IDA CONSUMER AWARENESS AND SATISFACTION SURVEY 2005

INTRODUCTION

- The Consumer Awareness & Satisfaction Survey 2005 ("**CASS 05**") aims to measure consumers' usage and awareness of, and satisfaction with selected telecoms services in Singapore. Consumers were asked for their opinions on quality of service, variety of services available and price competitiveness of the selected telecoms services. For this survey, price competitiveness is interpreted as the consumers' satisfaction level towards the prices of the selected telecoms services, given the range of products and price offerings by different providers in the market.

- The scope of telecoms services surveyed include: (a) fixed line telephone services; (b) mobile telephone services; (c) Broadband Internet services; (d) payphone services; (e) printed directories services; and (f) Service 100 directory enquiry service.

- The CASS 05 is the second one[1] that IDA has conducted since full liberalisation of the telecoms industry in 2000. Comparisons with the previous survey findings in 2003 are provided where available and appropriate.

RESEARCH METHODOLOGY

- In total, 1,500 individuals were interviewed between 22 October and 5 December 2005. The selection of the 1,500 individuals was done 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.

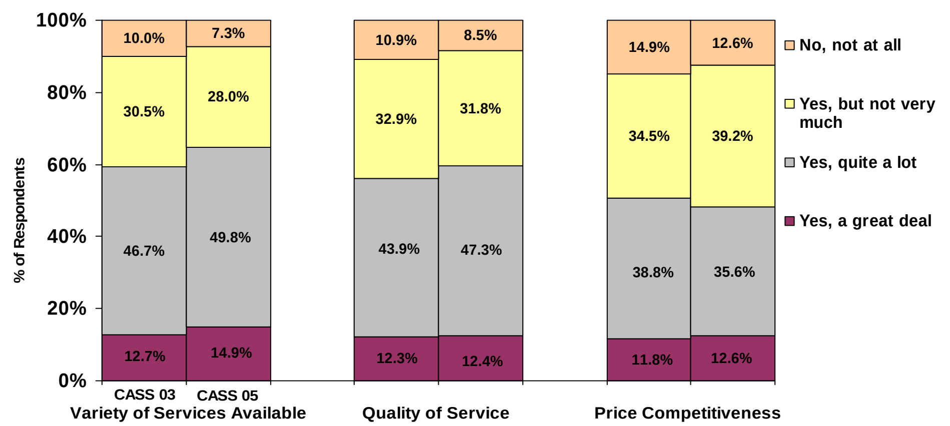
- To be eligible for the survey, the individual must be a Singapore Citizen or Singapore PR aged 18 years and above

SURVEY FINDINGS

A PERCEIVED IMPROVEMENTS IN TELECOMMUNICATIONS SERVICES

Compared to 2003, there was a general improvement in consumers' perception of the variety of telecoms services available, as well as quality and price competitiveness of telecoms services (**Figure A1**).

Figure A1: Perceived Improvements in Telecoms Services



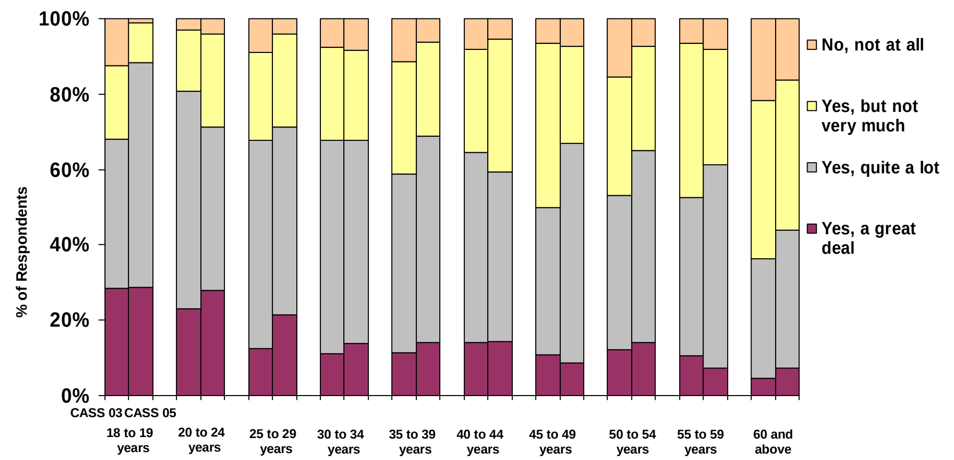
Base: Total resident population aged 18 years and above.

[1] The first Consumer Awareness & Satisfaction Survey was conducted in 2003 ("CASS 03").

Variety of Services

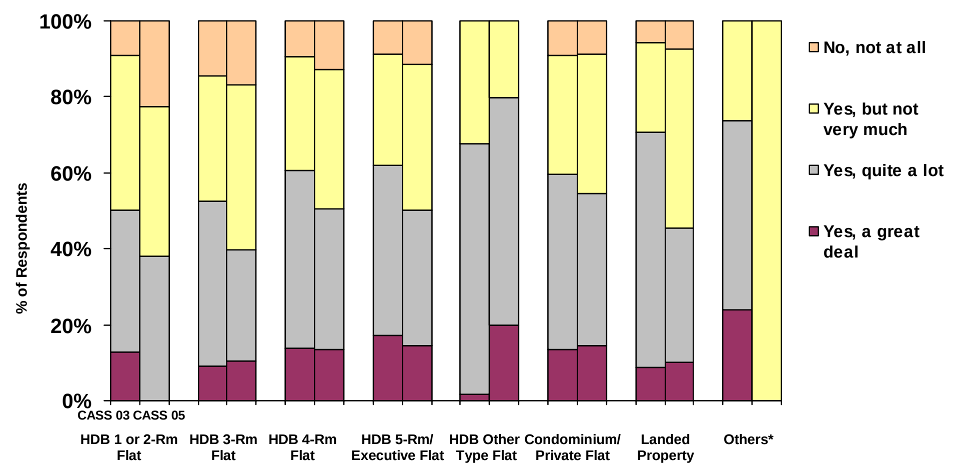
Figure A2 and **Figure A3** provide a breakdown of perceived improvement in the variety of telecoms services available by age and housing type respectively.

Figure A2: Perceived Improvements in Telecoms Services – Variety of Services by Age



Base: Total resident population aged 18 years and above.

Figure A3: Perceived Improvements in Telecoms Services – Variety of Service by Housing Type

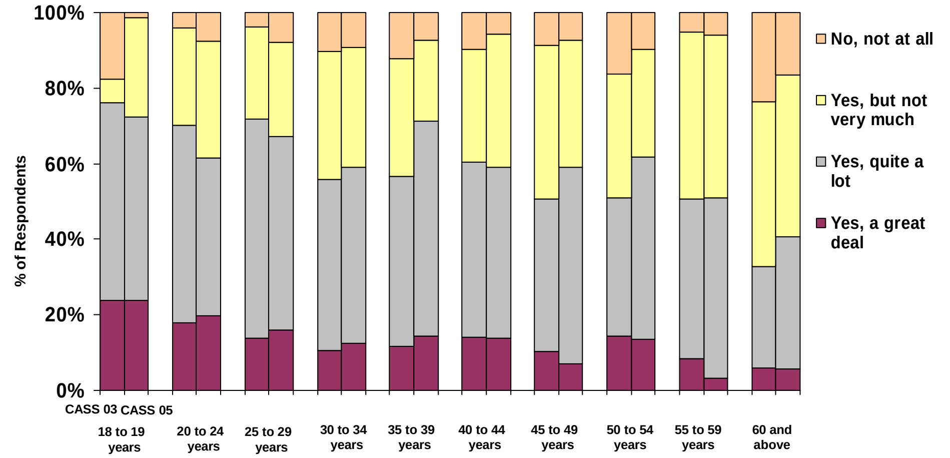


Base: Total resident population aged 18 years and above.
* E.g. prison quarters - housing for prison officers/families.

Quality of Services

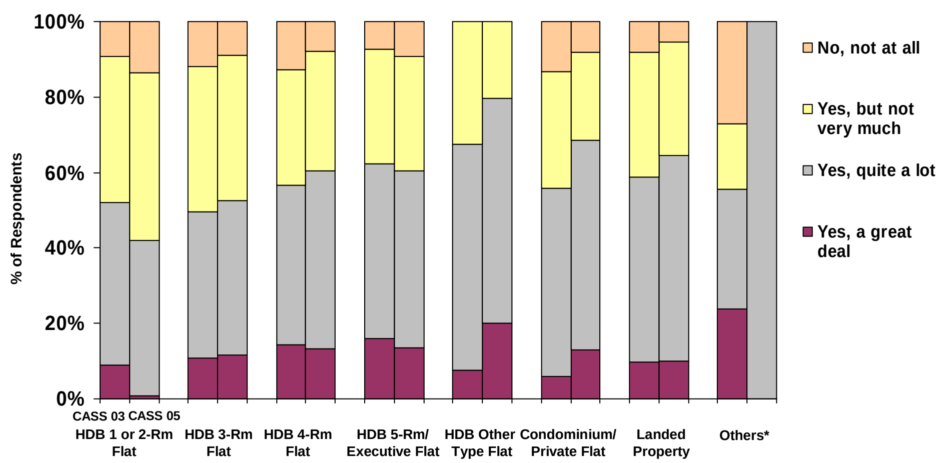
Figure A4 and **Figure A5** provide a breakdown of perceived improvement in the quality of telecoms services by age and housing type respectively.

Figure A4: Perceived Improvements in Telecoms Services – Quality of Service by Age



Base: Total resident population aged 18 years and above.

Figure A5: Perceived Improvements in Telecoms Services – Quality of Service by Housing Type

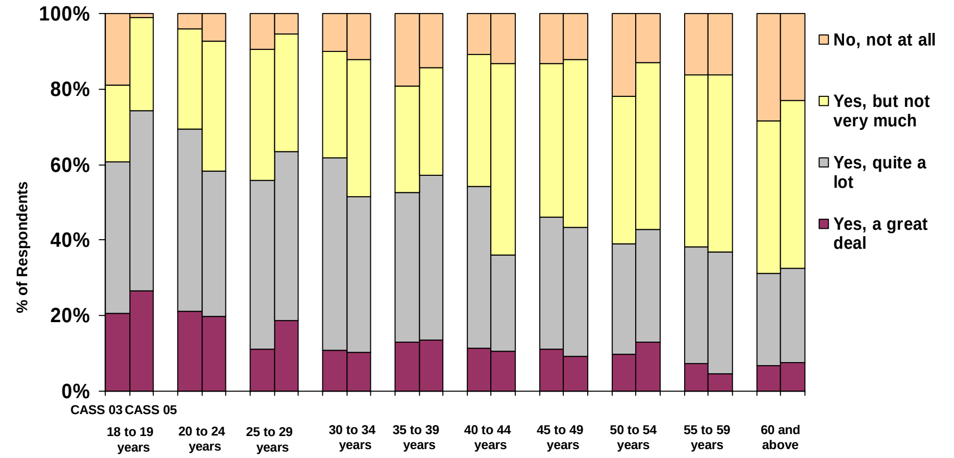


Base: Total resident population aged 18 years and above.
* E.g. prison quarters - housing for prison officers/families.

<u>Price Competitiveness</u>

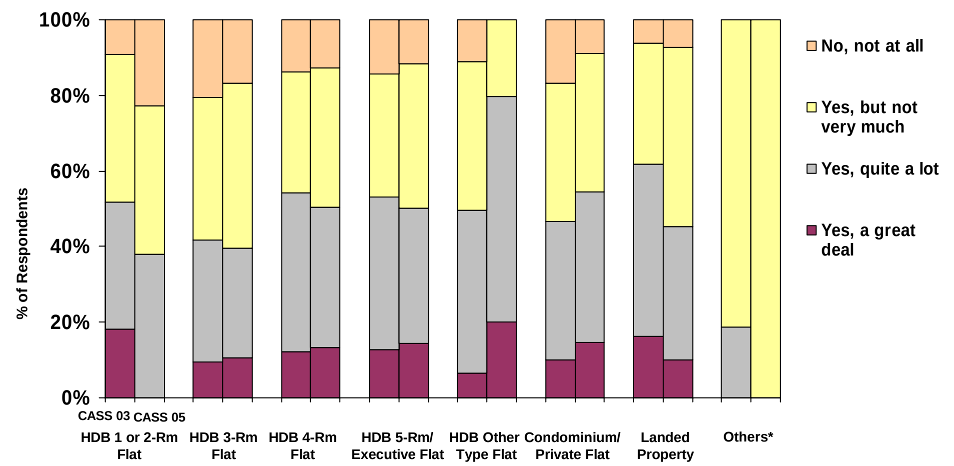
Figure A6 and **Figure A7** provide a breakdown of perceived improvement in the price competitiveness of telecoms services by age and housing type respectively.

Figure A6: Perceived Improvements in Telecoms Services – Price Competitiveness By Age



Base: Total resident population aged 18 years and above.

Figure A7: Perceived Improvements in Telecoms Services – Price Competitiveness by Housing Type



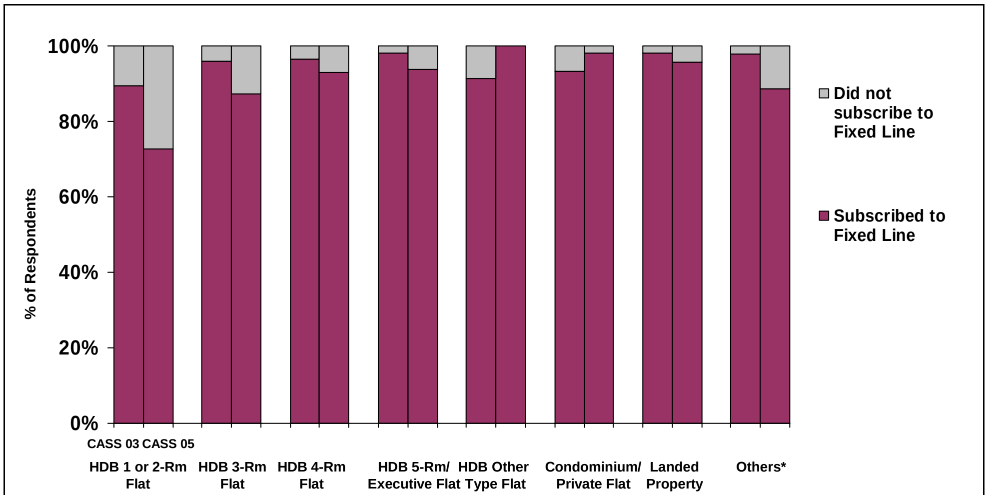
Base: Total resident population aged 18 years and above.
* E.g. prison quarters - housing for prison officers/families.

B FIXED LINE TELEPHONE SERVICES

Subscription to Fixed Line Telephone Services

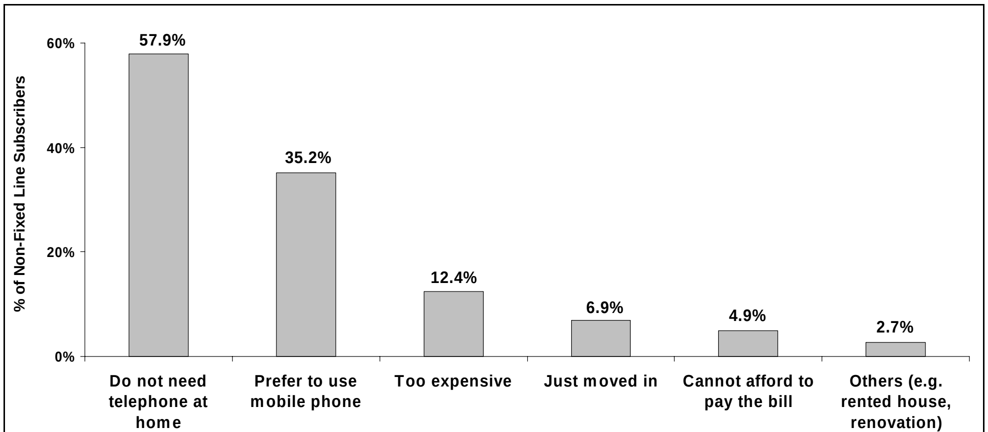
In general, there was a decrease in subscription of fixed line telephone services in Singapore households since 2003. **Figure B1** provides a breakdown of the subscription of fixed line telephone services by housing type. Lack of need for a fixed line telephone service at home and preference for using mobile phones were the most common reasons cited by consumers who did not subscribe to fixed line telephone services (**Figure B2**).

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



Base: Total resident population aged 18 years and above.
* E.g. prison quarters - housing for prison officers/families.

Figure B2: Reasons for Not Subscribing to Fixed Line Telephone Services

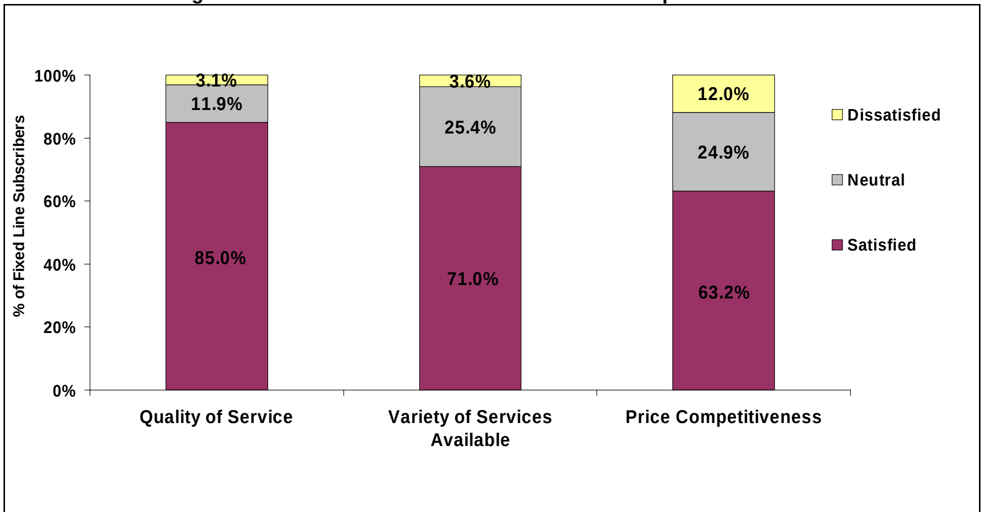


Base: Total resident population aged 18 years and above whose households did not subscribe to fixed line telephone services.
Note: Responses are based on a multiple-response question, hence percentages do not add up to 100%.

Satisfaction with Fixed Line Telephone Services

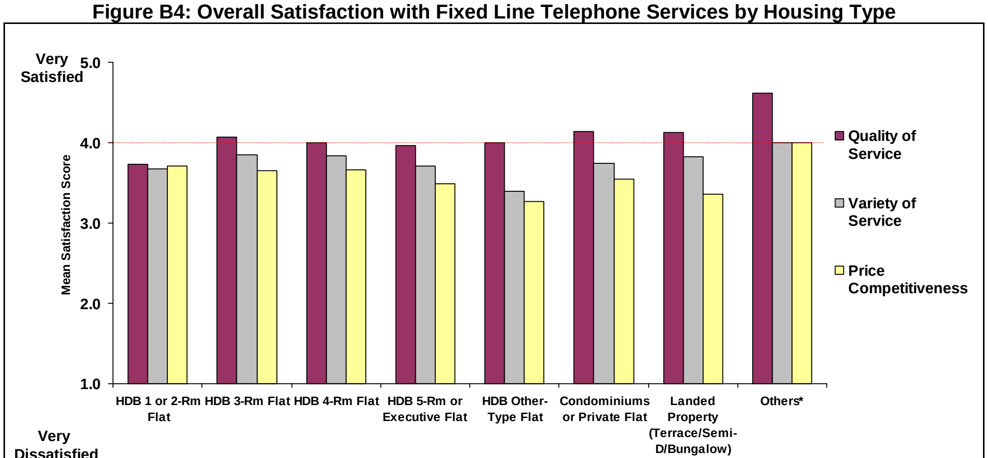
Respondents whose households subscribed to fixed line telephone services were generally satisfied with the quality of service, variety of services and price competitiveness (**Figure B3**). The breakdown of the satisfaction by housing type is shown in **Figure B4**.

Figure B3: Overall Satisfaction with Fixed Line Telephone Services



Base: Total resident population aged 18 years and above whose households subscribed to fixed line telephone services.

Figure B4: Overall Satisfaction with Fixed Line Telephone Services by Housing Type



Base: Total resident population aged 18 years and above whose households subscribed to fixed line telephone services. Note: The satisfaction index is based on a 5-point scale where "1" = Very Dissatisfied, and "5" – Very Satisfied. The dotted red line denotes that ratings higher than 4.0 are considered excellent.

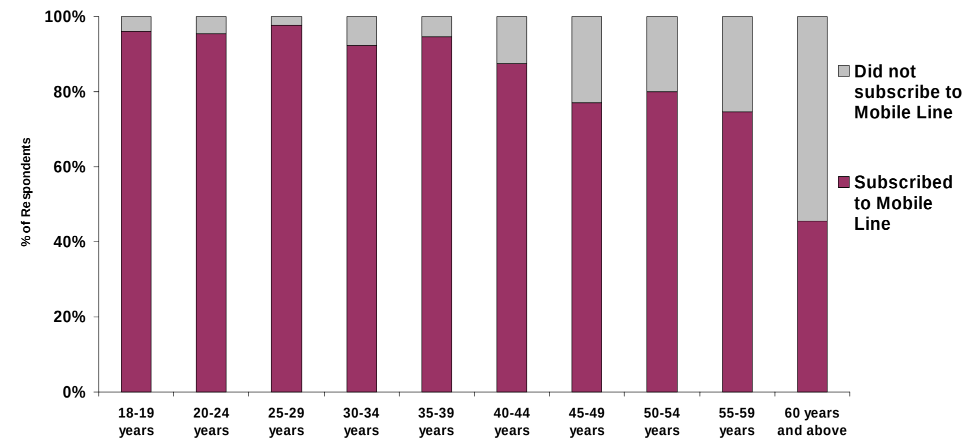
* E.g. prison quarters - housing for prison officers/families.

C MOBILE TELEPHONE SERVICES

Subscription to Mobile Telephone Services

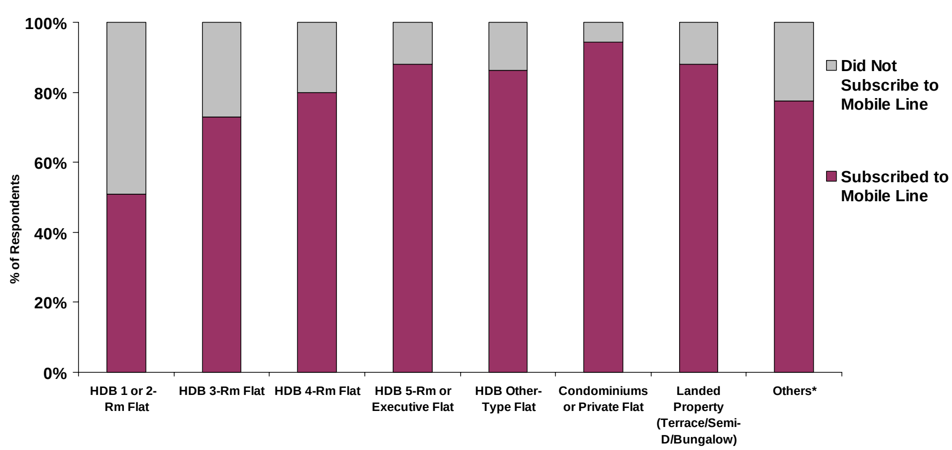
Subscription to mobile telephone services was prevalent in the Singapore residential population. **Figure C1** and **Figure C2** provide a breakdown by age and housing type of mobile telephone subscribers respectively; while **Figure C3** shows the breakdown by fixed line telephone service subscription.

Figure C1: Subscription to Mobile Telephone Services by Age



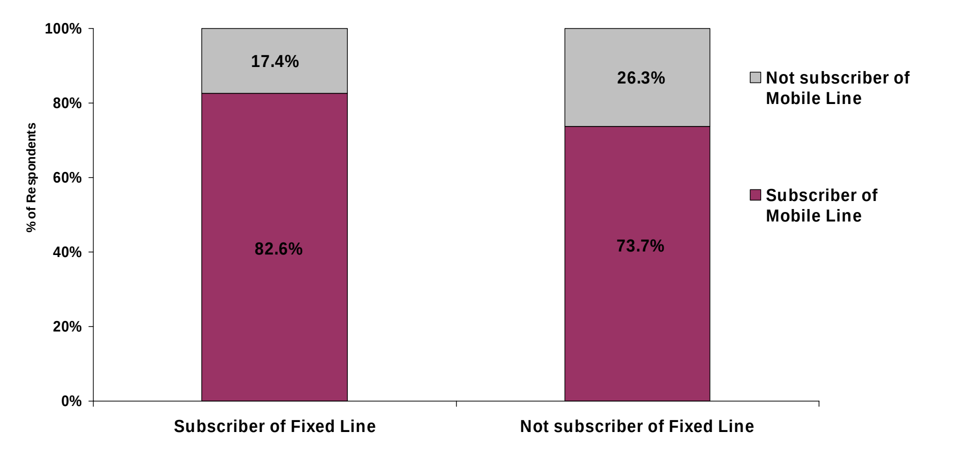
Base: Total resident population aged 18 years and above.

Figure C2: Subscription to Mobile Telephone Services by Housing Type



Base: Total resident population aged 18 years and above.
* E.g. prison quarters - housing for prison officers/families

Figure C3: Subscription to Mobile Telephone Services by Subscription to Fixed Line Telephone Services

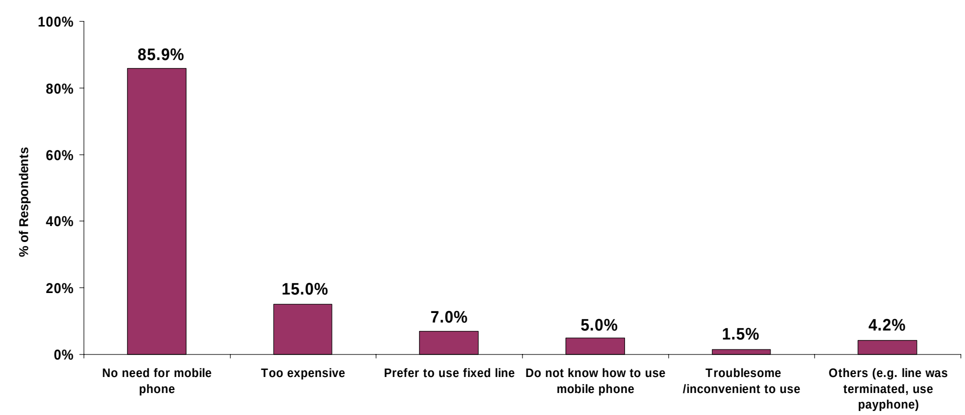


Base: Total resident population aged 18 years and above.

Reasons for Not Subscribing to Mobile Telephone Services

Lack of need for mobile phones was the most commonly cited reason by respondents for not subscribing to mobile telephone services (**Figure C4**).

Figure C4: Reasons for Not Subscribing to Mobile Telephone Services

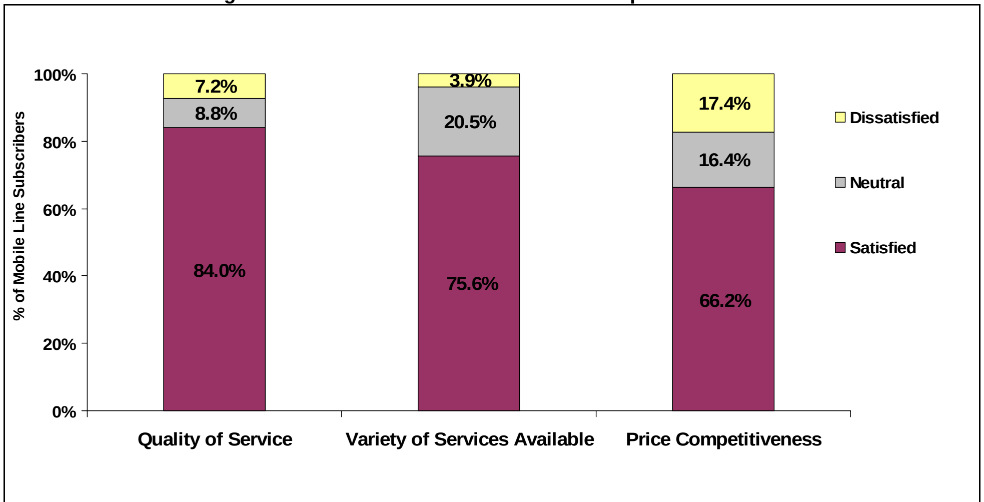


Base: Total resident population aged 18 years and above who did not subscribe to mobile telephone services.
Note: Responses are based on a multiple-response question, hence percentages do not add up to 100%.

Satisfaction with Mobile Telephone Services

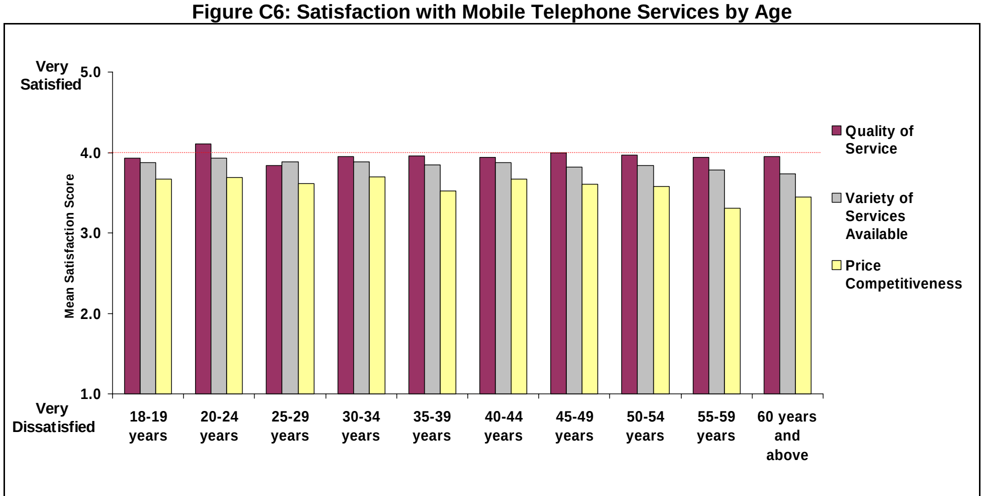
Subscribers of mobile telephone services were generally satisfied with the quality of service, variety of services and price competitiveness (**Figure C5**). The breakdown of satisfaction level by age and housing type are provided in **Figure C6** and **Figure C7** respectively.

Figure C5: Overall Satisfaction – Mobile Telephone Services



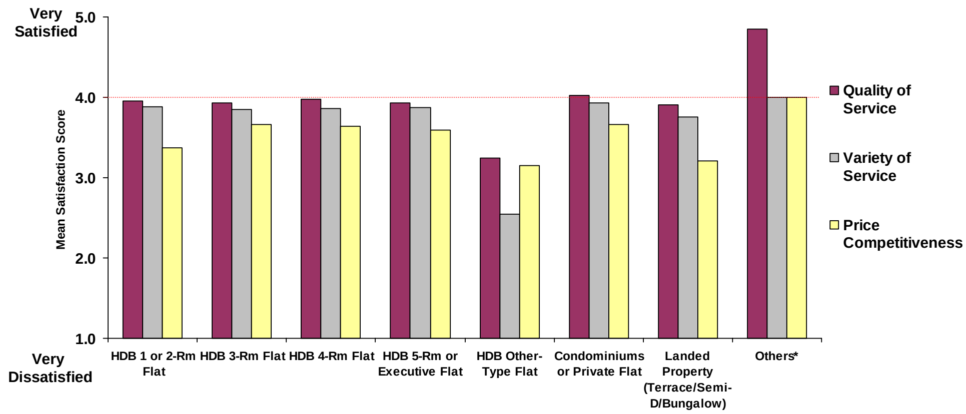
Base: Total resident population aged 18 years and above who subscribed to mobile telephone services.

Figure C6: Satisfaction with Mobile Telephone Services by Age



Base: Total resident population aged 18 years and above who subscribed to mobile telephone services. Note: The satisfaction index is based on a 5-point scale where "1" = Very Dissatisfied, and "5" – Very Satisfied. The dotted red line denotes that ratings higher than 4.0 are considered excellent.

Figure C7: Satisfaction with Mobile Telephone Services by Housing Type



Base: Total resident population aged 18 years and above who subscribed to mobile telephone services. Note: The satisfaction index is based on a 5-point scale where "1" = Very Dissatisfied, and "5" – Very Satisfied. The dotted red line denotes that ratings higher than 4.0 are considered excellent.

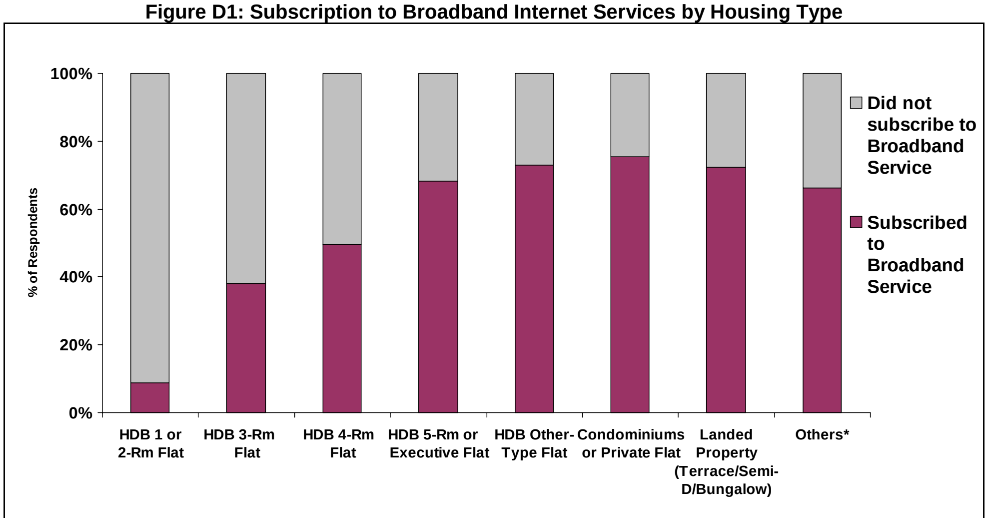
* E.g. prison quarters - housing for prison officers/families.

D BROADBAND INTERNET SERVICES

Subscription to Broadband Internet Services

Figure D1 provides the breakdown of subscription to Broadband Internet services by housing type. Generally, penetration of Broadband Internet services was more prevalent in private than public housing.

Figure D1: Subscription to Broadband Internet Services by Housing Type

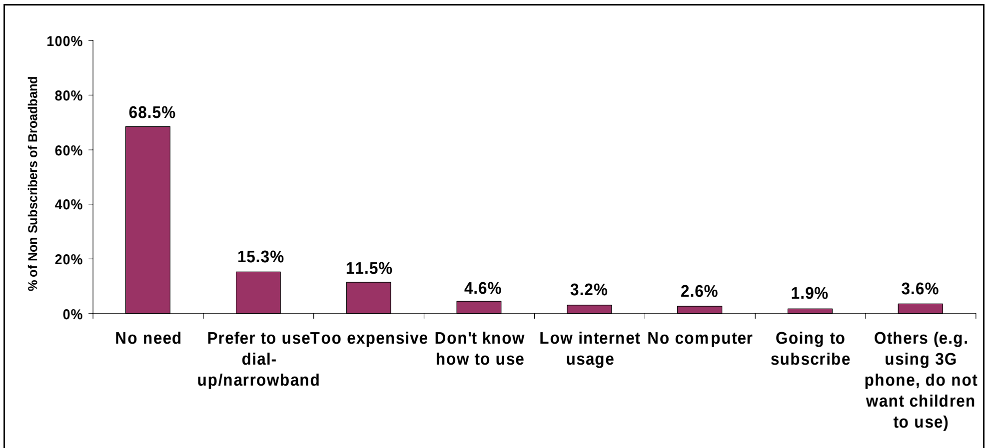


Base: Total resident population aged 18 years and above.
* E.g. prison quarters - housing for prison officers/families.

Reasons for Not Subscribing to Broadband Internet Services

The most commonly cited reason by respondents whose households did not subscribe to Broadband Internet services was the lack of need for such a service (**Figure D2**).

Figure D2: Reasons for Not Subscribing to Broadband Internet Services

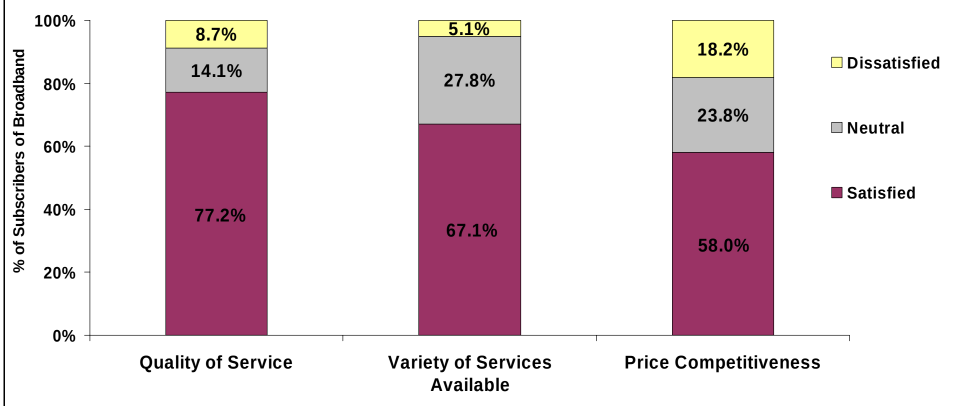


Base: Total resident population aged 18 years and above whose households did not subscribe to Broadband Internet services.
Note: Responses are based on a multiple-response question, hence percentages do not add up to 100%.

Satisfaction with Broadband Internet Services

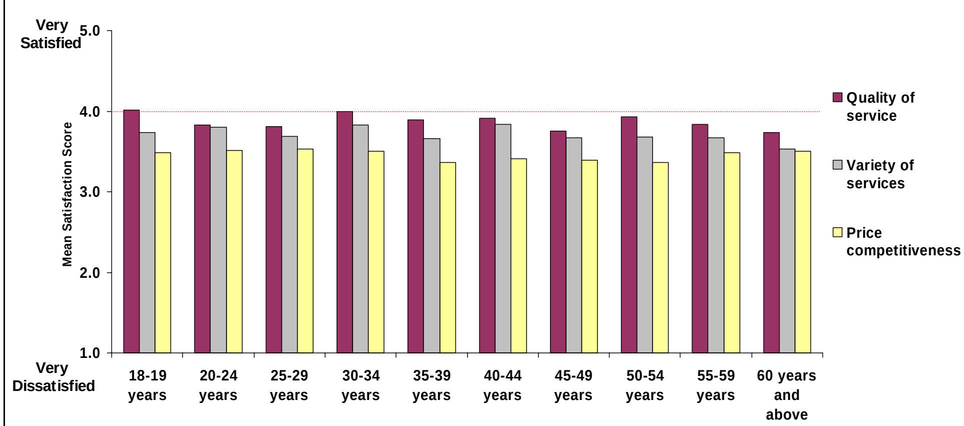
Respondents were generally satisfied with the quality and variety of services, as well as price competitiveness (**Figure D3**). The breakdown of satisfaction levels by age and housing type are provided in **Figure D4** and **Figure D5** respectively.

Figure D3: Overall Satisfaction with Broadband Internet Services



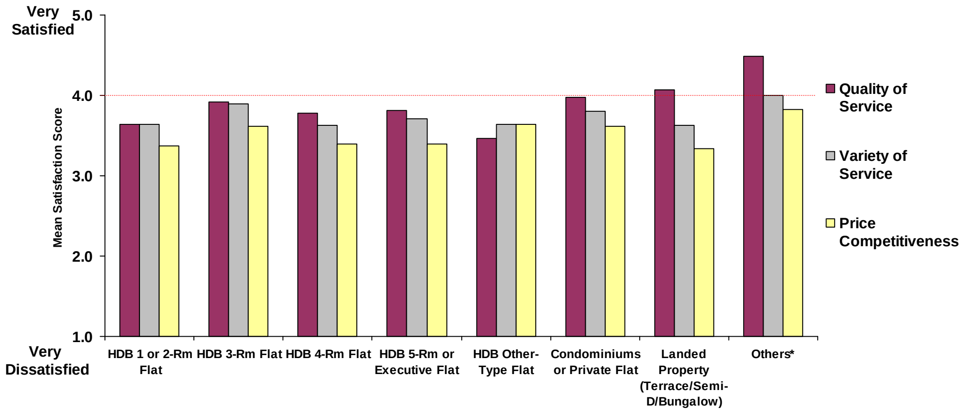
Base: Total resident population aged 18 years and above whose households subscribed to Broadband Internet services.

Figure D4: Overall Satisfaction with Broadband Internet Services by Age



Base: Total resident population aged 18 years and above whose households subscribed to Broadband Internet services. Note: The satisfaction index is based on a 5-point scale where "1" = Very Dissatisfied, and "5" – Very Satisfied. The dotted red line denotes that ratings higher than 4.0 are considered excellent.

Figure D5: Overall Satisfaction with Broadband Internet Services by Housing Type

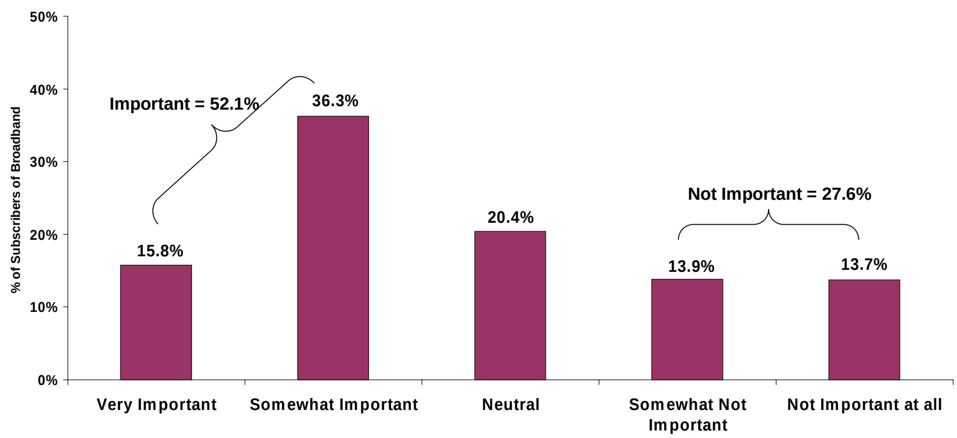


Base: Total resident population aged 18 years and above whose households subscribed to Broadband Internet services at home. Note: The satisfaction indices are based on a 5-point scale where "1" = Very Dissatisfied, and "5" – Very Satisfied in terms of satisfaction levels. The dotted red line denotes that ratings higher than 4.0 are considered excellent.
* E.g. prison quarters - housing for prison officers/families.

<u>Importance of Freebies in Choosing Service Plans</u>

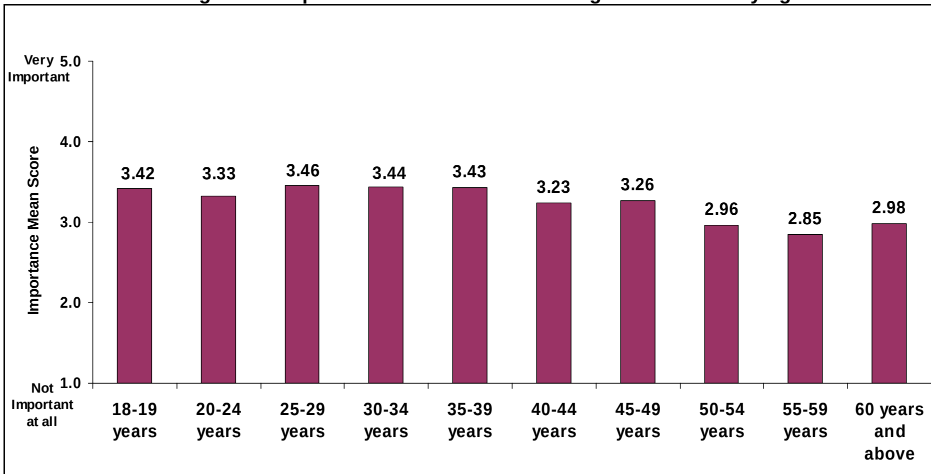
Slightly more than half of the Broadband Internet subscribers considered freebies an important factor in choosing a service plan (**Figure D6**). The breakdown by age groups and housing types are provided in **Figure D7** and **Figure D8** respectively.

Figure D6: Overall Importance of Freebies in Choosing a Service Plan



Base: Total resident population aged 18 years and above whose households subscribed to Broadband Internet services. Note: The importance index is based on a 5-point scale where "1" = Not Important at All, and "5" – Very Important.

Figure D7: Importance of Freebies in Choosing a Service Plan by Age



Base: Total resident population aged 18 years and above whose households subscribed to Broadband Internet services. Note: The importance index is based on a 5-point scale where "1" = Not Important at All, and "5" – Very Important.

Figure D8: Importance of Freebies in Choosing a Service Plan by Housing Type

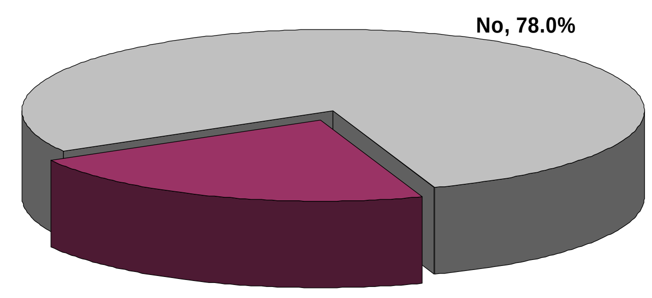
Base: Total resident population aged 18 years and above whose households subscribed to Broadband Internet services. Note: The importance index is based on a 5-point scale where "1" = Not Important at All, and "5" – Very Important.
* E.g. prison quarters - housing for prison officers/families.

E PAYPHONE SERVICES

Usage of Payphone Services

Generally, usage of payphone services was not high. Eight out of ten respondents indicated that they did not use a payphone in the last six months (**Figure E1**).

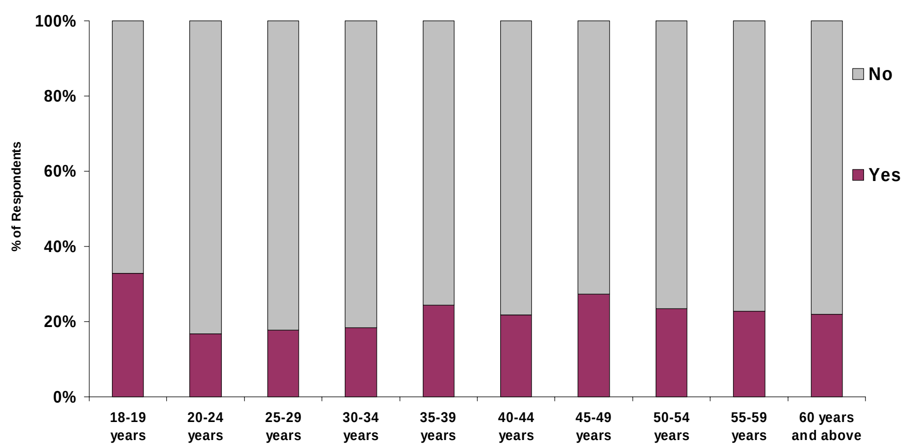
Figure E1: Overall Usage of Payphone Services (Last 6 Months)



Base: Total resident population aged 18 years and above.

The breakdown by age groups is shown in **Figure E2**. The youngest age group of 18-19 years exhibited the highest usage.

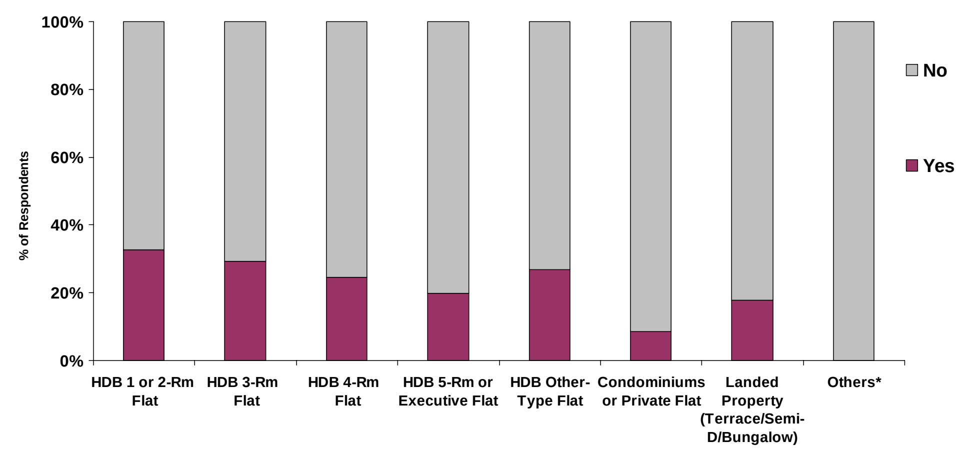
Figure E2: Usage of Payphone Services (Last 6 Months) by Age



Base: Total resident population aged 18 years and above.

The breakdown by housing types is shown in **Figure E3**. Respondents living in private property were less likely to use payphone services compared to respondents living in public housing.

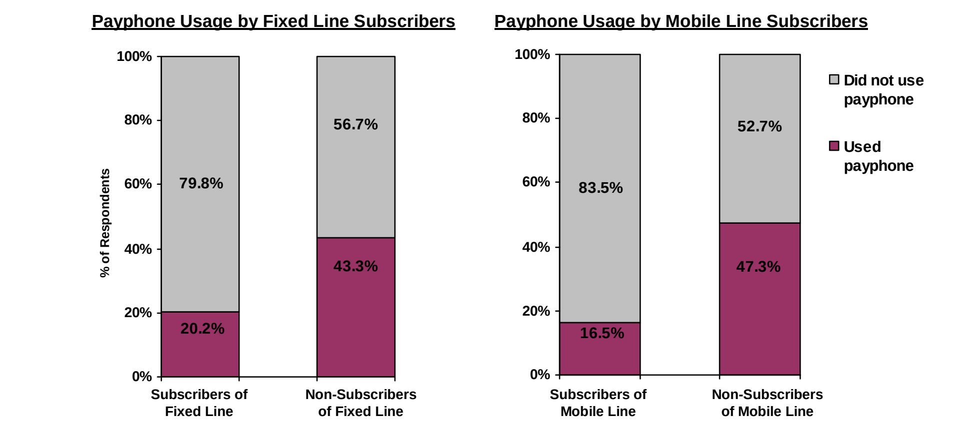
Figure E3: Usage of Payphone Services (Last 6 Months) by Housing Type



Base: Total resident population aged 18 years and above.
* E.g. prison quarters - housing for prison officers/families.

The breakdown by subscriptions to fixed line telephone services and mobile telephone services are shown in **Figure E4**. Respondents who did not subscribe to fixed line telephone services or mobile telephone services were more dependent on payphone services.

Figure E4: Usage of Payphone Services by Subscribers of Fixed Lines and Mobile Telephone Services

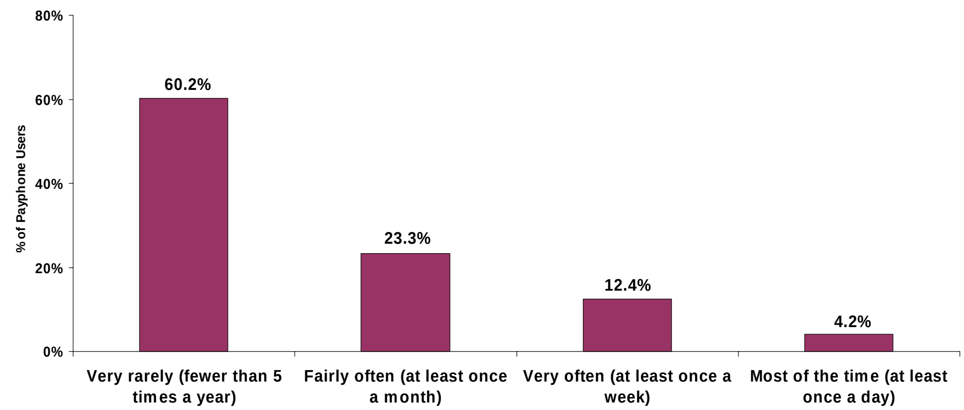


Base: Total resident population aged 18 years and above.

Frequency of Payphone Usage

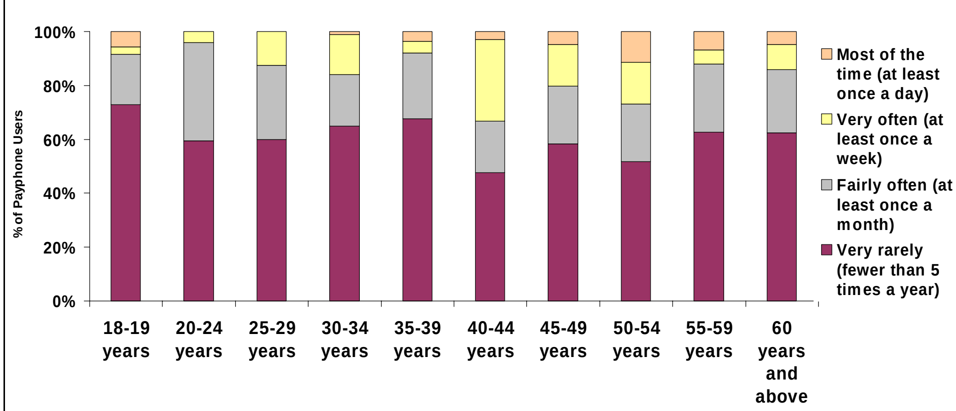
Generally, users of payphone services exhibited low frequency of usage, with 6 in 10 respondents using the service less than five times a year (**Figure E5**). The breakdown by age and housing type are shown in **Figure E6** and **Figure E7** respectively. Among all housing types, respondents living in HDB one- or two-room flats used payphone services most frequently.

Figure E5: Overall Frequency of Payphone Service Usage



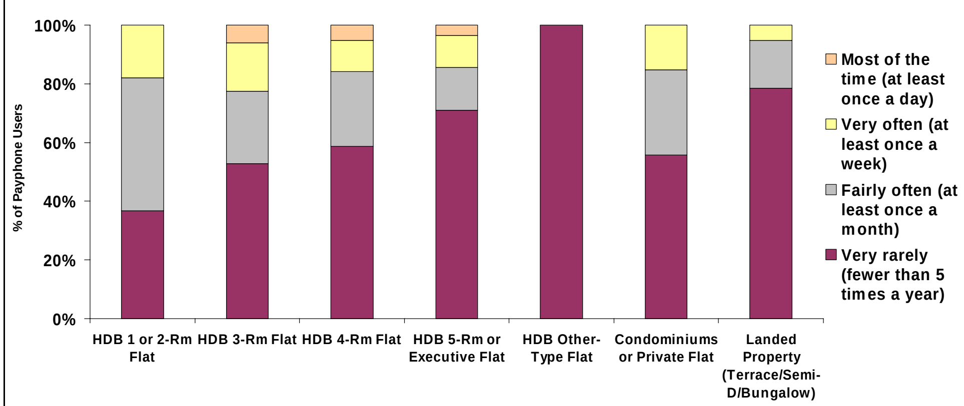
Base: Total resident population aged 18 years and above who used payphone services in the last 6 months.

Figure E6: Frequency of Payphone Service Usage by Age



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

Figure E7: Frequency of Payphone Usage by Housing Type

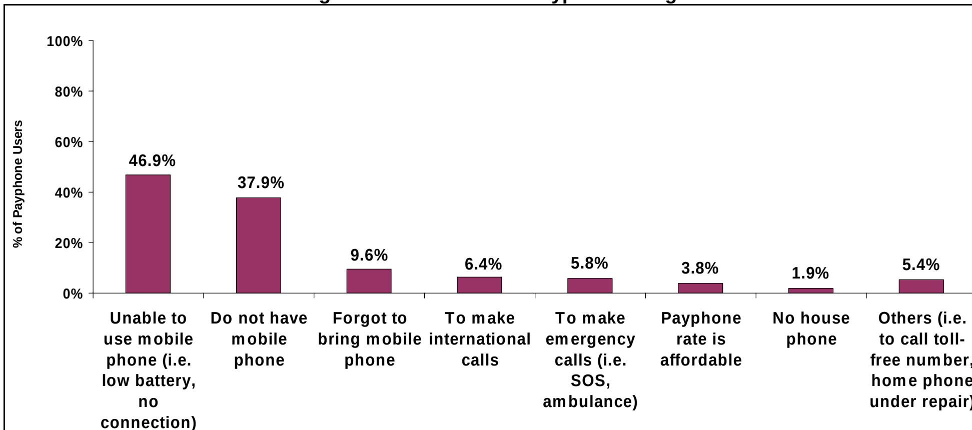


Base: Total resident population aged 18 years and above who used payphone services in the last 6 months.

<u>Reasons for Payphone Usage</u>

The reasons for using payphone services cited by respondents who had used the service in the last six months are shown in **Figure E8**.

Figure E8: Reasons for Payphone Usage

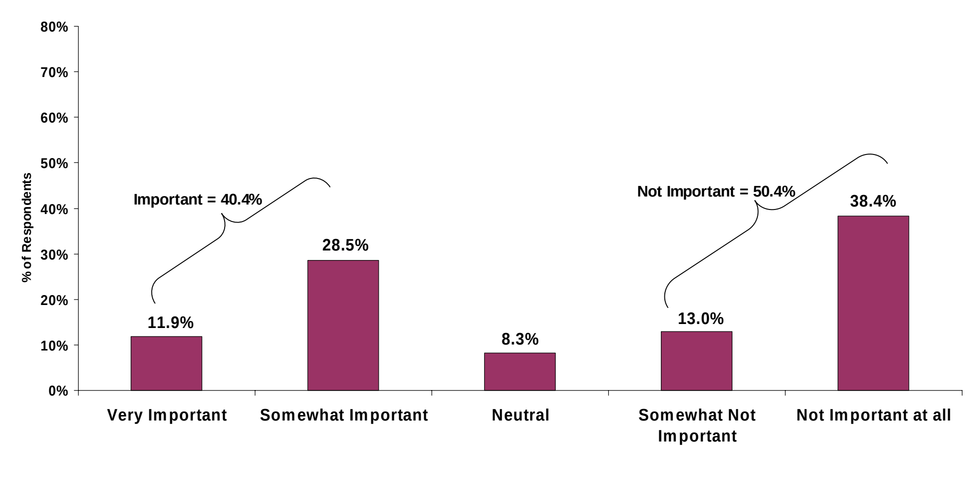


Base: Total resident population aged 18 years and above who used payphone services in the last 6 months.
Note: Responses are based on a multiple-response question, hence percentages do not add up to 100%.

Importance of Payphone Services

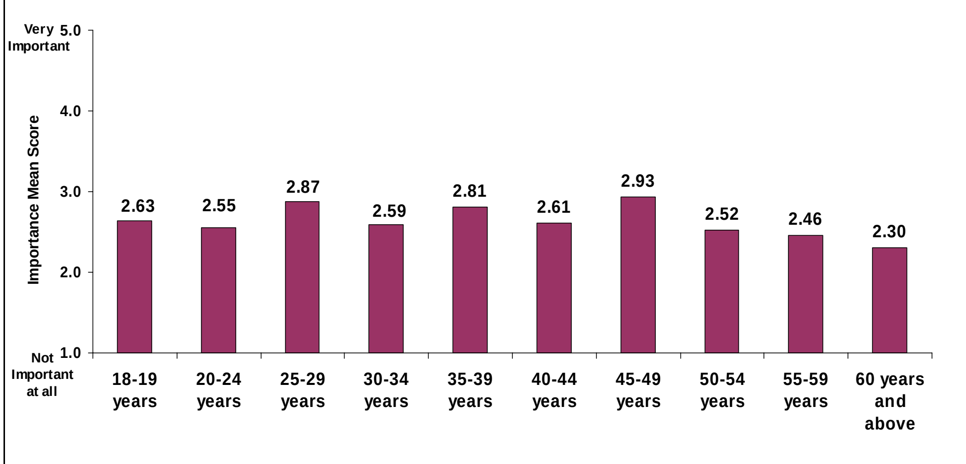
While slightly more than half of the respondents indicated that payphone services were not an important service, 40% of the respondents indicated otherwise (**Figure E9**). **Figure E10** and **Figure E11** show the perceived importance of payphone services by age groups and housing types of the respondents respectively.

Figure E9: Overall Importance of Payphone Service



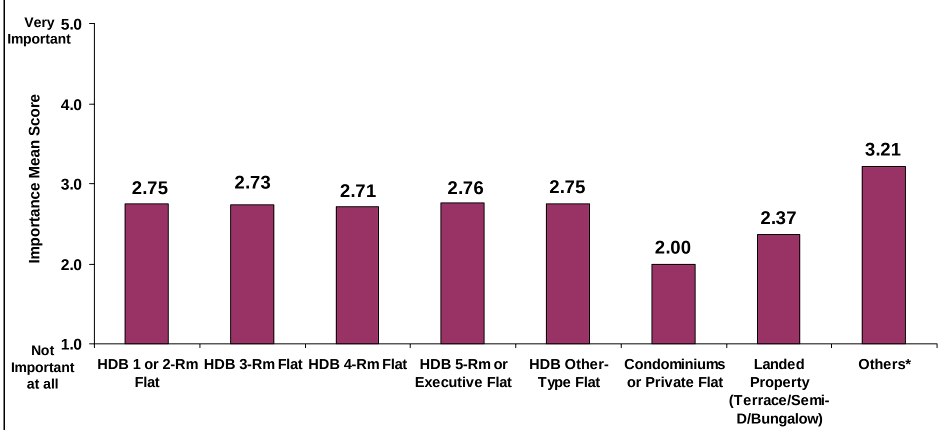
Base: Total resident population aged 18 years and above.

Figure E10: Importance of Payphone Services by Age



Base: Total resident population aged 18 years and above. Note: The importance index is based on a 5-point scale where “1” = Not Important at All, and “5” – Very Important.

Figure E11: Importance of Payphone Services by Housing Type

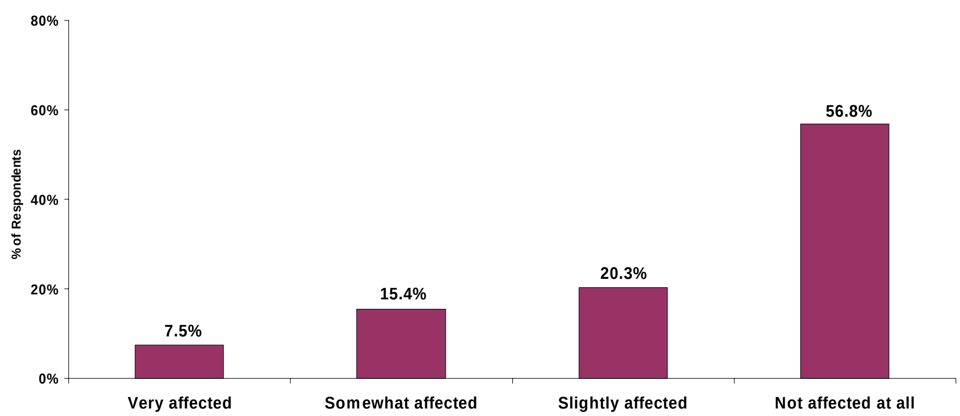


Base: Total resident population aged 18 years and above. Note: The importance index is based on a 5-point scale where "1" = Not Important at All, and "5" – Very Important.
* E.g. prison quarters - housing for prison officers/families.

Impact of the Reduction of Payphones

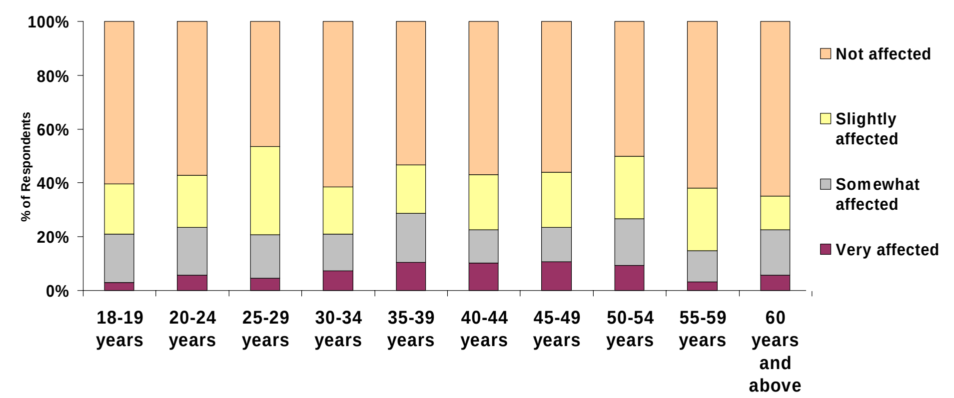
Slightly over half of the respondents indicated that they would not be affected at all should the number of payphones be reduced (**Figure E12**). The breakdown by age groups is shown in **Figure E13**.

Figure E12: Overall Impact of the Reduction of Payphone Services



Base: Total resident population aged 18 years and above.

Figure E13: Impact of the Reduction of Payphones by Age



Base: Total resident population aged 18 years and above.

F PRINTED DIRECTORIES SERVICES[2]

Usage of Printed Directories Services

Approximately one-third of respondents used printed directories services in the last six months (**Figure F1**). The breakdown of usage by age and housing type are shown in **Figure F2** and **Figure F3** respectively.

Figure F1: Overall Usage of Printed Directories Services

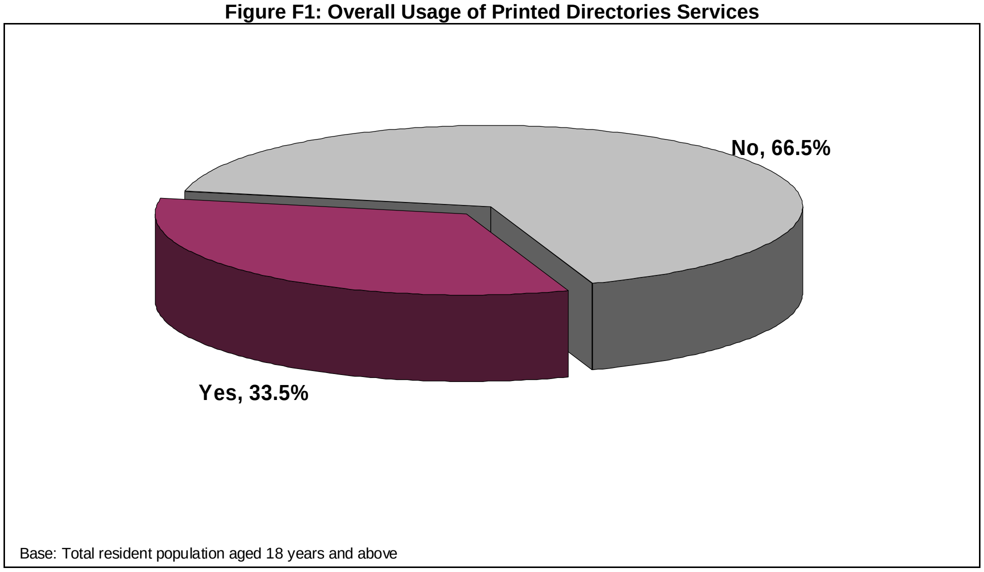
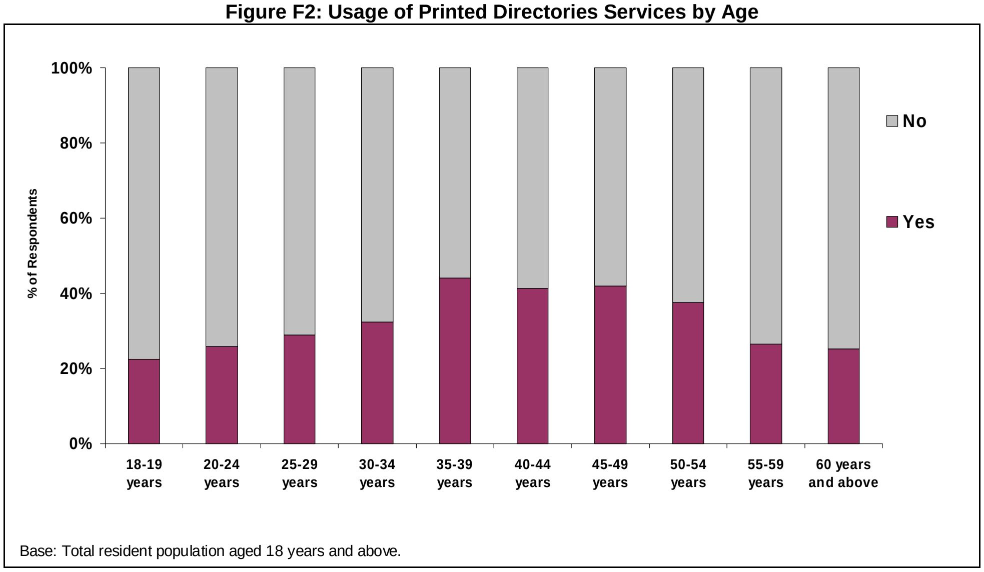
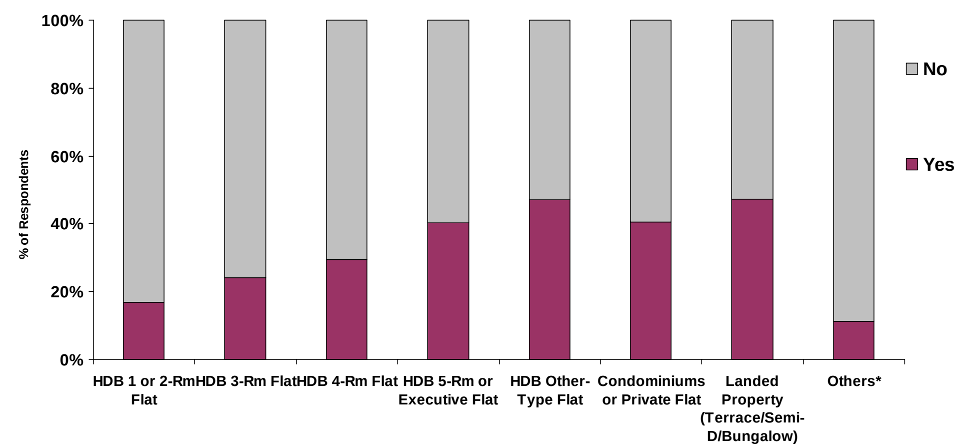


Figure F2: Usage of Printed Directories Services by Age



[2] Printed Directories refers to the Singapore Phone Book (comprising the White Pages Business and Residential Listings, the Chinese Yellow Pages and the Yellow Pages Buying and Commercial/Industrial Guides) and advertisement sales. These books provide residential, business and commercial phone listings with directory information, such as names, addresses and telephone numbers of subscribers of a fixed line service.

Figure F3: Usage of Printed Directories by Housing Type

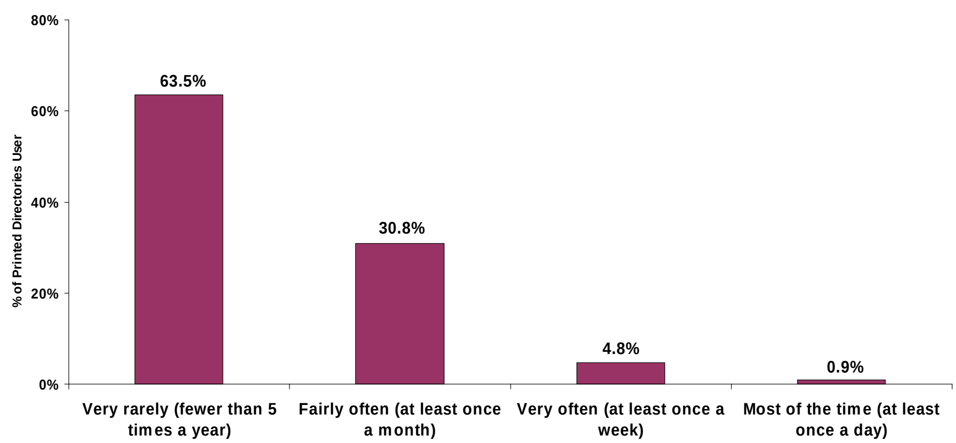


Base: Total resident population aged 18 years and above.
* E.g. prison quarters - housing for prison officers/families.

Frequency of Printed Directories Services Usage

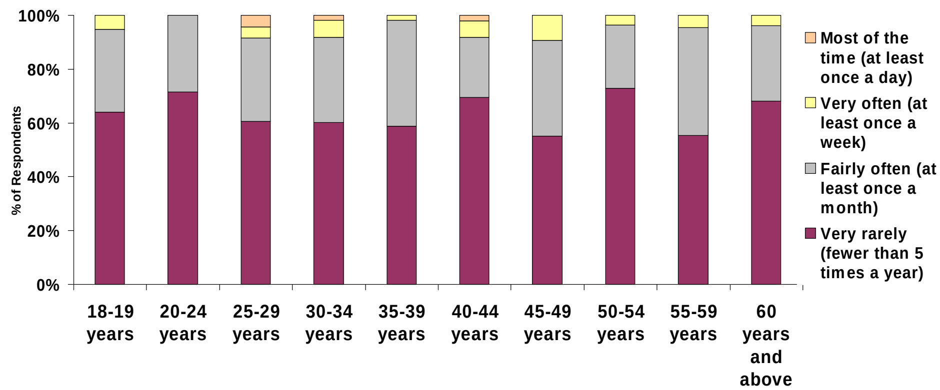
The majority of respondents used printed directories services fewer than five times a year (**Figure F4**). The breakdown of usage by age is shown in **Figure F5**.

Figure F4: Frequency of Printed Directories Services Usage



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

Figure F5: Frequency of Printed Directories Usage by Age

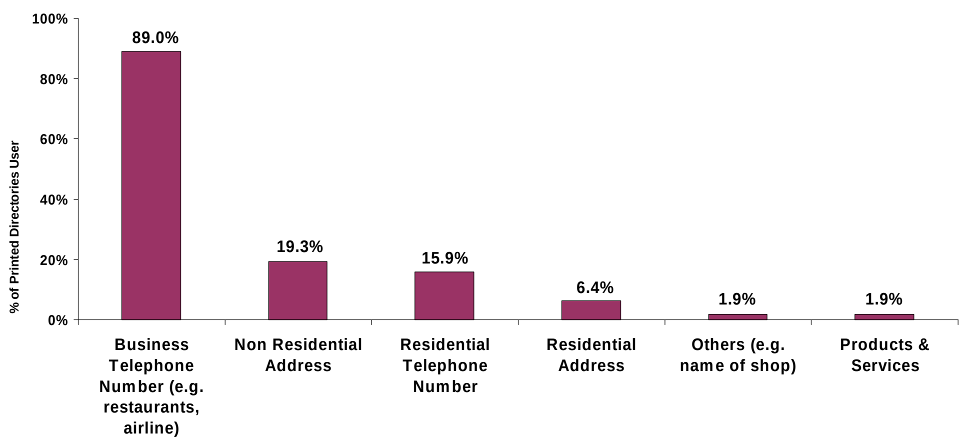


Base: Total resident population aged 18 years and above who used printed directories services in the last 6 months.

Information Most Commonly Looked For

Respondents indicated that business telephone numbers was the information that they most commonly looked for when using printed directories services (**Figure F6**).

Figure F6: Information Most Commonly Looked For

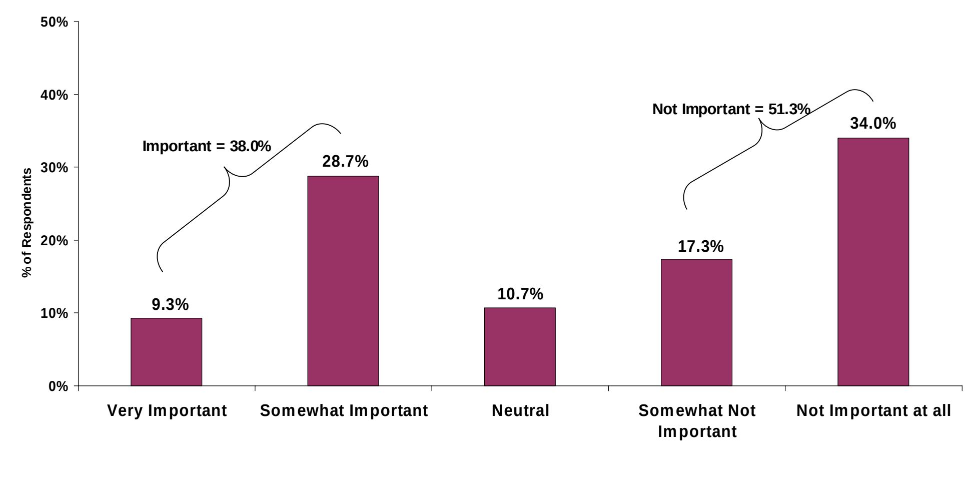


Base: Total resident population aged 18 years and above who used printed directories services in the last 6 months.
Note: Responses are based on a multiple-response question, hence percentages do not add up to 100%.

Importance of Printed Directories Services

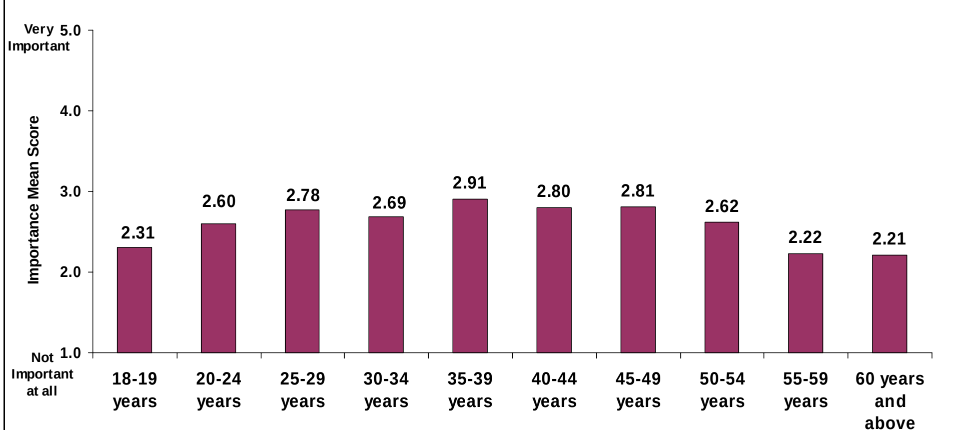
While slightly more than half of the respondents indicated that they did not find printed directories services important, another 38% of the respondents indicated otherwise (**Figure F7**). The perceived importance of printed directories services by age groups and housing types are shown in **Figure F8** and **Figure F9** respectively.

Figure F7: Overall Importance of Printed Directories



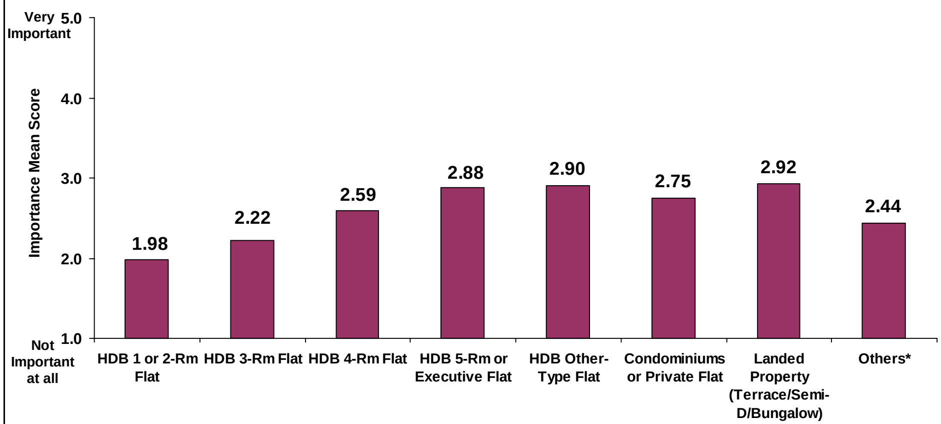
Base: Total resident population aged 18 years and above.

Figure F8: Importance of Printed Directories Services by Age



Base: Total resident population aged 18 years and above. Note: The important index is based on a 5-point scale where "1" = Not Important at All, and "5" – Very Important.

Figure F9: Importance of Printed Directories Services by Housing Type

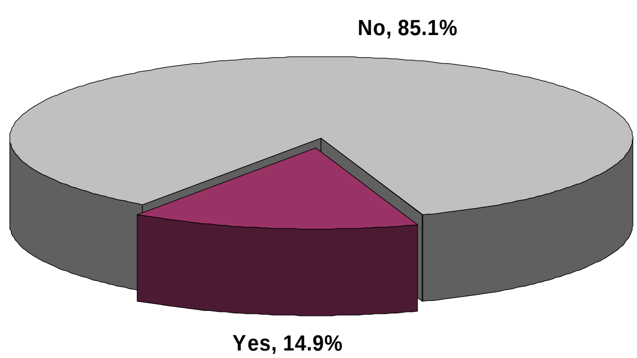


Base: Total resident population aged 18 years and above. Note: The important index is based on a 5-point scale where "1" = Not Important at All, and "5" – Very Important.
* E.g. prison quarters - housing for prison officers/families.

<u>Change in Usage If Printed Directories Were Provided at a Charge</u>

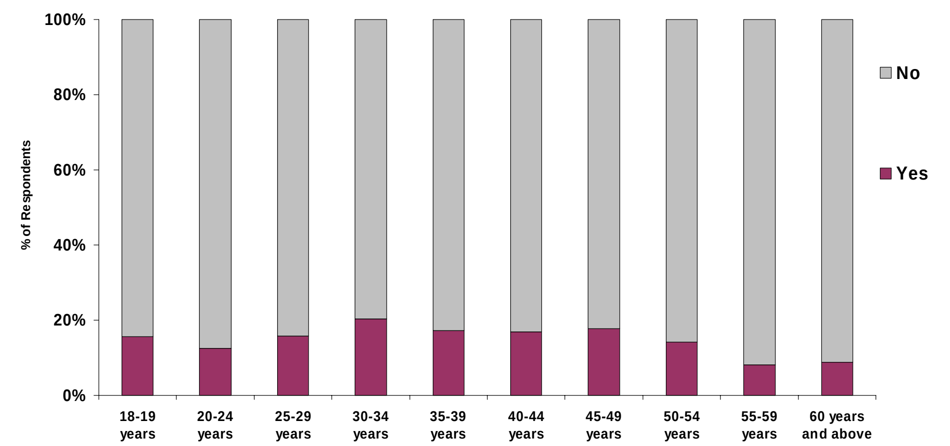
Figure F10 shows that only 15% of respondents would continue using printed directories services if they were to be provided at a charge. The breakdown by age and housing type are shown in **Figure F11** and **Figure F12** respectively.

Figure F10: Willingness to Continue Using Printed Directories Services if Provided at a Charge – Overall



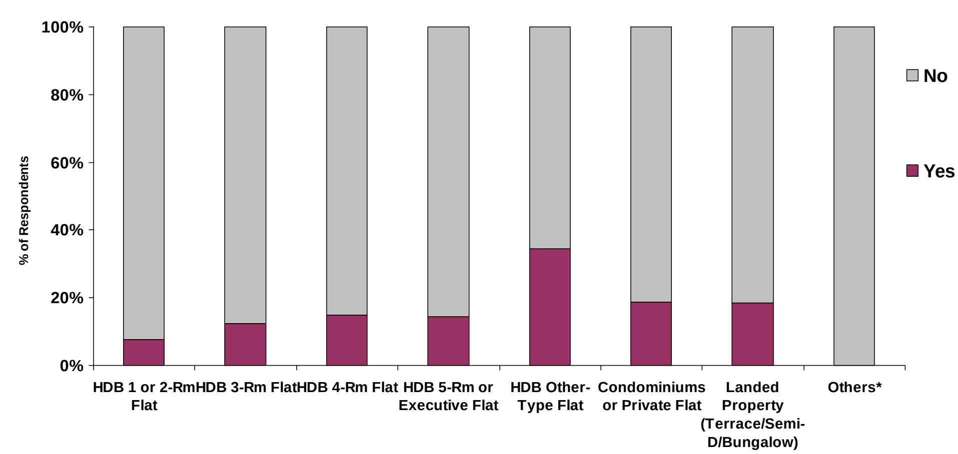
Base: Total resident population aged 18 years and above.

Figure F11: Willingness to Continue Using Printed Directories Services if Provided at a Charge - by Age



Base: Total resident population aged 18 years and above.

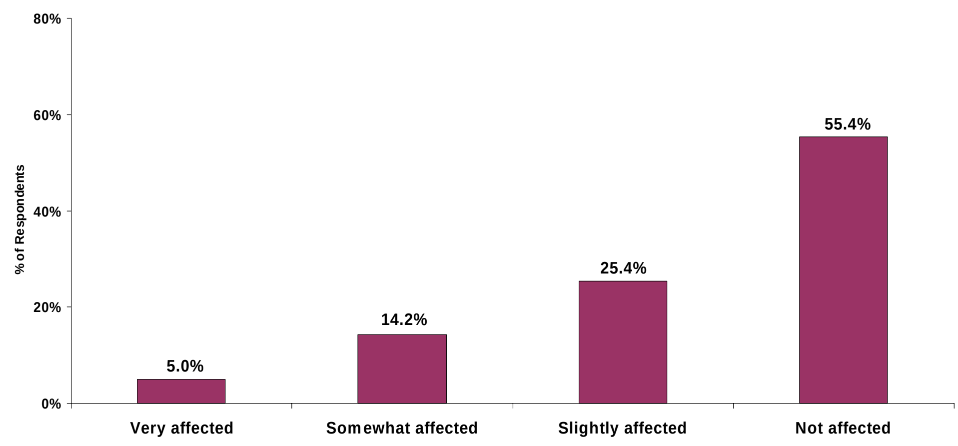
Figure F12: Willingness to Continue Using Printed Directories Services if Provided at a Charge - by Housing Type



Base: Total resident population aged 18 years and above.
* E.g. prison quarters - housing for prison officers/families.

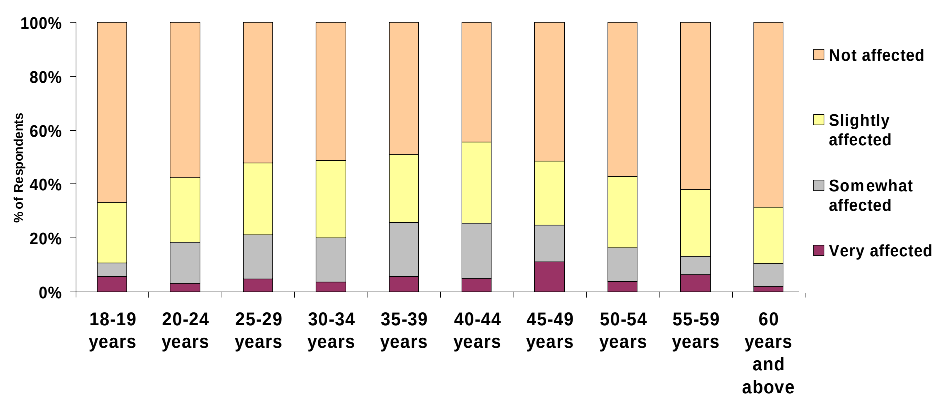
<u>Impact if Printed Directories Services Were No Longer Available</u>
Slightly more than half of the respondents indicated that they would not be affected at all if printed directories services were no longer available (**Figure F13**). The breakdown by age is shown in **Figure F14**.

Figure F13: Impact if Printed Directories Services Were No Longer Available – Overall



Base: Total resident population aged 18 years and above.

Figure F14: Impact if Printed Directories Were No Longer Available - by Age



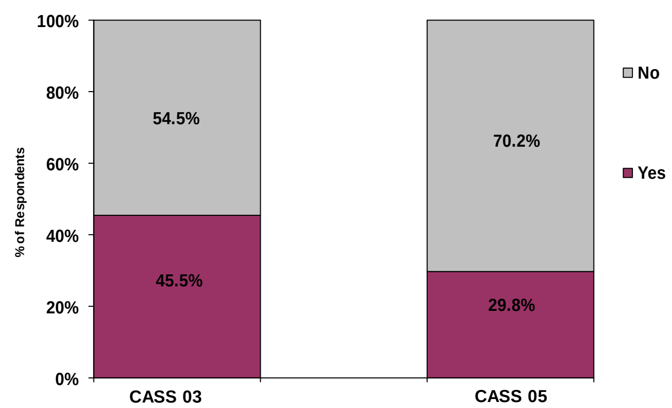
Base: Total resident population aged 18 years and above.

G SERVICE 100[3] (Directory Enquiry Service)

Usage of Service 100

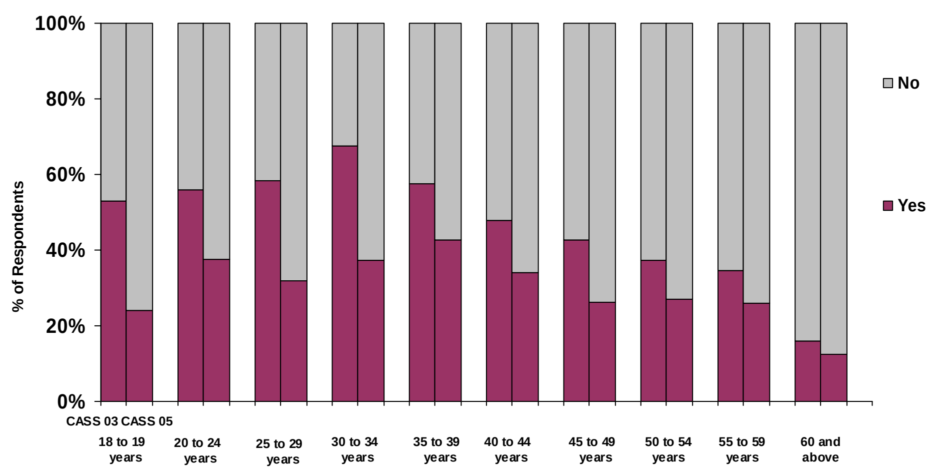
There was an overall decrease in the usage of Service 100 since 2003 (**Figure G1**). **Figure G2** and **Figure G3** show that the decrease in the usage of Service 100 cuts across all age groups and housing types respectively.

Figure G1: Overall Usage of Service 100 (Last 6 Months)



Base: Total resident population aged 18 years and above.

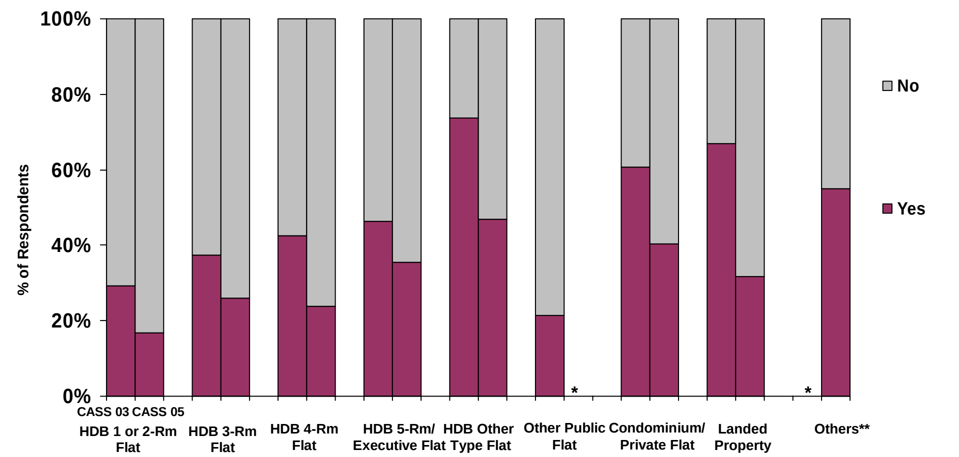
Figure G2: Usage of Service 100 (Last 6 Months) by Age



Base: Total resident population aged 18 years and above.

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

Figure G3: Usage of Service 100 (Last 6 Months) by Housing Type

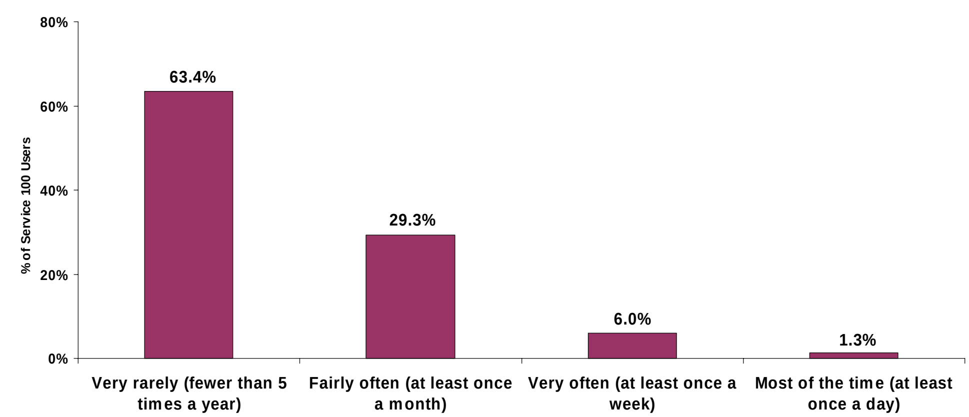


Base: Total resident population aged 18 years and above. Note: * indicates that no household was recorded under the particular housing type.
** E.g. prison quarters - housing for prison officers/families.

<u>Frequency of Usage</u>

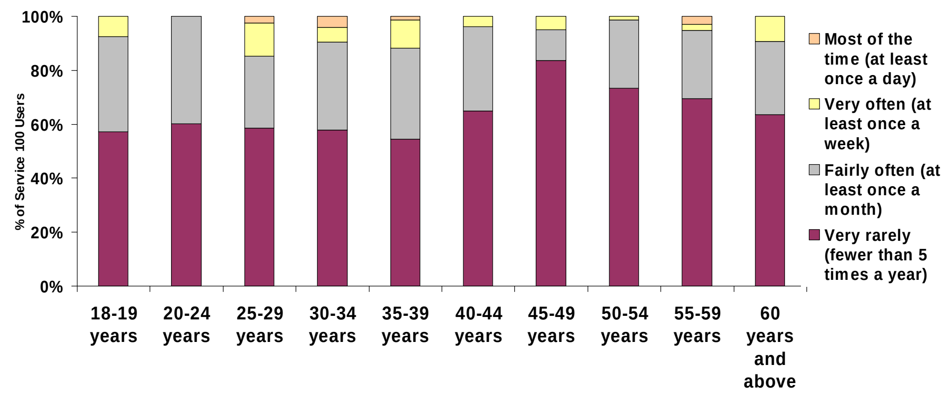
The majority of respondents used Service 100 fewer than five times a year (**Figure G4**). **Figure G5** and **Figure G6** show the breakdown by age groups and housing type respectively.

Figure G4: Overall Frequency of Service 100 Usage



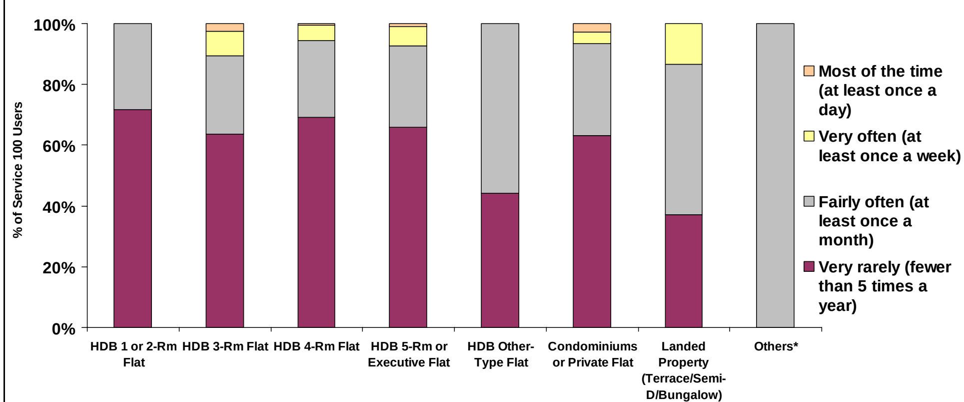
Base: Total resident population aged 18 years and above who have used Service 100 in the last 6 months.

Figure G5: Frequency of Service 100 Usage by Age



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

Figure G6: Frequency of Service 100 Usage by Housing Type

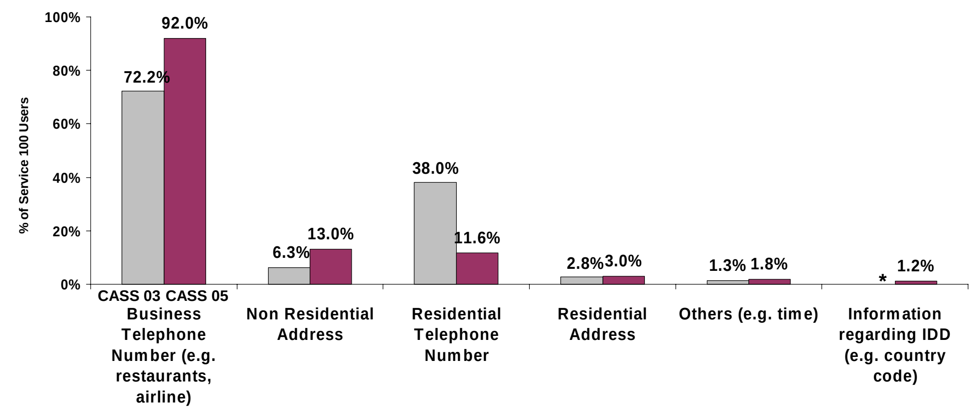


Base: Total resident population aged 18 years and above who have used Service 100 in the last 6 months.
* E.g. prison quarters - housing for prison officers/families.

Information Most Commonly Requested

The breakdown in the type of information requested for by users of Service 100, as well as comparison with survey findings in 2003 is provided in **Figure G7**.

Figure G7: Information Most Commonly Requested

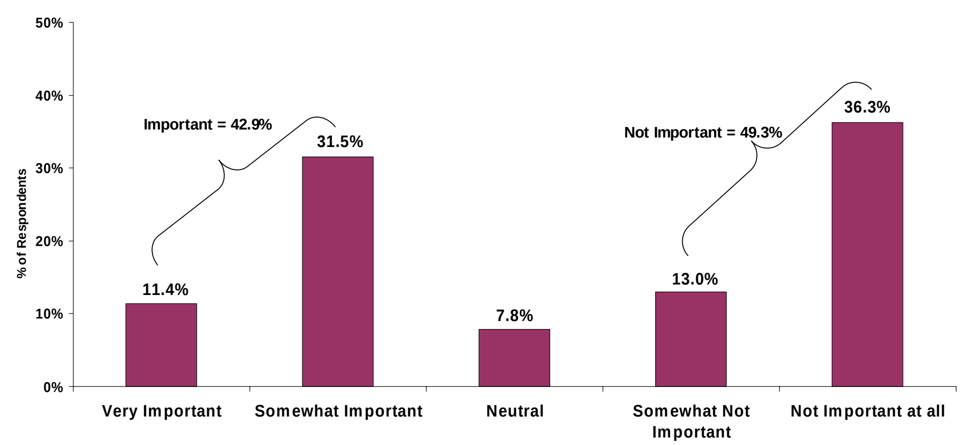


Base: Total resident population aged 18 years and above who have used Service 100 in the last 6 months. Note: * indicates that the response was not mentioned in CAS 03. Responses are based on a multiple-response question, hence percentages do not add up to 100%.

Importance of Service 100

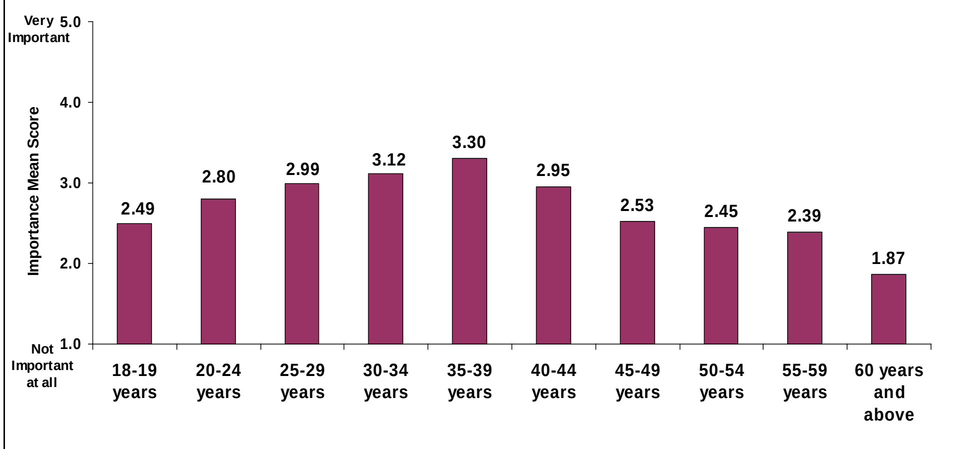
While close to half of the respondents did not perceive Service 100 as important, 42.9% of respondents perceived otherwise (**Figure G8**). The breakdown by age groups and housing types are shown in **Figure G9** and **Figure G10** respectively.

Figure G8: Overall Importance of Service 100



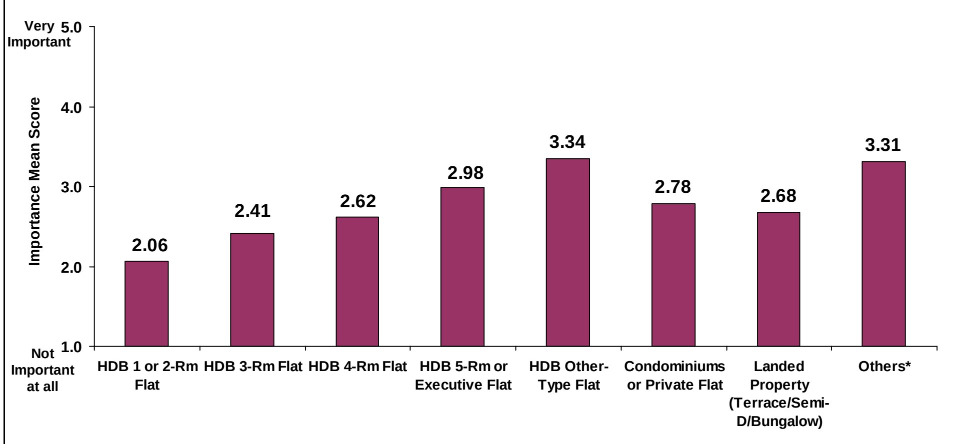
Base: Total resident population aged 18 years and above.

Figure G9: Importance of Service 100 by Age



Base: Total resident population aged 18 years and above. Note: The important index is based on a 5-point scale where "1" = Not Important at All, and "5" – "Very Important".

Figure G10: Importance of Service 100 by Housing Type

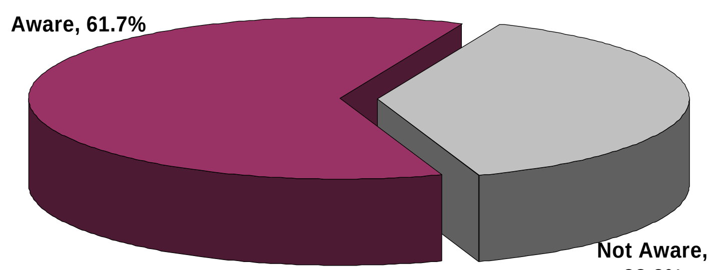


Base: Total resident population aged 18 years and above. Note: The important index is based on a 5-point scale where "1" = Not Important at All, and "5" – "Very Important".
* E.g. prison quarters - housing for prison officers/families.

Awareness of Other Forms of Directory Services Apart from Service 100

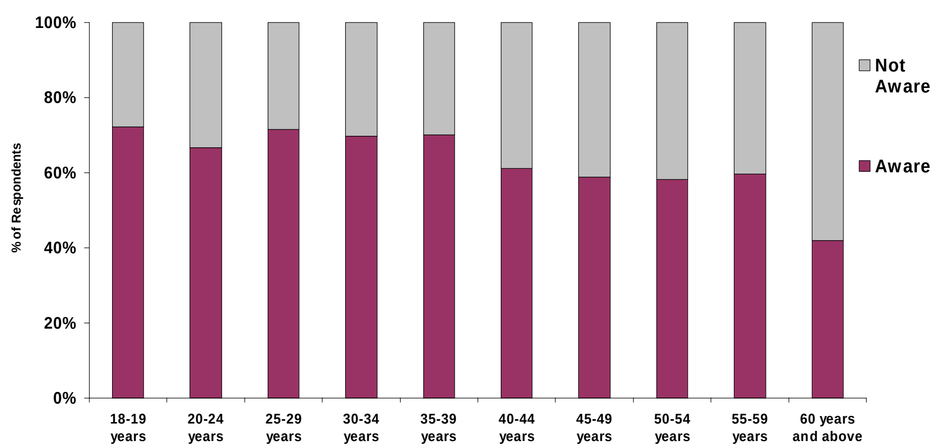
Slightly over 60% of the respondents were aware of other forms of directory services aside from Service 100 (**Figure G11**). The breakdown by age, housing type and usage of Service 100 are shown in **Figure G12**, **Figure G13** and **Figure G14** respectively.

Figure G11: Overall Awareness of Other Forms of Directories



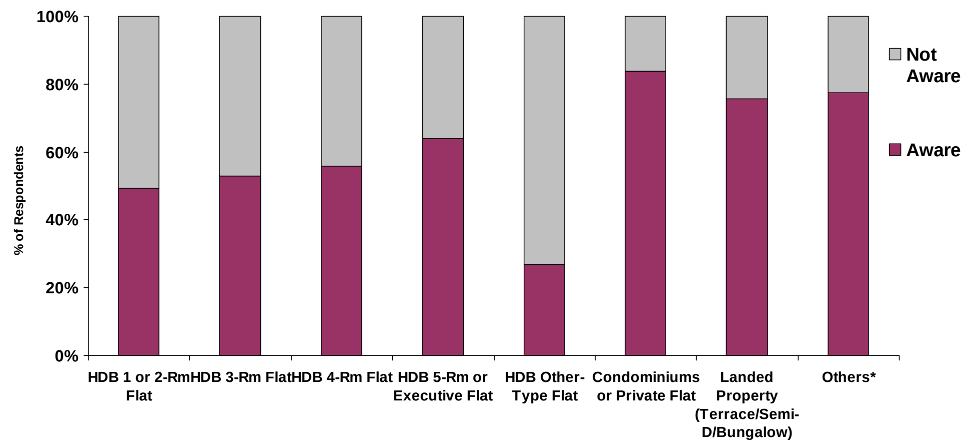
Base: Total resident population aged 18 years and above.

Figure G12: Awareness of Other Forms of Directories by Age



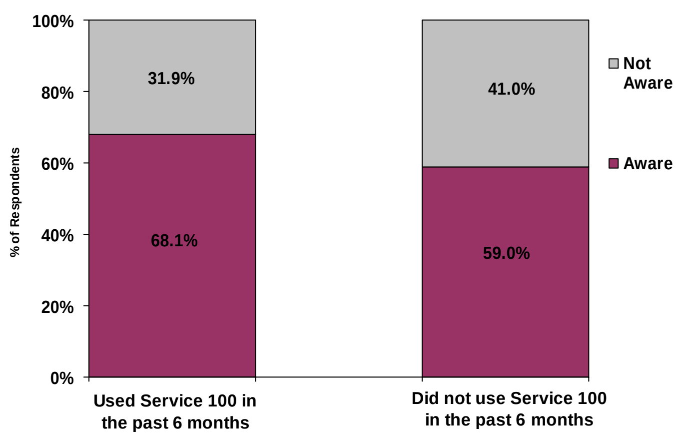
Base: Total resident population aged 18 years and above.

Figure G13: Awareness of Other Forms of Directories by Housing Type



Base: Total resident population aged 18 years and above.
* E.g. prison quarters - housing for prison officers/families.

Figure G14: Awareness of Other Forms of Directories by Usage of Service 100

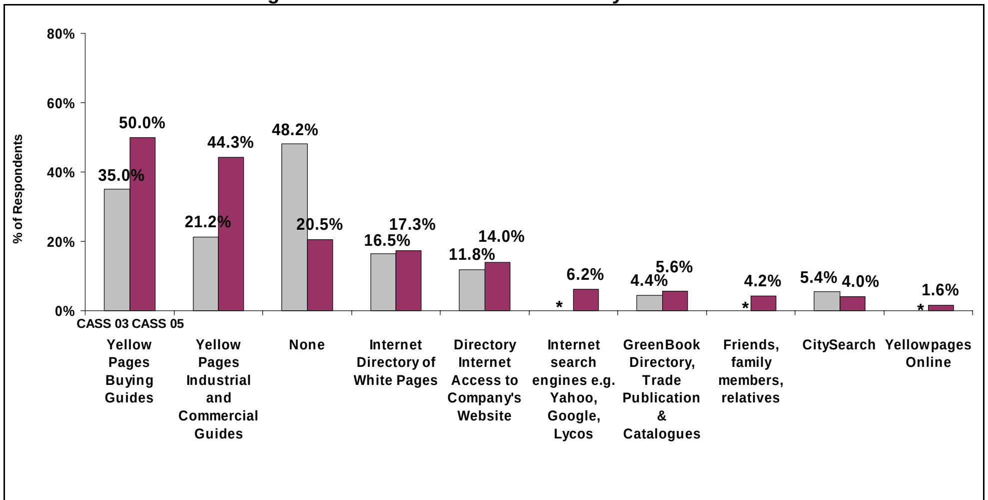


Base: Total resident population aged 18 years and above.

Other Sources of Directory Information Used

With the exception of CitySearch, there was a general increase in the use of alternative sources of directory information since 2003 (**Figure G15**).

Figure G15: Other Sources of Directory Information

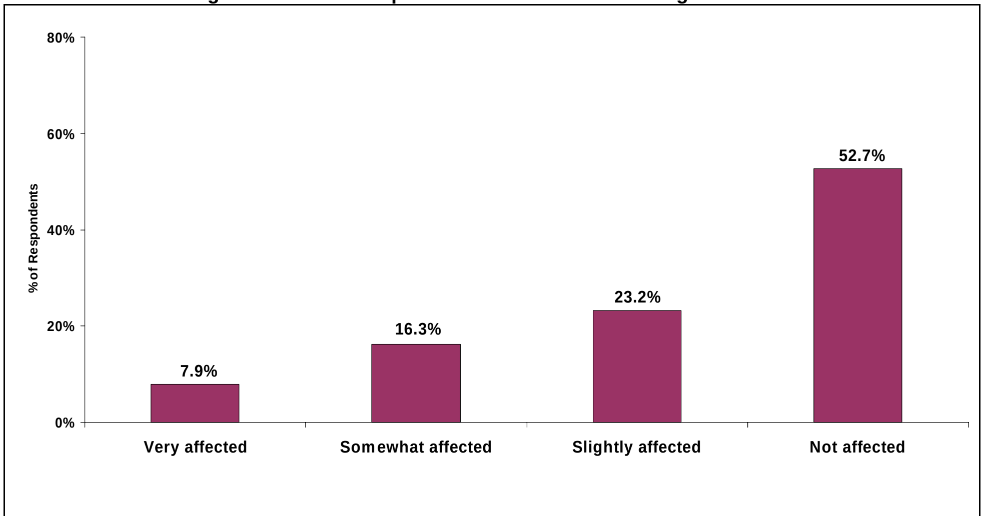


Base: Total resident population aged 18 years and above. Note: * alternative sources were not mentioned in CAS 03. Responses are based on a multiple-response question, hence percentages do not add up to 100%.

Impact If Service 100 Was No Longer Available

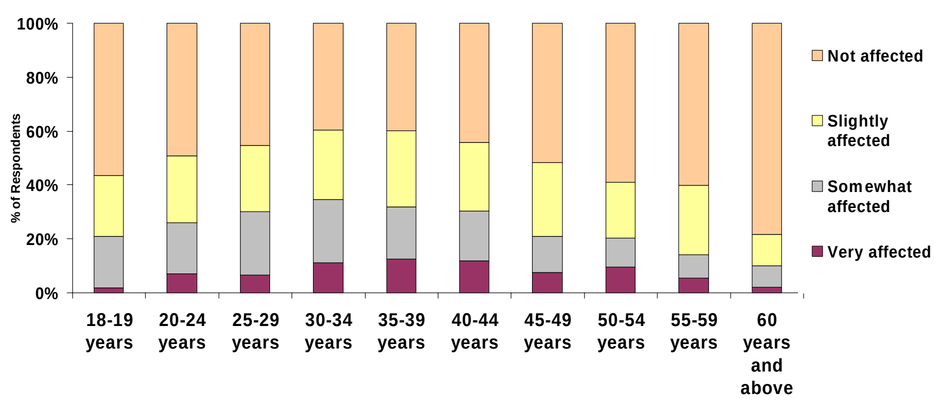
Slightly more than half the respondents indicated that they would not be affected if Service 100 were not available (**Figure G16**). The breakdown by age groups and housing types are shown in **Figure G17** and **Figure G18** respectively.

Figure G16: Overall Impact If Service 100 Were No Longer Available



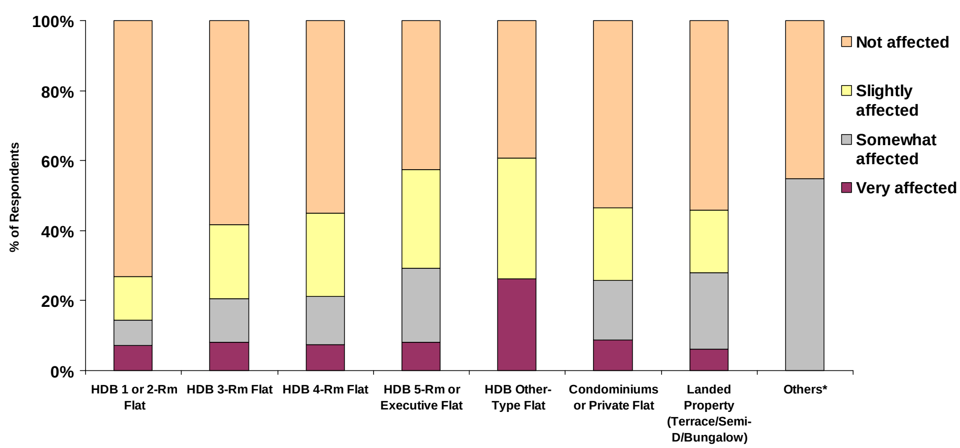
Base: Total resident population aged 18 years and above.

Figure G17: Impact If Service 100 Were No Longer Available - by Age



Base: Total resident population aged 18 years and above.

Figure G18: Impact If Service 100 Were No Longer Available - by Housing Type



Base: Total resident population aged 18 years and above.
* E.g. prison quarters - housing for prison officers/families.