

Survey Findings

The Consumer Satisfaction Survey 2009



TABLE OF CONTENT

1.BACKGROUND.....	1
2.SAMPLING AND METHODOLOGY.....	2
3.CONSUMER SATISFACTION INDEX (CSI).....	3
4.RESEARCH FINDINGS.....	4
5.EXECUTIVE SUMMARY.....	5
6.DETAILED FINDINGS.....	6
A. PUBLIC CELLULAR.....	7
B. PAY TV.....	8
C. BROADBAND.....	9
D. FIXED LINE TELEPHONE.....	10
E. DIGITAL LEASED LINES.....	11

Background of Customer Satisfaction Survey

The first survey (Wave 1) was conducted throughout the months of February and April 2001 with their findings released in June 2001. The second survey (Wave 2) was canvassed between the months of August and October 2001 and the results were released in November 2001. Both surveys were conducted by Taylor Nelson Sofres (TNS). Initially, the survey was confined to telecommunication and broadcasting services.

For the year 2002, the study was expanded to also include postal, equal access, voip, audio text, premium service and 3G analysis. TNS together with University Kebangsaan Malaysia (School of Communication and Media Studies) conducted the two CSS (Wave 3 & 4). UKM performed the survey to gauge and review the general satisfaction relating to broadcasting and postal services. TNS on the other hand, conducted the survey on telecommunication services. The results of both surveys were released in June and December 2002 respectively.

In 2003, SKMM carried out two CSS, Wave 5 was conducted by TNS and UKM in the period of April and June 2003, while Wave 6 was conducted by UKM together with IIUM in the second half of the year 2003. In Wave 6, SKMM changed its direction in the postal services which studied postal and courier service together and focused on Pos Malaysia alone. Therefore, Pos Laju being a courier service was surveyed together with other courier service providers to enable its performance to be benchmarked in the courier services industry.

In 2004, SKMM reviewed the trends achieved in the last 3 years and decided to embark on a paradigm shift in conducting the customer satisfaction survey. A nationwide survey continued to be conducted in the second half of the year studied entirely by TNS. The CSS 2004 became an annual exercise to measure the consumer satisfaction levels of services provided in the communications and multimedia industry. In the survey, the study was conducted using a computer assisted telephone interview (CATI) system. Besides the standard CSI, a TRI*M analysis was performed to improve the CSS.

After a lapse of one year, the consumer satisfaction survey was re-initiated and SKMM appointed IDC Malaysia Sdn Bhd to entirely conduct the surveys (CSS 2006 & 2007). The surveys adopted the similar methodology primarily completed using CATI and supplemented with face-to-face interviews. The latest survey had an increase targeted sample of 35,171 respondents as compared to the previous CSI conducted in 2006, which had a sample size of 35,079 achieved. In 2009, the survey was conducted entirely by SKMM which had a sample size of 7,203 and adopted similar methodology using CATI system.

**TRIM is a proprietary strategic analytical tool owned by TNS and used to Measure, Manage and Monitor consumer satisfaction.*

Sampling and Methodology

The consumer satisfaction 2009 survey probed on five service categories which are Fixed line, cellular services, broadband, digital leased lines and Pay TV services. Certain service categories were asked both in the consumer segment and commercial segments while a few categories were only asked once on their particular segment i.e. consumer or commercial depending on the nature of the service usage.

Data collection for this survey was primarily canvassed using Computer Assisted Telephone Interviews (CATI). To represent the population distribution of various subscribers, the responses from the 2009 Consumer Satisfaction Survey was weighted based on the service provider's subscriber population sourced as at June 2009.

Table 1 Sampling and Methodology

Service categories covered in CSI 2009, indicating the segments and service provider(s) covered, interview method and sample size achieved.

Services	Target Respondents	Service Providers	Total Industry (National level)	Individual Service Provider	Method	2009 Sample Achieved
1.Cellular	Residential	DiGi, Maxis, Celcom and U Mobile	✓	✓	CATI	2113
2.Fixed Line	Residential	Telekom/TIME	✓	✓	CATI	740
	Commercial	Telekom	✓	✓	CATI	520
3.Broadband	Residential	Telekom,P1 Celcom, DiGi ,U Mobile and Maxis	✓	✓	CATI	2402
	Commercial	Telekom, JARING	✓	✓	CATI	560
4. Pay TV	Residential	Astro	✓	✓	CATI	524
5. Digital Leased Line	Commercial	All Providers	✓	✓	CATI	344

Table 2 Consumer Satisfaction Index

Consumer Satisfaction Index (CSI)

$$\text{CSI} = \frac{\text{Mean Weighted Performance} + \text{Mean Overall Satisfaction}}{2}$$

The Average
of all Weighted
Performance
Scores (1-5)

CSI
Score

Overall
Satisfaction
(1-5)

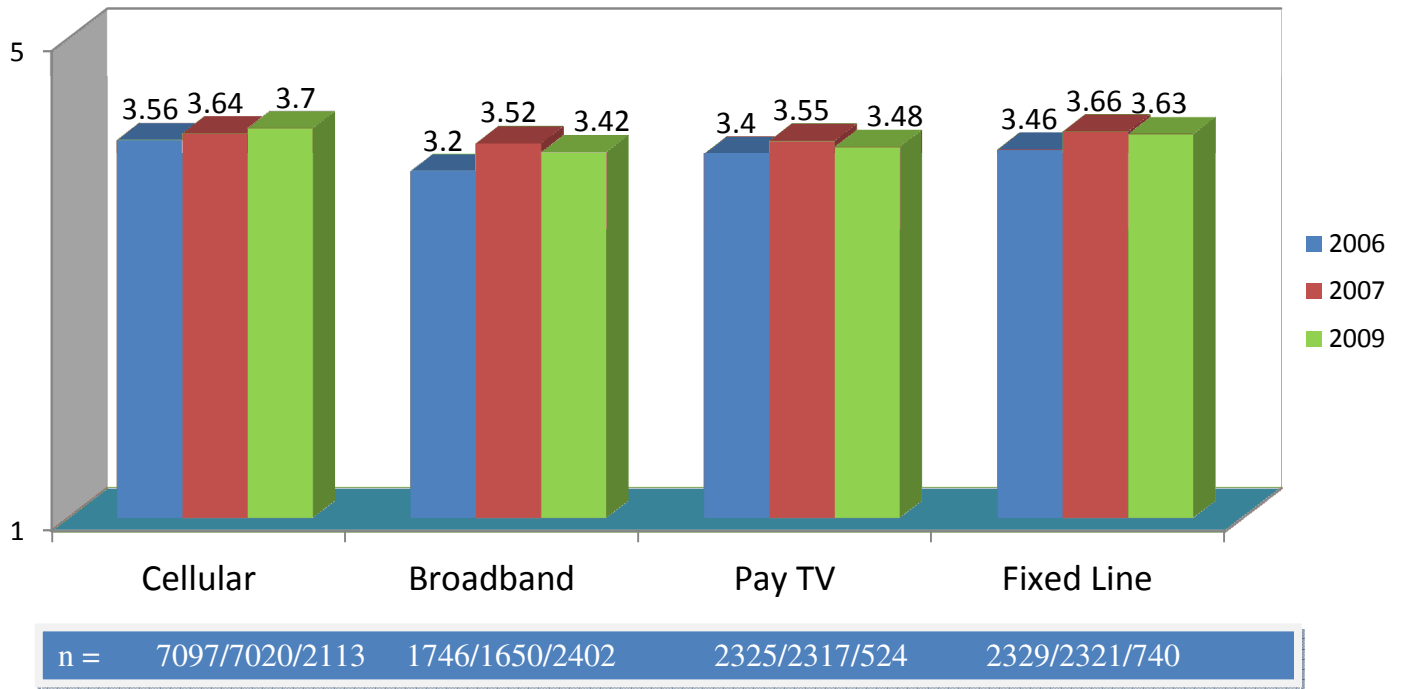
The CSI Score is derived by the sum of “The average of Weighted Performance Scores(1-5)” and mean overall satisfaction score, which will then be divided by two

Research Findings

1. It is to be noted that the CSI 2009 targeted a much smaller sample compared to the previous surveys.
2. Within each service category, the respondents were asked to evaluate a list of attributes. Please note that under ‘Customer Improvement areas’, only the attributes that have been identified as priority are listed, and not necessarily all the attributes that have been evaluated.
3. When making comparative analysis with previous surveys, consideration on the period of study sampling, demographic profile, methodology, approach and geographic coverage need to be taken into perspective.

Executive Summary

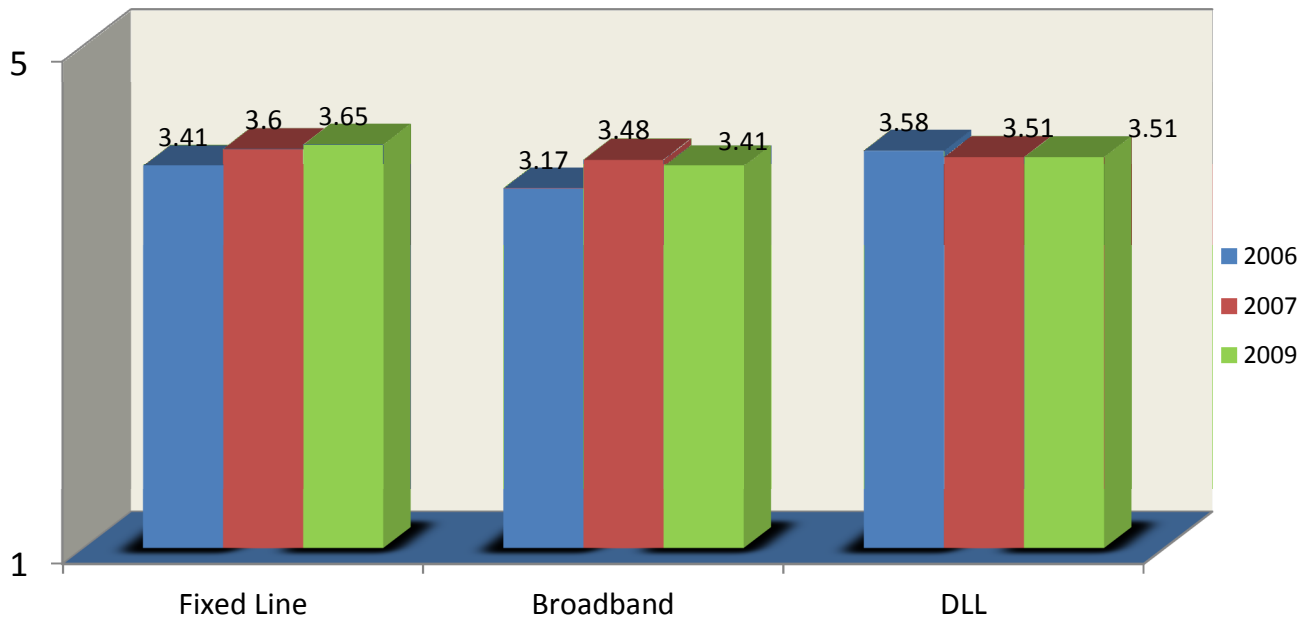
Table 3 CSI Score by Product –Consumer Segment



n= represents sample size

- In 2009, cellular services scored the highest performance in the consumer segment with an index of 3.70. The trend showed consistent performance with a marginal increase over the past three years.
- Broadband industry scored an index of 3.42 in 2009, showing a marginal decline by -0.10 point from its score in 2007. Similarly, both Pay TV and fixed line services recorded marginal decline in their score for the year 2009.
- Pay TV service recorded 3.48 index in 2009, posting a decrease of 0.07 point from its score in 2007. Fixed line scored an index of 3.63 in 2009, indicating 0.03 point lower than 2007. Overall, consumer satisfaction on the broadband, Pay TV and fixed line service reflected fluctuating trend throughout the surveys.

Table 4 CSI by Product – Commercial Industry



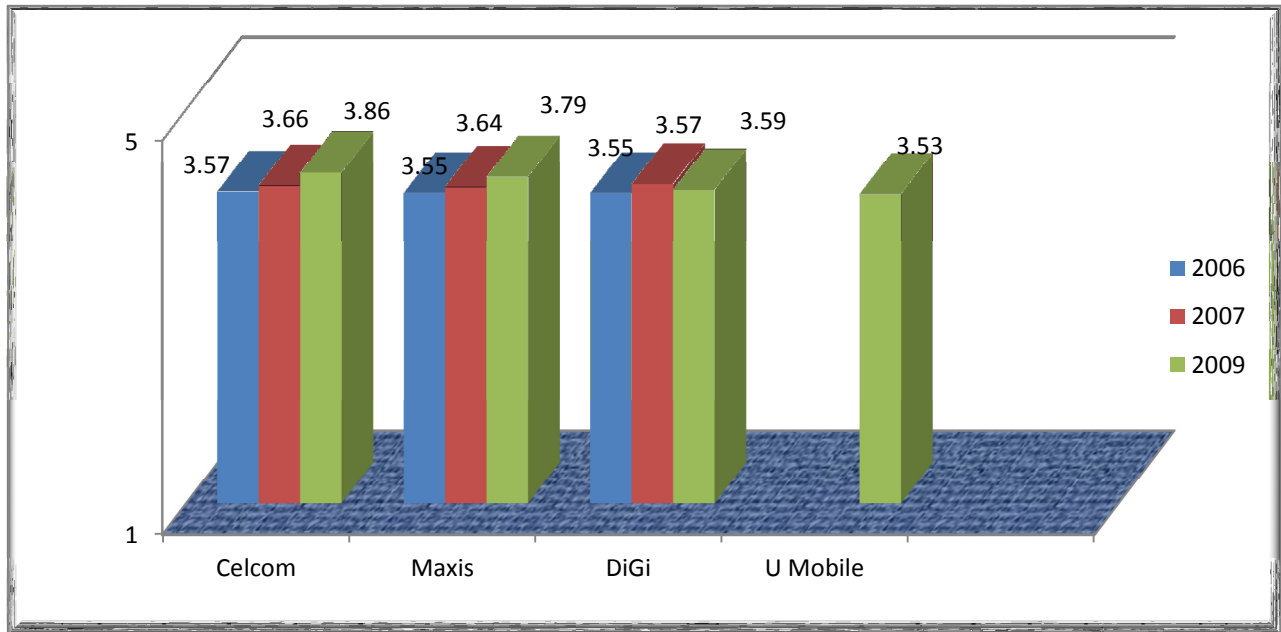
n =	3563/3311/516	1092/1242/525	298/294/344
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n= represents sample size

- Fixed line services represent the highest score in the commercial segment with an index of 3.65 in 2009. The CSI score indicated upward trend over the past surveys with a score of 3.41 in 2006 and increased by 0.19 point in 2007. Overall, commercial respondents rated consistent performance on the level of fixed line services provided to them.
- The CSI score for broadband commercial stood at 3.41 index in 2009, reflected a marginal decrease of 0.07 points from the previous year. Generally, broadband commercial service indicated fluctuating trend in its consumer satisfaction index.
- Digital leased line respondents rated a score of 3.51 index in 2009, the same result recorded in 2007. As compared to the CSI result in 2006, the satisfaction level for the service recorded a marginal decrease of 0.07 points in the evaluation conducted in 2007 and also 2009.

Detailed Findings by Industry

Table 5 CSI by Service Provider -Cellular Service



n =	2386/2349/529	2384/2335/544	2327/2336/523	517
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n= represents sample size

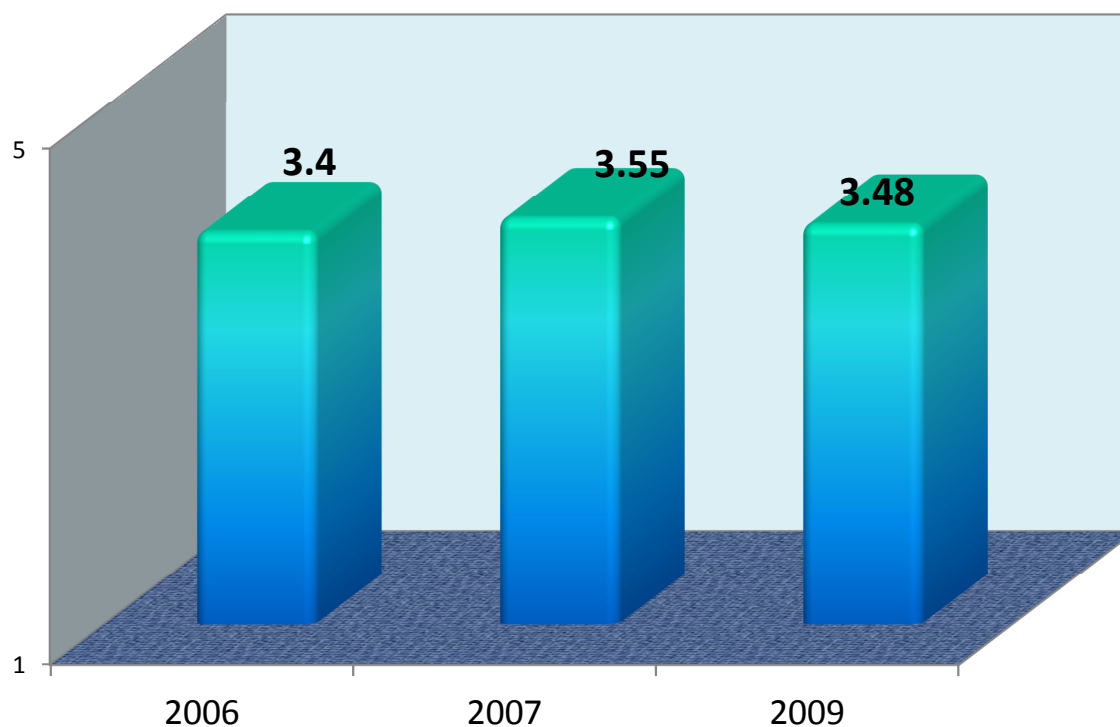
Cellular Service

- In the year 2009, four major mobile operators were studied to gauge consumer satisfaction in the aspect of product, customer service and also billing services in the cellular industry. Celcom scored the highest consumer satisfaction index in 2009 with a score of 3.86 and followed by Maxis at 3.79 index, DiGi at 3.59 and U Mobile at 3.53 index
- Out of the 27 attributes fielded to the respondents, the top key improvements highlighted for Cellular services are indicated as below;

Key Improvement Areas-2009

No	Key Improvement Areas
1	Attractiveness of other promotion
2	Quality of other services
3	Service provided are as advertised
4	Reasonable Charges for other service (MMS, Voicemail , GPRS and others)
5	Geographical Network Coverage

Table 6 CSI by Service Provider - Pay TV



n =	2325	2317	524
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n= represents sample size for each provider.

Pay TV Service

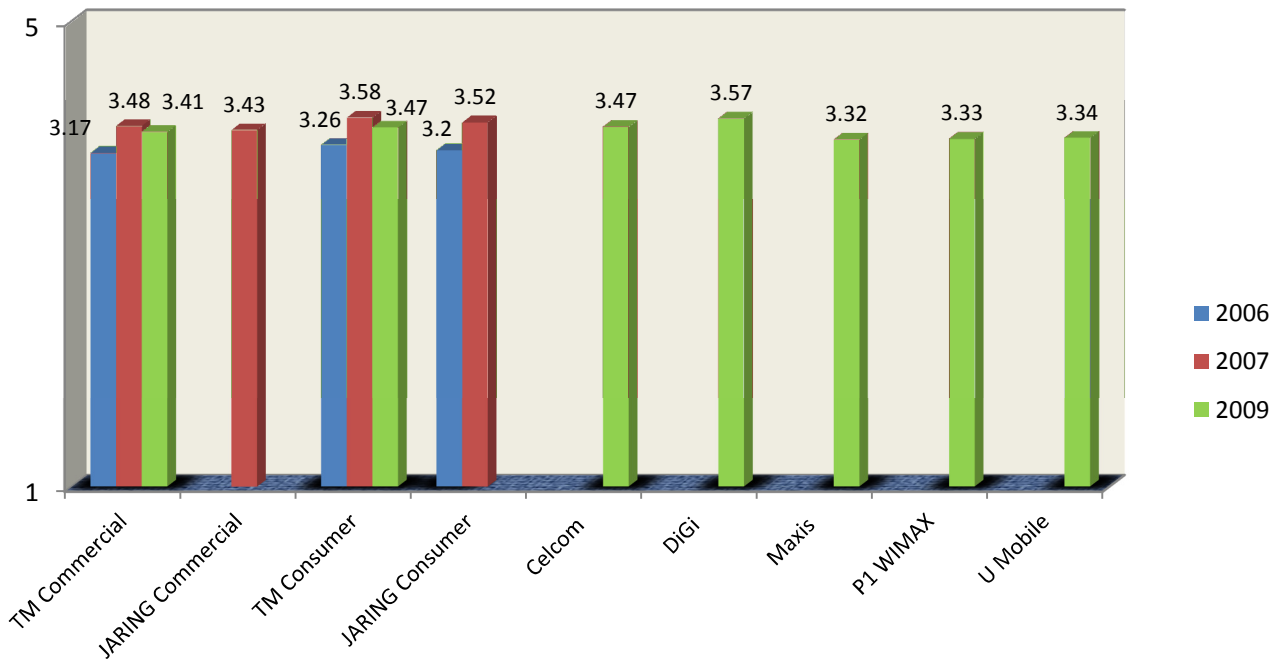
In 2009, Pay TV services obtained a score of 3.48 index in its CSI performance, the result posted a marginal decline of 0.07 points from the result achieved in 2007. Over the past three years, Pay TV consumer rated fluctuating performance on the level of Pay TV services experienced by them.

The evaluation on Pay TV service was fielded to adults aged 15 years or older covering the perception of viewer and also subscriber of Astro services. Out of the 37 attributes posted to the respondents, the top key improvements highlighted for Pay TV services are indicated as below;

Key Improvement Areas-2009

No	Key Improvement Areas
1	Frequency of repeated shows / programs
2	Provides a good balance of programs and advertisements
3	Reasonable charges for other services (pay per view programs)
4	Reasonable charges for monthly access fee i.e. how much paid to get connected
5	Reasonable start up charges e.g. DTU installation cost

Table 7 CSI by Service Provider -Broadband Service



n= 1092/1070/527 172 1376/1152/510 370/498 384 361 383 382 356

**n= represents sample size for each provider.*

Growth in the broadband industry is rapid, posting progress in the technology and product development resulting in an increasingly competitive broadband environment. The market trend has evolved from wired broadband to wireless mobile broadband era. Hence, the survey included both wired and wireless broadband respondents. The broadband surveys were segmented into consumer and commercial sector.

Broadband Consumer

In 2009, the broadband consumer survey probes into the perception of users of Maxis, DiGi, Celcom, U Mobile, P1 WIMAX and also Telekom Malaysia Berhad (TM).

TM scored an index of 3.47 in its CSI for the year 2009. Overall, TM reflected a fluctuating trend with a score of 3.26 in 2006, improved to 3.58 in 2007 and a marginal drop of 0.11 point in 2009. JARING performed well with a score of 3.2 in 2006 and posted an increase of 0.32 point in 2007.

For mobile broadband services, DiGi scored the highest index at 3.57, Celcom and U Mobile scored an index of 3.47 and 3.34 respectively. Both, Packet 1 and Maxis posted an index of 3.33 and 3.32 accordingly.

Out of the 26 attributes asked to the respondents, the top key improvements highlighted on broadband services are identified as below;

Key Improvement Areas-2009

No	Key Improvement Areas
1	Attractiveness of promotion
2	Service provided are as advertised
3	Keeps customers informed when services will be performed
4	Speed of internet access
5	Provides good network quality

Broadband Commercial

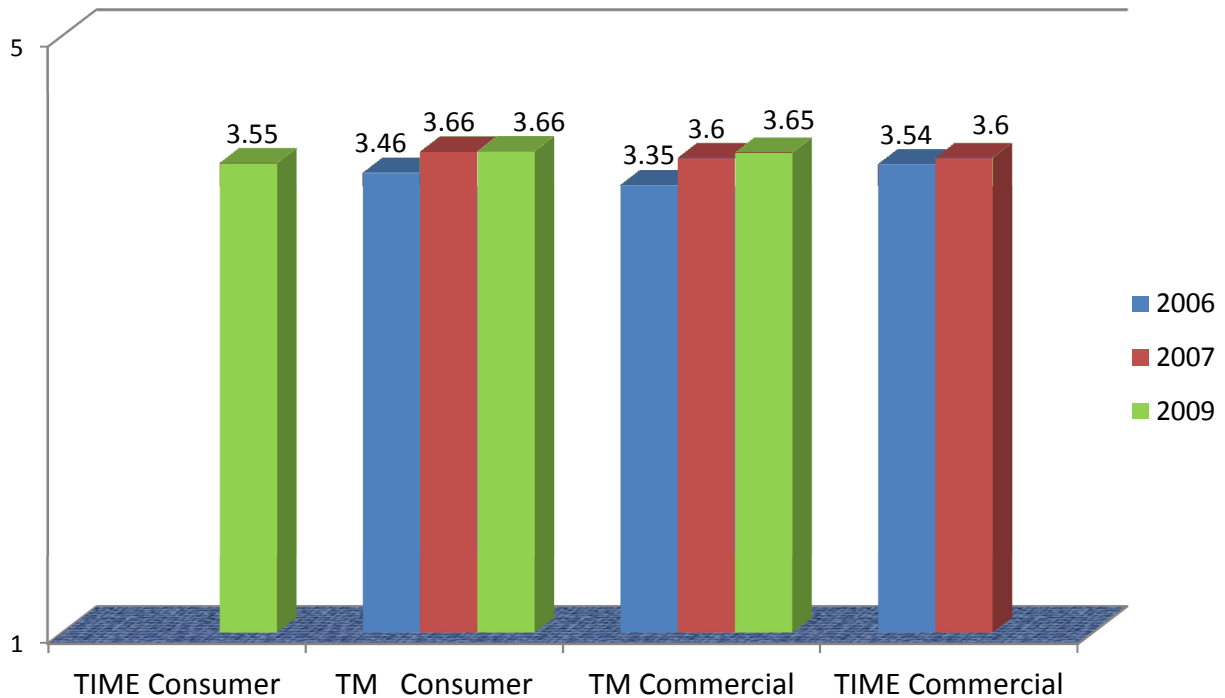
In 2009, evaluation on broadband commercial segment was conducted only to TM commercial respondents. TM recorded an index of 3.41 in 2009, a declined performance of 0.07 point from 3.48 score in 2007. TM commercial respondents rated fluctuating performance over the past three years.

Commercial respondents have high expectation to experience improvement in the product aspect as well customer service area. Out of the 26 attributes probed to the respondents, the top key improvements highlighted on broadband are identified as below;

Key Improvement Areas-2009

No	Key Improvement Areas
1	Attractiveness of promotion
2	Service provided are as advertised
3	Keeps customers informed about when services will be performed
4	Provides good broadband product plan/package
5	Speed of restoring service disruptions

Table 8 CSI by Service Provider-Fixed Line Service



n=	216	2329/2321/524	2363/2296/519	1200/1015
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n= represents sample size

Fixed Line (Consumer)

In 2009, TIME was studied together with TM to measure customer satisfaction in consumer area with a score of 3.55 index. TM indicated consistent performance throughout the surveys; consumer satisfaction on TM’s services scored the same indices at 3.66 in 2009 and 2007, an increase of 0.20 points from the previous year 2006.

Out of the 26 attributes asked to the respondents, the top key improvements highlighted on fixed line are identified as below;

Key Improvement Areas-2009

No	Key Improvement Areas
1	Keeps customers informed when services will be performed
2	Speed of handling complaints
3	Speed of restoring service disruptions
4	Effectiveness of handling complaints
5	Effectiveness of restoring service disruptions

Fixed line Commercial

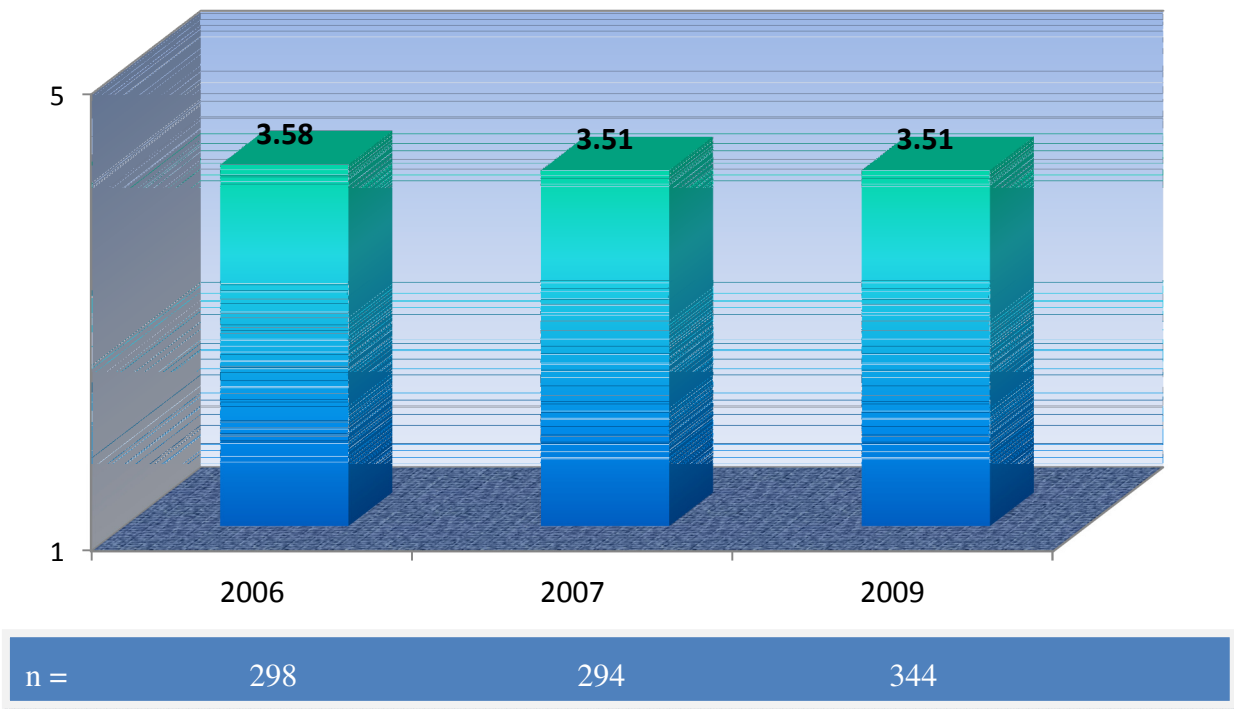
TM posted consistent performance throughout the surveys with a score of 3.65 in 2009 and 3.60 in 2007 and 3.35 in 2006. TIME on the other hand, reflected the same pattern showing upward movement with a score of 3.54 in 2006 and 3.6 index in 2007.

Out of the 26 attributes which were posted to commercial respondents, the top key improvements highlighted on fixed line services are identified as below;

Customer Priority Area-2009

No	Customer Priority
1	Keeps customers informed when services will be performed
2	Service provider provides its services at the time it promises to do so
3	Speed of restoring service disruptions
4	Speed of handling complaints
5	Ease of speaking to a service agent in person or through a telephone call, waiting time to get connected to customer service

Table 9 CSI Score by Digital Leased Line



n= represents sample size for each provider.

Research on digital leased lines was only conducted among the commercial respondents. In 2009, commercial respondents rated 3.51 index on the level of digital leased line service, the same score obtained in 2007, a decline of 0.07 points from the survey conducted in 2006. Due to the small sample size, analysis by network providers were unable to be provided.

Overall, commercial respondents have a high expectation to experience improvement in the billing and customer service. Out of the 26 attributes which were probed to commercial respondents, the top key improvements highlighted on digital leased line services are identified as below;

Key Improvement Areas-2009

No	Key Improvement Areas
1	Keeps customers informed when services will be performed
2	Reasonable charges for monthly access fee i.e. how much paid to get connected to your network provider
3	Promptness of getting answers from customer services
4	Reasonable charges for digital leased line service
5	Service provided are as advertised