

# **IDA CONSUMER AWARENESS AND SATISFACTION SURVEY 2005 – NUMBER PORTABILITY**

## **INTRODUCTION**

- The Annual IDA Consumer Awareness and Satisfaction Survey 2005 (“**CASS 05**”) aims to measure consumers’ usage, awareness, and satisfaction on telecom services in Singapore. It gathered consumers’ opinion on telecom service quality, variety and price competitiveness.
- Generally, consumers were asked to rate fixed line and mobile telephony services. Specifically, they were also polled on Number Portability services for fixed line and mobile telephony. The survey also sought to gauge their interest in using a fixed line telephone service number as mobile telephone number.

## **RESEARCH METHODOLOGY**

- A total of 1,500 individuals were interviewed between 22 October and 5 December 2005. The individuals were selected through a two-stage stratified design: (a) 1,500 households were selected from the Household Sampling Frame maintained by the Singapore Department of Statistics; and (b) From this sample, one individual from the household were randomly picked for the survey.
- To be eligible for the survey, the individual must be a Singapore Citizen or Singapore PR, age 18 years and above.

## **SUMMARY OF KEY FINDINGS**

- Fixed line Number Portability
  - (a) Most respondents were not aware of such a service. 39.4 per cent of them are aware of the service and only 1.2 per cent of households polled have switched fixed line operators.
  - (b) 53.1 per cent of the respondents said being able to keep their number was a critical consideration when switching fixed line operators.
  - (c) Among those who switched fixed line operators, they expressed dissatisfaction with the recurring monthly charges that came with such a service.
- Mobile Number Portability
  - (a) There was higher awareness (72.7 per cent) of such a service as compared to awareness of fixed line number porting service.
  - (b) 63.9 per cent of mobile line subscribers considered it critical to be able to keep their number if they switch mobile operators.

- (c) Among those who switched mobile operators and subscribed to mobile number portability, they were least satisfied with having two numbers after porting and not being able to receive MMS on the original number. They were most satisfied with the one-time administrative charge for the service.

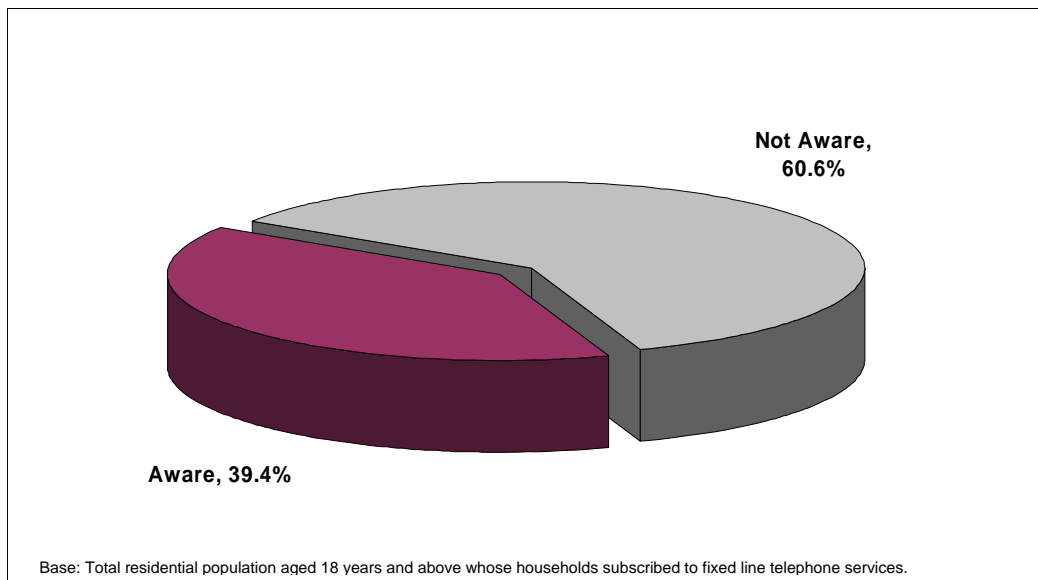
**SURVEY FINDINGS**

**A. Fixed line Number Portability**

**1. Awareness of Fixed line Number Portability Service**

The majority of respondents who subscribed to fixed line telephone services did not know about fixed line number portability. Six out of ten respondents were not aware that they could keep their number when they switch to another fixed line operator (Figure A1).

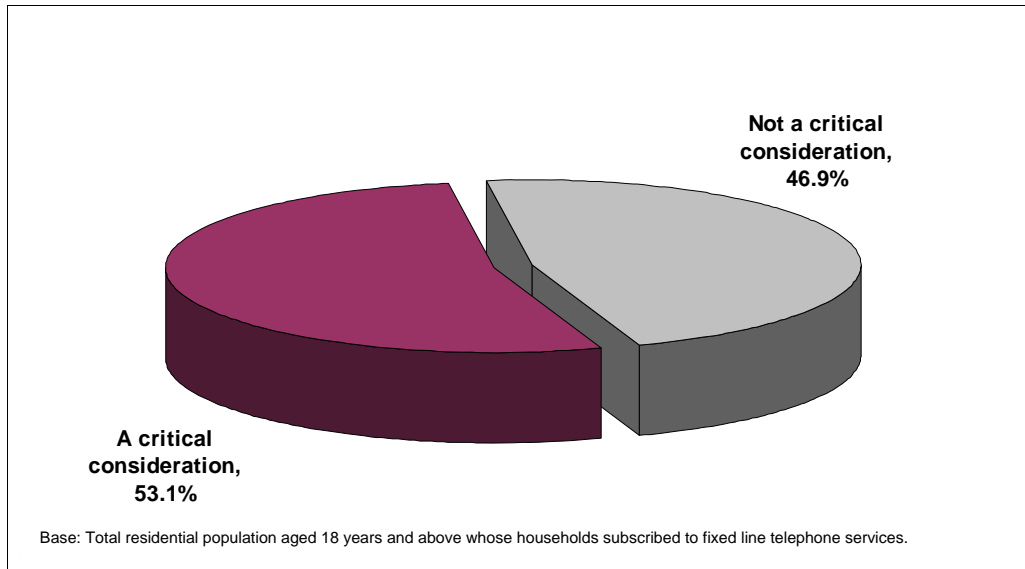
**Figure A1: Overall Awareness of Fixed line Number Portability**



## 2. Consideration of Fixed line Number Portability

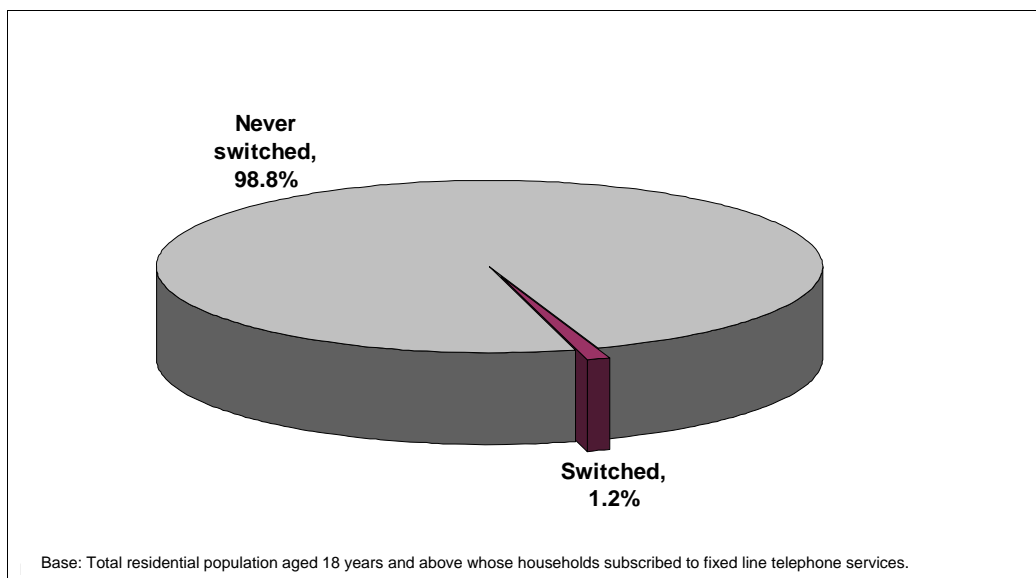
More than half of the respondents said the ability to retain their number is a critical factor when they want to switch between fixed line operators (Figure A2).

**Figure A2: Is the Ability to Retain Your Fixed line Number a Critical Consideration When You Wish to Switch Operators? – Overall**



Almost all respondents interviewed had not switch fixed line operators. Only 1.2 per cent of households had switched fixed line operators (Figure A3).

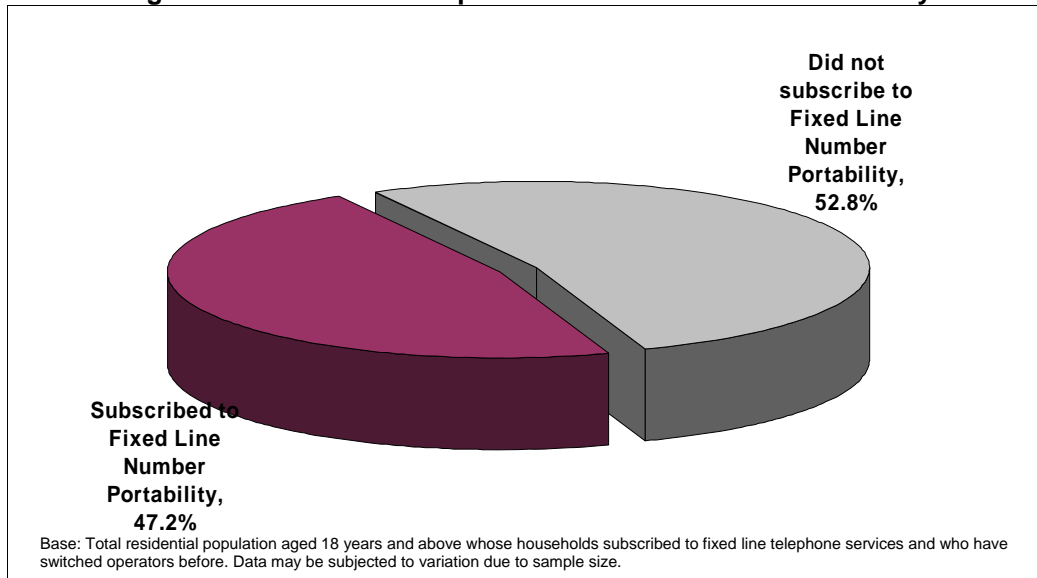
**Figure A3: Overall Switch Fixed line Service Operator**



### 3. Fixed line Number Portability Subscriptions

About half of the number of respondents who switched fixed line operators subscribed to the fixed line number portability (Figure A4).

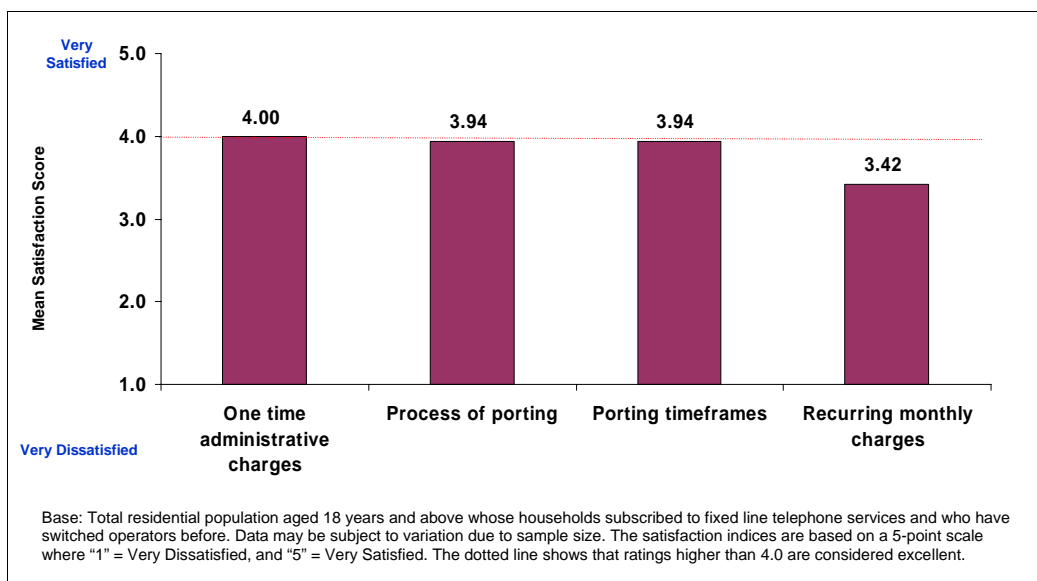
**Figure A4: Overall Subscription of Fixed line Number Portability**



### 4. Satisfaction with Fixed line Number Portability

Those who switched fixed line operators and subscribed for fixed line number portability were generally satisfied with the one-time administrative charges, process of porting and porting timeframe. Subscribers gave the thumbs down for the recurring monthly charges that came with such services (Figure A5).

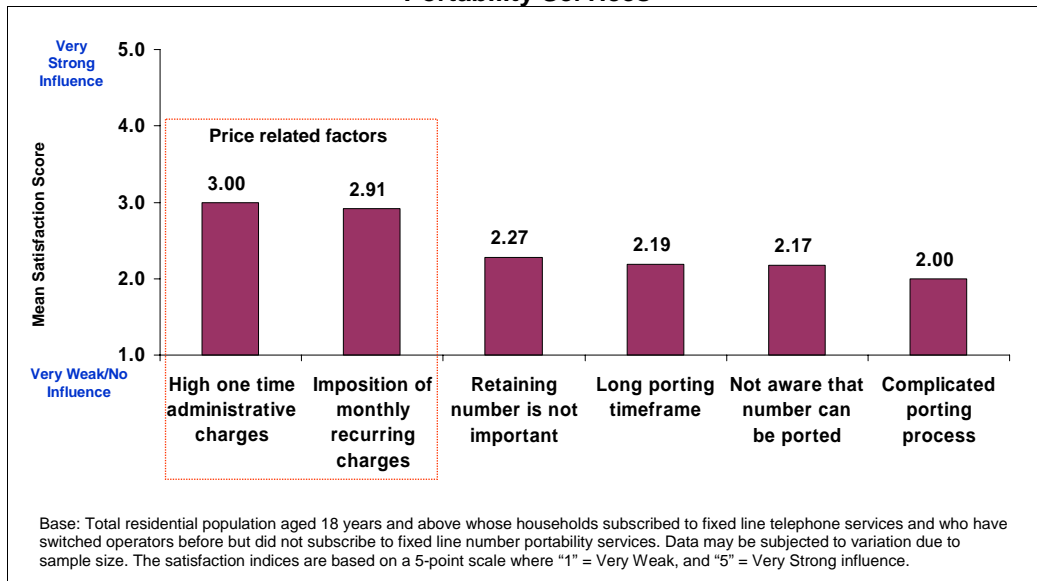
**Figure A5: Overall Satisfaction Ratings - Fixed line Number Portability**



## 5. Reasons for Not Subscribing to Fixed line Number Portability

Respondents who did not subscribe to fixed line number portability were more likely to be put off by price-related factors such as the high one-time administrative charges and the imposition of monthly recurring charges, compared to other factors. Factors such as long porting timeframe, lack of awareness and complicated porting process did not influence respondents' decision as much (Figure A6).

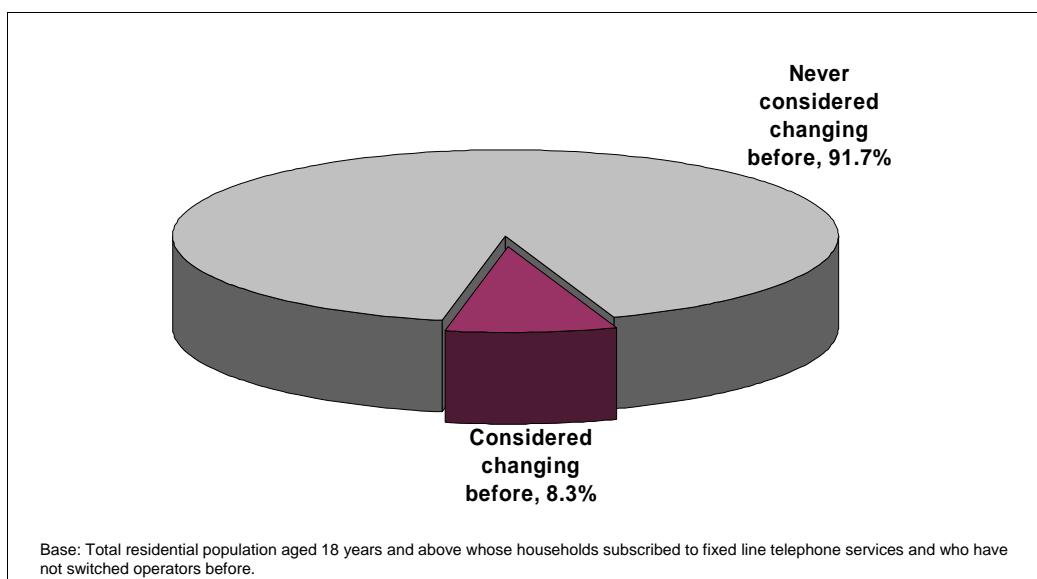
**Figure A6: Factors Influencing the Decision Not to Subscribe to Fixed line Number Portability Services**



## 6. Consideration in Switching Fixed line Operators

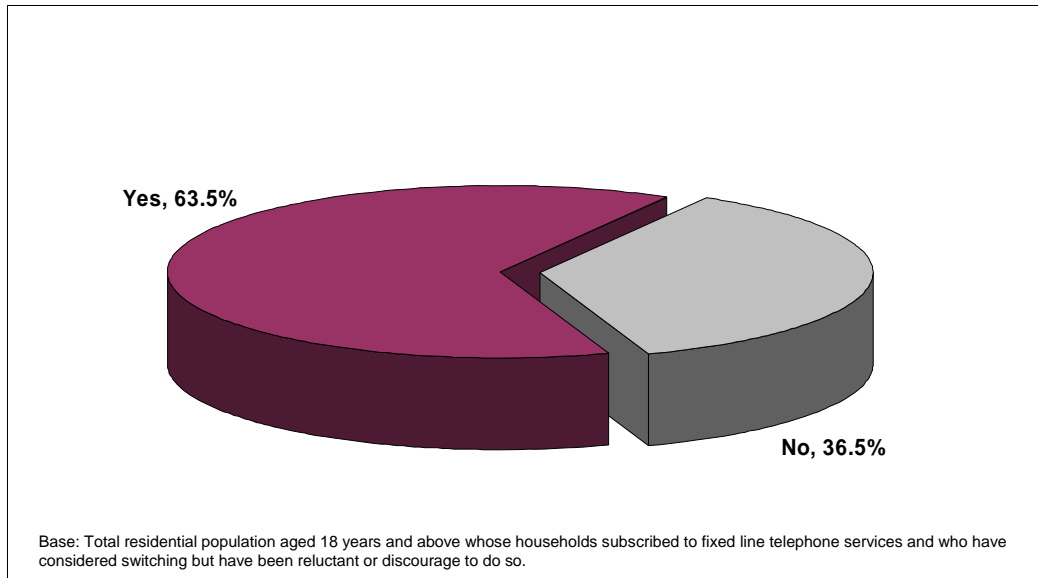
For those who have never switched fixed line operators, 91.7 per cent said they never considered it (Figure A7).

**Figure A7: If You Have Not Switched Operators Before, Have You Ever Considered Changing but Have Been Reluctant or Discouraged to Do So?**



Among respondents who had considered switching but did not do so, 63.5 per cent cited features in the existing number portability solution as a drawback (Figure A8).

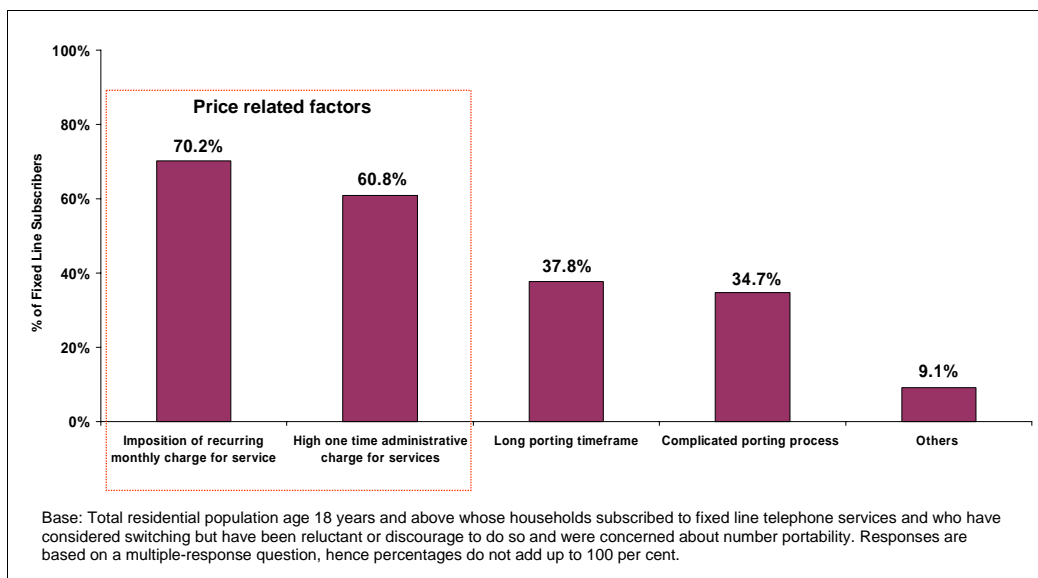
**Figure A8: If You Have Considered Changing But Have Been Reluctant or Discouraged to Do So, Would Number Portability be One of the Reasons for that Consideration?**



## 7. Reasons for the Reluctance in Switching Fixed line Operators

Price-related factors for fixed line number portability emerged as respondents' main concern for their reluctance to switch fixed line operators (Figure A9).

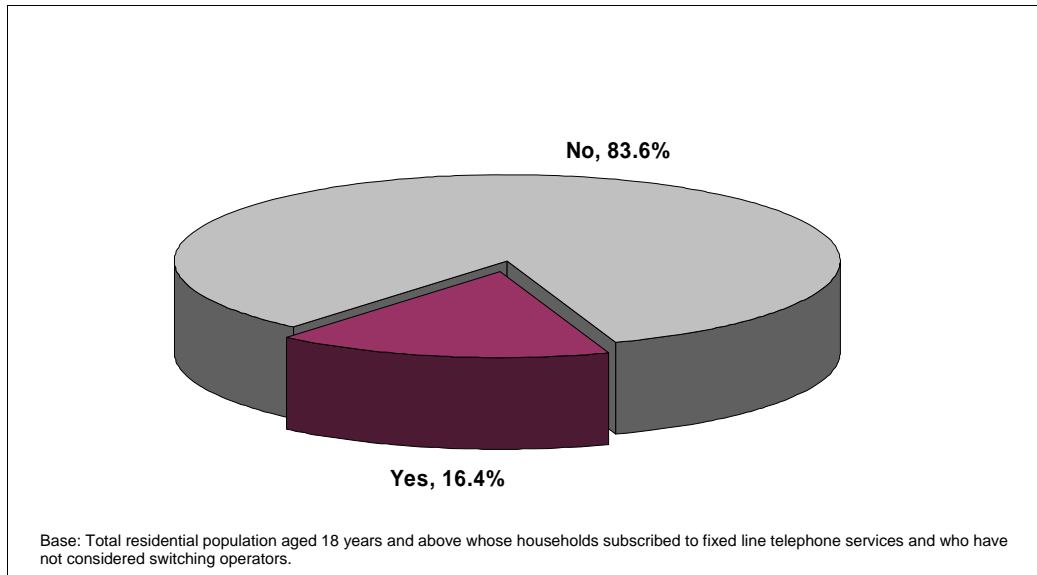
**Figure A9: Areas on Number Portability that Would Make You Reluctant to Change Fixed line Operators**



## 8. Influence of Number Portability on Change in Operator

Of those respondents who never considered switching, 16.4 per cent of them said they would change operators due to the presence of fixed line number portability option (Figure A10).

**Figure A10: If You Have Not Considered Switching Operator, Would Number Portability Encourage You to Do So Now? – Overall**

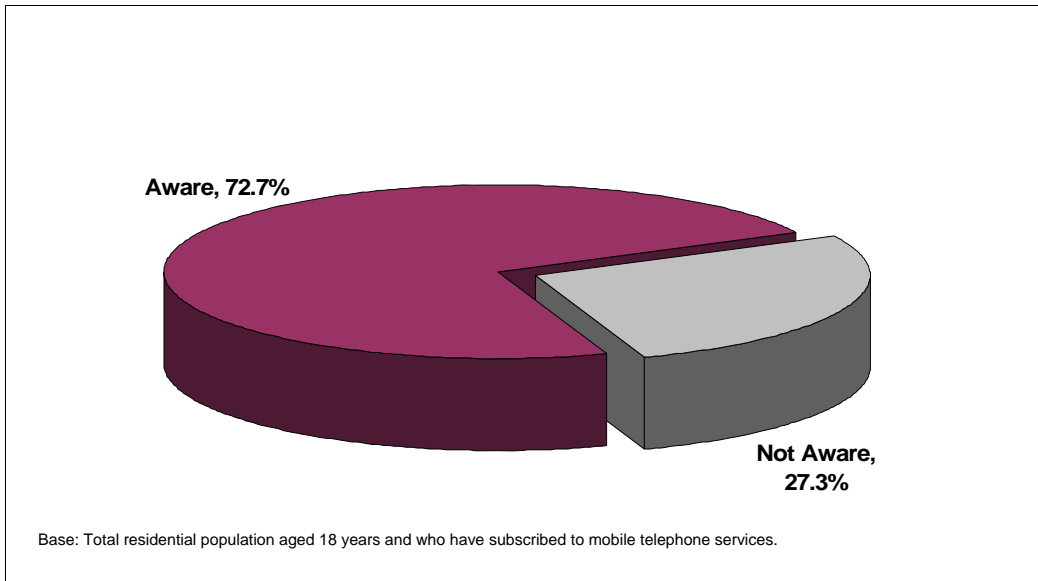


## B. Mobile Number Portability

### 1. Awareness of Mobile Number Portability Service

There was a higher level of awareness for mobile number portability, compared to the awareness for fixed line number porting. Among those who subscribed to mobile telephone services, 72.7 per cent of them know about mobile number portability (Figure B1).

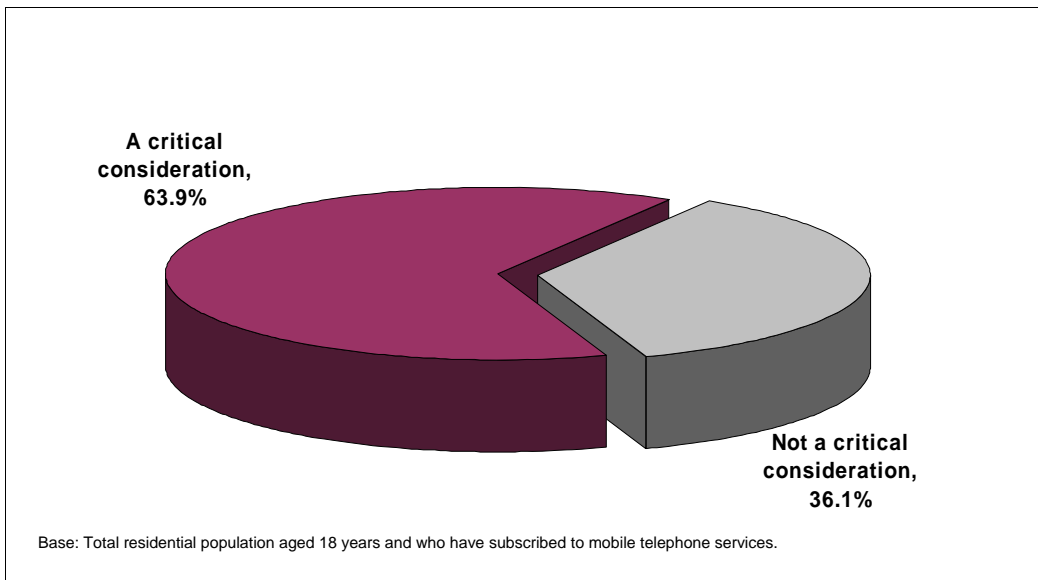
**Figure B1: Overall Awareness of Mobile Number Portability Service**



## 2. Consideration of Mobile Number Portability

Among those who have considered switching mobile operators, 63.9 per cent of them considered it critical to be able to retain their mobile number. Respondents valued their mobile numbers and want to keep it more than their fixed line numbers (Figure B2).

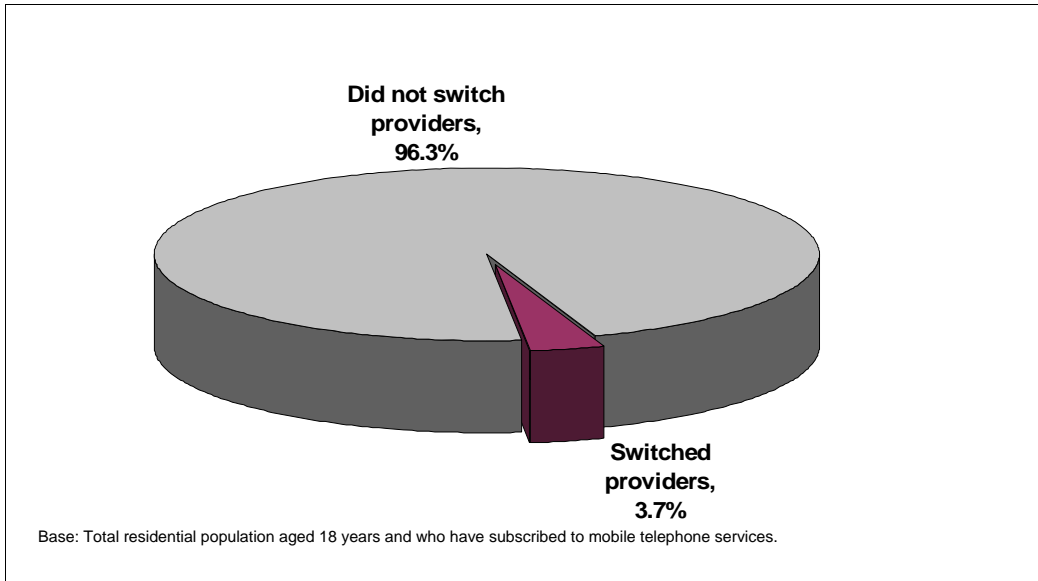
**Figure B2: Is the Ability to Retain Your Mobile Line Number a Critical Consideration When You Wish to Switch Operators? – Overall**



Most of the respondents, or 96.3 per cent, had not switched mobile operators in the six months before the survey. Only 3.7 per cent of the respondents had switched their mobile line operators (Figure B3)



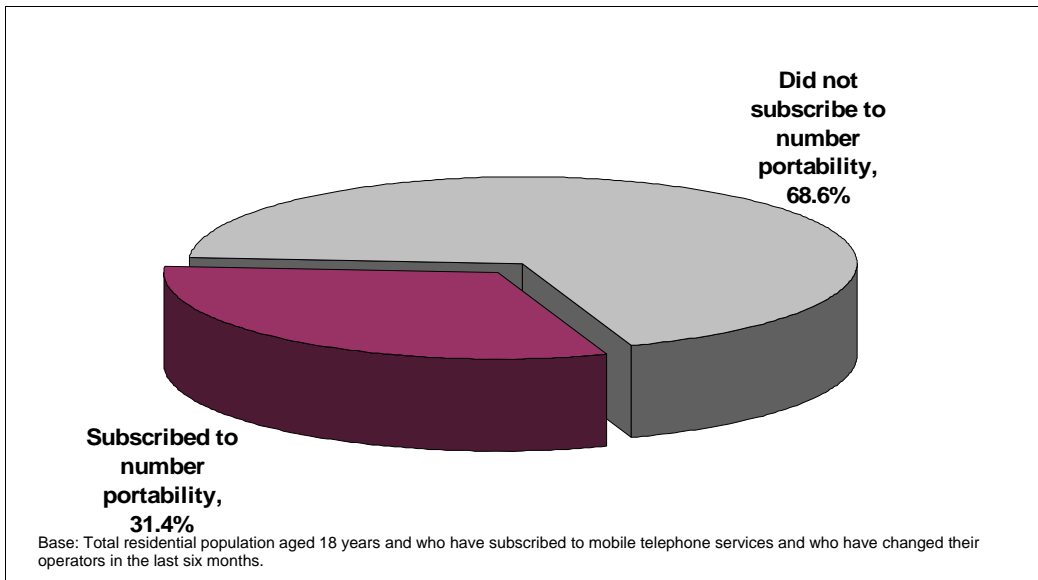
**Figure B3: Overall Switch Service Operator**



### 3. Mobile Number Portability Subscriptions

About a third of the respondents who switched mobile operators subscribed to mobile number portability (Figure B4).

**Figure B4: Overall Subscription of Mobile Number Portability**

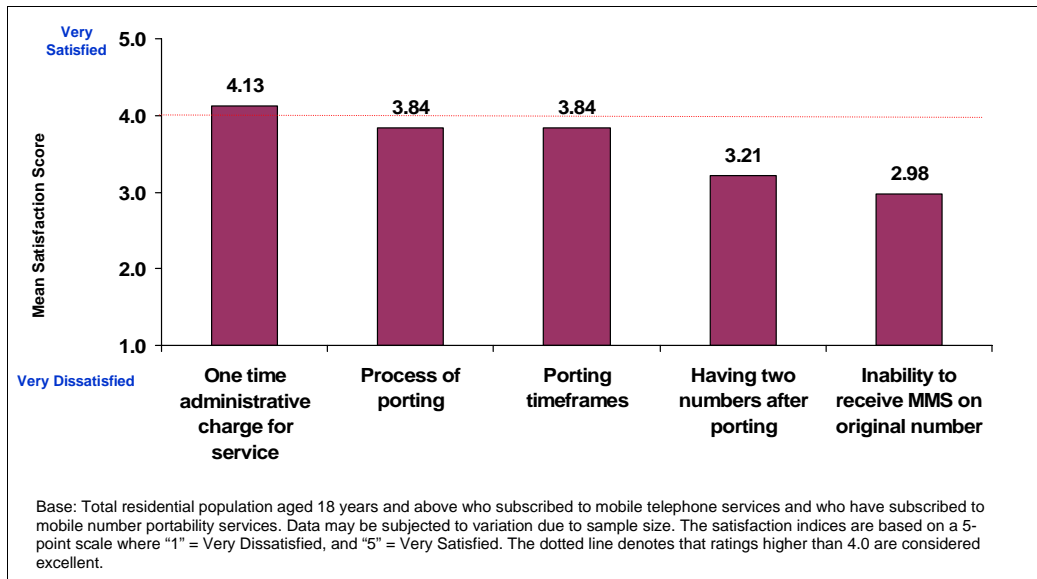


### 4. Satisfaction with Mobile Number Portability

Respondents who subscribed to mobile number portability were mostly satisfied with its one-time administrative charge. They were least satisfied with

having two numbers after porting, and that they cannot receive MMS through their original number (Figure B5).

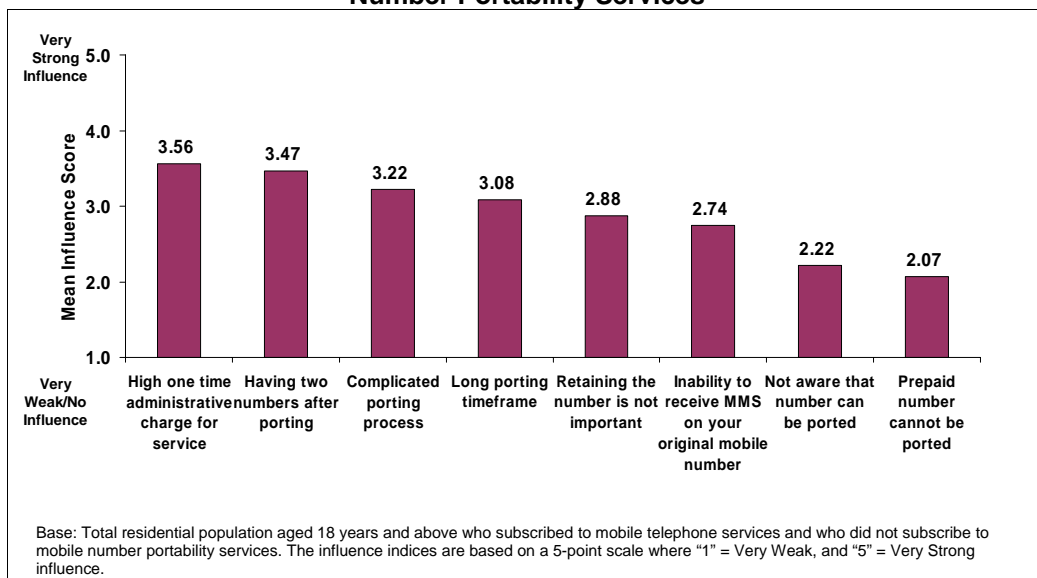
**Figure B5: Overall Satisfaction Ratings - Mobile Number Portability**



## 5. Reasons for Not Subscribing to Mobile Number Portability

Respondents who did not want mobile number portability cited reasons of high one-time administrative charge and having to hold two numbers after porting (Figure B6).

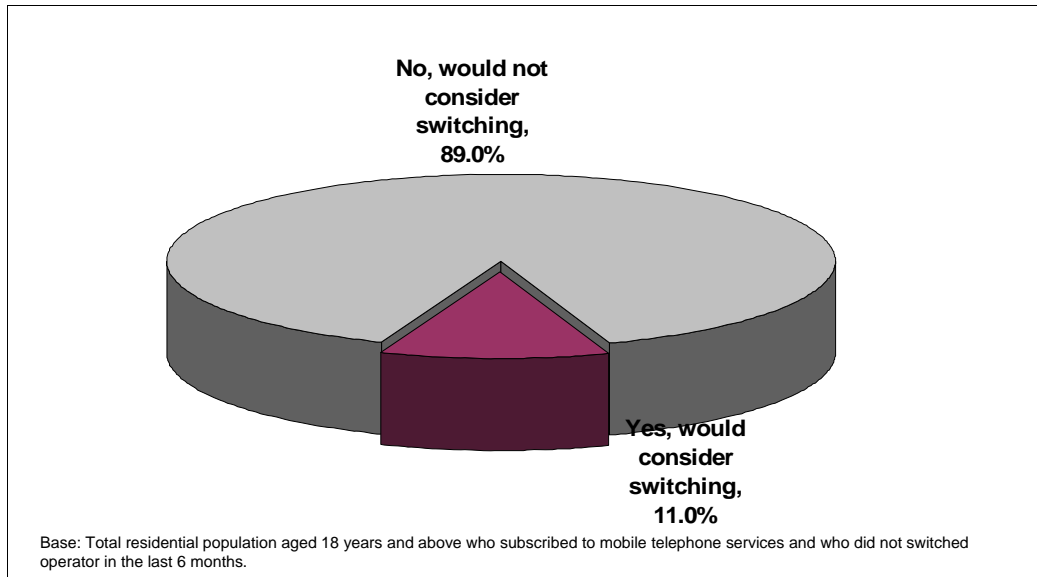
**Figure B6: Mean Influence Score – Factors Influencing the Decision Not to Subscribe to Number Portability Services**



## 6. Consideration in Switching Mobile Operators

Among the respondents who did not switch mobile line operators, 89 per cent said that they would not consider doing so (Figure B7). The rest, 11 per cent, said that they would consider it.

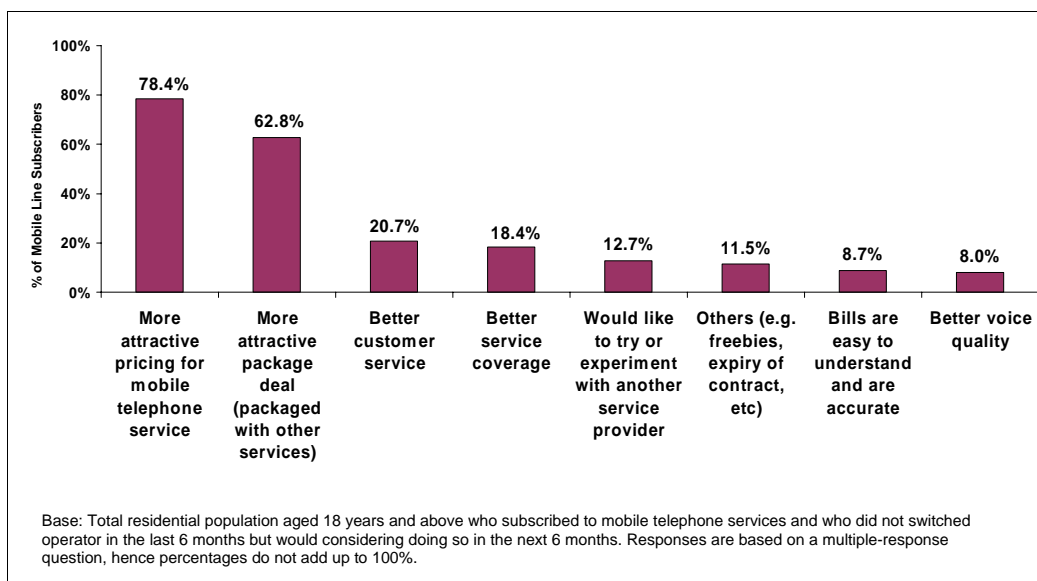
**Figure B7: Overall Consider Switching Service Operator**



## 7. Reasons for Intention to Switch Mobile Line Operators

For those respondents who would considered switching mobile operators, they said that more attractive pricing and package deals were the two most compelling reasons to do so (Figure B8).

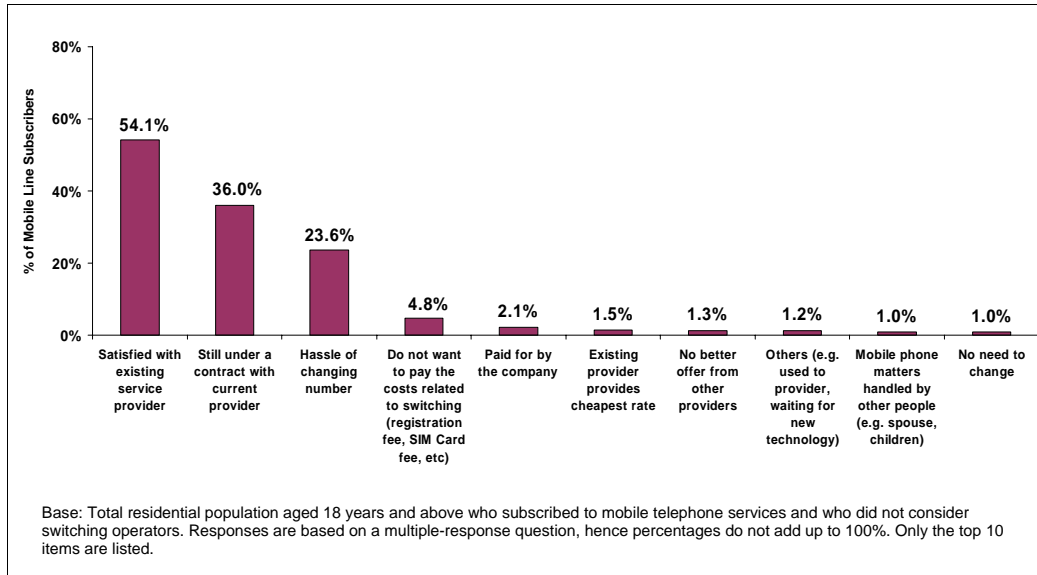
**Figure B8: Reasons for Intention to Switch Mobile Operators**



## 8. Reasons for Not Switching Mobile Line Operators

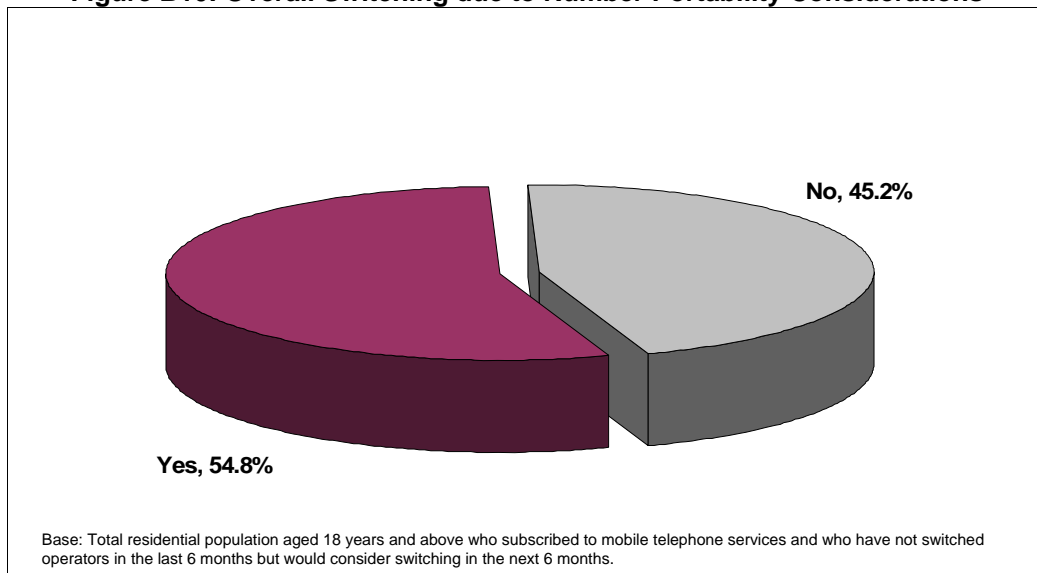
Among those respondents who would not consider switching, the most common reasons were: (a) satisfaction with their current mobile service operators; (b) still in a contract with current mobile service operator; and (c) to avoid the hassle of changing numbers (Figure B9).

**Figure B9: Reasons for Not Intending to Switch Mobile Operators**



For those respondents who would consider switching, slightly more than half of them cited mobile number portability as a consideration (Figure B10).

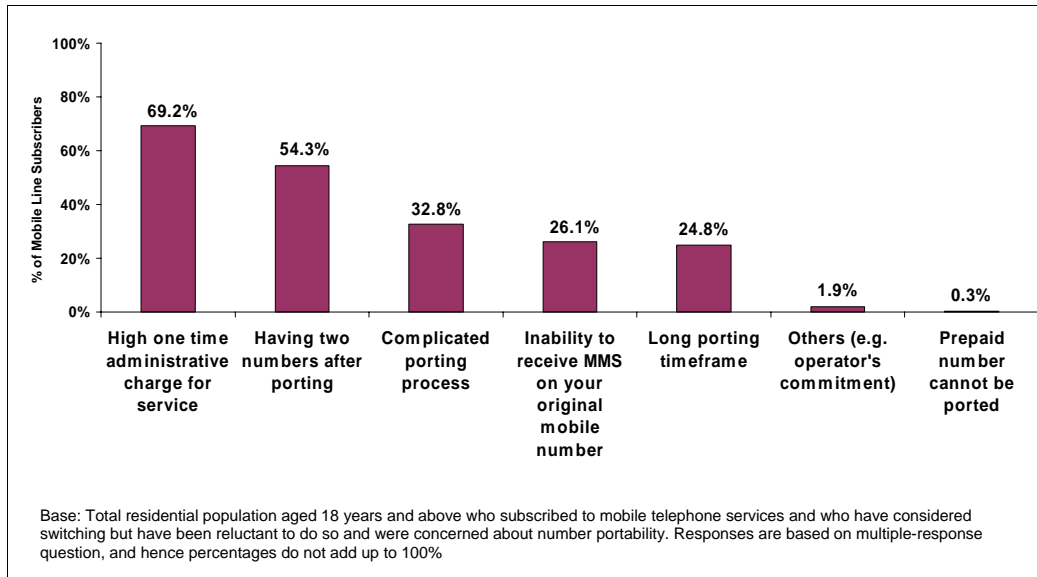
**Figure B10: Overall Switching due to Number Portability Considerations**



## 9. Reasons for Reluctance to Switch Mobile Operators

The high one-time administrative charge and having two numbers after porting were the main concerns in mobile number portability when switching operators (Figure B11).

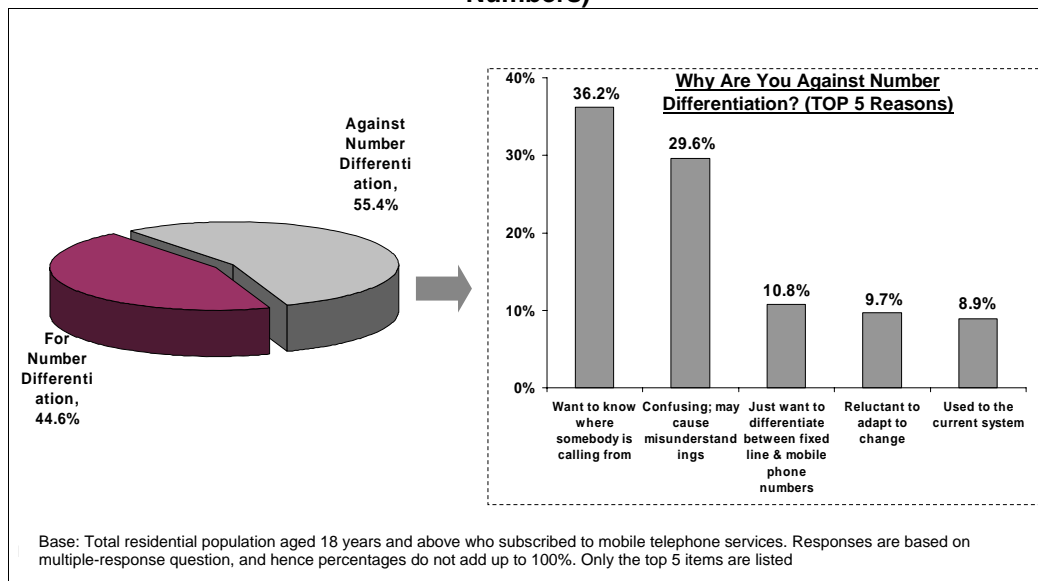
**Figure B11: Reasons for Reluctance to Switch for Mobile Number Portability**



## 10. Attitudes towards Number Differentiation (Between Mobile and Fixed line Numbers)

Respondents were almost equally divided on the issue of number differentiation. Most preferred the current system which shows whether a call came from a mobile or a fixed line phone based on the first digit in the telephone number. The majority were against the idea of having mobile numbers start with '6', which is currently pegged to all fixed line numbers. Mobile numbers all start with either '8' or '9'. Respondents indicated that there is a need for them to be able to identify a caller's location. The lack of such distinctions may cause confusion and misunderstandings (Figure B12).

**Figure B12: Attitudes towards Number Differentiation (Between Mobile and Fixed line Numbers)**



## 11. Attitudes towards Using Fixed line Number as Mobile Line Number

Slightly more than half the number of the respondents did not find the idea of using fixed line numbers as mobile numbers attractive. They said that it would introduce confusion and misunderstandings (Figure B13).

**Figure B13: Do You Consider Using a Fixed line Telephone Number as a Mobile Phone Number an Attractive Idea?**

