Telecommunications Customer Satisfaction

Results of polling undertaken by Roy Morgan Research for Communications Alliance Ltd

Wave 20 - October 2018

Research Objective

- 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.

Touch Points

- ***Customer Information*** *– satisfaction with information provided at point of sale or post purchase,*
- ***Billing*** *– ease of understanding the Telco bill*
- ***Spend Management*** *– experience with, and awareness of, tools to monitor and manage spend with the Telco Service Provider and how this aligns with "Bill Shock" experiences, and*
- ***Complaint Handling*** *– satisfaction levels amongst those who have raised a complaint with their Telco Service Provider, particularly in regard to how the process was handled and the outcome of the complaint.*

Methodology

- The first wave of the research was conducted in March 2013 and the survey has been conducted on a quarterly basis since then, with the exception of 3 quarters (December 15, March 16 and June 16). This report summarises the key findings of the Wave 20 survey held in October 2018
- Around 500 online interviews are conducted per wave, amongst a representative sample of Australian population in terms of gender, age (18+) and location (State, metro and non-metro). Results are weighted to current ABS population estimates.

Target Audience

The target respondent for the research has been defined as:

- Males and females aged 18+
- Having at least one of these three items for personal usage - home phone, internet connection and mobile phone
- Had some form of contact with at least one telephone or internet service provider in the six months prior to their interview. This contact included activities such as making a purchase, receiving a bill, contacting their provider/s by phone or online (email, chat, website), or making a complaint or a general enquiry.

The methodology and target population remained unchanged across all waves.

Significance Testing

- Percentage increases/decreases between the current and previous waves have been tested for statistical significance – for the current report, the comparison waves are Wave 19 and Wave 20.

- In this report, a significant decrease or increase was defined at the 90% confidence level. That is, the increase or decrease between the defined periods was certain 90% of the time.

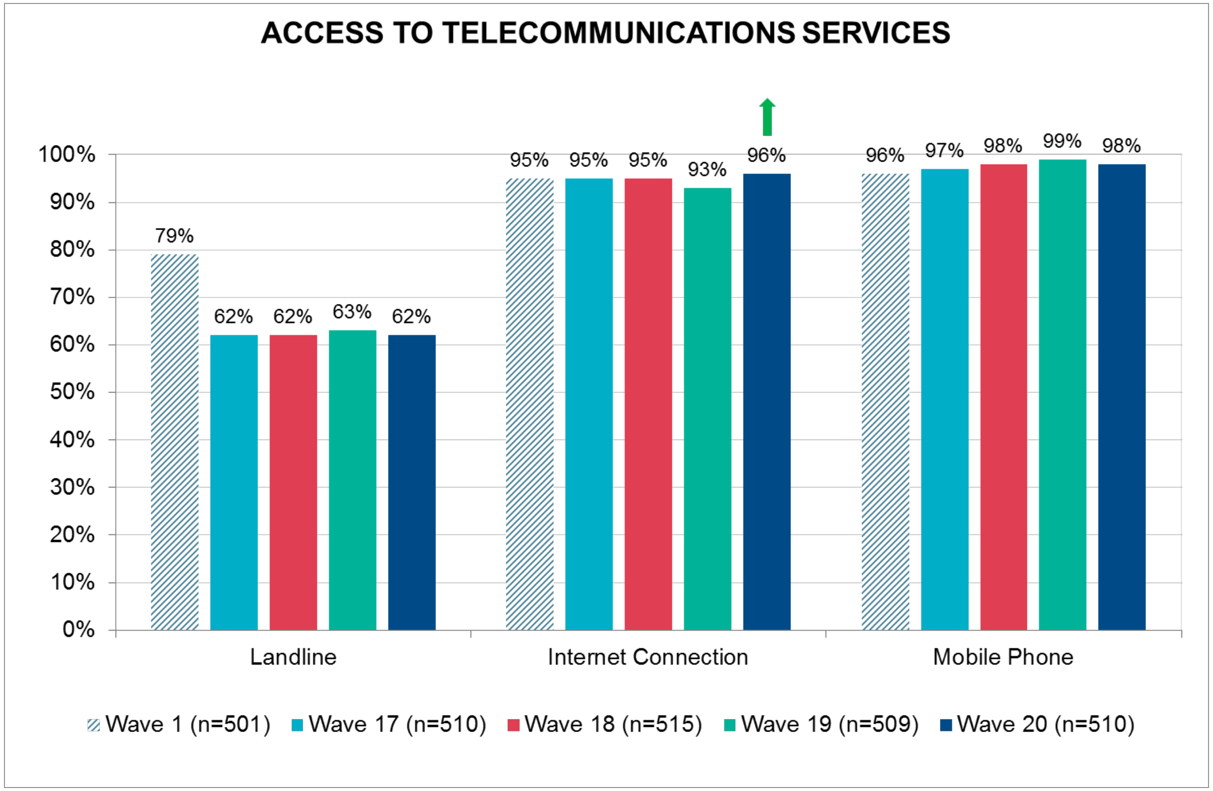
- Special formatting was applied to indicate statistical significance. Where there was a significant increase in the second period, a **green arrow** above the percentage was added and conversely significant decreases were denoted in **red (red arrow for wave on wave trends).** Where there was no significance, there was no arrow indicating an increase/decrease between waves.

Access to Telecommunications Services*

**Target Audience: 18+; have a home phone, mobile phone and/or internet connection; and had contact with one (or more) service provider(s) in the last 6 months*

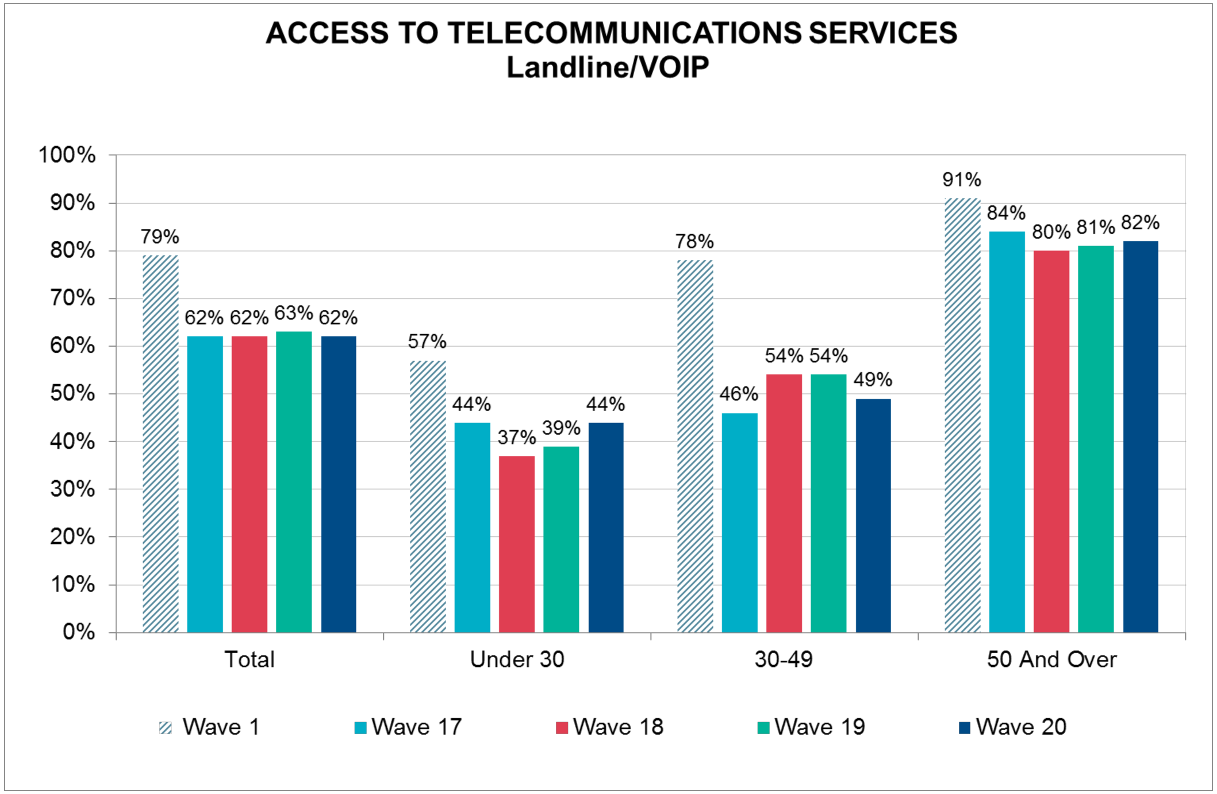
Access to Telecommunications Services

- 98% of people in Wave 20 who had some form of contact with a service provider in the last 6 months had a mobile phone available for their personal use while 96% had an internet connection in their household for personal use. 62% had access to a landline or VOIP phone.

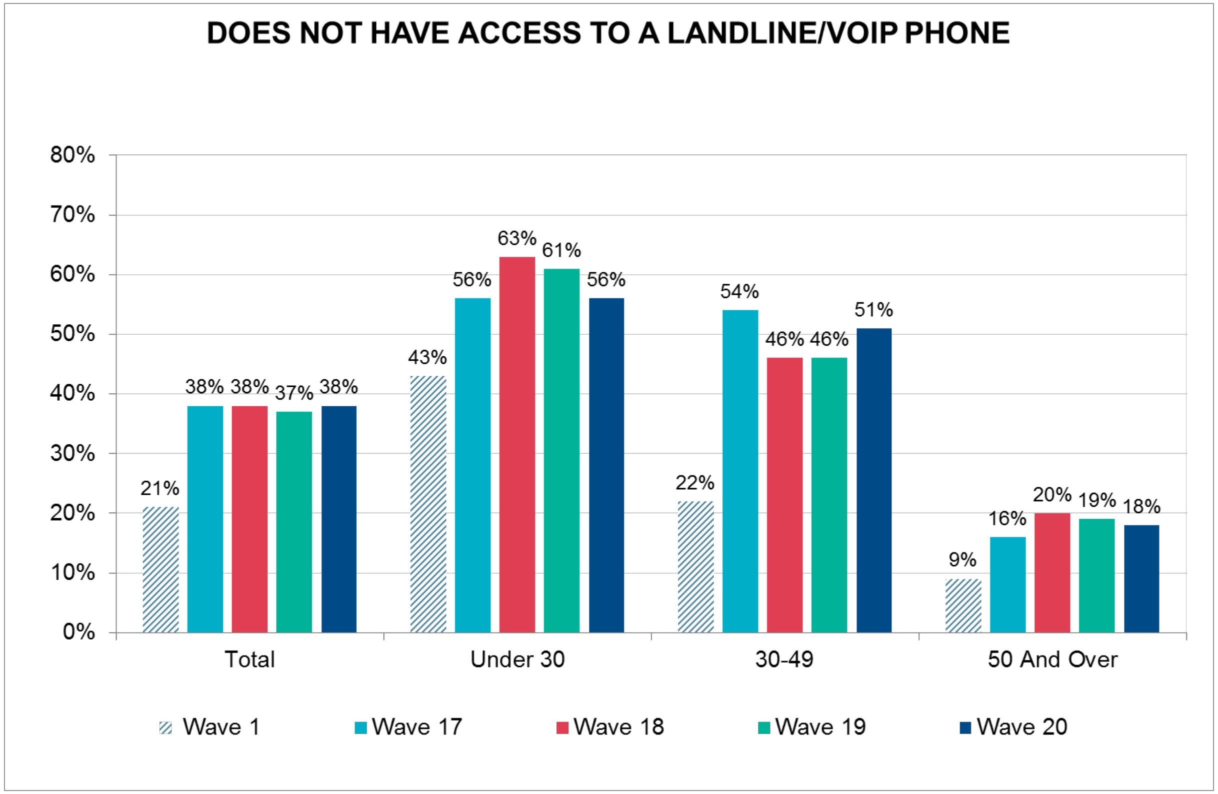


Access to Landline/ VOIP – By Age

- Access to telecommunication services differed by age, with older people aged 50 years and over more likely to have access to a landline/ VOIP (81%) than those who were under the age of 30 (39%) and 30-49 (54%).
- There were no significant changes in terms of access to a landline/VOIP in the current wave compared to the previous wave.

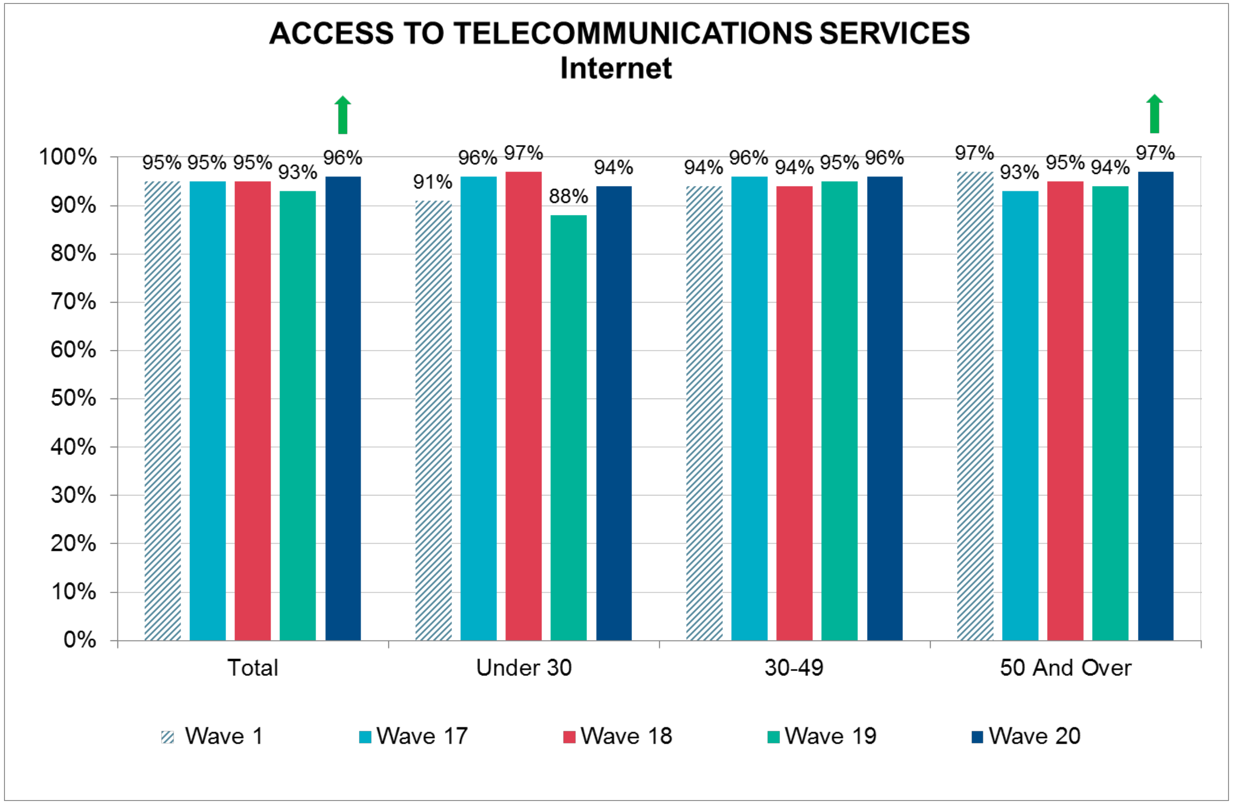


‘No’ Access to Landline/ VOIP – By Age



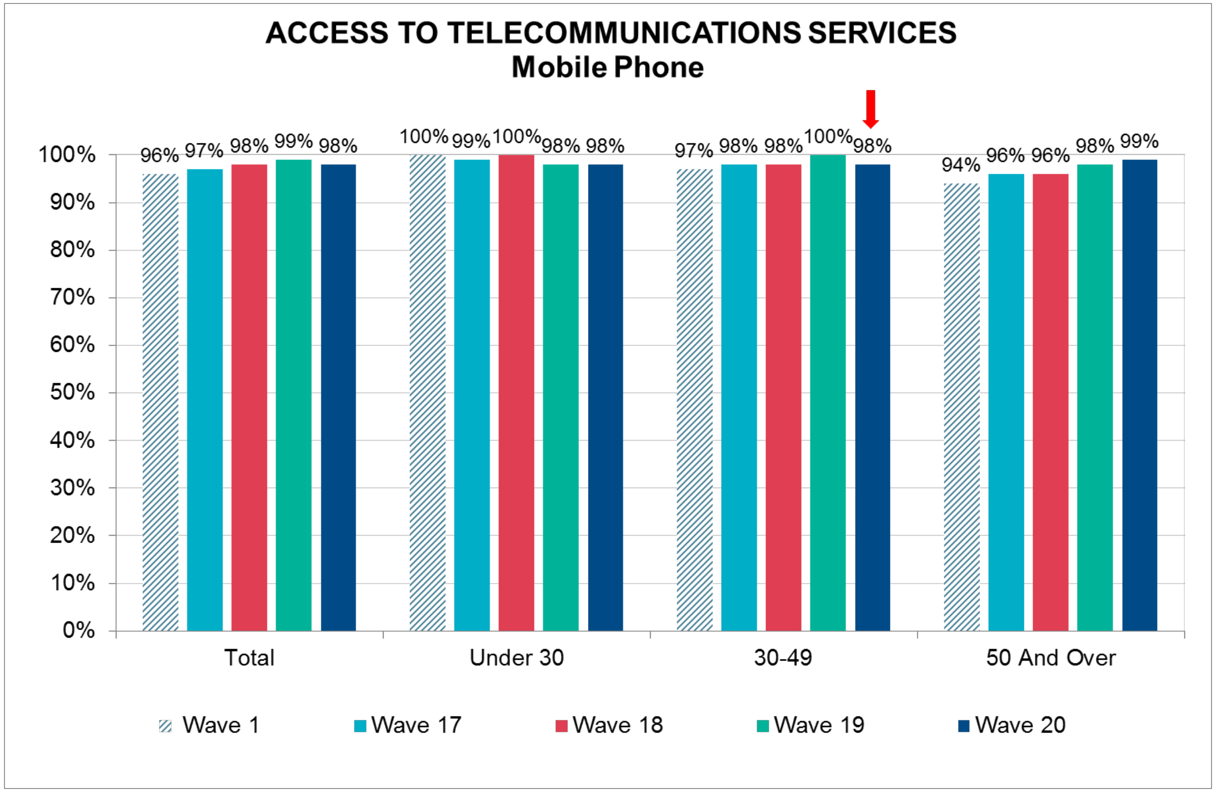
Access to Internet – By Age

- Access to an internet connection, amongst people who had some form of contact with a service provider in the past 6 months was significantly higher in Wave 20 compared to Wave 19. This increase was largely driven by the 50 and Over segment that rose significantly from 94% in Wave 19 to 97% in Wave 20.



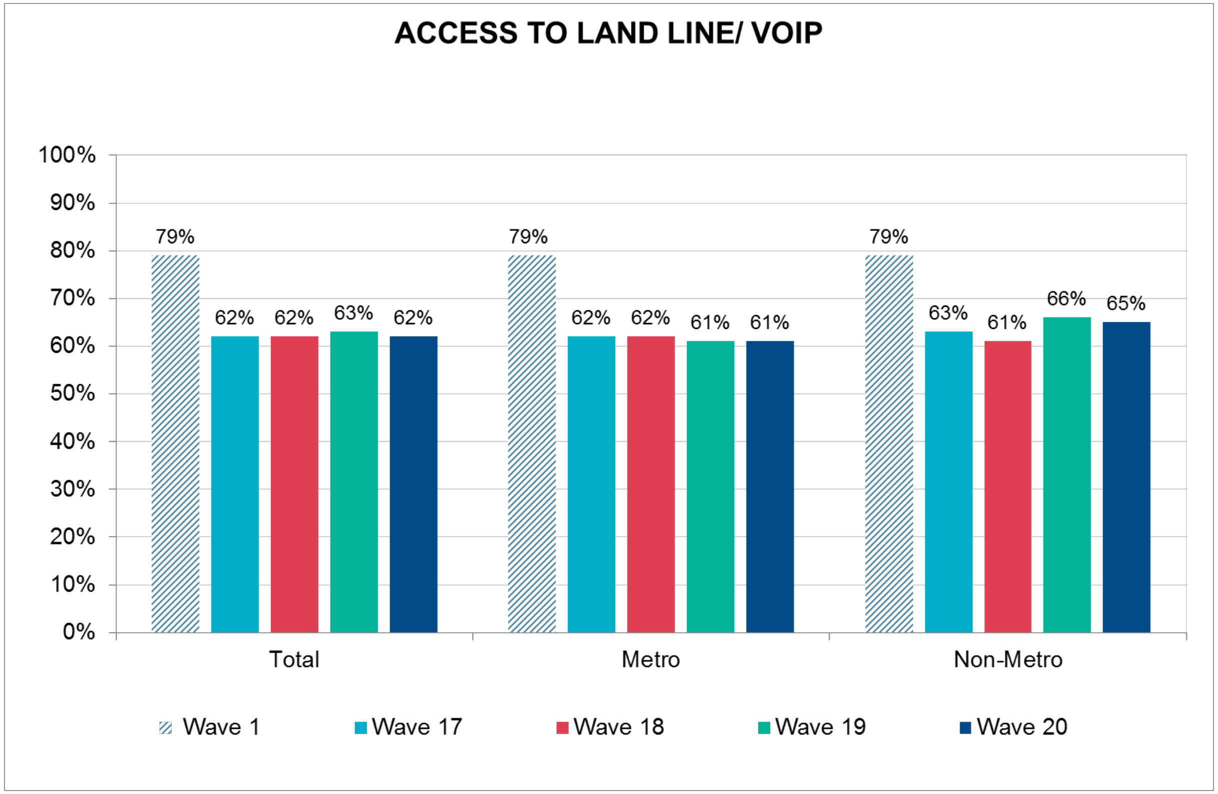
Access to Mobile Phone – By Age

- Despite a significant decrease in access to a mobile phone within the 30-49 segment from Wave 19 to Wave 20, there was no significant change in the current wave compared to the previous wave overall.



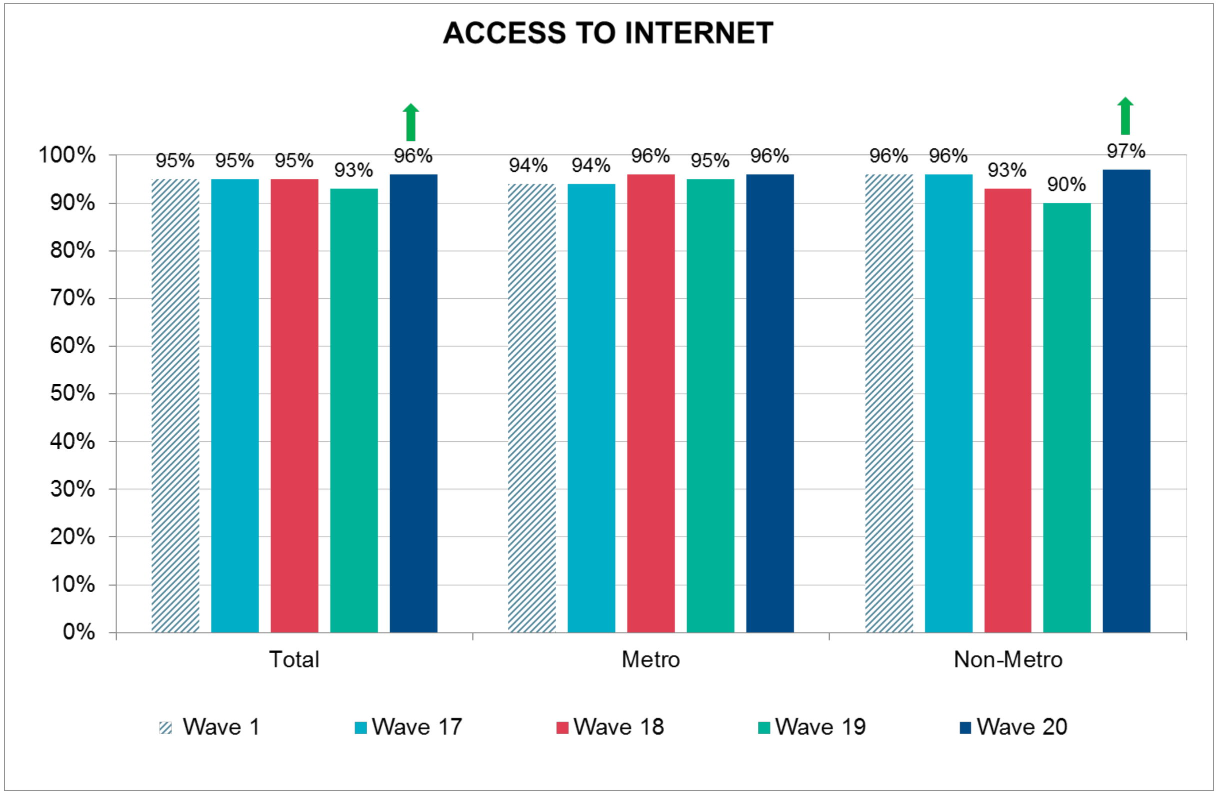
Access to Landline/ VOIP – Metro vs. Non-metro

- There were no significant changes by area in terms of access to a landline/VOIP in the current wave compared to the previous wave.



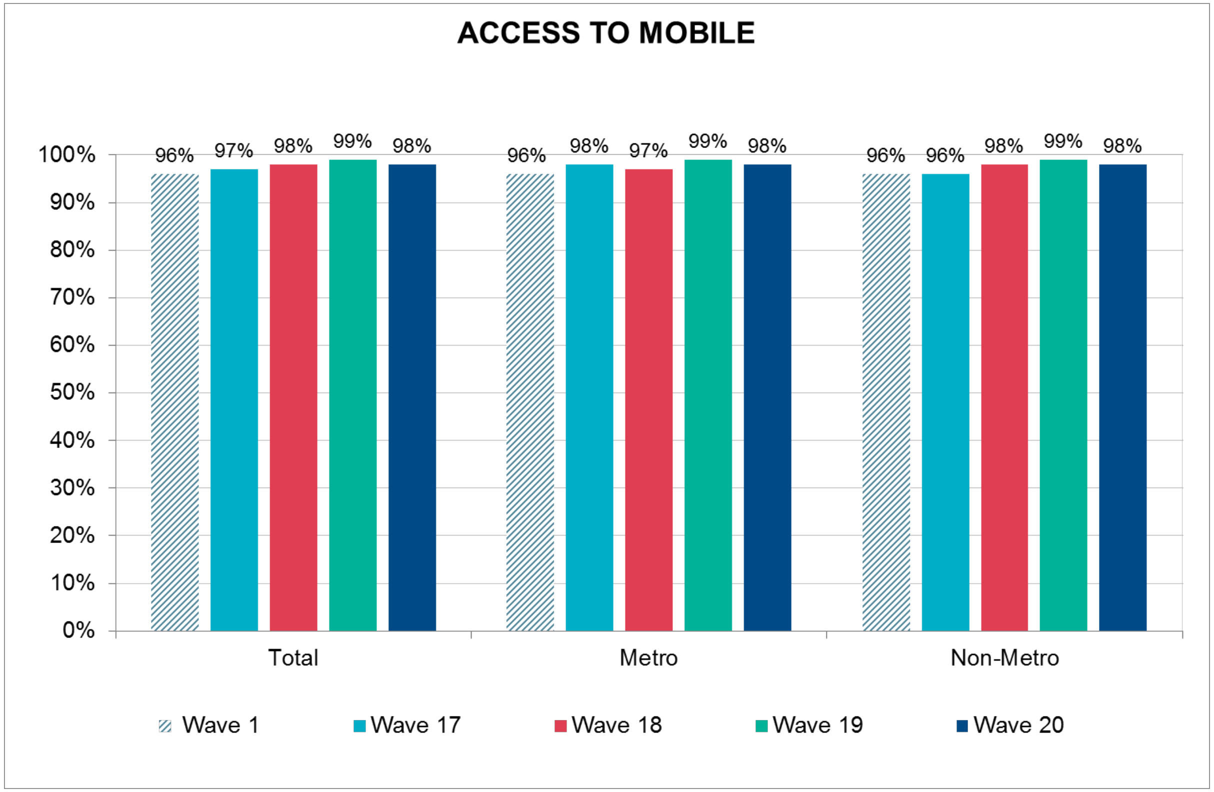
Access to Internet – Metro vs. Non-metro

- The access to an internet connection increased significantly in the current wave, and was largely driven by non-metro areas that show a significant increase from 90% in Wave 19 to 97% in Wave 20.



Access to Mobile – Metro vs. Non-metro

- Access to a mobile in both metro and non-metro areas was slightly (not significantly) lower in the current wave compared to the previous wave.

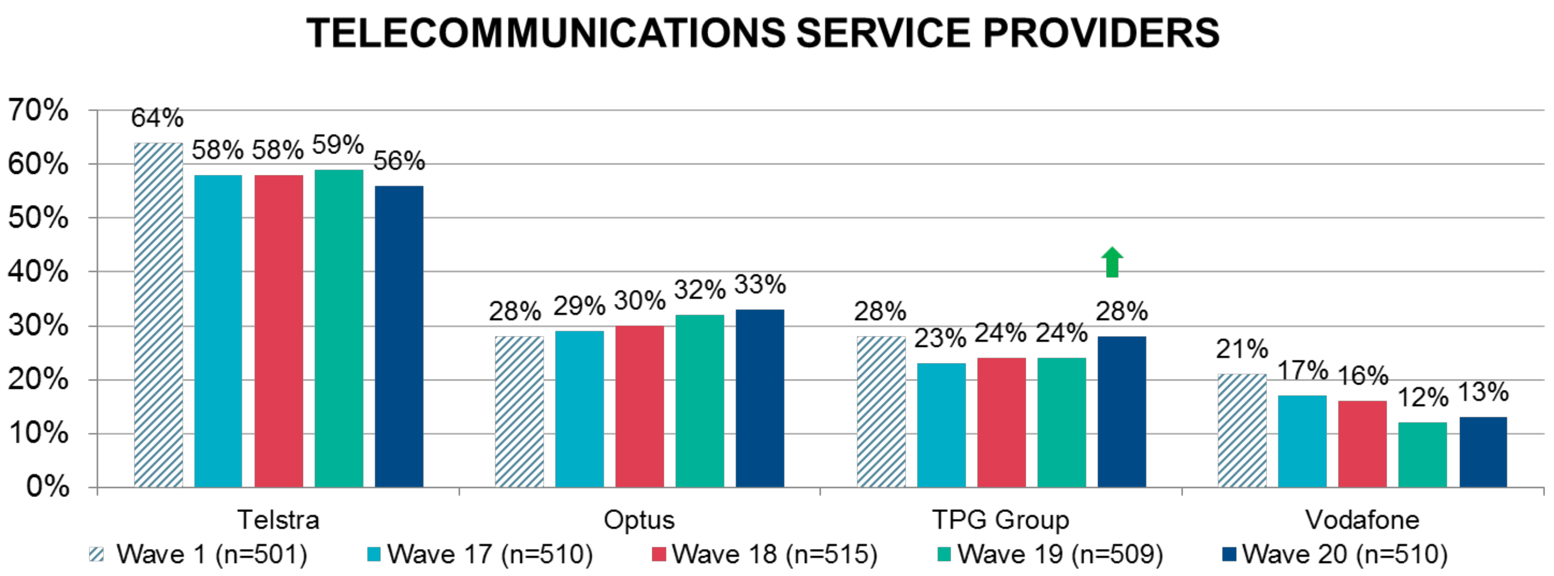


Telecommunication Service Providers*

**Target Audience: 18+; have a home phone, mobile phone and/or internet connection; and had contact with one (or more) service provider(s) in the last 6 months*

Telecommunications Service Providers[1]

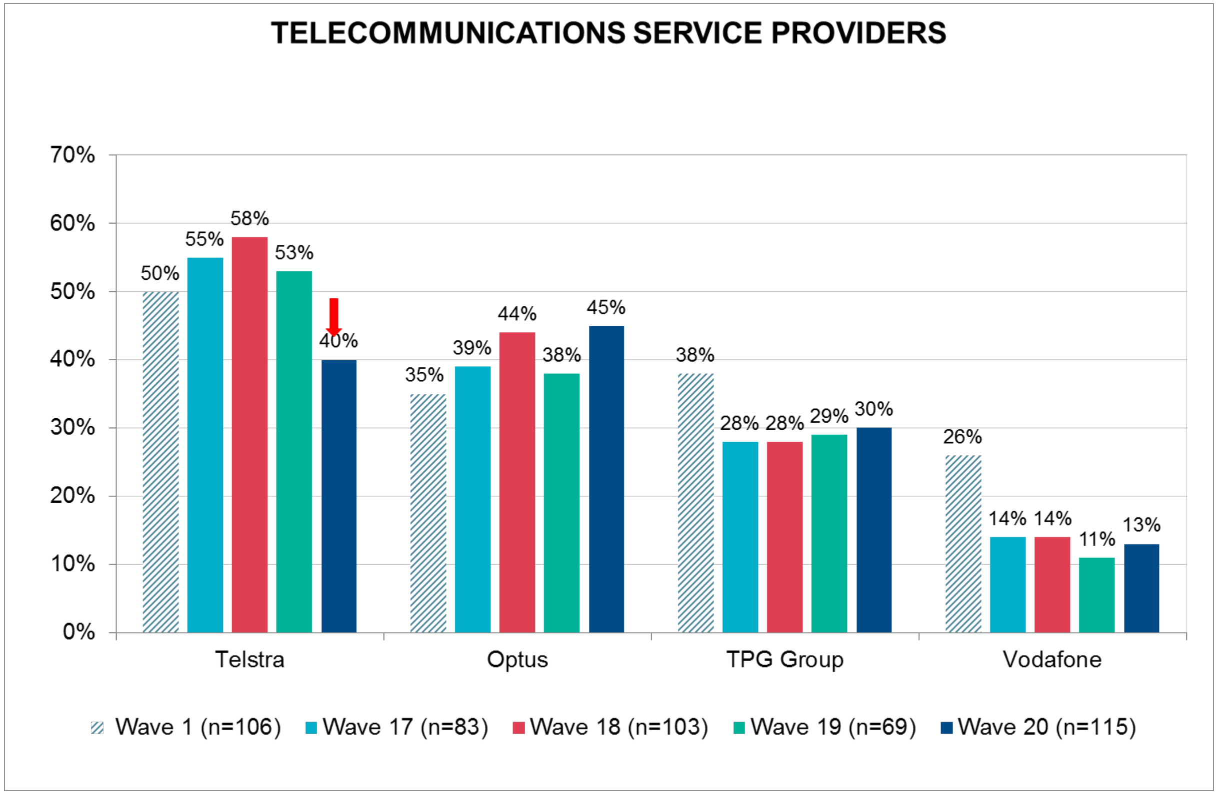
- Telstra[2] (56%) was the leading provider of home phone, mobile phone or internet services used by people who had some form of contact with a service provider in the last 6 months, followed by Optus (33%), TPG Group[3] (28%) and Vodafone[4] (13%). The proportion of people that used a TPG Group service increased significantly (4%) in Wave 20.



[1] Please note that the target audience of this research is 'Australians aged 18+ who are personal users of a home phone, internet connection or mobile phone AND have had contact with a service provider in the last 6 months'. Therefore, the usage of telecommunication service providers in this report is based on a segment of the Australian population and not on a representative sample of the overall population.
[2] The survey captured 'Telstra' and 'Telstra/ BigPond' separately till Wave 16; the data for both these providers has been clubbed under 'Telstra' for this section till Wave 16. From Wave 17 onwards, the survey only captures 'Telstra'.
[3] 'TPG Group' includes the following brands: 'TPG', 'Adam', 'iiNet', 'Internode', 'Netspace' and 'Westnet'.
[4] The survey captured '3' and 'Vodafone' separately till Wave 16; the data for both these providers has been clubbed under 'Vodafone' for this section till Wave 16. From Wave 17 onwards, the survey only captures 'Vodafone'.

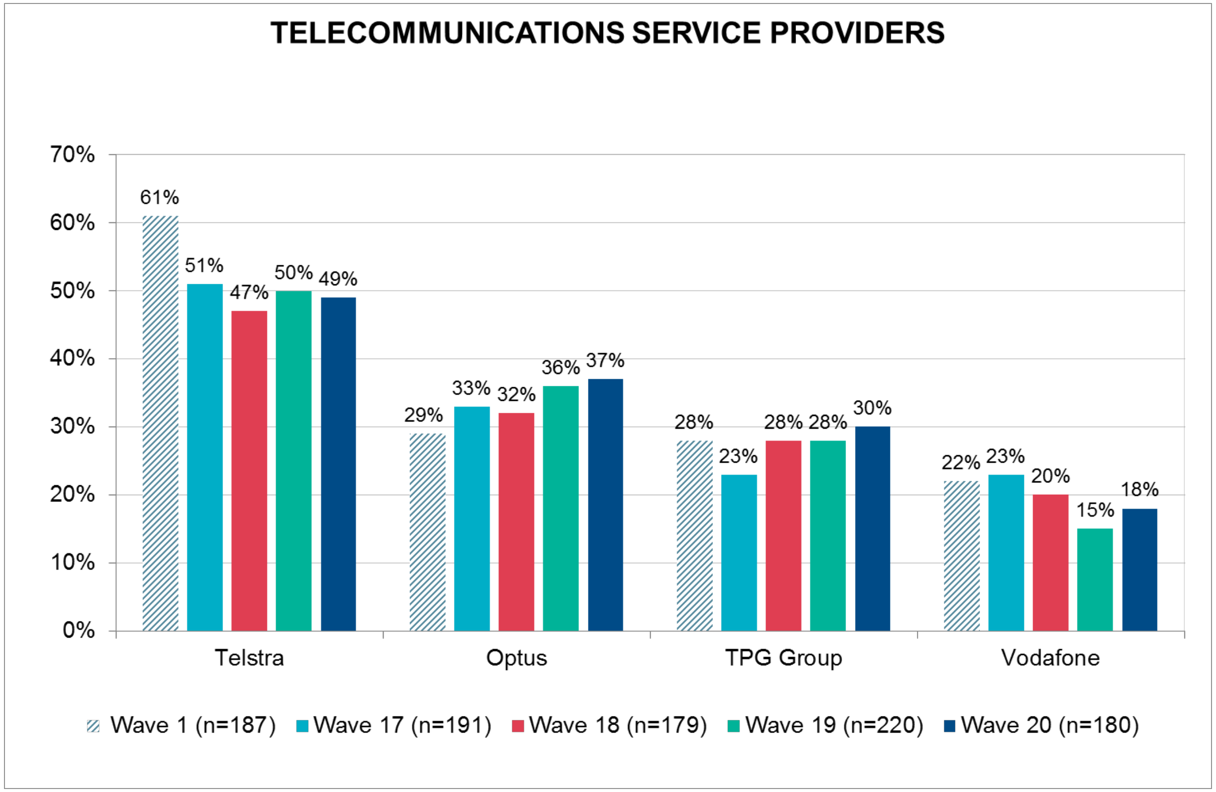
Telecommunications Service Providers- 'Under 30' segment

- Among less than 30 year olds who had contact with a service provider in the last 6 months, 40% used a Telstra service in Wave 20, dropping significantly from 53% in Wave 19.
- 45% had a service with Optus, 30% had a TPG Group service and 13% had a service with Vodafone. Only slight (not significant) differences between the current and previous wave.



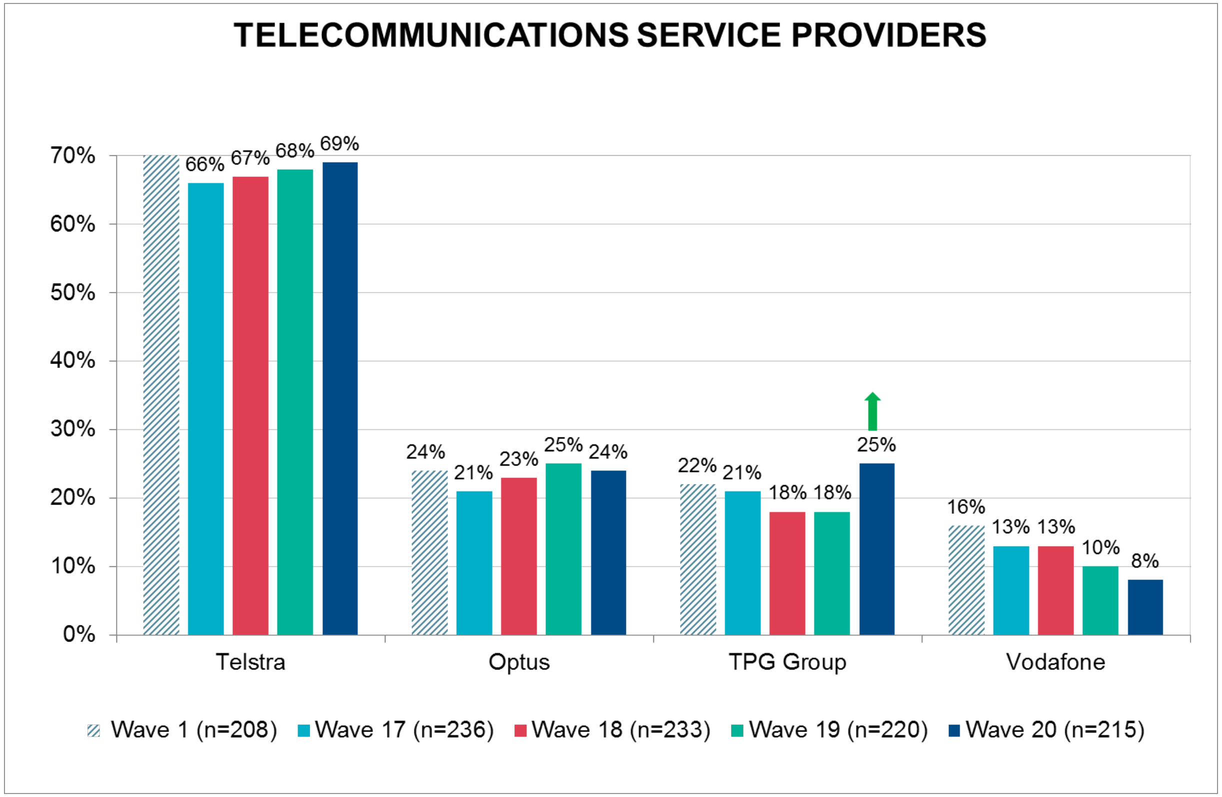
Telecommunications Service Providers- '30 to 49' segment

- Among 30-49 year olds, 49% used a Telstra service in Wave 20, 37% had a service with Optus, 30% had a TPG Group service, and 18% had a service with Vodafone. There were no significant changes between the current and previous waves.



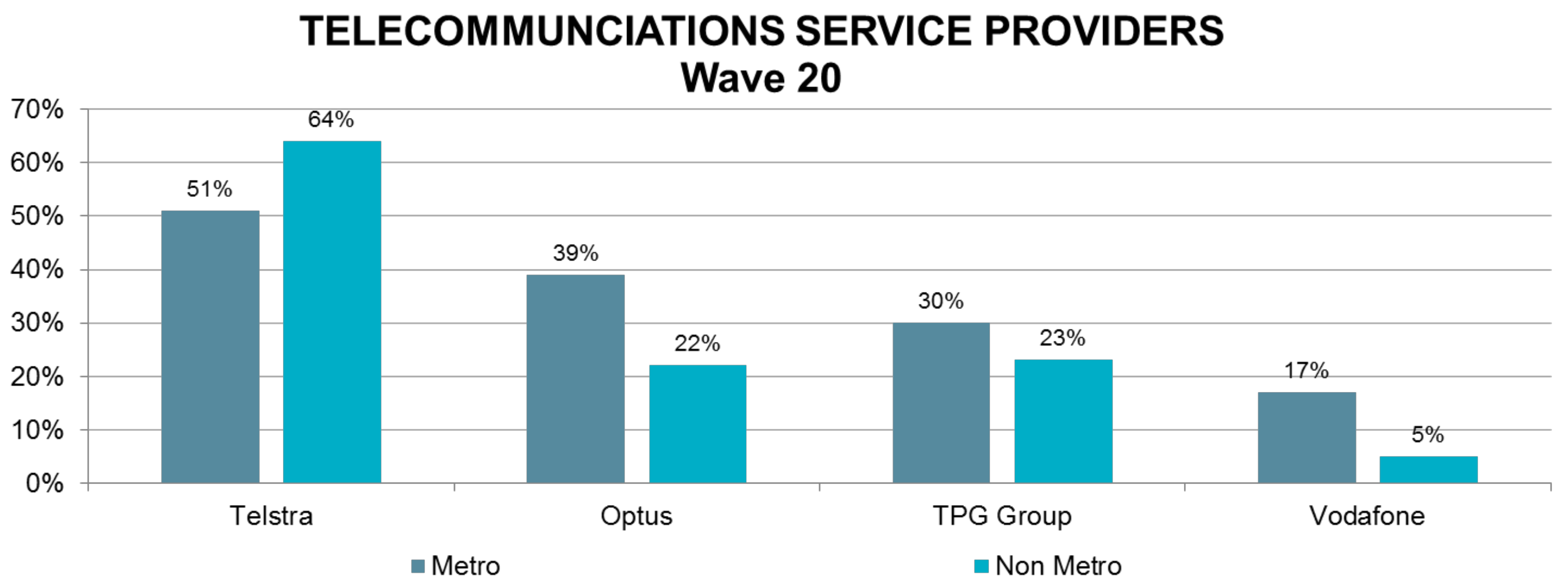
Telecommunications Service Providers- ‘50 and over’ segment

- The 50 and Over segment continues to have the highest incidence of people with a Telstra service (69%) in Wave 20. This was followed by TPG Group (which increased significantly from 18% in Wave 19 to 25% in Wave 20), Optus (24%), and Vodafone (8%).



Telecommunications Service Providers- Metro vs. Non-metro

- When usage of telecommunications service providers was examined by people's area of residence in Wave 20, the results revealed those that used Telstra services were more common in non-metro areas (64%) than in metro areas (51%). On the other hand, Optus, TPG group and Vodafone services were more common in metro areas (39%, 30% and 17% respectively) than in non-metro areas (22%, 23% and 5% respectively).

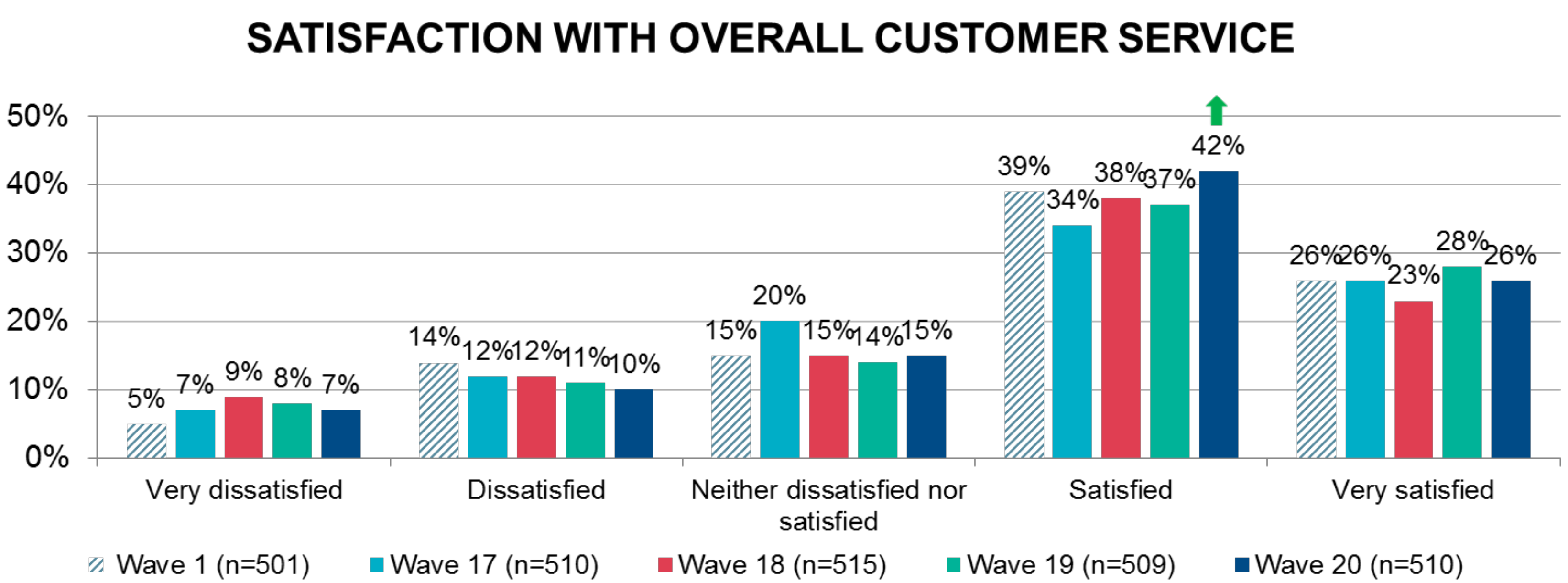


Satisfaction with Customer Service*

**Target Audience: 18+; have a home phone, mobile phone and/or internet connection; and had contact with one (or more) service provider(s) in the last 6 months*

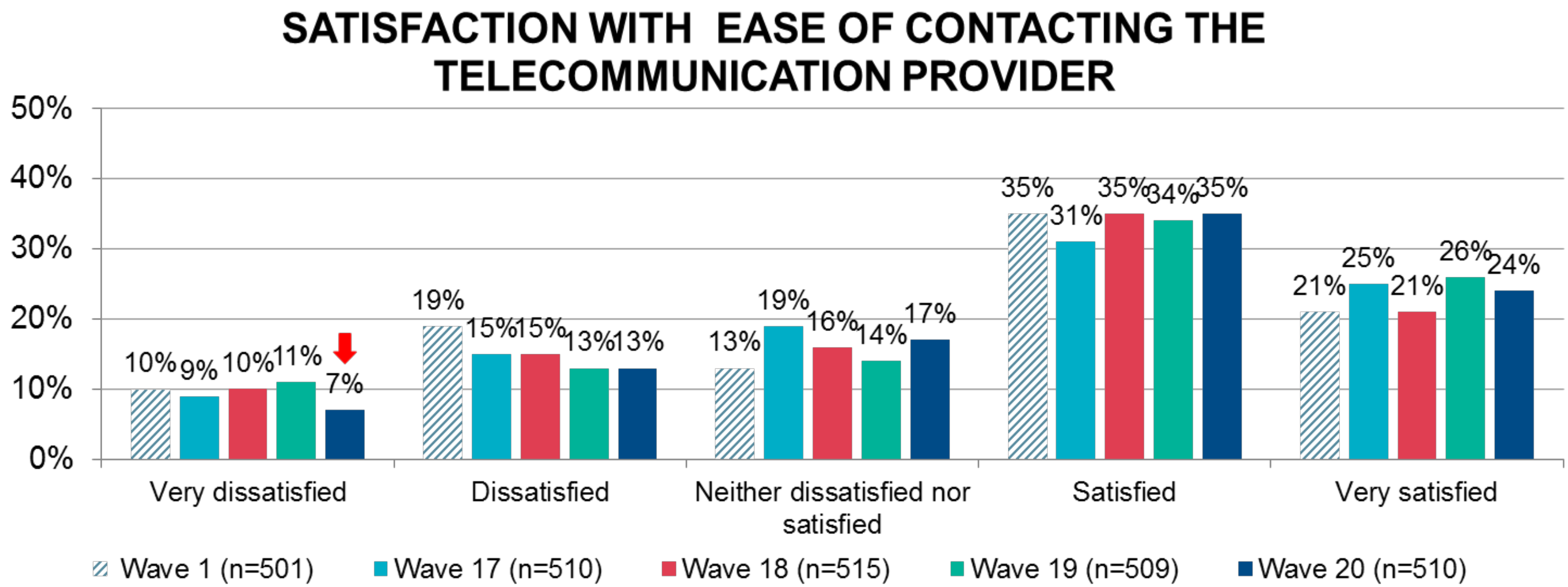
Satisfaction With Overall Level of Customer Service

- In Wave 20, more than two in three (68%) were satisfied ('Very Satisfied' or 'Satisfied') with the overall level of customer service received on their most recent contact with a telecommunication provider. There was a significant increase (+5%) in the number of people being 'satisfied' with the level of customer service received.
- Nearly one in six (17%) people were dissatisfied ('Very Dissatisfied' or 'Dissatisfied') with the overall level of customer service received on their most recent contact with a provider. 7% people were very dissatisfied.



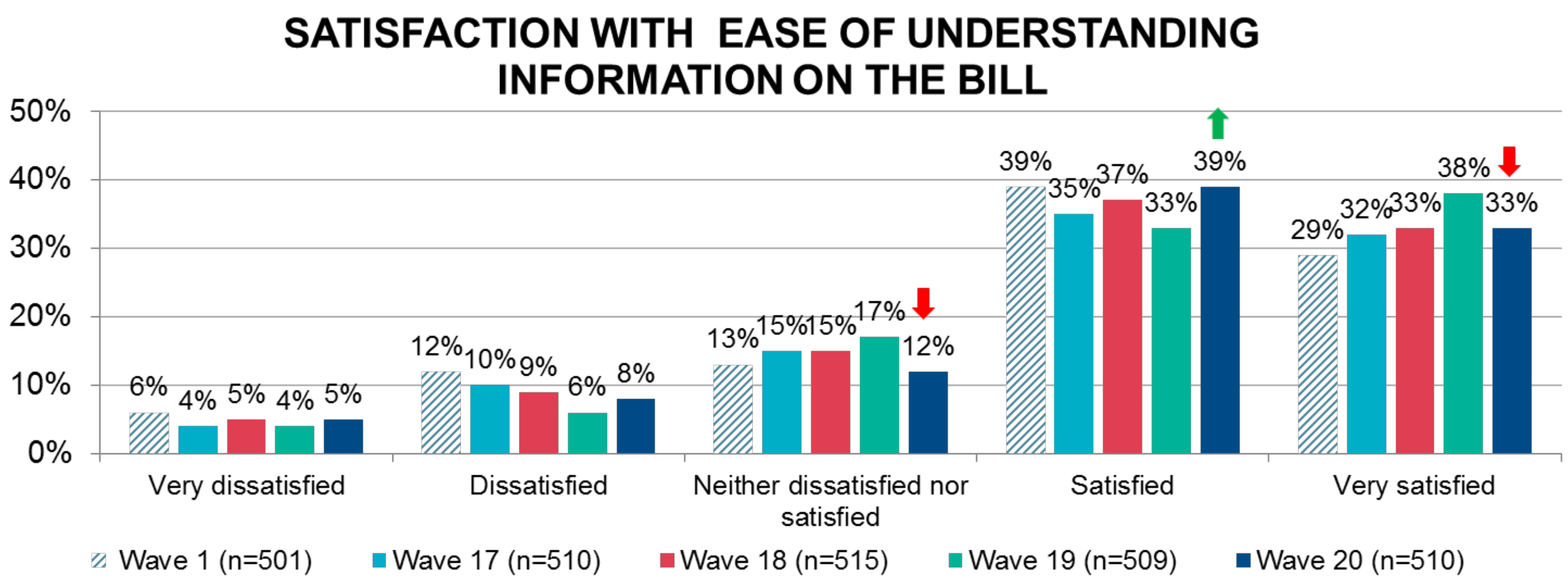
Satisfaction With Ease of Contacting Telecommunications Provider

- In Wave 20, nearly three in five (59%) were satisfied ('Very Satisfied' or 'Satisfied') with the ease of contacting their telecommunications provider. 24% of people were very satisfied.
- One in five (20%) were dissatisfied ('Very Dissatisfied' or 'Dissatisfied') with the ease of contacting their provider. 7% of people were very dissatisfied, which was a significant decrease (-4%) on the previous wave.



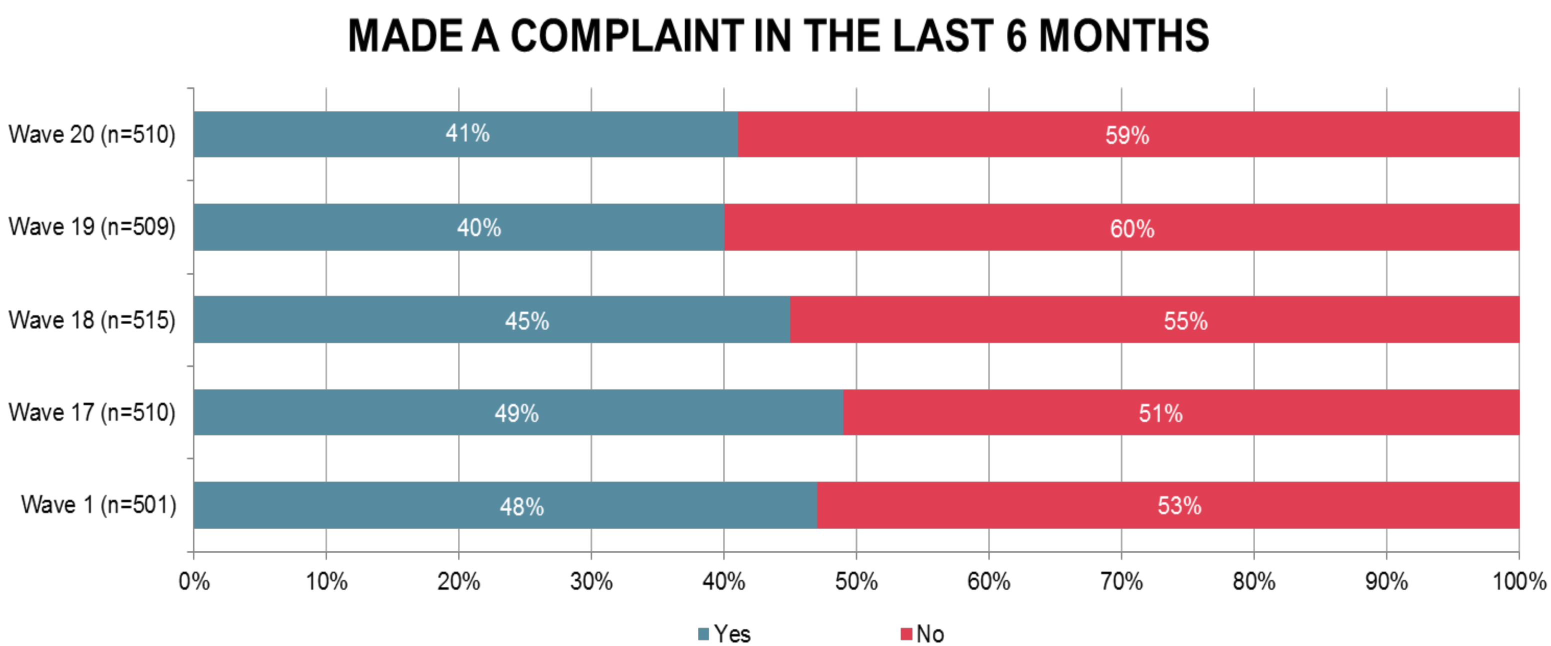
Satisfaction With Ease of Understanding Information on the Bill

- Satisfaction with ease of understanding bill information continued to be high in Wave 20 with over seven in ten (72%) customers being satisfied (‘Very Satisfied’ or ‘Satisfied’). There was a significant increase (+6%) in the number of people being ‘satisfied’ with the ease of understanding bill information, although the number of people ‘Very satisfied’ decreased significantly (-5%).
- The levels of dissatisfaction with the ease of understanding the bill in Wave 20 (13%) were slightly higher than Wave 19 (when levels of dissatisfaction were 10%). There were no significant changes in dissatisfaction from the previous wave.



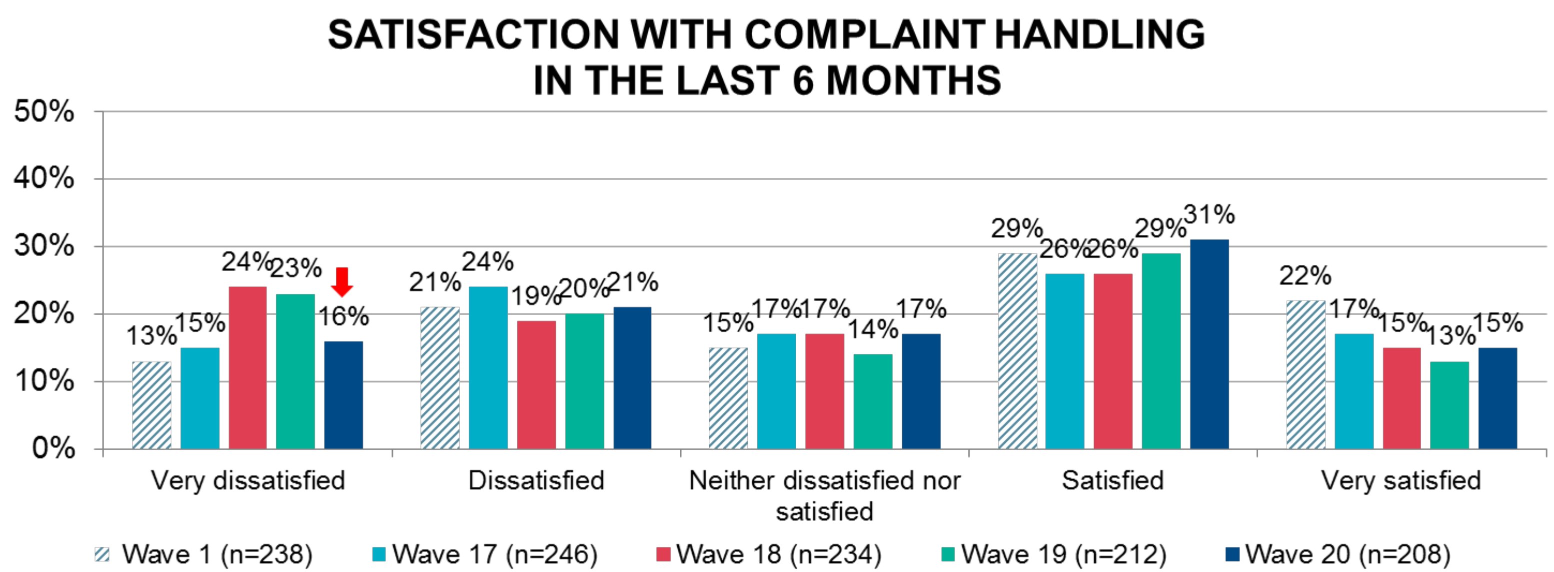
Satisfaction with Complaint Handling

- In Wave 20, more than two in five (41%) of those who had some type of contact with a service provider in the last 6 months had made a complaint to their provider, with numbers keeping fairly consistent with Wave 19 (40%). There were no significant changes from the previous wave.



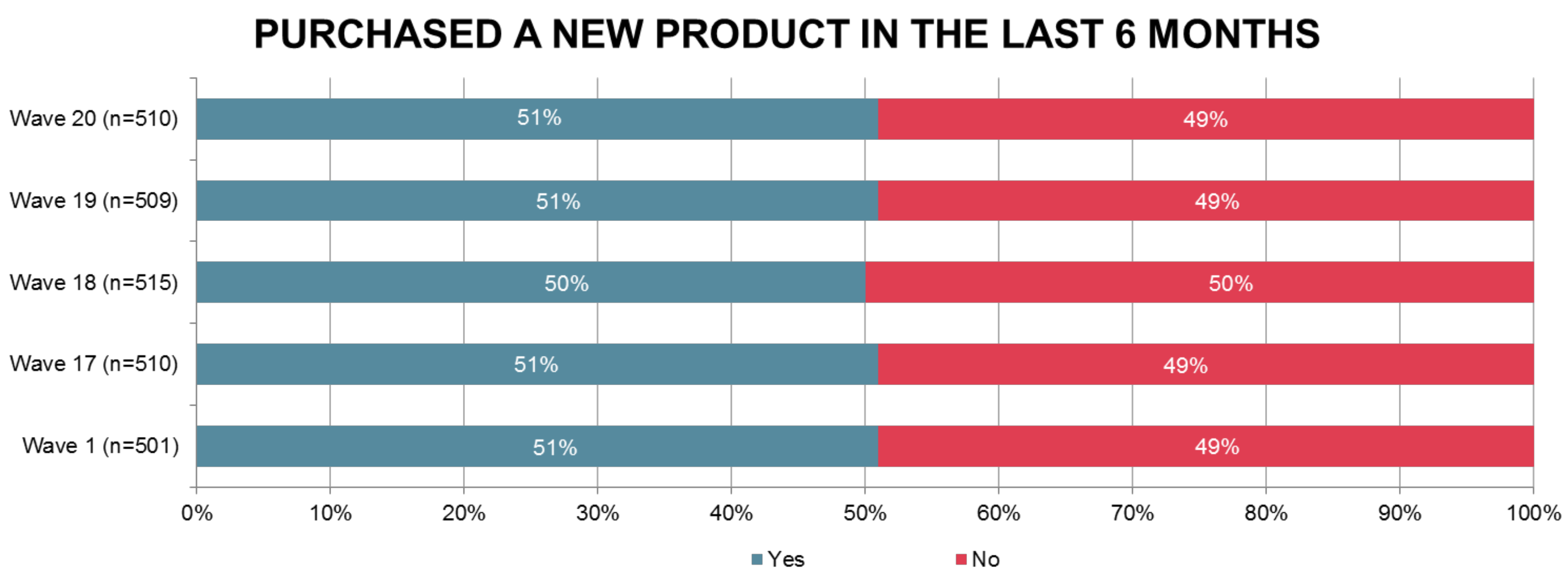
Satisfaction with Complaint Handling

- 46% of those who had made a complaint in the last 6 months were satisfied ('Very Satisfied' or 'Satisfied') with how their complaints had been handled, with 15% indicating that they were very satisfied.
- 37% of people were dissatisfied ('Very Dissatisfied' or 'Dissatisfied') with the complaint handling process in Wave 20, with the number of customers that were very dissatisfied dropping significantly from Wave 19 (23%) to Wave 20 (16%).



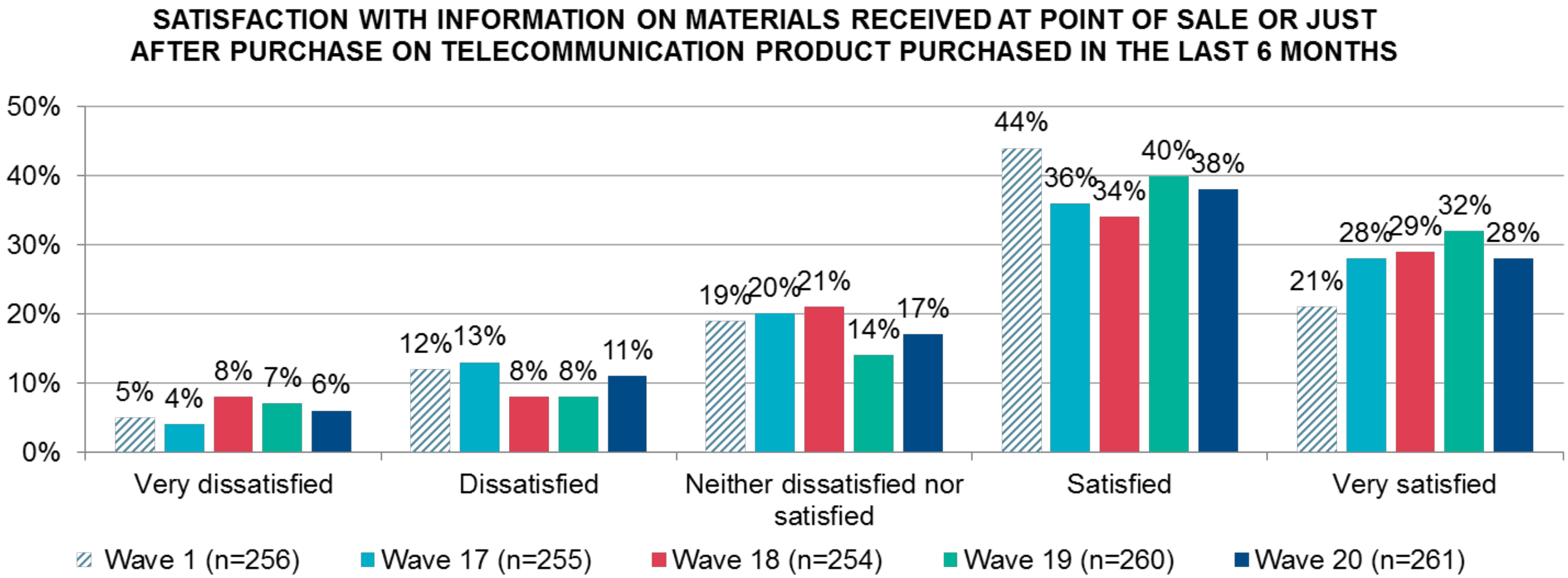
Satisfaction With Information on Materials Received at POS or Just After Purchase

- In Wave 20, one in two (51%) had purchased a telecommunication product in the last 6 months.



Satisfaction With Information on Materials Received at POS or Just After Purchase

- The levels of satisfaction ('Satisfied' or 'Very Satisfied') with information on materials received at the point of sale or just after purchase, among people who had purchased a telecommunications product in the last six months, were slightly lower in Wave 20 (66%) compared to Wave 19 (72%).
- 17% of people were dissatisfied ('Very Dissatisfied' or 'Dissatisfied') with the information received on materials at point of sale or just after purchase.
- There were no significant changes from the previous wave.

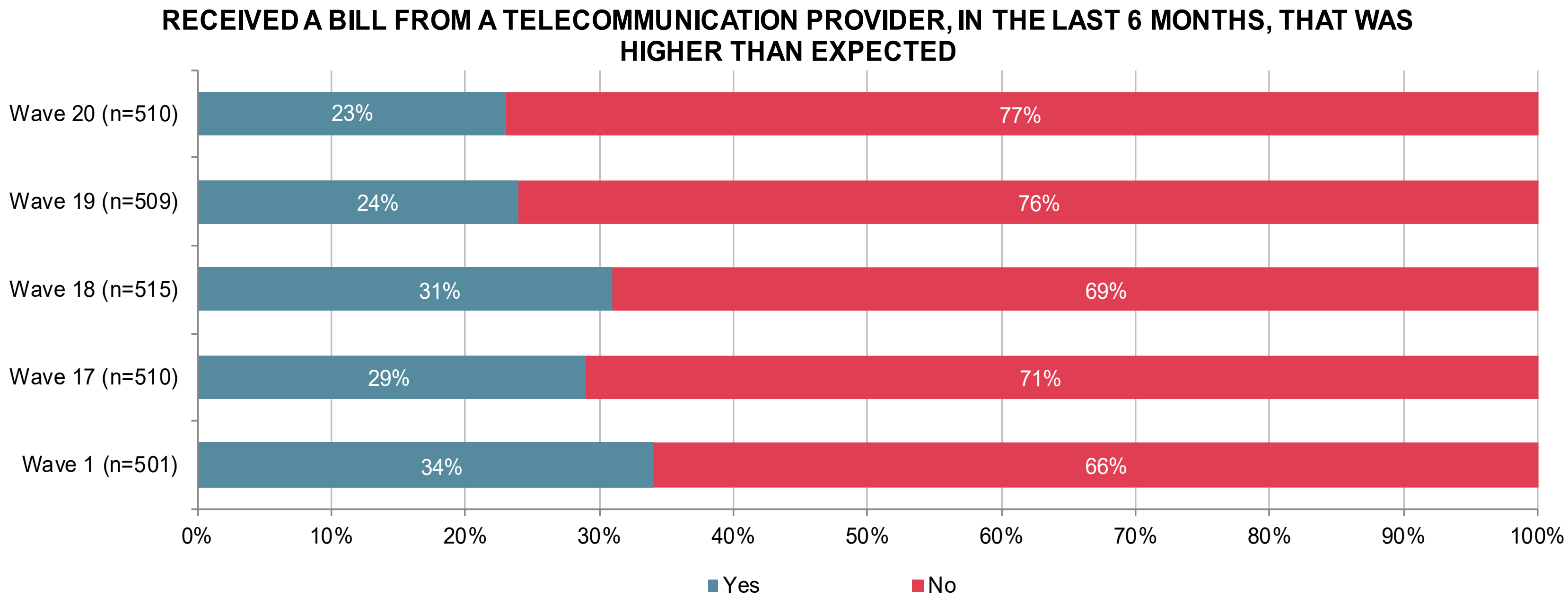


Billing*

**Target Audience: 18+; have a home phone, mobile phone and/or internet connection; had contact with one (or more) service provider(s) in the last 6 months*

Higher Than Expected Bills

- In Wave 20, 23% received a bill from a telecommunications provider in the last 6 months that was higher than expected. This was fairly consistent with the numbers in Wave 19 (24%).



Awareness of Spend Monitoring Tools

- 62% of those who received a bill that was higher than expected were aware that there were tools available to help them monitor their spending with their telecommunications provider. There were no significant changes from Wave 19 to Wave 20.