



Telecommunications Customer Satisfaction

Results of the Seventh-wave polling undertaken by Roy Morgan Research for Communications Alliance Ltd from June 2014 – September 2014

Research Objectives and Methodology



- Roy Morgan Research is tracking customer satisfaction among Australian telecommunications customers.
- Quarterly polling monitors:
 - overall customer satisfaction; and
 - customer experience viz. four transactional touch points relating to Telecommunications Consumer Protections (TCP) Code provisions; and
 - fulfils in part the agreed co-regulatory requirement to create trackable performance metrics re customer service and complaint handling.
- Additional questions were introduced in this quarter to monitor mobile calls to 13 and 1300 numbers.



- **Customer Information** – satisfaction with information provided at point of sale or post-purchase
- **Billing** – ease of understanding the telecommunications bill
- **Spend Management** – experience with and awareness of spend management tools
- **Complaint Handling** – satisfaction levels among those who have complained to their Service Provider, re handling and outcome of the complaint

Polled Base



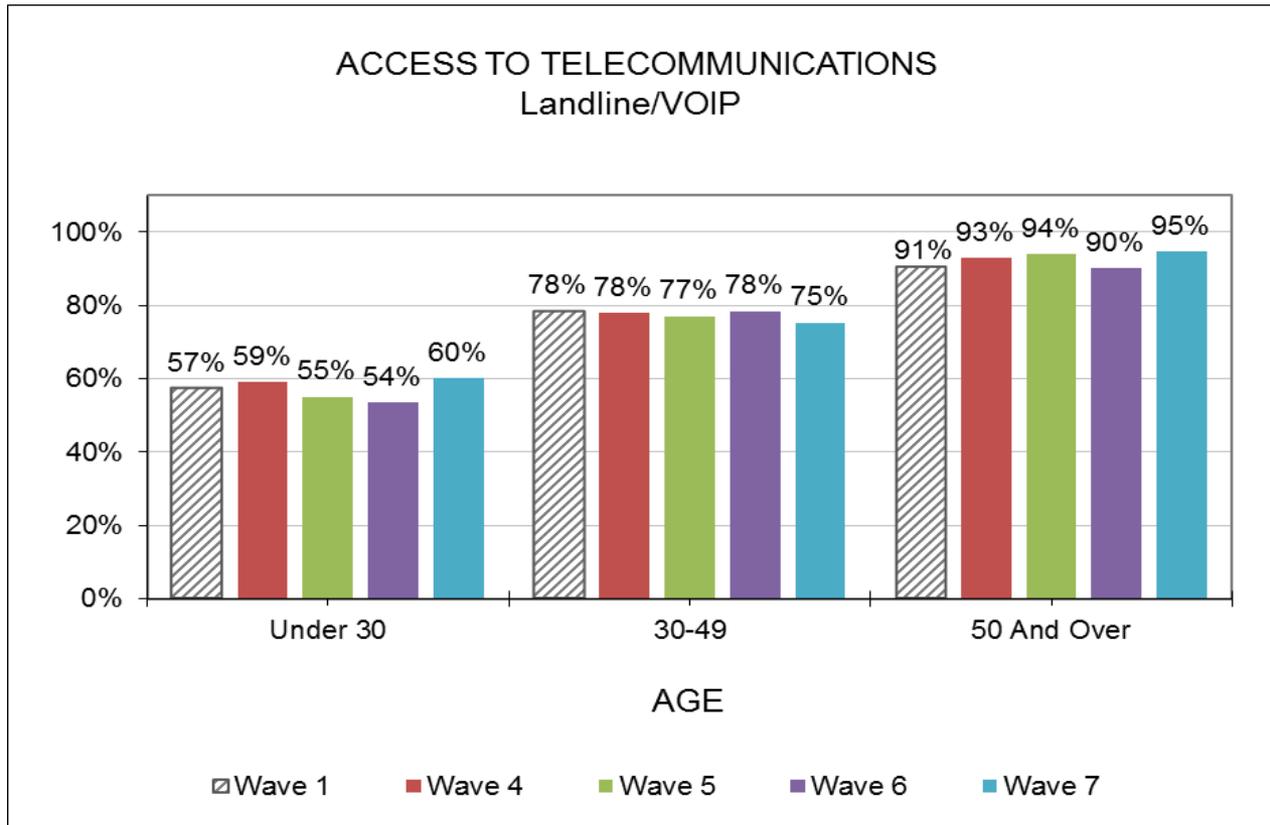
- The first wave was conducted in March 2013, with polling being undertaken every quarter. The seventh wave was conducted in September 2014.
- Online survey of a representative sample of Australian telecommunication users aged 18+.
- All respondents had some form of contact with at least one telephone or internet SP in the prior six months.
- Contacts include purchasing, receiving a bill, contacting provider/s by phone or online (email, chat, website), or making a complaint or general enquiry.

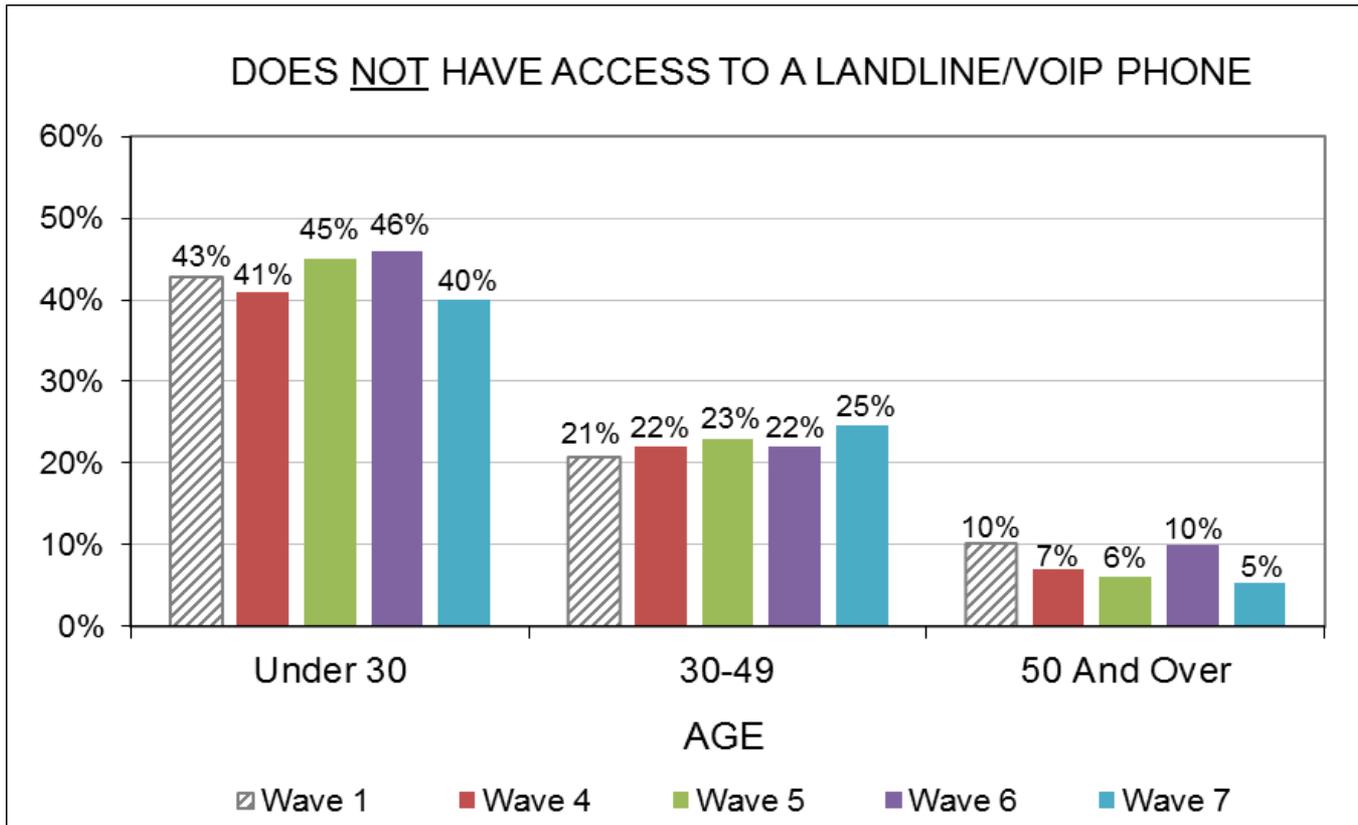


- This report summarises the key findings of the Wave 7 survey conducted in September 2014. In September 2014 (Wave 7), three additional questions about 13 and 1300 numbers were included in the questionnaire.
- The graphical representation of the data for reporting was modified in Wave 7. In the first six reports, charts showed results of all waves conducted. Since Wave 7, charts show a comparison of the results of the first wave and four most recent waves of the survey.



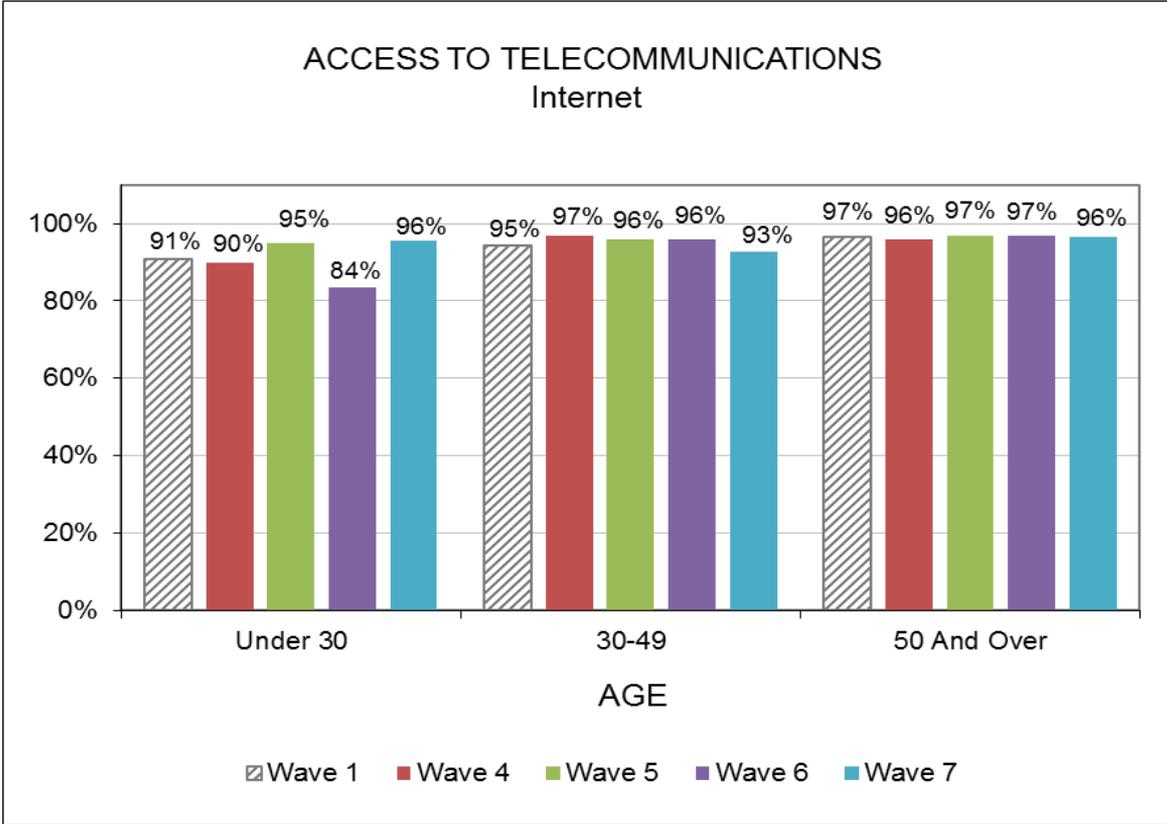
- In Wave 7, nearly all respondents (97%) had a mobile phone available for their personal use. A similar proportion (95%) had an Internet connection for personal use. Access to a landline or VOIP phone was, however, substantially lower with one in five (20%) not having a home phone. The results correspond with previous waves' figures.
- Access to telecommunications differs by age with younger people, particularly those under the age of 30, less likely to have access to landline/VOIP (60%) when compared to those who are 30-49 (75%) and 50 years old and over (95%). This pattern is observed across the six waves of the study.





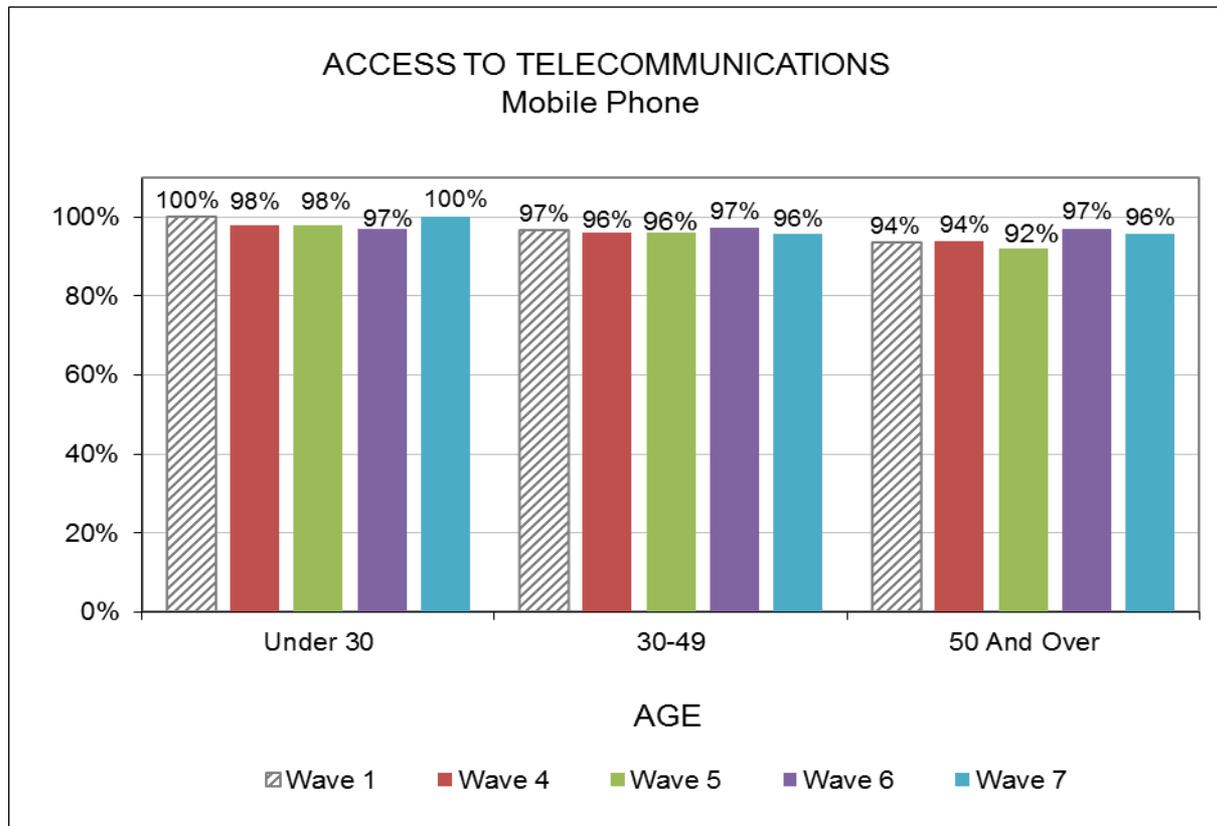


- The Internet is now an established channel of communication with 95% of the population having access to the Internet. There is relatively little differentiation by age in regard to Internet access. In Wave 6, a smaller proportion of younger respondents under 30 years old (84%) reported having access to the Internet. However, in Wave 7 results were similar to those in previous waves with 96% of those aged less than 30 years old having access to the Internet





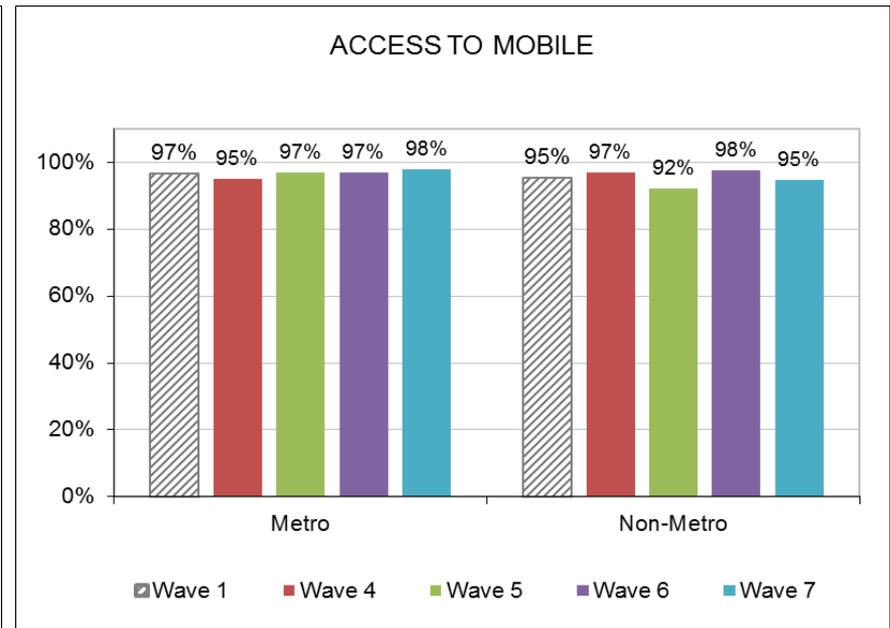
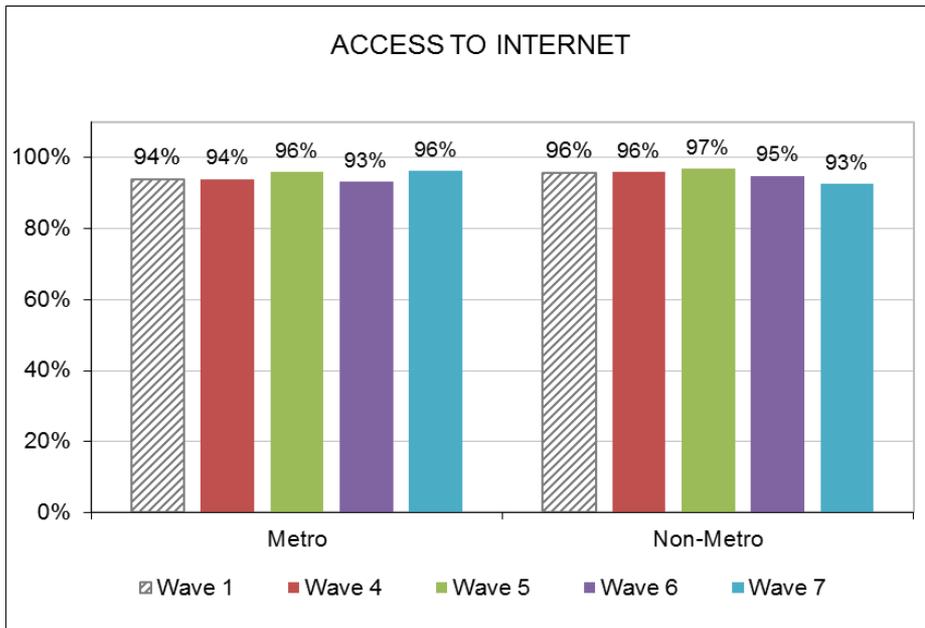
- Mobile access remains stable across all waves of the survey.



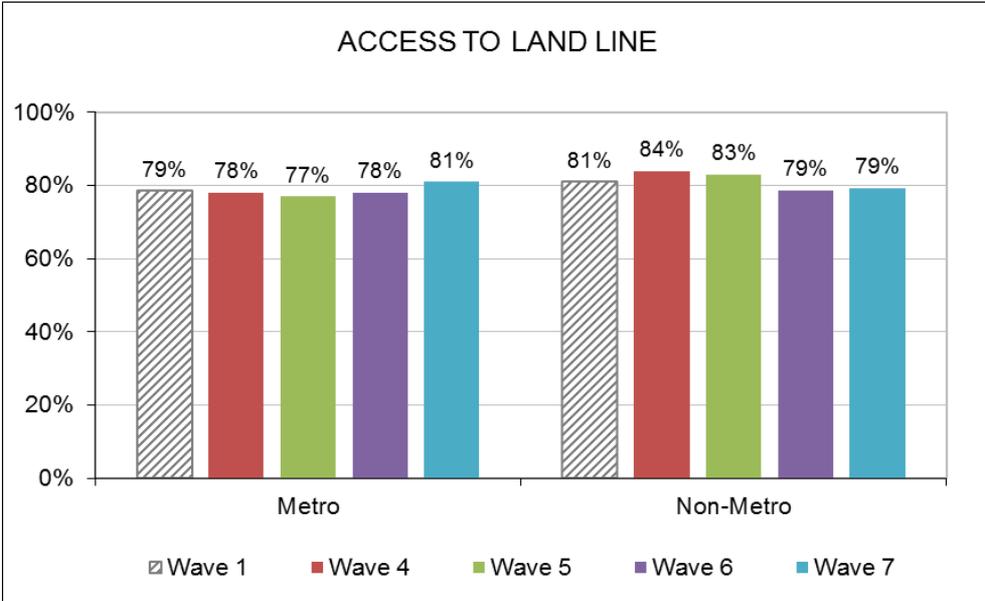
Metro/Non-Metro



- In wave 7, there was no difference in access to the Internet, mobile phone and land line between those living in metropolitan and non-metropolitan regions. The figures are in line with the results of previous surveys.



Metro/Non-Metro

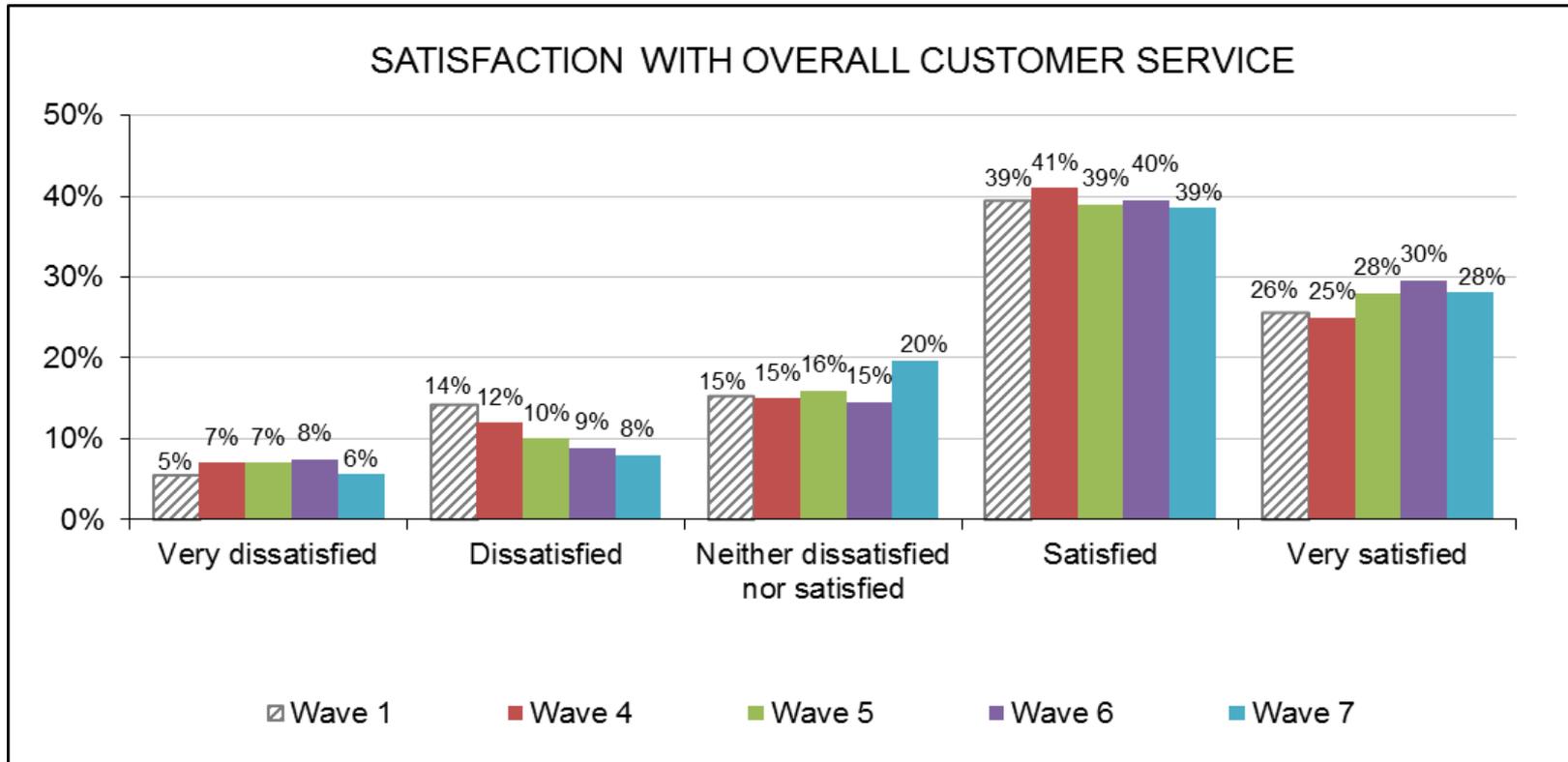


Overall Customer Satisfaction



- Overall customer satisfaction with the level of service provided by Australian telecommunication providers continues to be high (67%). Just over a quarter (28%) of customers reported being very satisfied and a further two in five (39%) are satisfied.
- One in seven (14%) respondents were dissatisfied ('Very dissatisfied' and 'Dissatisfied') with the customer service in some way, with only a small group of customers (6%) reported being very dissatisfied.
- The results demonstrate that the satisfaction with service remains stable over the period with minor fluctuations. In Wave 7, the dissatisfaction level has dropped slightly ('Very dissatisfied' and 'Dissatisfied' – 14%) as compared to Wave 1 ('Very dissatisfied' and 'Dissatisfied' – 19%).

Overall Customer Satisfaction

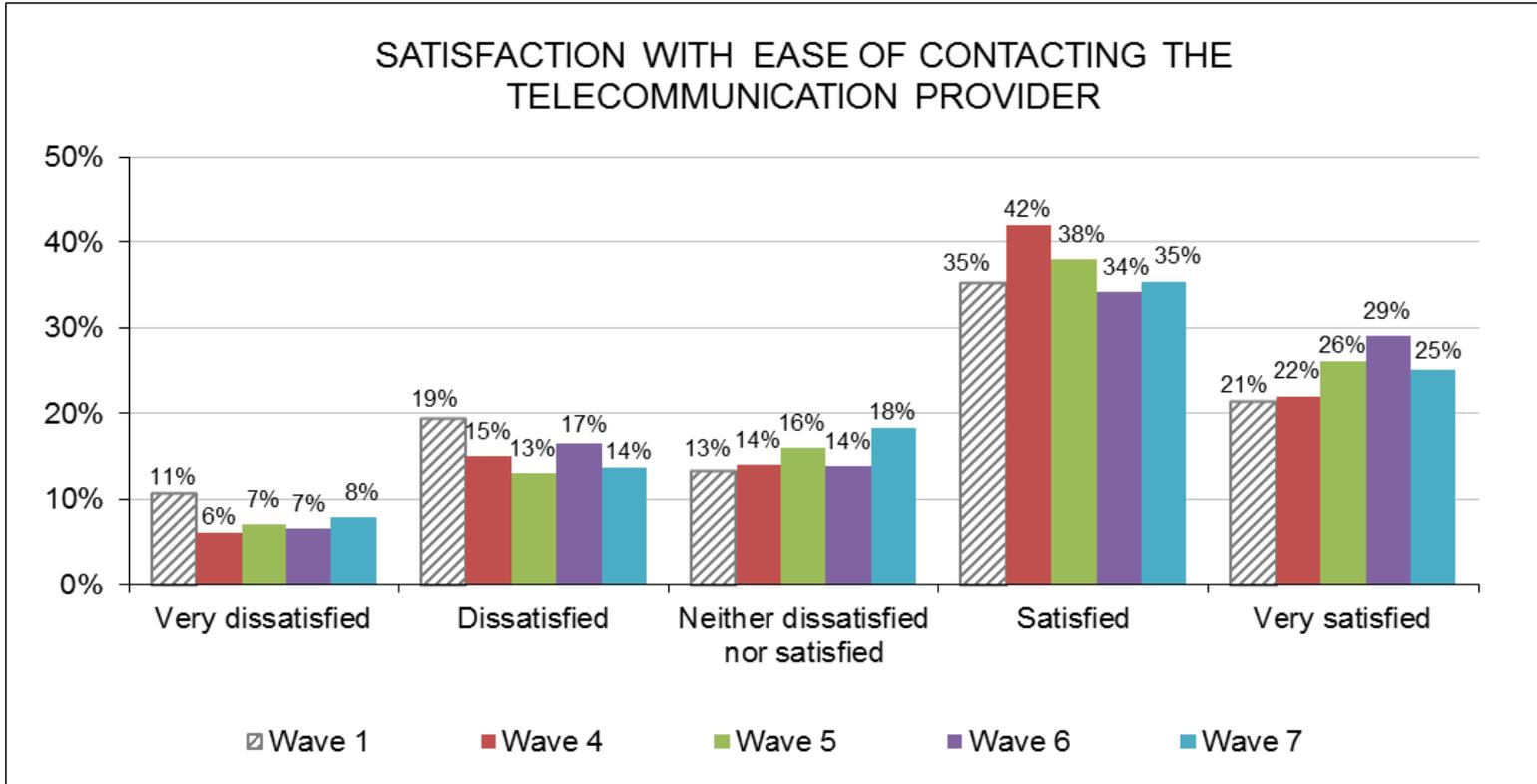


Ease of Contacting Provider



- In Wave 7, three in five (60%) were satisfied ('Very satisfied' and 'Satisfied') with the ease of contacting their telecommunication provider with a quarter (25%) indicating that they were very satisfied.
- One in five (22%) were, however, dissatisfied ('Very dissatisfied' and 'Dissatisfied') with the ease of their contact. A small number of the customers (8%) gave their telecommunication provider a very dissatisfied satisfaction score.
- Satisfaction with ease of contacting has remained at 60% or above for the last four quarters, compared to 56% in the first Wave. Conversely, dissatisfaction was highest in Wave 1 (30%) and has been held below 24% for the last four quarters.

Ease of Contacting Provider

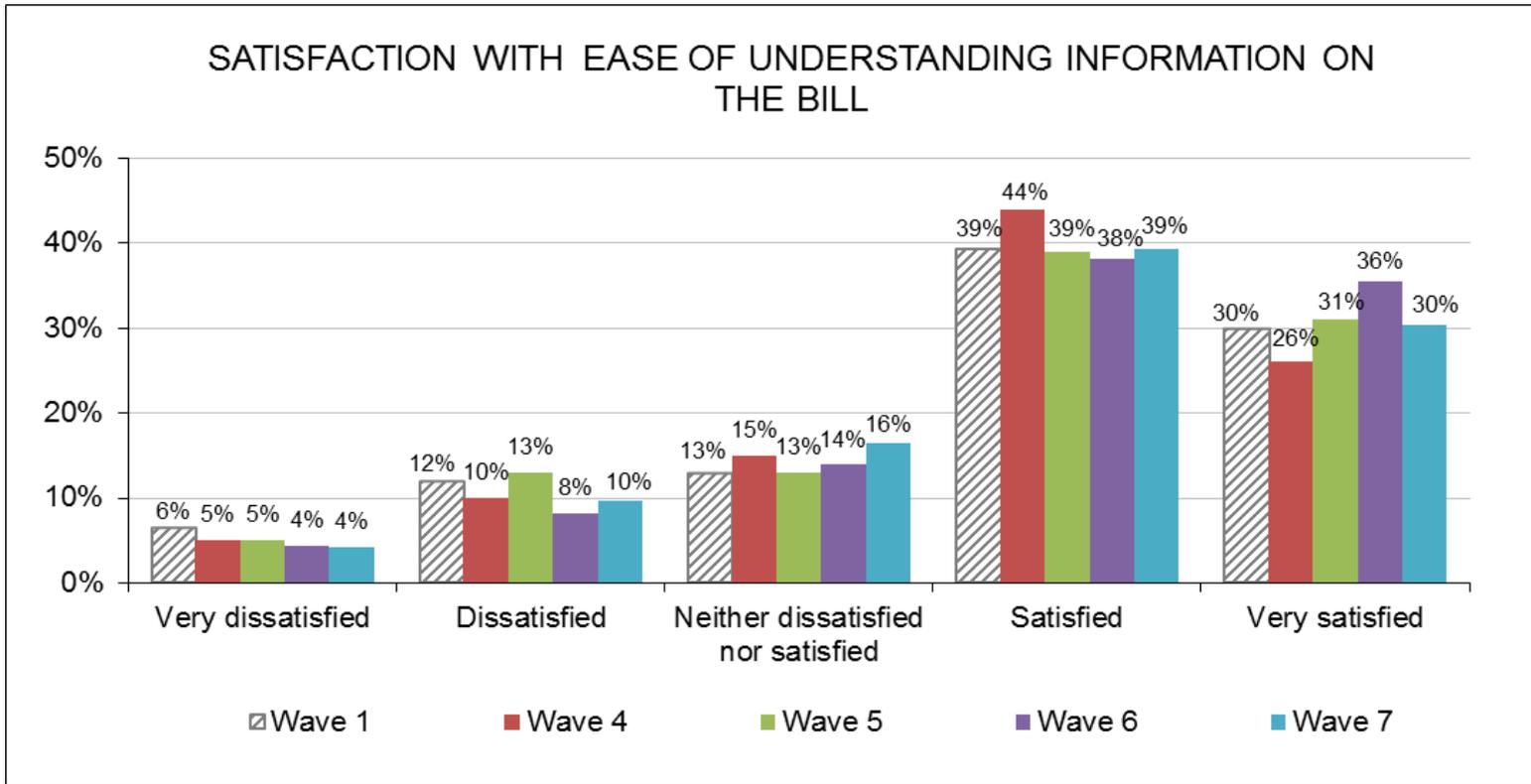


Understanding Bills



- In Wave 7, the satisfaction with ease of understanding information on the bill continues to be high. Almost seven out of ten (69%) of customers were satisfied ('Very satisfied' and 'Satisfied') with the ease of understanding the information on their telecommunication bill.
- One in seven customers (14%) were dissatisfied ('Very dissatisfied' and 'Dissatisfied') with the ease of understanding their bill. A small proportion of those customers who were dissatisfied found that they were 'Very dissatisfied' (4%).
- The last four quarters show a consistent level of satisfaction ('Very satisfied' and 'Satisfied') at 69% or above as compared to Wave 1.

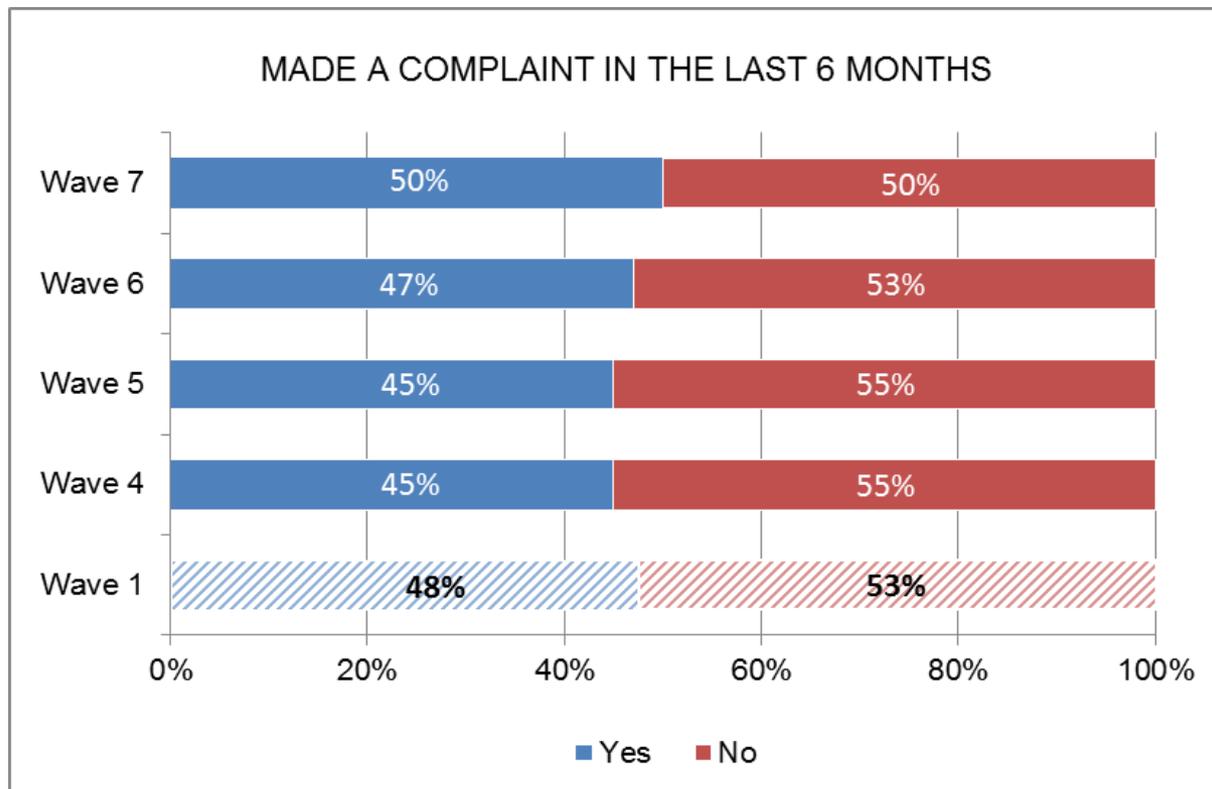
Understanding Bills



Complaint Handling



- Half (50%) of customers had made some form of complaint to their telecommunications provider in the six months prior to their interview, and show an upward trend over the last two quarters.

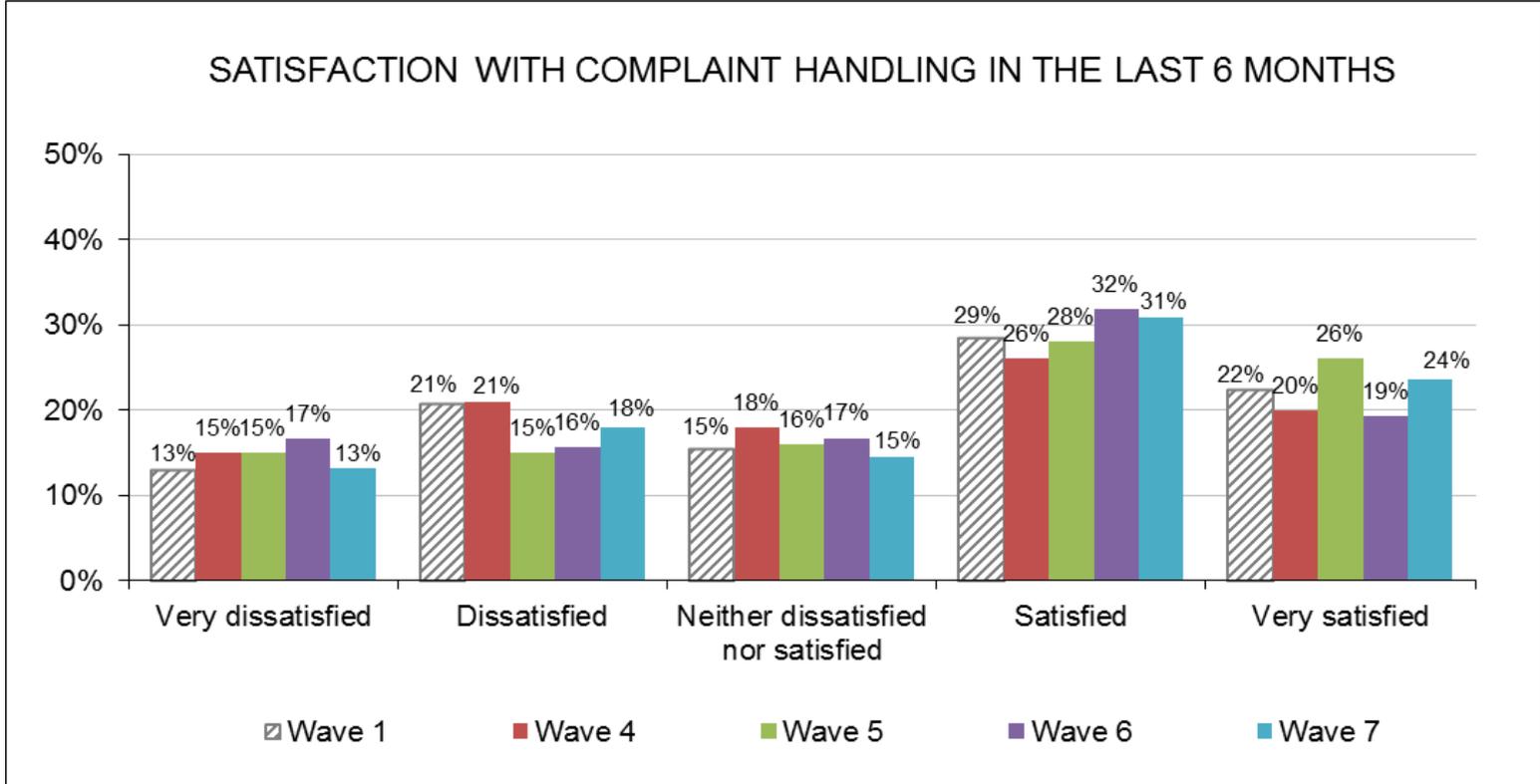


Complaint Handling



- Just over a half (55%) of those who had made a complaint in the last six months were satisfied ('Very satisfied' and 'Satisfied') with how that complaint had been handled.
- Three in ten of those making a complaint (31%) reported their dissatisfaction ('Very dissatisfied' and 'Dissatisfied') with complaint handling. One in seven (13%) were 'Very dissatisfied' with the process.
- In the last three quarters, the level of satisfaction with complaint handling remains consistently at 51% or more satisfied and is similar to Wave 1 (51%).

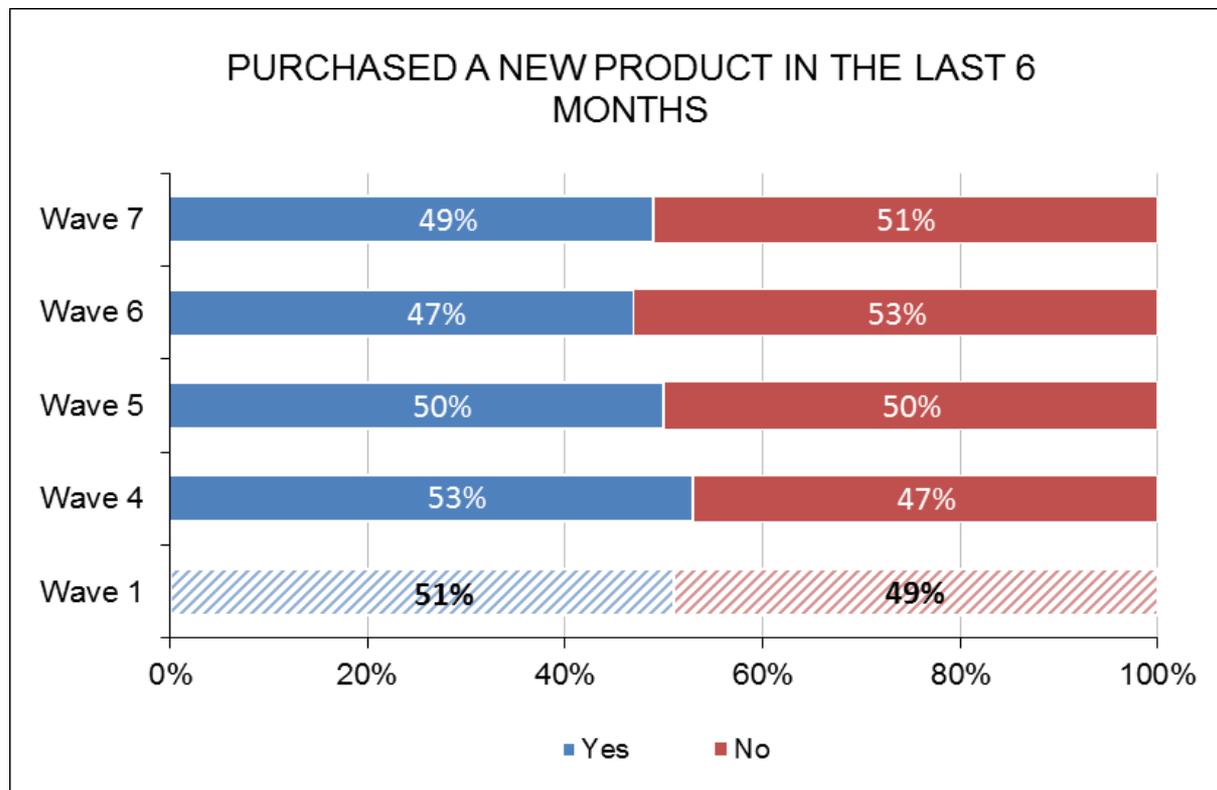
Complaint Handling



Product Satisfaction



- In Wave 7, just under a half of customers (49%) said that they had purchased a telecommunication product in the six months prior to the survey.

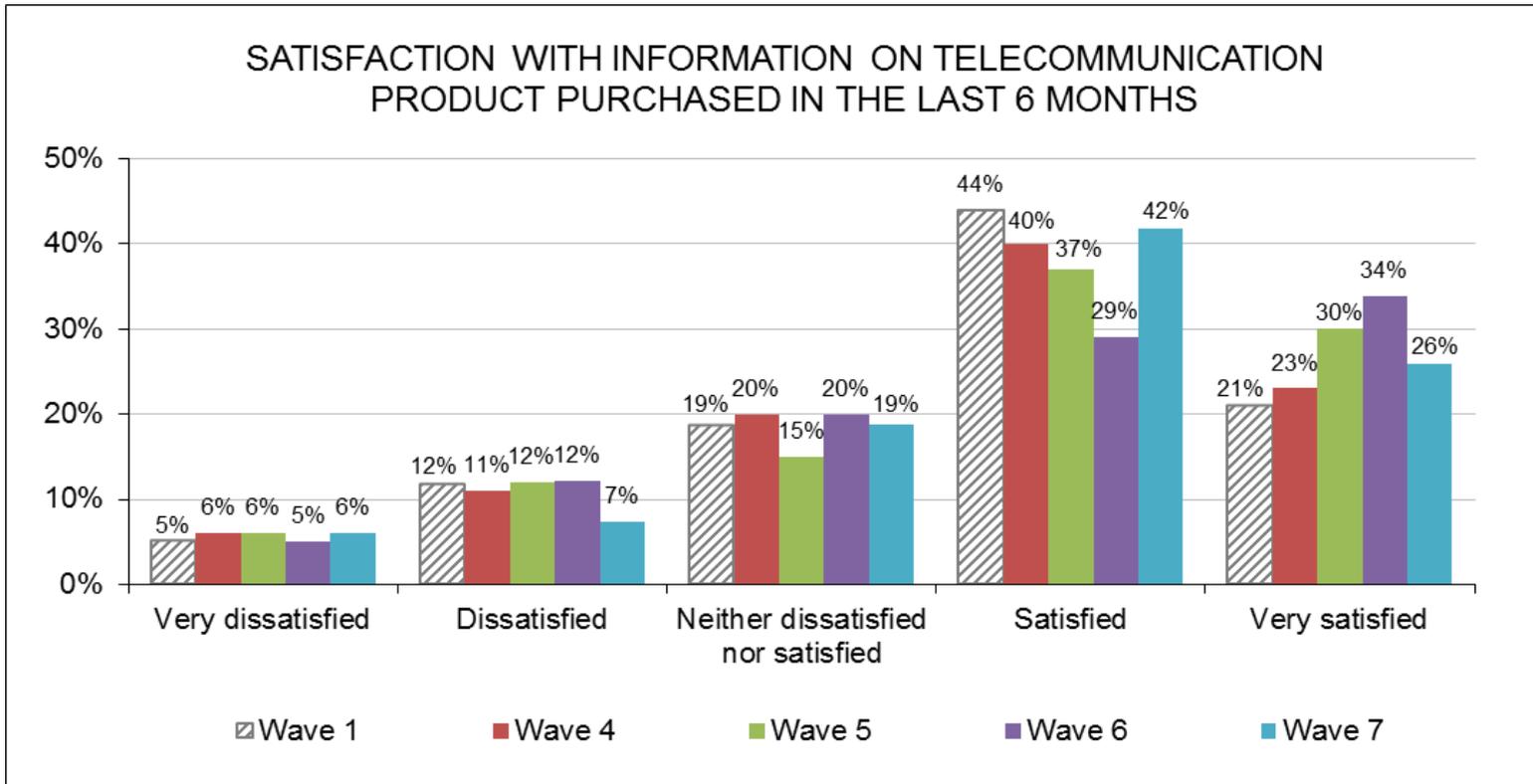


Product Satisfaction



- In Wave 7, overall satisfaction with the information on products was high with two-thirds (68%) of those making a purchase 'Satisfied' (26%) or 'Very satisfied' (42%) which corresponds with overall satisfaction of the previous waves' results. One in seven (13%) were dissatisfied ('Very dissatisfied' and 'Dissatisfied') in some way with the information on telecommunication products purchased.
- The proportion of respondents who were 'Very satisfied' with the information on products kept increasing (from 21% in Wave 1 to 34% in Wave 6) over the period of 6 waves of the survey while the proportion of those who were 'Satisfied' kept declining (from 44% in Wave 1 to 29% in Wave 6). However, in Wave 7 the results for those 'Very satisfied' and 'Satisfied' returned to the level of Wave 1.

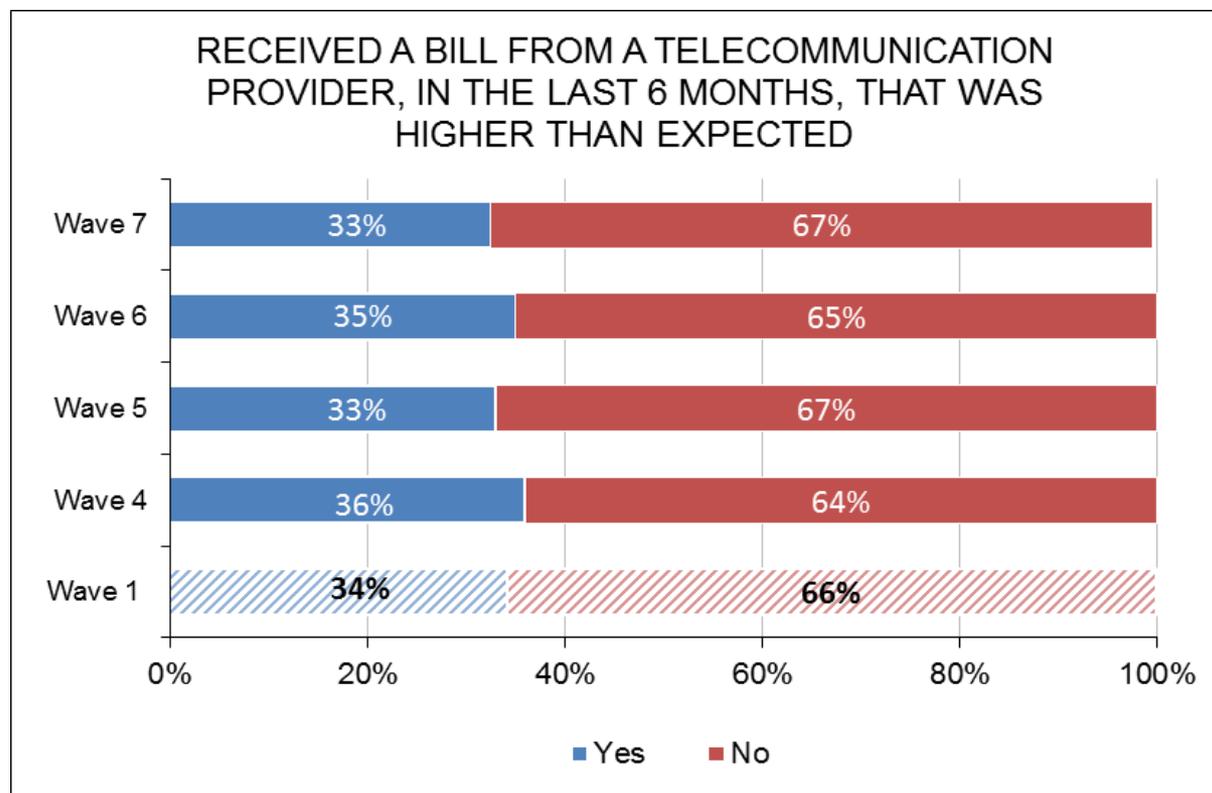
Product Satisfaction



Higher Than Expected Bills



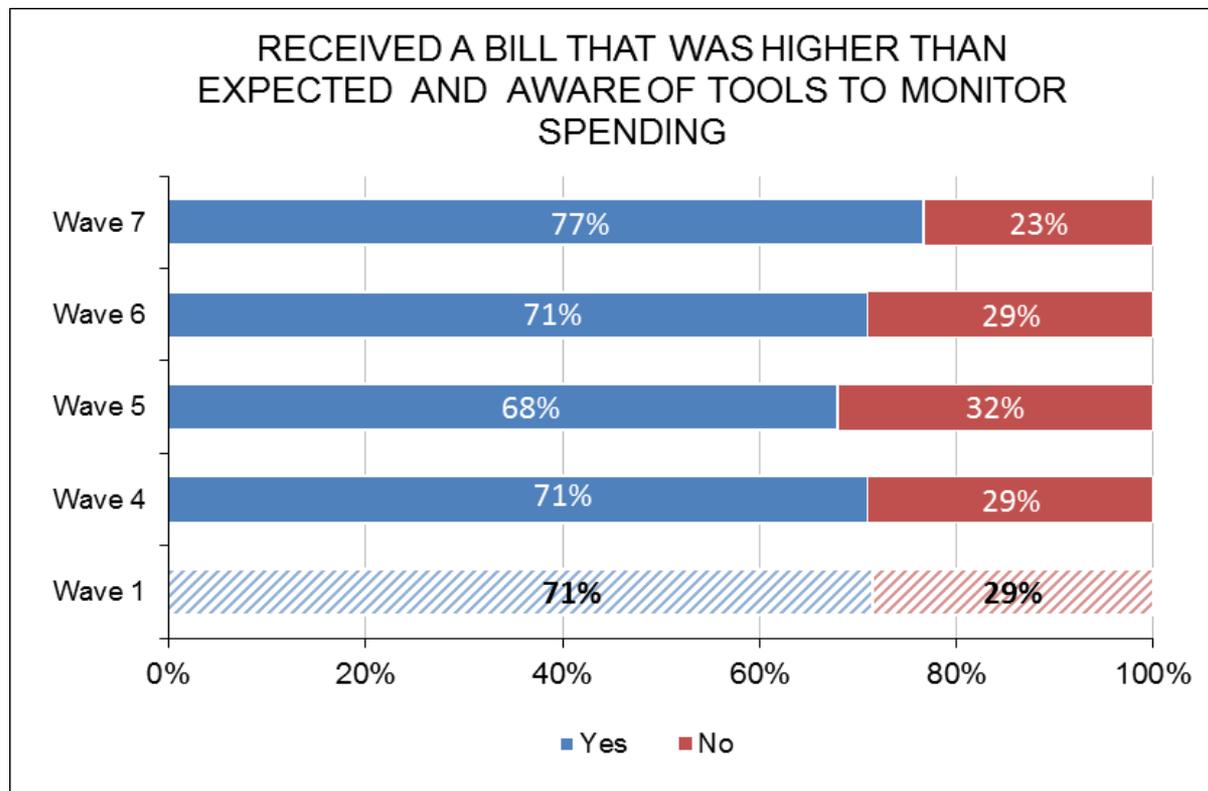
- A third (35%) of customers received a bill from a telecommunication provider in the last six months that was higher than expected.



Higher Than Expected Bills



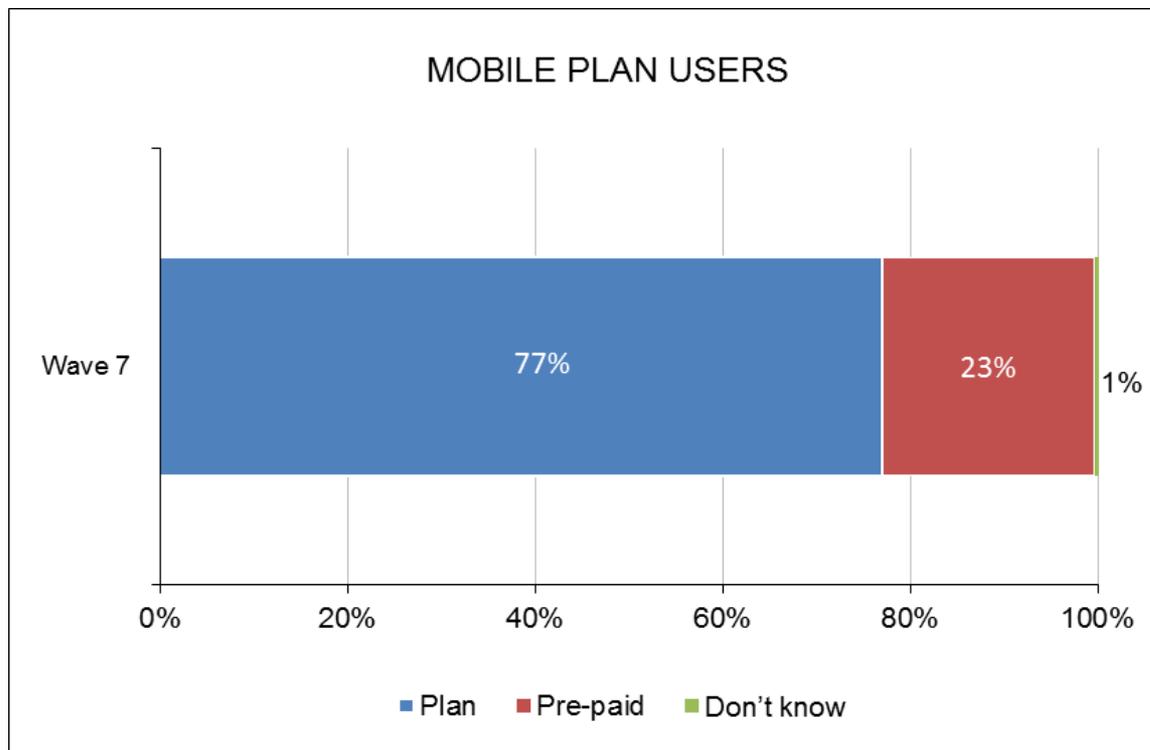
- Three-quarters (77%) of customers were aware that there were tools available to help them monitor their spending with their telecommunication provider, an increase in awareness compared to previous waves.



13 and 1300 Numbers



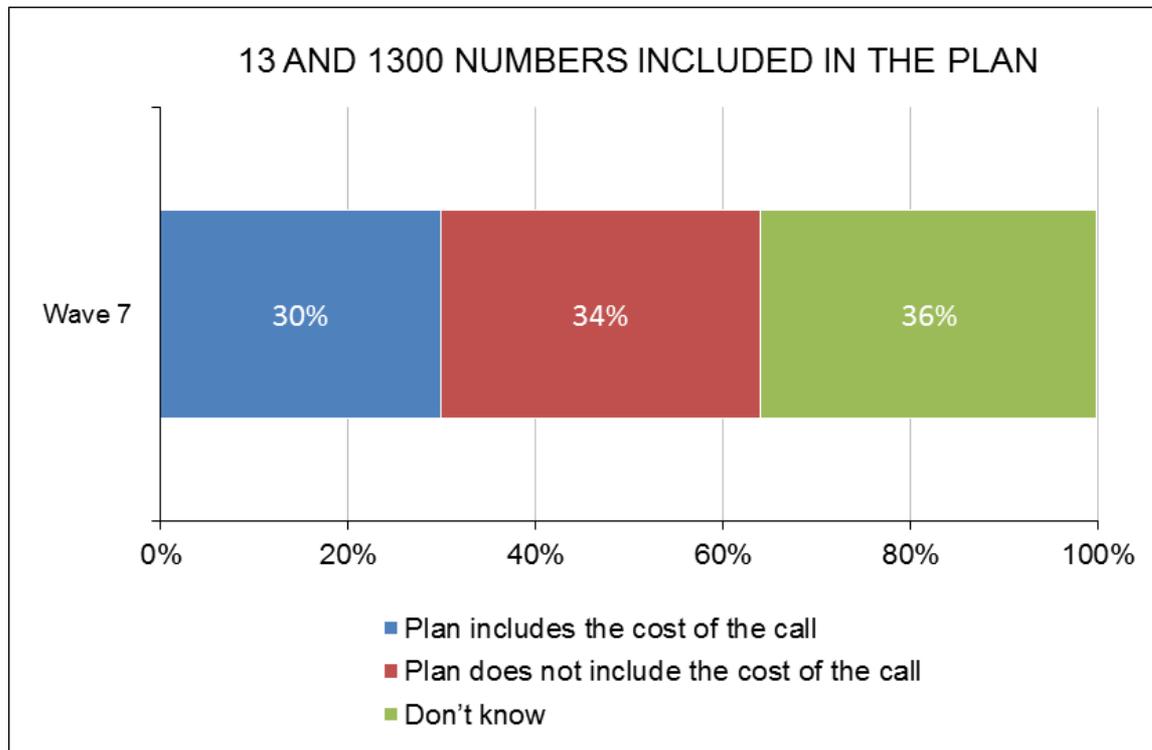
- Three-quarters (77%) of those respondents who had mobile connection for personal usage said that they were on a mobile plan while a quarter (23%) reported that their calls were pre-paid.



13 and 1300 Numbers



- Of those respondents who were on mobile plan, a third (34%) said that their plan included the cost of calls on 13 and 1300 numbers as a part of monthly usage allowance. However, over a third (36%) were not aware if the cost of calls to 13 and 1300 were included in their mobile plan.



13 and 1300 Numbers



- One in seven (13%) of those respondents who were aware that the cost of calls to 13 and 1300 were included in their plan as a part of monthly usage allowance had an experience where they exceeded their monthly call allowance and incurred significant additional charges as a result of mobile calls to 13 or 1300 numbers.
- However, over four in five (83%) of those respondents who reported that the cost of calls on 13 and 1300 were included in their plan said that they did not incur significant additional charges as a result of mobile calls to 13 or 1300 numbers.

13 and 1300 Numbers

