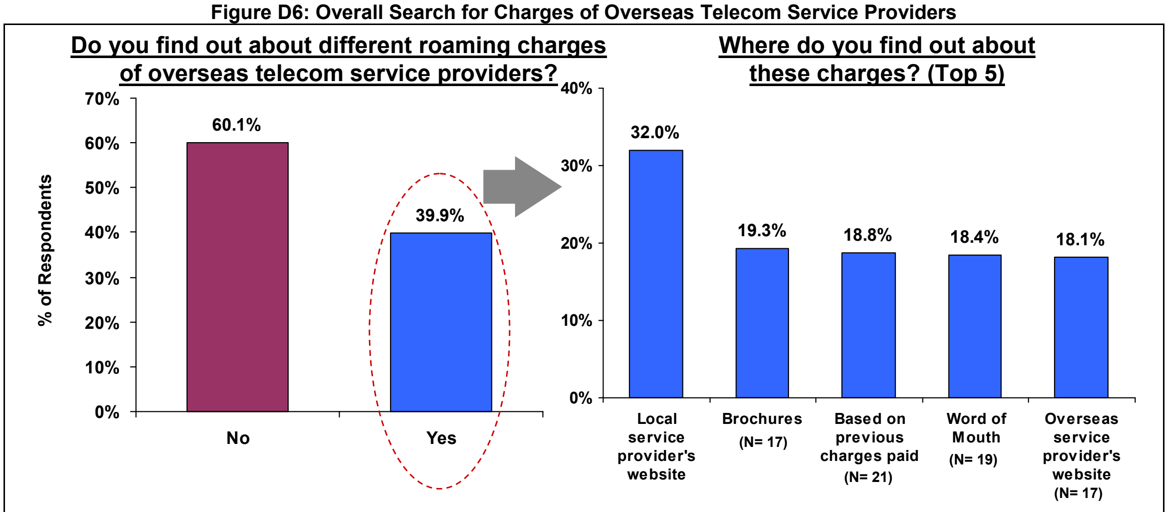
Figure D5: Overall Awareness and Ability to Select Overseas Telecom Service Providers and their Respective Charges



Note: This analysis is based on all respondents who used international roaming services

Among those who were aware of the charges offered by different overseas telecom service providers, close to 40% found out about charges before they travel; of this group, most obtained their information from the local service providers' websites (**Figure D6**).

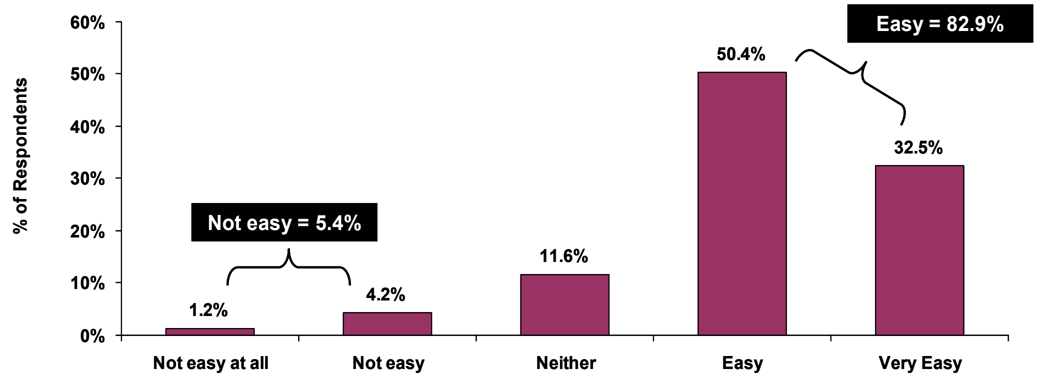
Figure D6: Overall Search for Charges of Overseas Telecom Service Providers



Note: Analysis is based on all respondents who were aware of different roaming charges offered by overseas telecom service provider.

More than 80% of respondents who were aware of the different roaming charges felt that it was easy to find out about the charges (**Figure D7**).

Figure D7: Ease of Finding Out About the Charges of Overseas Telecom Service Providers

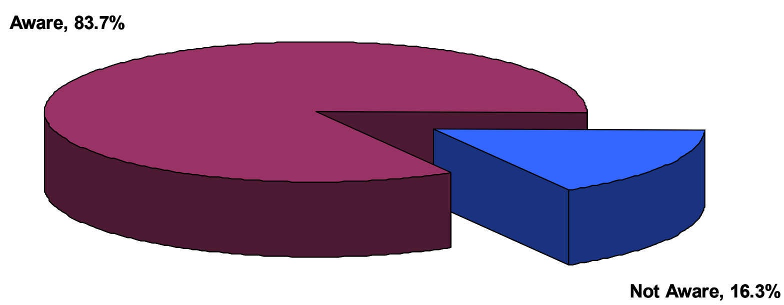


Base: Total resident population aged 18 years and above who were aware of different roaming charges offered by overseas telecom service provider.

Awareness of Alternatives to International Roaming Service

Among those who were aware of international roaming service, more than 8 in 10 respondents knew about other ways to make calls back to Singapore using their mobile phones (**Figure D8**).

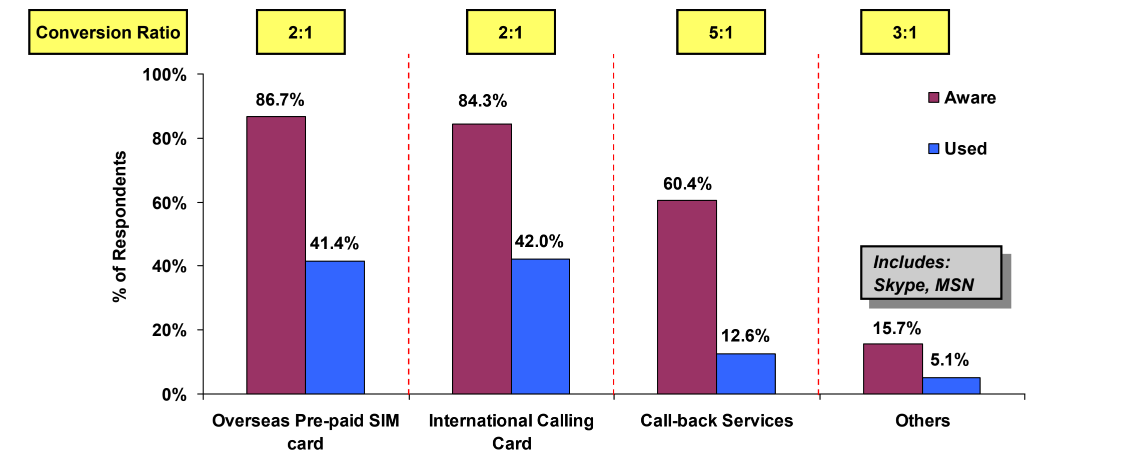
Figure D8: Overall Awareness of Alternatives to International Roaming Service



Base: Total resident population aged 18 years and above who were aware of international roaming services.

Among the alternatives to international roaming service, overseas pre-paid SIM card and international calling card were the highest in converting awareness to usage – for every 2 persons who were aware, 1 had used before (**Figure D9**).

Figure D9: Awareness and Usage of Alternatives to International Roaming Service

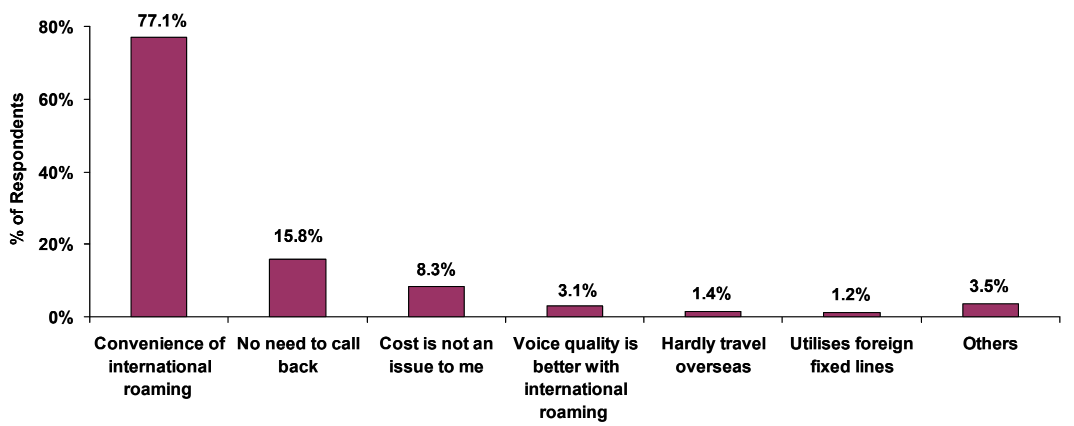


Note: Analysis is based on all respondents who were aware of alternatives to international roaming

Reasons for Not Using Alternatives to International Roaming Service

The convenience of using international roaming was cited as the main factor for not using the alternatives **(Figure D10)**.

Figure D10: Reasons for not using Alternatives to International Roaming Service



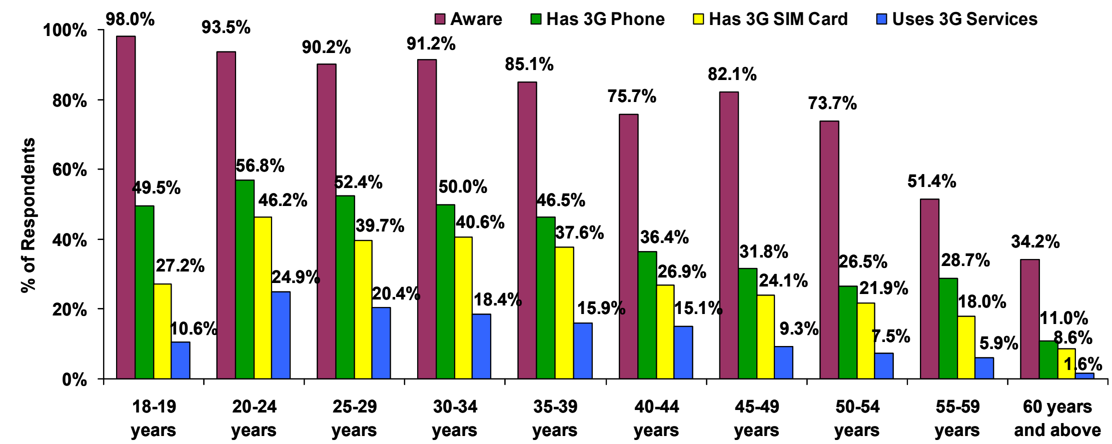
Base: Total resident population aged 18 years and above who did not use any alternatives to international roaming services. Responses are based on a multiple-response question, hence percentages do not add up to 100%.

E 3G SERVICE

Awareness and Usage of 3G Service

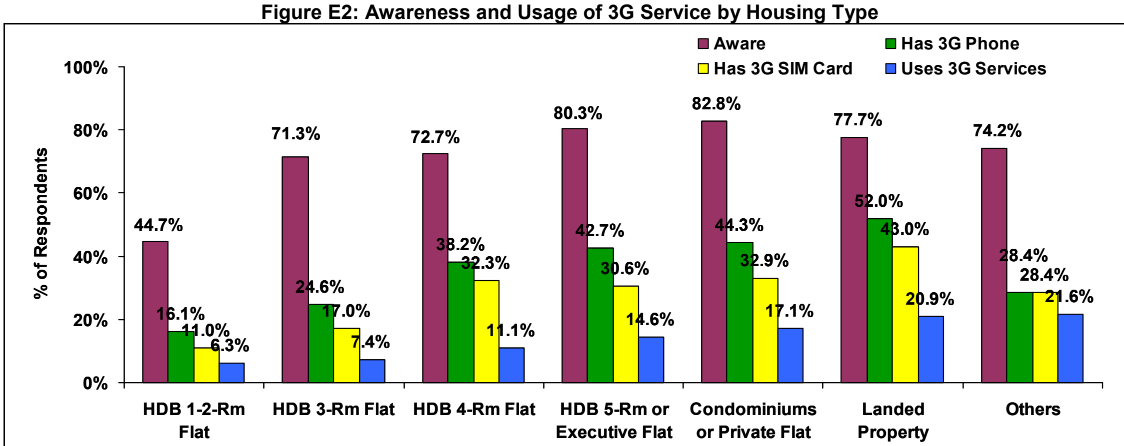
In general, the majority of respondents were aware of 3G service although much fewer had used 3G service within the past 6 months. Breakdown of the awareness and usage of 3G service by age and housing type are shown in **Figure E1** and **Figure E2** respectively.

Figure E1: Awareness and Usage of 3G Service by Age



Base: Total resident population aged 18 years and above. 'Usage' = Usage in the last 6 months.

Figure E2: Awareness and Usage of 3G Service by Housing Type

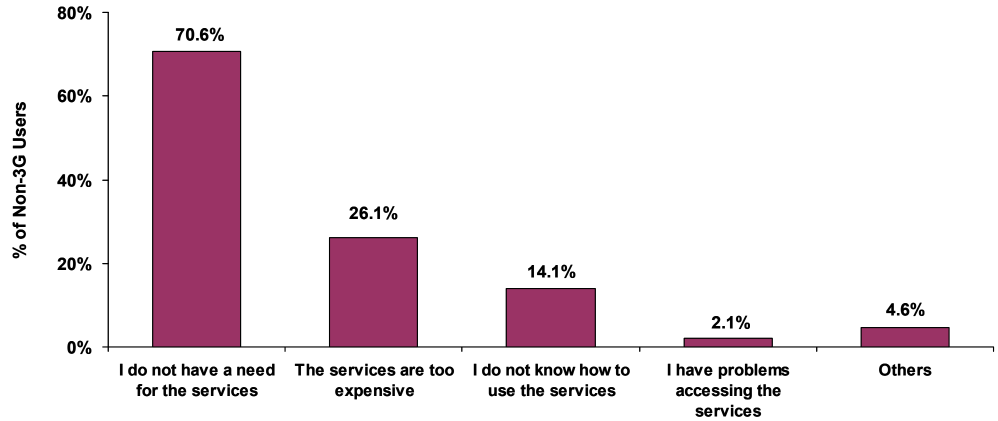


Base: Total resident population aged 18 years and above. 'Usage' = Usage in the last 6 months.

Reasons for Not Using 3G Service

The main reason cited by respondents for not using 3G service was lack of need for the service (**Figure E3**).

Figure E3: Reasons for not using 3G Service

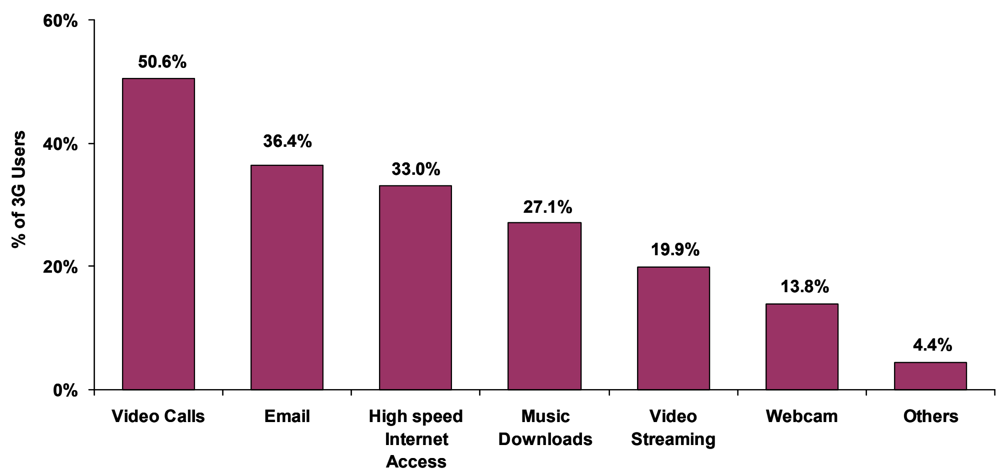


Base: Total resident population aged 18 years and above who do not use 3G services. Responses are based on a multiple-response question, hence percentages do not add up to 100%. 'Usage' = Usage in the last 6 months.

Types of 3G Service Used

For those who had used 3G service, most used it for video calls and emails (**Figure E4**).

Figure E4: Types of 3G Service Used

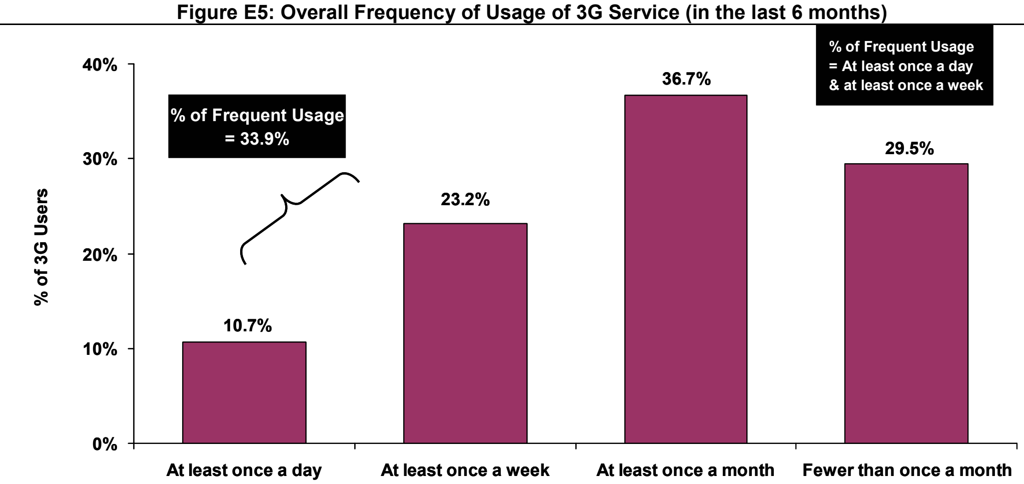


Base: Total resident population aged 18 years and above who used 3G services. Responses are based on a multiple-response question, hence percentages do not add up to 100%. 'Usage' = Usage in the last 6 months.

Frequency of Usage of 3G Service

For those who had used 3G service, more than a third used it at least once a week (**Figure E5**).

Figure E5: Overall Frequency of Usage of 3G Service (in the last 6 months)

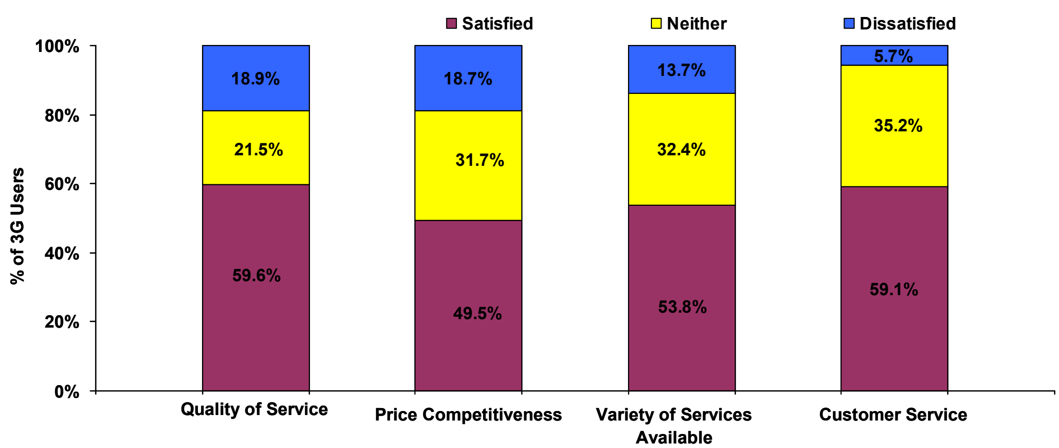


Base: Total resident population aged 18 years and above who used 3G services. 'Usage' = Usage in the last 6 months.

Satisfaction with 3G Service

Generally, users were satisfied across the four measured aspects in relation to 3G service (**Figure E6**).

Figure E6: Overall Satisfaction with 3G Service



Base: Total resident population aged 18 years and above who used 3G services.

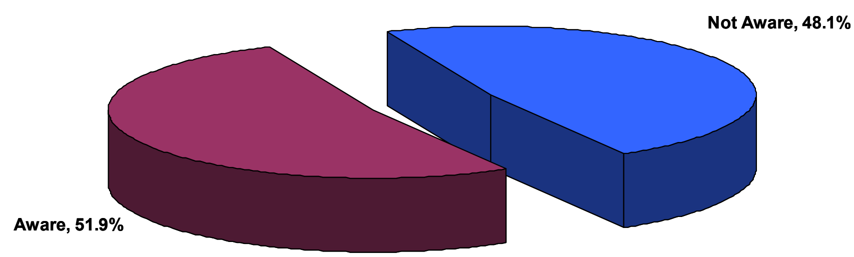
F PREMIUM RATE SERVICE[1]

Awareness and Usage of Premium Rate Service

More than half of the respondents were aware of premium rate service (**Figure F1**). Breakdown of the awareness of premium rate service by age and housing type are shown in **Figure F2** and **Figure F3** respectively.

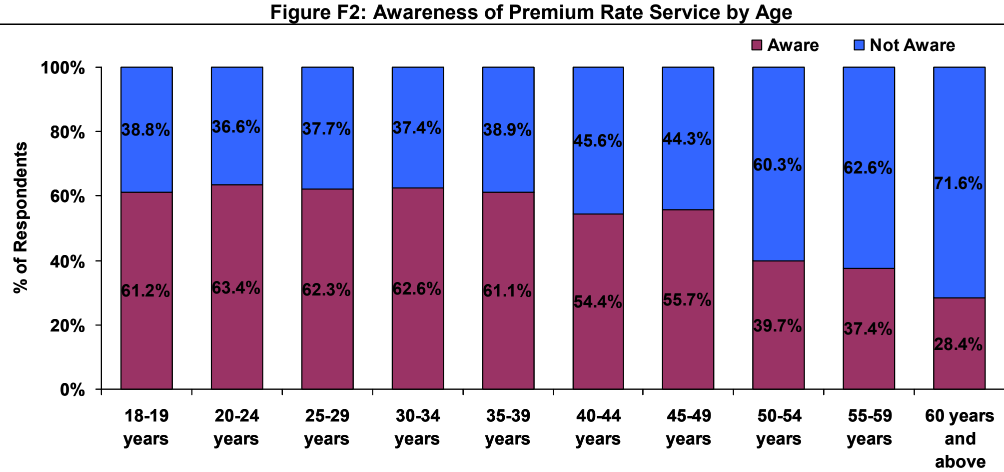
However, only less than 20% of respondents had used premium rate service (**Figure F4**). Breakdown of usage by age and housing type can be found in **Figure F5** and **Figure F6**.

Figure F1: Overall Awareness of Premium Rate Service



Base: Total resident population aged 18 years and above.

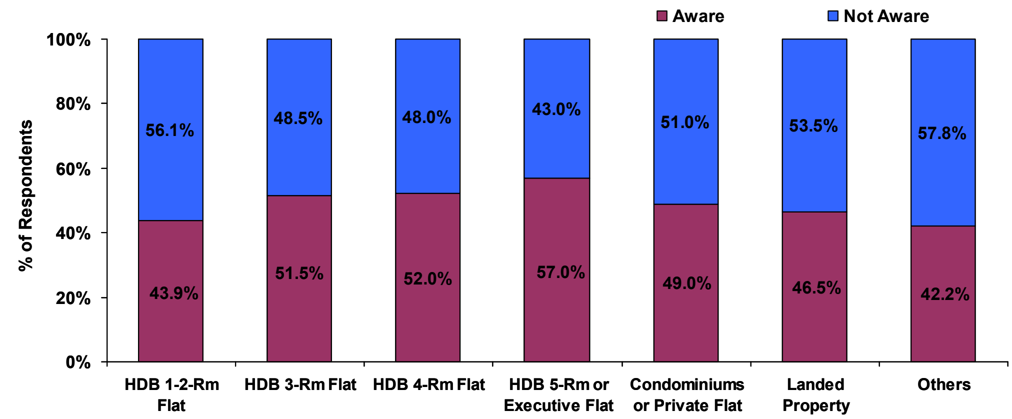
Figure F2: Awareness of Premium Rate Service by Age



Base: Total resident population aged 18 years and above.

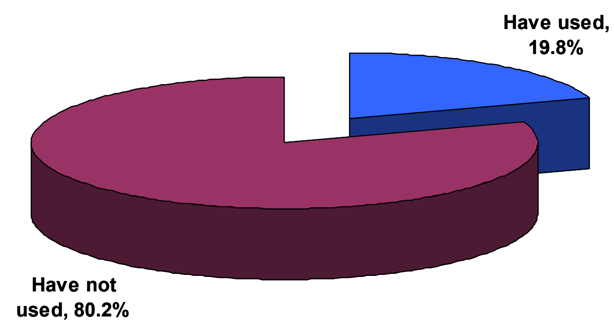
[1] Premium Rate Service refers to a value-added service that allows the mobile subscriber to download wallpapers, ring tones, logos, games, news etc through his/her mobile phone. It also includes chatlines, contest participation, charitable fundraising and votelines.

Figure F3: Awareness of Premium Rate Service by Housing Type



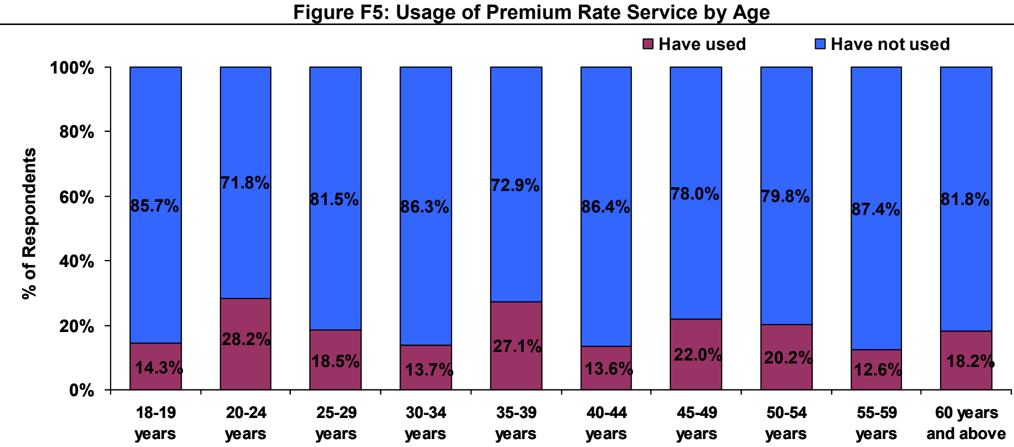
Base: Total resident population aged 18 years and above.

Figure F4: Overall Usage of Premium Rate Service



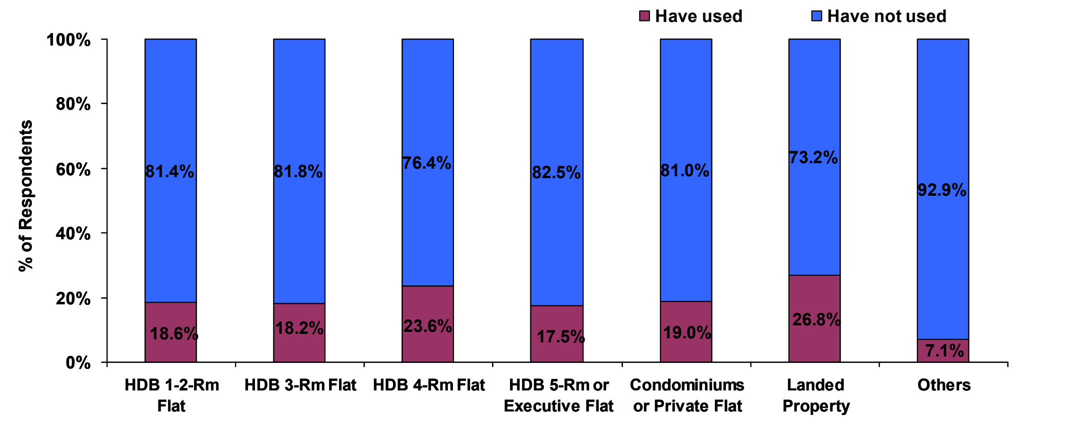
Base: Total resident population aged 18 years and above who were aware of premium rate services.

Figure F5: Usage of Premium Rate Service by Age



Base: Total resident population aged 18 years and above who were aware of premium rate services.

Figure F6: Overall Usage of Premium Rate Service by Housing Type

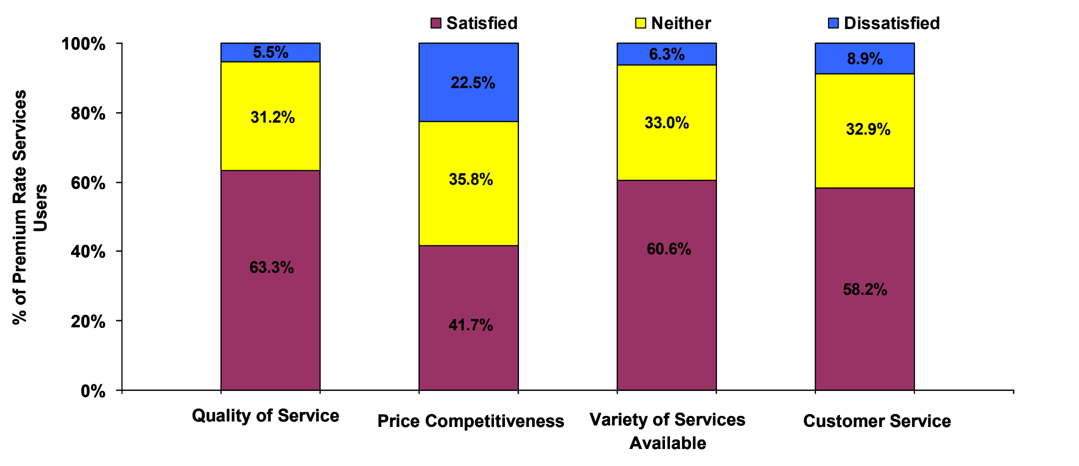


Base: Total resident population aged 18 years and above who were aware of premium rate services.

<u>Satisfaction with Premium Rate Service</u>

Respondents were generally satisfied with all aspects except for price competitiveness (**Figure F7**).

Figure F7: Overall Satisfaction with Premium Rate Service



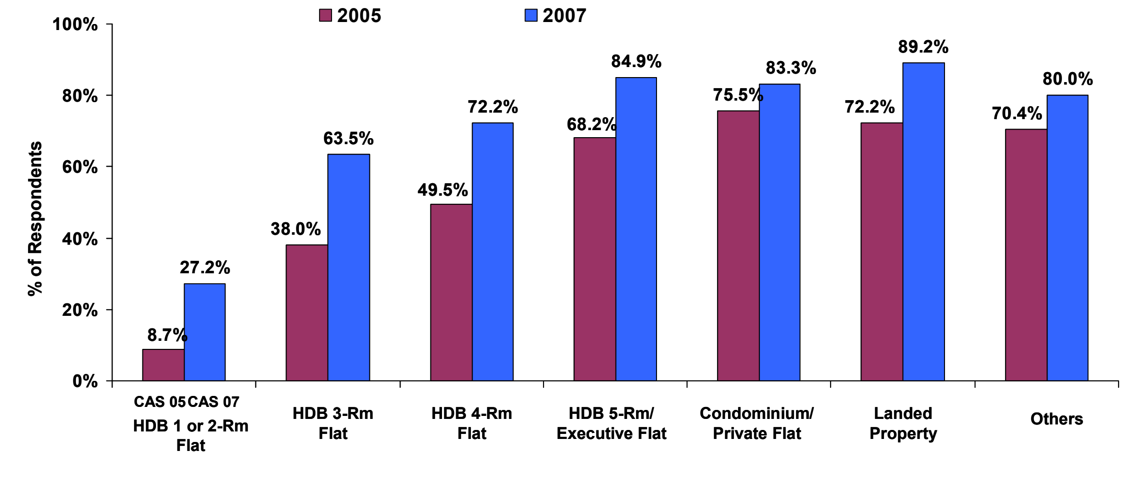
Base: Total resident population aged 18 years and above who have paid for premium rate services.

G BROADBAND INTERNET SERVICE

Subscription to Broadband Internet Service

Generally, there was an increase in the number of subscriptions to Broadband Internet service since 2005 across all housing types. The increase was most evident for respondents who stayed in HDB 4-Rm Flats and below (**Figure G1**).

Figure G1: Subscription to Broadband Internet Service by Housing Type

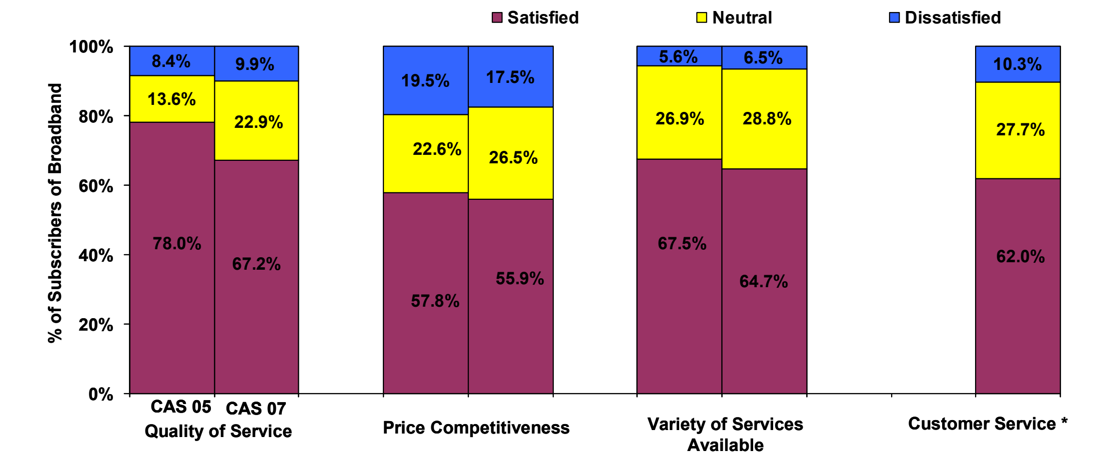


Base: Total resident population aged 18 years and above.

Satisfaction with Broadband Internet Service

Subscribers of Broadband Internet service were generally satisfied with the quality of service, variety of services available, price competitiveness and quality of customer service, although satisfaction levels were generally lower than in 2005 (**Figure G2**).

Figure G2: Overall Satisfaction with Broadband Internet Service



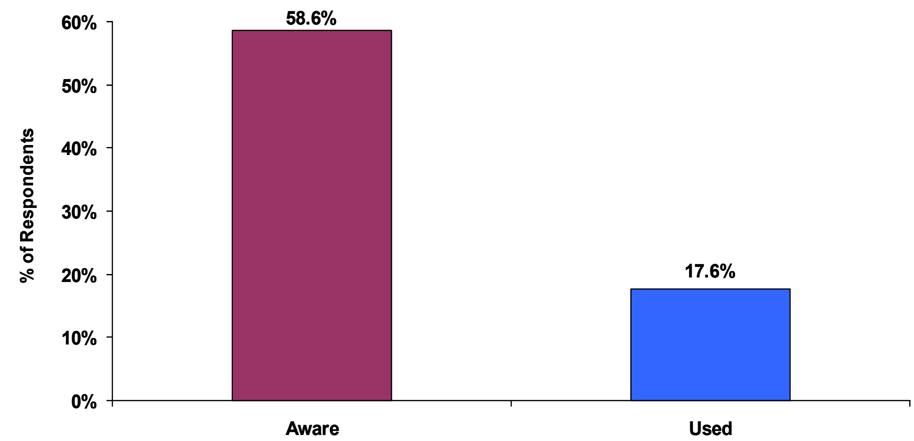
Base: Total resident population aged 18 years and above who subscribed to broadband internet services. * This aspect was not asked in CASS 05.

H VOICE OVER INTERNET PROTOCOL (VOIP)[2]

Awareness and Usage of VOIP Service

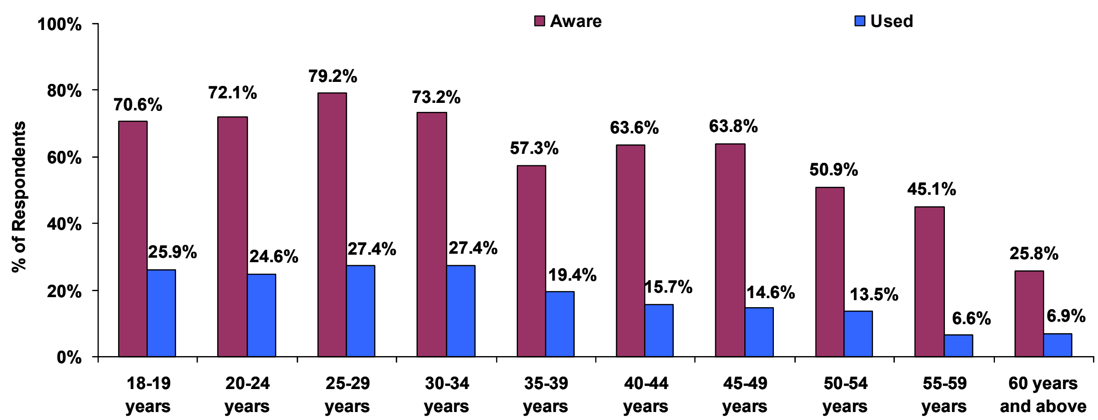
Only slightly more than half of respondents were aware of VOIP service. Usage in the last 6 months stood at only close to 20% (**Figure H1**). Breakdown of awareness and usage by age and housing type are shown in **Figure H2** and **Figure H3** respectively.

Figure H1: Overall Awareness and Usage of VOIP Service



Base: Total resident population aged 18 years and above. 'Usage' = Usage in the last 6 months.

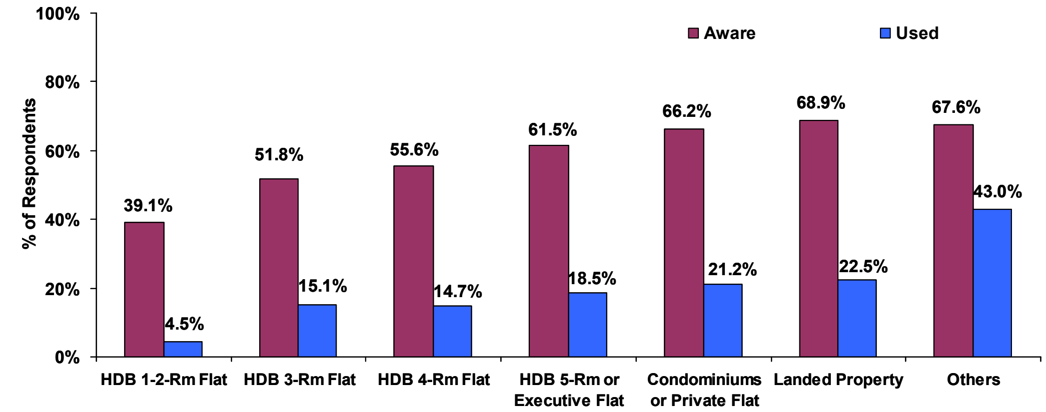
Figure H2: Awareness and Usage of VOIP Service by Age



Base: Total resident population aged 18 years and above. 'Usage' = Usage in the last 6 months.

[2] For this survey, VOIP refers to a service that allows the user to make free or cheaper calls through the Internet on a personal computer. Some examples are Skype, MSN Messenger and Google Talk.

Figure H3: Awareness and Usage of VOIP Service by Housing Type

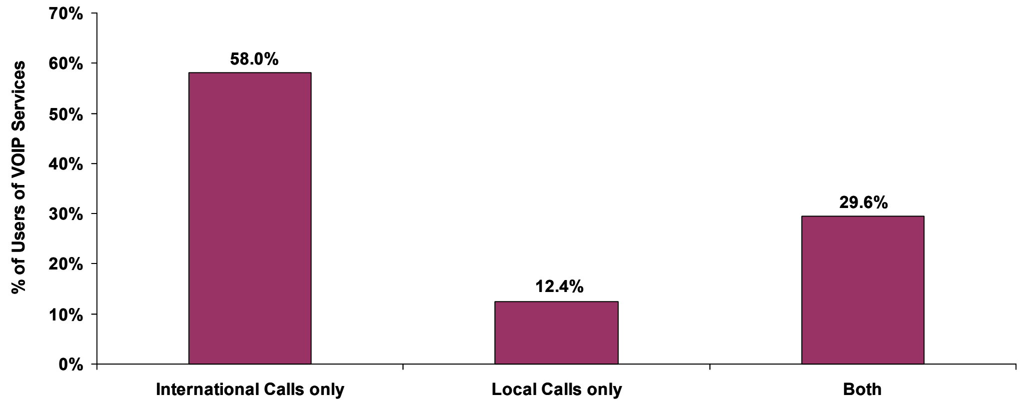


Base: Total resident population aged 18 years and above. 'Usage' = Usage in the last 6 months.

Types of Calls Made

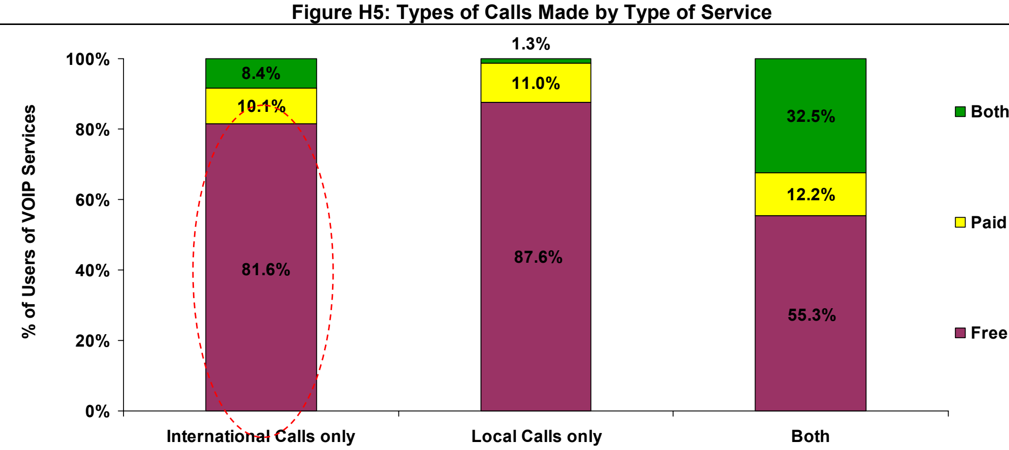
Among users of VOIP service, about 6 in 10 used it to make international calls. Near to one third used it for both local and international calls (**Figure H4**). The majority of those who made international calls used a free VOIP service (**Figure H5**).

Figure H4: Overall Types of Calls Made



Base: Total resident population aged 18 years and above who have used VOIP services.

Figure H5: Types of Calls Made by Type of Service

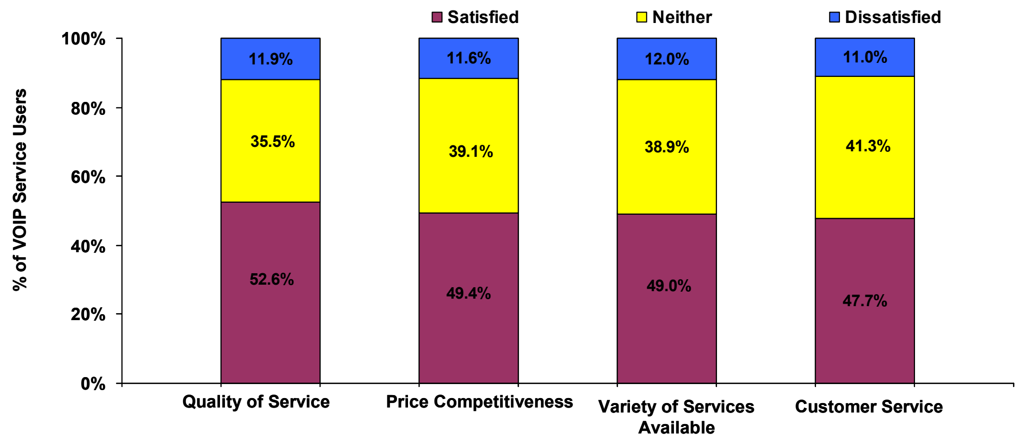


Note: Total resident population aged 18 years and above who have used VOIP services

Satisfaction with VOIP Service

Respondents were generally satisfied with their usage of VOIP service (**Figure H6**).

Figure H6: Overall Satisfaction with VOIP Service



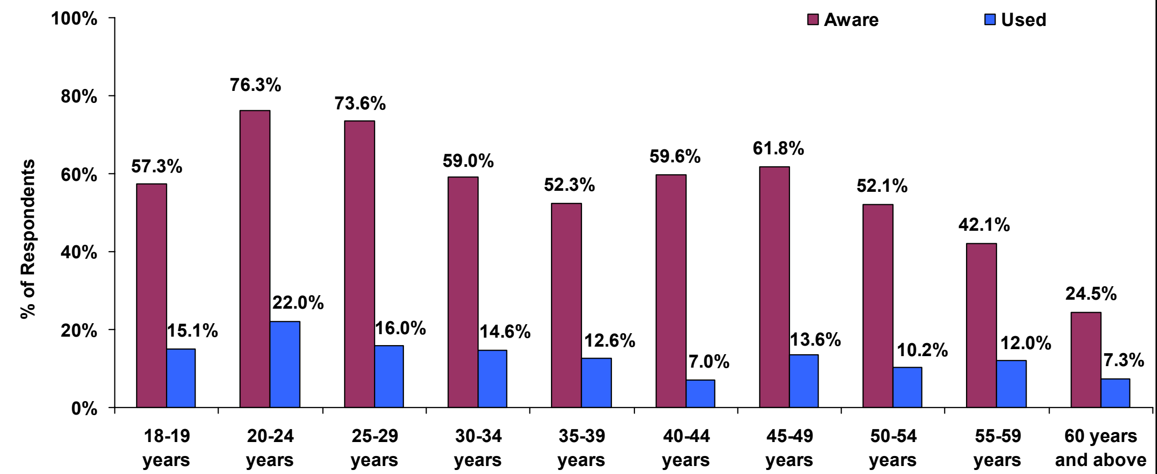
Base: Total resident population aged 18 years and above who have used VOIP services.

I BUNDLED SERVICES[3]

Awareness and Usage of Bundled Services

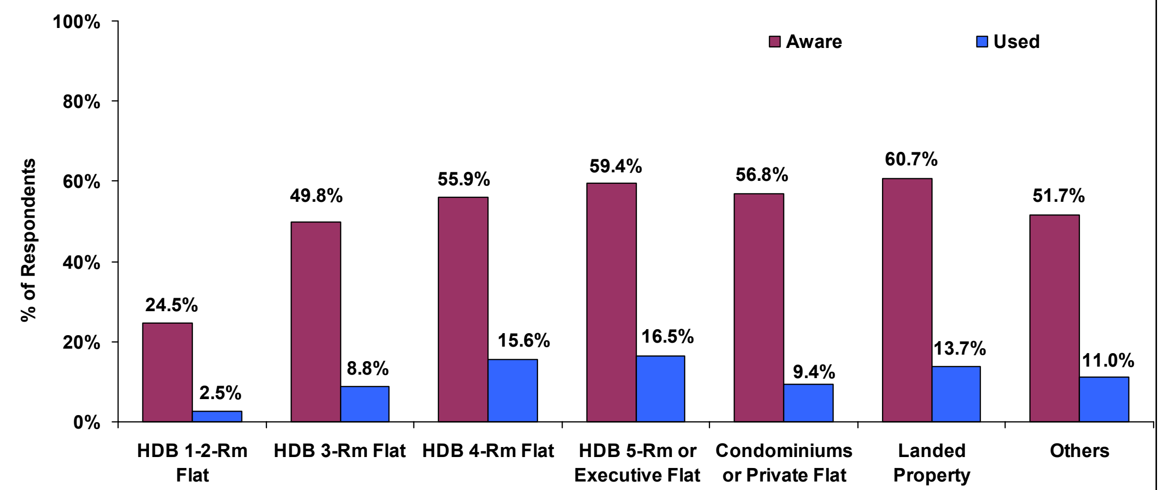
Slightly more than half of respondents were aware of bundled services but fewer have used it. Breakdown of awareness and usage by age and housing type are shown in **Figure I1** and **Figure I2** respectively.

Figure I1: Awareness/Usage of Bundled Services By Age



Note: Total resident population aged 18 and above.

Figure I2: Awareness/Usage of Bundled Services By Housing Type



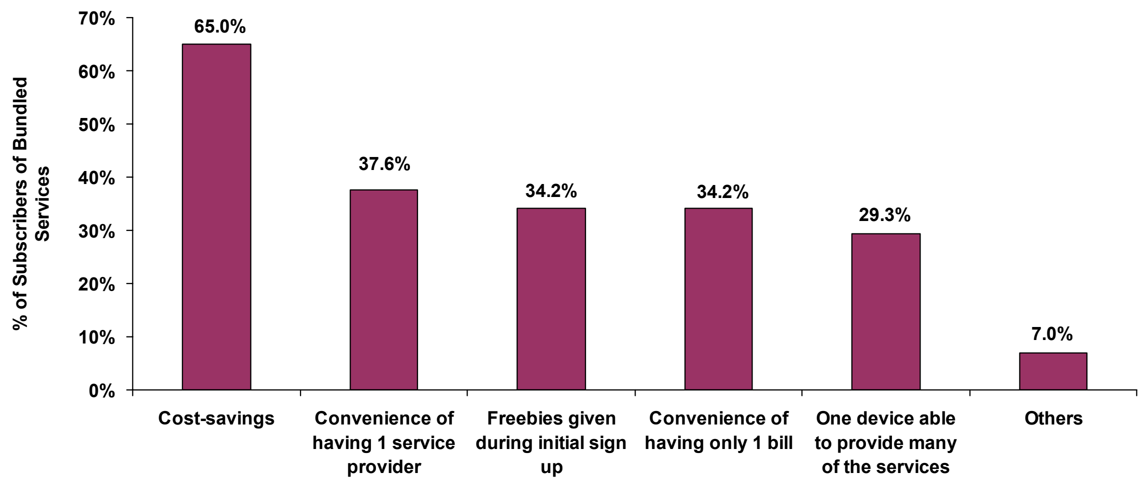
Note: Total resident population aged 18 and above.

[3] For this survey, Bundled Services refer to a package of <u>three or more</u> services provided by one single service provider.

Reasons for Signing Up for Bundled Services

Cost savings was cited as the main reason for subscribing to bundled services **(Figure I3)**.

Figure I3: Reasons for Signing Up for Bundled Services

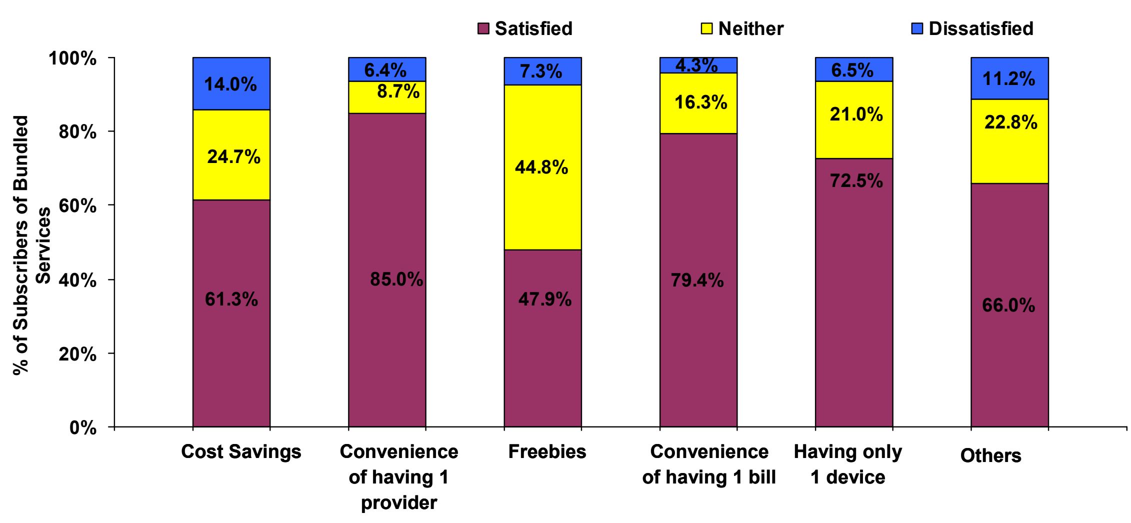


Note: Analysis is based on respondents who subscribed to bundled services. Responses are based on a multiple-response question, hence percentages do not add up to 100%.

Satisfaction with Bundled Services

Respondents were generally satisfied with Bundled Services on each of the following aspects (**Figure I4**).

Figure I4: Satisfaction with Bundled Services



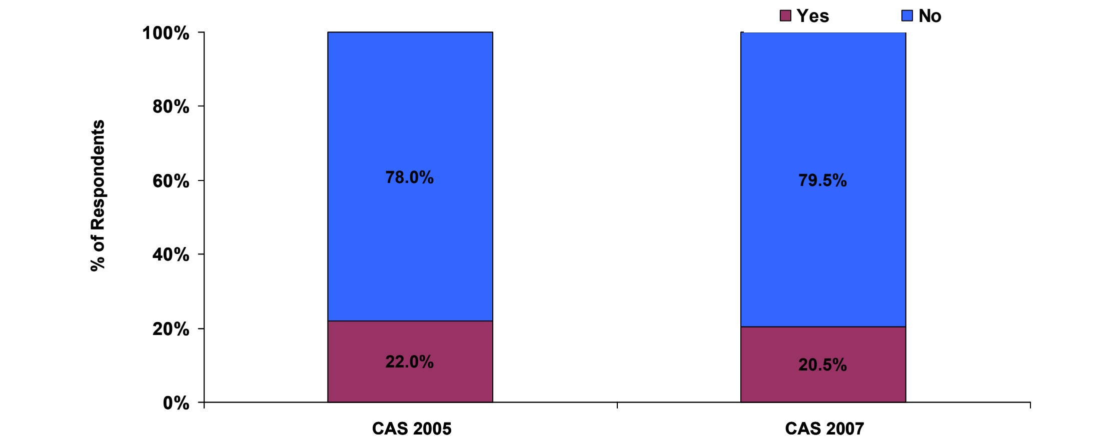
Note: This analysis is based on all respondents who subscribed to bundled services.

J PAYPHONE SERVICE

Usage of Payphone Service

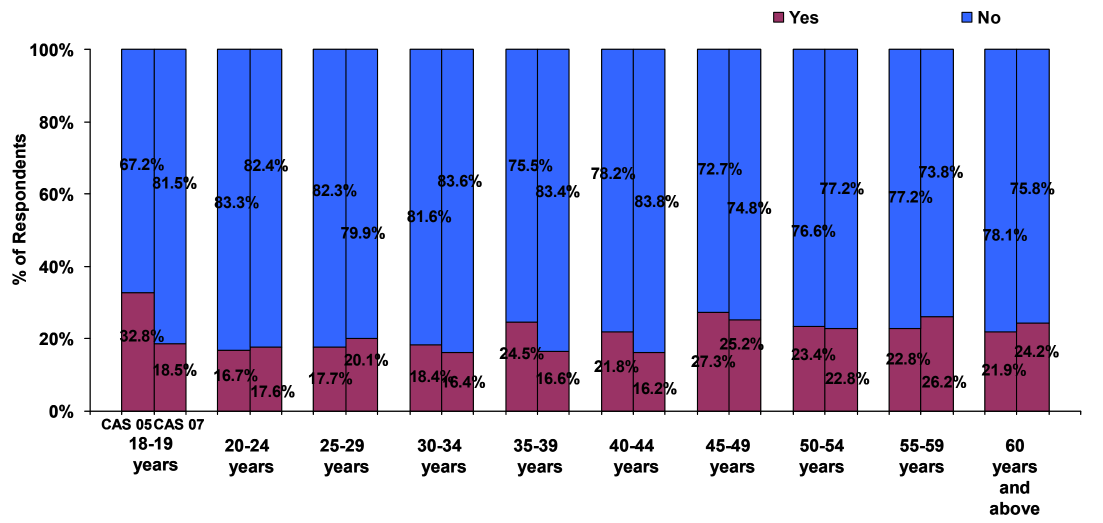
Usage rate for payphone service decreased further from 2005 - eight out of ten respondents indicated that they did not use a payphone in the last six months (**Figure J1**). Usage by age and housing type can be seen in **Figure J2** and **Figure J3** respectively.

Figure J1: Overall Usage of Payphone Service (in the last 6 months)



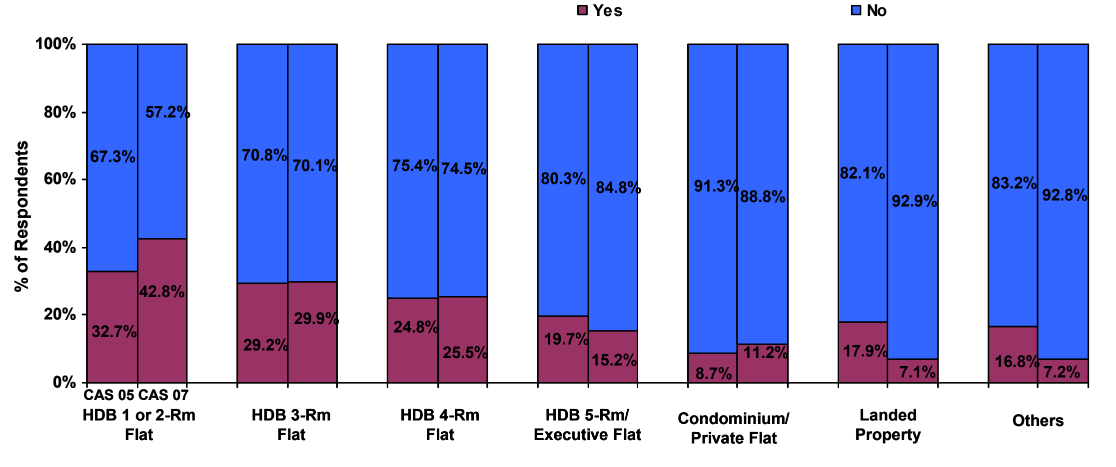
Base: Total resident population aged 18 years and above.

Figure J2: Usage of Payphone Service by Age (in the last 6 months)



Base: Total resident population aged 18 years and above.

Figure J3: Usage of Payphone Service by Housing Type (in the last 6 months)

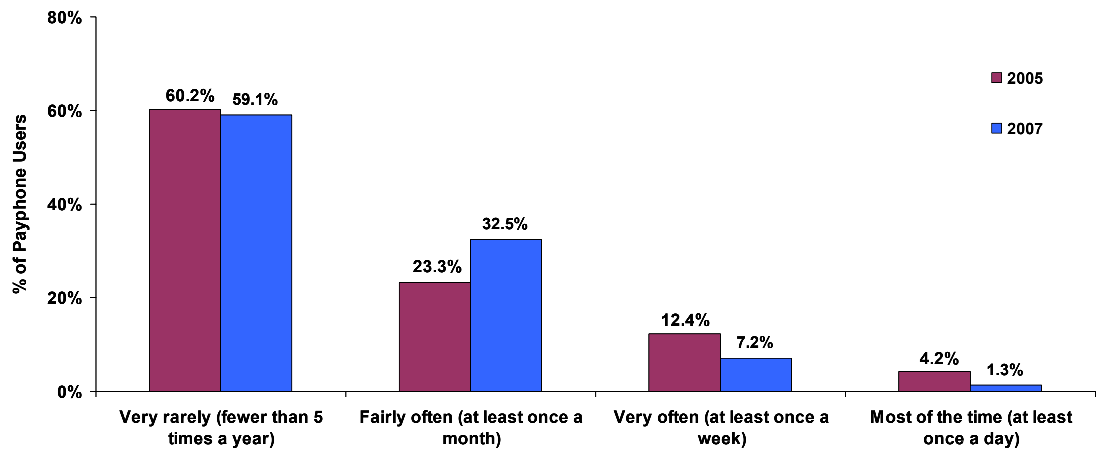


Base: Total resident population aged 18 years and above.

Frequency of Usage of Payphone Service

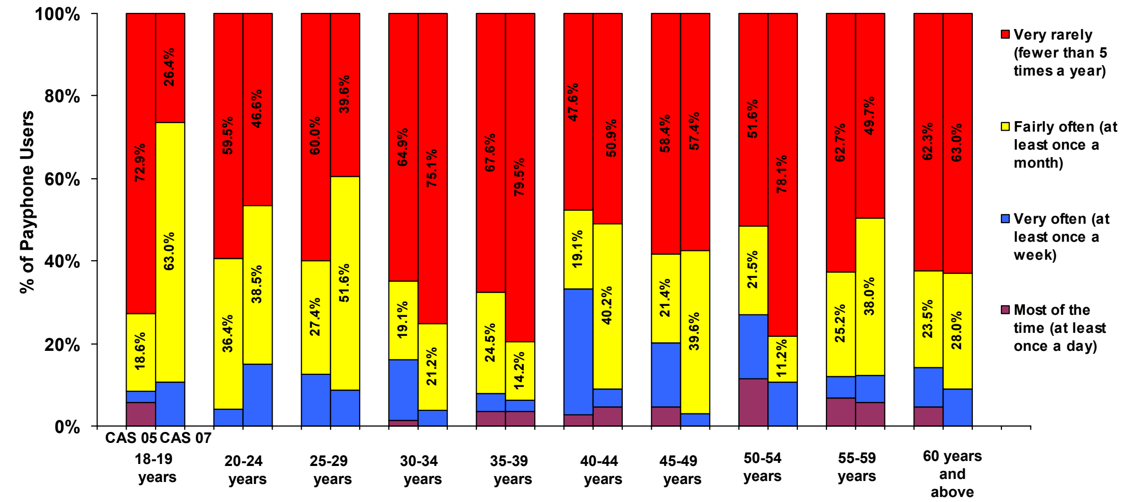
Frequency of payphone usage was generally low. The percentage of users who use payphone at least once a week has decreased since 2005 (**Figure J4**). Frequency of usage by age and housing type can be seen in **Figure J5** and **Figure J6** respectively.

Figure J4: Frequency of Usage of Payphone Service



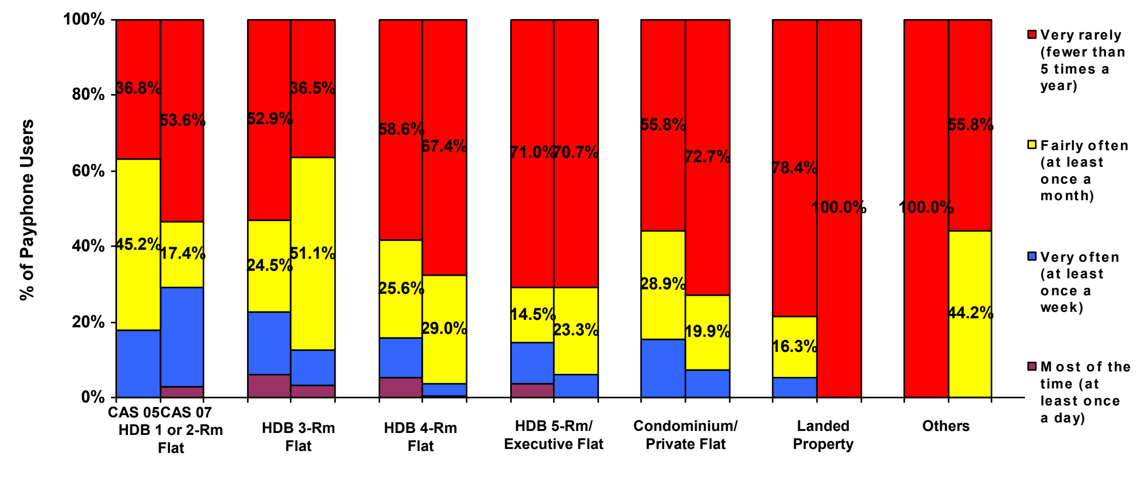
Base: Total resident population aged 18 years and above who used payphone in the last 6 months.

Figure J5: Frequency of Usage of Payphone Service by Age



Base: Total resident population aged 18 years and above who used payphone in the last 6 months.

Figure J6: Frequency of Usage of Payphone Service by Housing Type



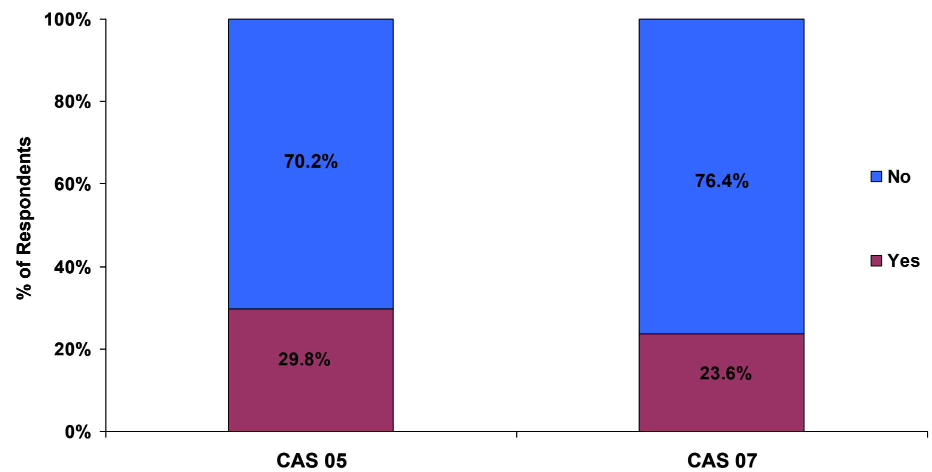
Base: Total resident population aged 18 years and above who used payphone in the last 6 months.

K SERVICE 100[4] (Directory Enquiry Service)

Usage of Service 100

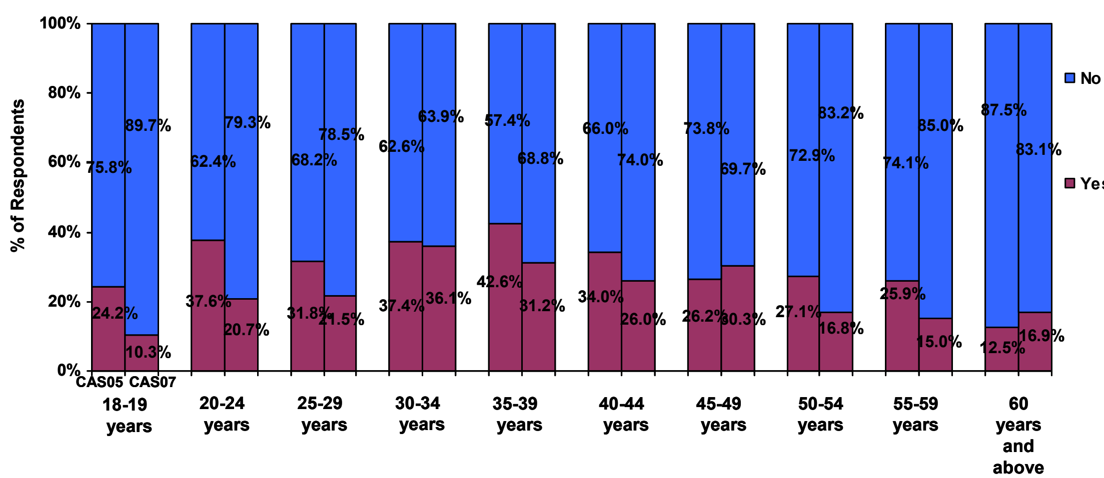
There was an overall decrease in the usage of Service 100 since 2005 (**Figure K1**). **Figure K2** and **Figure K3** show the usage by age and housing type respectively.

Figure K1: Usage of Service 100 (in the last 6 months)



Base: Total resident population aged 18 years and above.

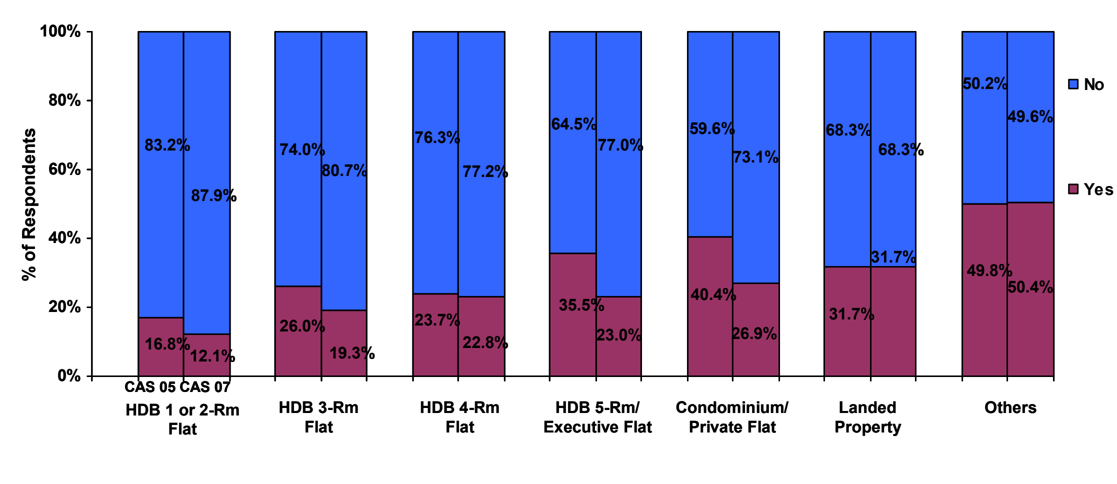
Figure K2: Usage of Service 100 by Age (in the last 6 months)



Base: Total resident population aged 18 years and above.

[4] Service 100 refers to the operator-assistance service that provides callers with directory information, such as names, addresses and telephone numbers of subscribers to fixed line telephone services.

Figure K3: Usage of Service 100 by Housing Type (in the last 6 months)

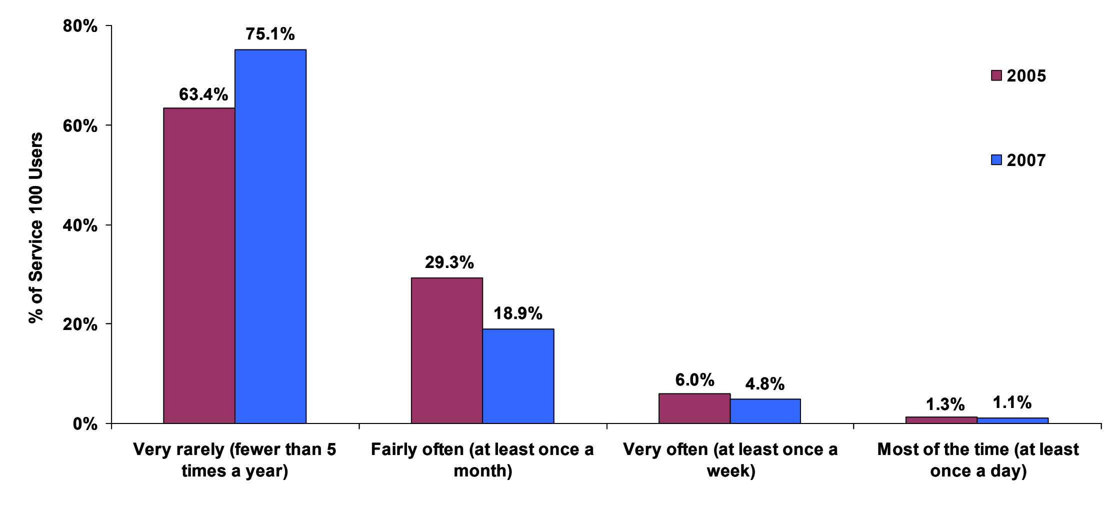


Base: Total resident population aged 18 years and above.

Frequency of Usage of Service 100

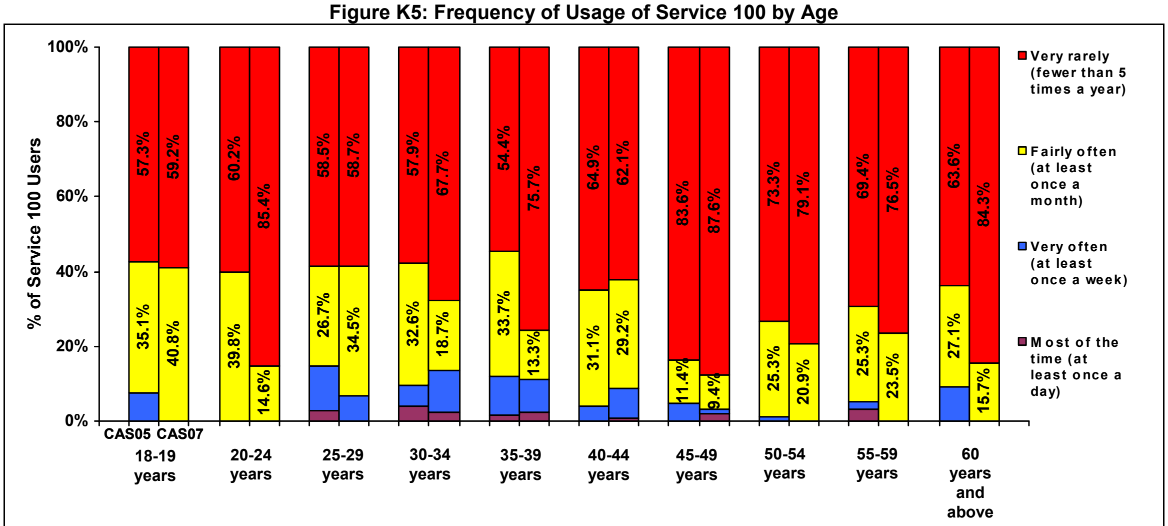
The frequency of Service 100 usage was also low. Frequency decreased from 2005, with more than three-quarters using Service 100 less than 5 times a year (**Figure K4**). **Figure K5** and **Figure K6** show the frequency of usage by age and housing type respectively.

Figure K4: Overall Frequency of Usage of Service 100



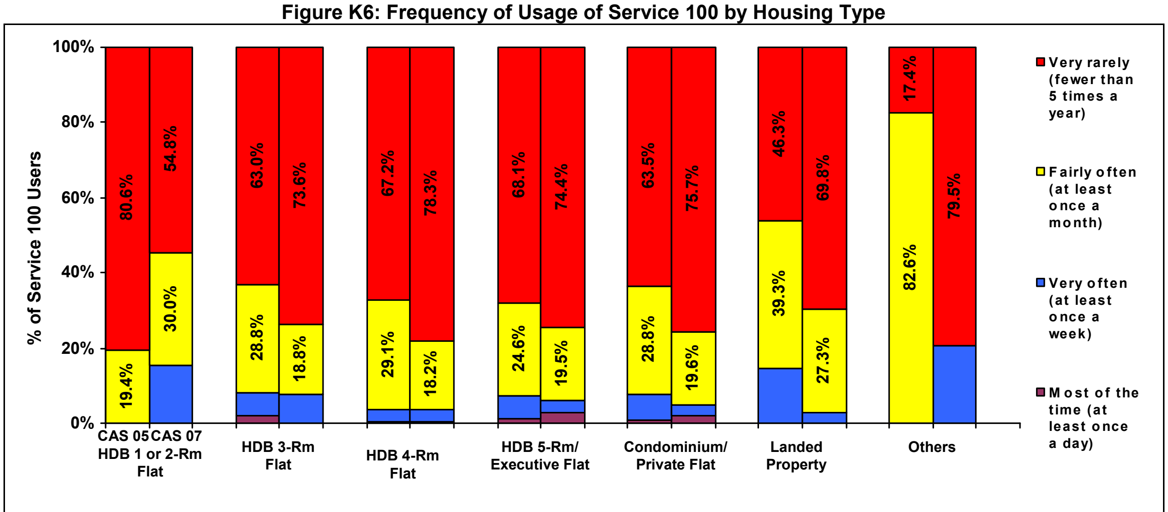
Base: Total resident population aged 18 years and above who have used Service 100 in the last 6 months.

Figure K5: Frequency of Usage of Service 100 by Age



Base: Total resident population aged 18 years and above who have used Service 100 in the last 6 months.

Figure K6: Frequency of Usage of Service 100 by Housing Type



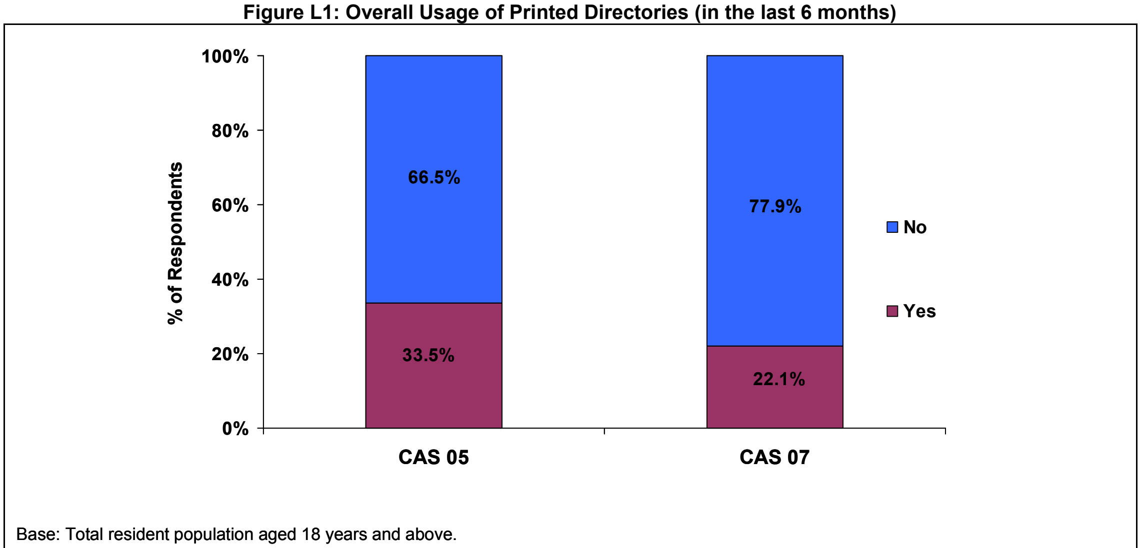
Base: Total resident population aged 18 years and above who have used Service 100 in the last 6 months.

L PRINTED DIRECTORIES SERVICE[5]

Usage of Printed Directories

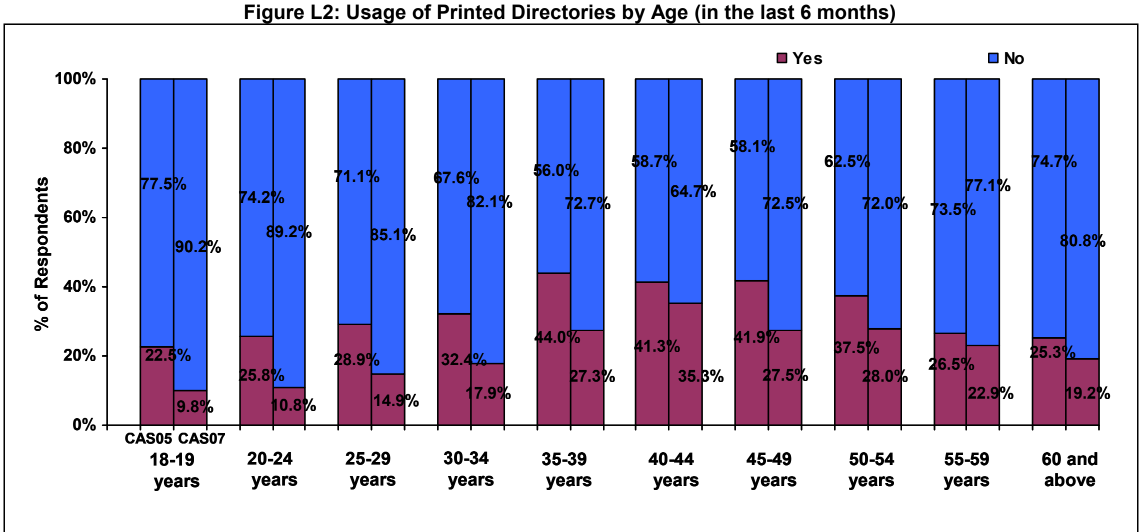
A decrease in usage of printed directories was observed. More than three-quarters had not used printed directories in the last 6 months (**Figure L1**). **Figure L2** and **Figure L3** show the usage by age and housing type.

Figure L1: Overall Usage of Printed Directories (in the last 6 months)



Base: Total resident population aged 18 years and above.

Figure L2: Usage of Printed Directories by Age (in the last 6 months)



Base: Total resident population aged 18 years and above.

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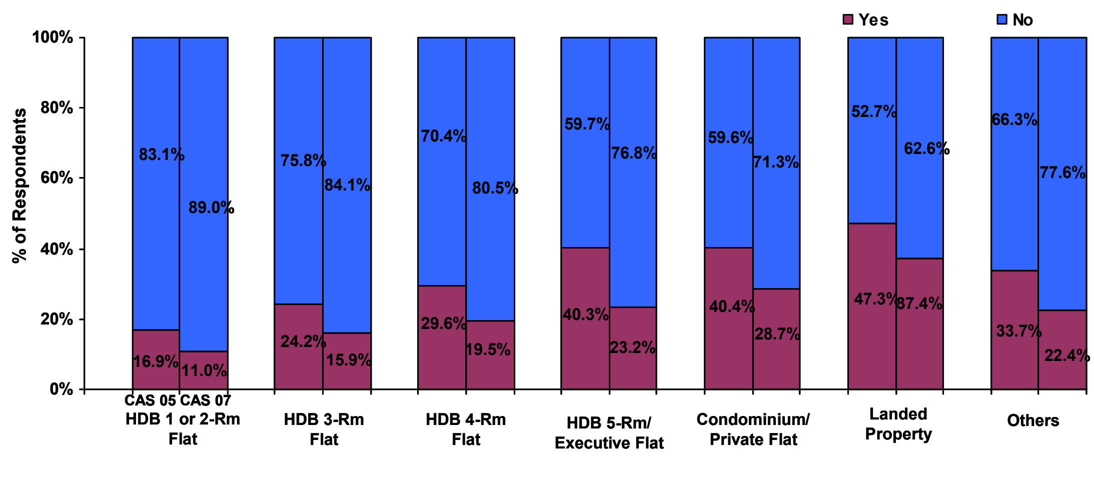
[5] Printed Directories refers to the Singapore Phone Book, comprising White Pages Business and Residential Listings, Chinese Yellow Pages and Yellow Pages Buying and Commercial/Industrial Guides. These books provide phone listing with directory information, e.g. names, addresses and telephone numbers of subscribers to fixed line services.

Figure L3: Usage of Printed Directories by Housing Type (in the last 6 months)

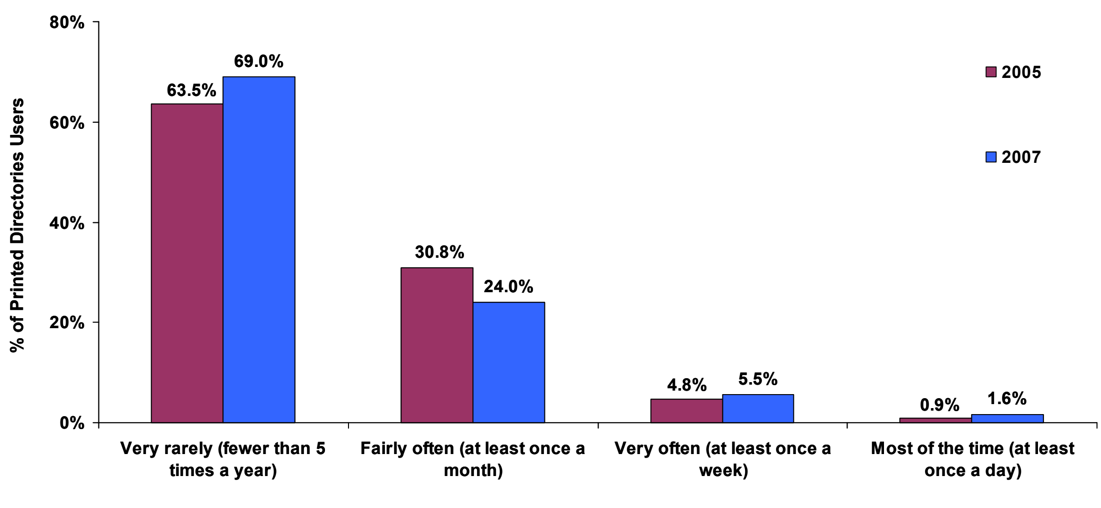


Base: Total resident population aged 18 years and above.

Frequency of Usage of Printed Directories

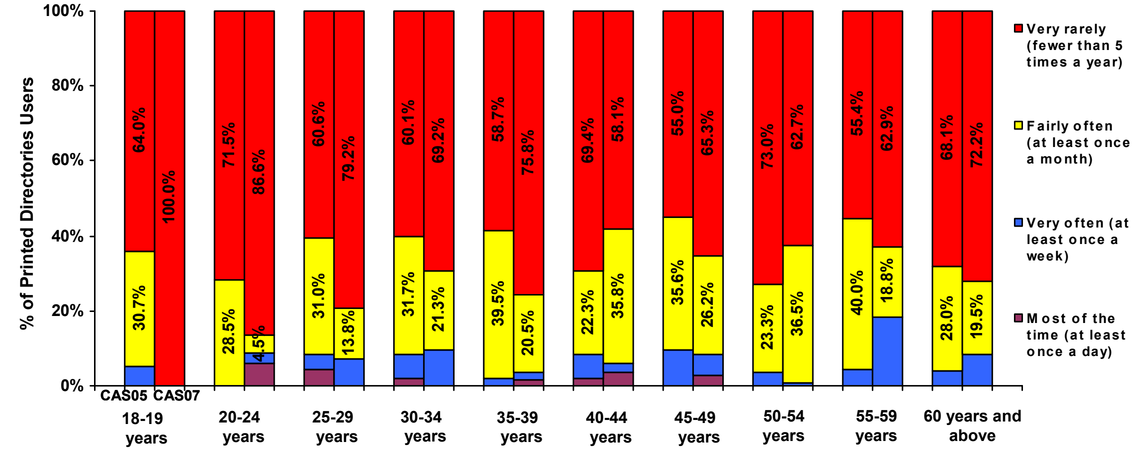
Frequency of usage had decreased from 2005, with about 7 in 10 using printed directories less than 5 times a year (**Figure L4**). Frequency of usage by age and housing type can be seen in **Figure L5** and **Figure L6** respectively.

Figure L4: Overall Frequency of Usage of Printed Directories



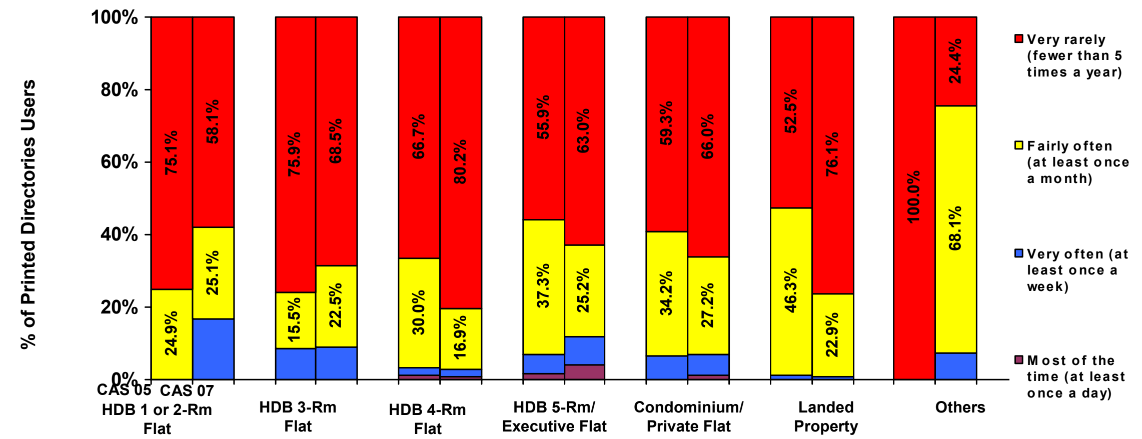
Base: Total resident population aged 18 years and above who have used printed directories in the last 6 months.

Figure L5: Frequency of Usage of Printed Directories by Age



Base: Total resident population aged 18 years and above who have used printed directories in the last 6 months.

Figure L6: Frequency of Usage of Printed Directories by Housing Type



Base: Total resident population aged 18 years and above who have used printed directories in the last 6 months.