



Suruhanjaya Komunikasi dan Multimedia Malaysia
Malaysian Communications and Multimedia Commission

Consumer Satisfaction Survey 2015



MALAYSIAN COMMUNICATIONS AND MULTIMEDIA COMMISSION, 2015

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TABLE OF CONTENTS

- List of Figures and Tables..... 3
- Executive Summary..... 4
- Introduction..... 6
- Objective of the Survey..... 7
- Methodology..... 8
- Contents and Scope of the Survey.....12
- Main Findings
 - Respondents Profile..... 15
 - Broadband Services..... 17
 - Criteria and Attributes..... 18
 - Products and Services..... 22
 - Customer Service..... 23
 - Mobile Cellular Services..... 25
 - Criteria and Attributes..... 26
 - Products and Services..... 30
 - Customer Service..... 31
- Conclusion..... 33
- Reference..... 34

LIST OF FIGURES AND TABLES

Figures

Figure 1: Sample Size by Service Provider 9

Figure 2: Comparisons of CSI Score (2006 to 2015) 17

Figure 3: User Experience..... 17

Figure 4: CSI by Criteria (2011-2015)..... 18

Figure 5: Service Quality Gap..... 19

Figure 6: Dimensions of Products and Service quality..... 22

Figure 7: Visit Customer Service..... 23

Figure 8: Visit Customer Service Centre in a Year 23

Figure 9: Waiting Time 24

Figure 10: Consumers’ Experience - Customer Service Centre..... 24

Figure 11: Comparison of CSI (2006 to 2015)..... 25

Figure 12: User Experience 25

Figure 13: CSI by Criteria (2011-2015)..... 26

Figure 14: Service Quality Gap..... 27

Figure 15: Importance-Satisfaction Matrix 28

Figure 16: Dimensions of Products and Service Quality 30

Figure 17: Visit Customer Service..... 31

Figure 18: Visit Customer Service Centre in a Year 31

Figure 19: Waiting Time 32

Figure 20: Consumer’s Experience - Customer Service Centre..... 32

Tables

Table 1: CSIs by Services and Criteria..... 5

Table 2: List of Service Providers..... 8

Table 3: CSI Scale and Definition 10

Table 4: List of Attributes by Criteria (Broadband Services) 12

Table 5: List of Attributes by Criteria (Mobile Cellular Services) 13

EXECUTIVE SUMMARY

Consumer Satisfaction Survey 2015 (CSS 2015) was commissioned by Malaysian Communications and Multimedia Commission (MCMC) on 26 January 2015 and ended on 19 May 2015. This is the first time for this major survey to be commissioned by an in-house team.

This survey is able to gauge the consumers' needs and expectation towards broadband and mobile cellular services and how such needs and expectations change over the years.

There were six (6) broad criteria measured with 32 and 42 attributes on broadband and mobile cellular services respectively. These attributes relate to coverage, upload and download speed, pricing, accuracy of billing, call centre service, rebate and compensation for downtime of service, customer loyalty programme, time taken to resolve complaint etc. The six (6) criteria are as follows:

- Service Quality;
- Product Information;
- Customer Service;
- Billing;
- Charges; and
- Delighting Consumer

A random sampling of 384 respondents were studied for each service provider. For mobile cellular services, the service providers selected are the four (4) major players and one (1) MVNO, i.e. Celcom, DiGi, Maxis, U Mobile and Tune Talk. In respect of the MVNO market, the samples collected from the MVNOs are rather small and in most instances the respondents are not able to communicate with our interviewers as most of them are foreign workers. As such, we were not able to make further assessment on the MVNO market. Notwithstanding that, consistent with CSS 2012, Tune Talk is included in the mobile cellular services assessment.

For broadband services, seven (7) service providers were selected which includes TM as the only fixed broadband provider while YTL and P1 being the WiMAX operators. Although there are other service providers who offer fixed broadband services, the number is rather small to be included for assessment of the fixed broadband market.

The rating methodology adopted is a 5-point Likert scale which will be used to calculate the Consumer Satisfaction Index (CSI) score whereby for expectations, '1' being not important at all to '5' being extremely important and for experience, '1' being completely dissatisfied to '5' being completely satisfied. The outcomes of the survey with the highest CSIs achieved for each criteria in both services are as tabulated in Table 1.

Table 1: CSIs by Services and Criteria

Criteria	Broadband	Cellular
	CSI	
Service Quality	3.83	4.22
Product Information	3.89	4.09
Customer Service	3.98	4.17
Billing	4.09	4.24
Charges	3.75	3.97
Delighting Consumer	3.59	4.01

The survey found that the CSI on broadband services has dropped from 3.99 in 2012 to 3.85. We believe this is partly due to increasing demand for bandwidth as consumers use more interactive applications compared with basic Internet browsing. On the other hand, the mobile cellular services satisfaction showed a marginal increase from 4.09 to 4.12, mainly due to easily attainable and simplicity in the wide range of services offered.

The survey identified that consumers are expecting better quality in the products and services provided. They also expect for continuous improvement and have high demand for better consumers' experience.

INTRODUCTION

The Malaysian Communications and Multimedia Commission (MCMC) has been monitoring the consumers' level of satisfaction relative to the overall service delivered by service providers in Malaysia since 2001.

MCMC aims to identify the consumers' needs and expectation by monitoring how these has changed over time via Consumer Satisfaction Survey (CSS).

The findings of the survey will be used as inputs by MCMC for policy intervention and is beneficial for both MCMC and service providers to prioritize and address any shortcoming.

In 2015, the survey focused on two (2) services namely, broadband and mobile cellular services.

OBJECTIVE OF THE SURVEY

The objective of the CSS 2015 are the following:

- Measure the consumer satisfaction level of broadband and mobile cellular services as well as to identify criteria and attributes that need improvement
- Monitoring and improving consumer's needs and expectation based on the consumers' satisfaction index (CSI).

METHODOLOGY

Target Population

Broadband Services

The target population for broadband services are all Internet users aged 15 years and above and have used the services for at least six (6) months.

Mobile Cellular Services

The target population for mobile cellular services are all main users of hand phones aged 15 years and above and have used the services for at least six (6) months. This includes both postpaid and prepaid users of each services attributes.

Sampling

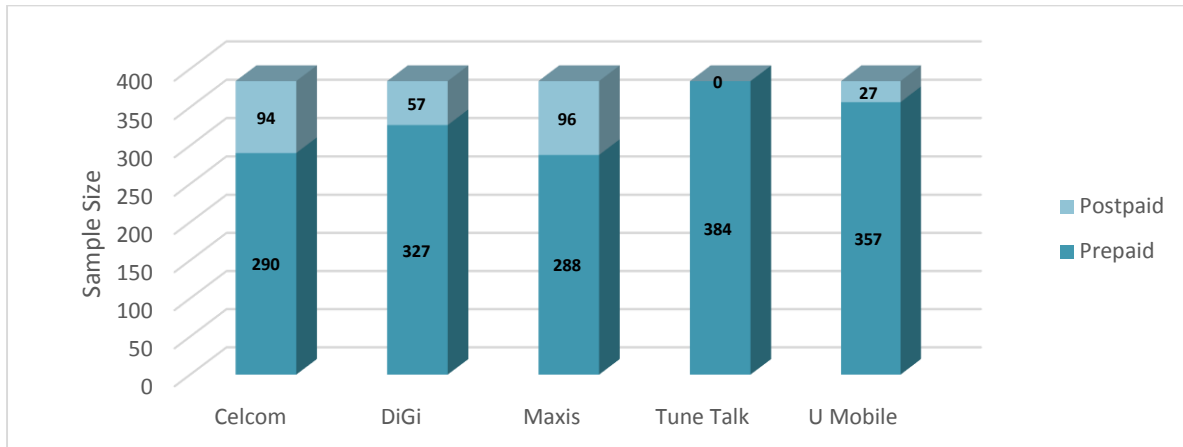
The sub-samples of a standard size for all service providers were used to represent subscribers in Malaysia. A sub-sample size of 384 was chosen to give a confidence level of 95% with a precision of 5% for each service provider. The estimates from each sub-sample were then weighted to yield national estimates. A total of five (5) mobile service providers (including Tune Talk) and seven (7) broadband service providers (fixed, mobile and WiMAX) were covered.

Table 2: List of Service Providers

No.	Service	Service Provider
1	Cellular	Maxis
2	Cellular	Celcom
3	Cellular	DiGi
4	Cellular	U Mobile
5	Cellular	Tune Talk
6	Broadband	TM
7	Broadband	Maxis
8	Broadband	Celcom
9	Broadband	U Mobile
10	Broadband	DiGi
11	Broadband	YTL
12	Broadband	P1

For mobile cellular services, the proportion of prepaid and postpaid subscriptions for each service provider is based on their individual market share as shown in Figure 1.

Figure 1: Sample Size by Service Provider



Data Collection

The survey was canvassed using a Computer Assisted Telephone Interview (CATI) system operating from the MCMC CATI Centre in Kuala Lumpur. The survey reached to a sample of 2,688 for broadband services and 1,920 for mobile cellular services.

Rating Scales

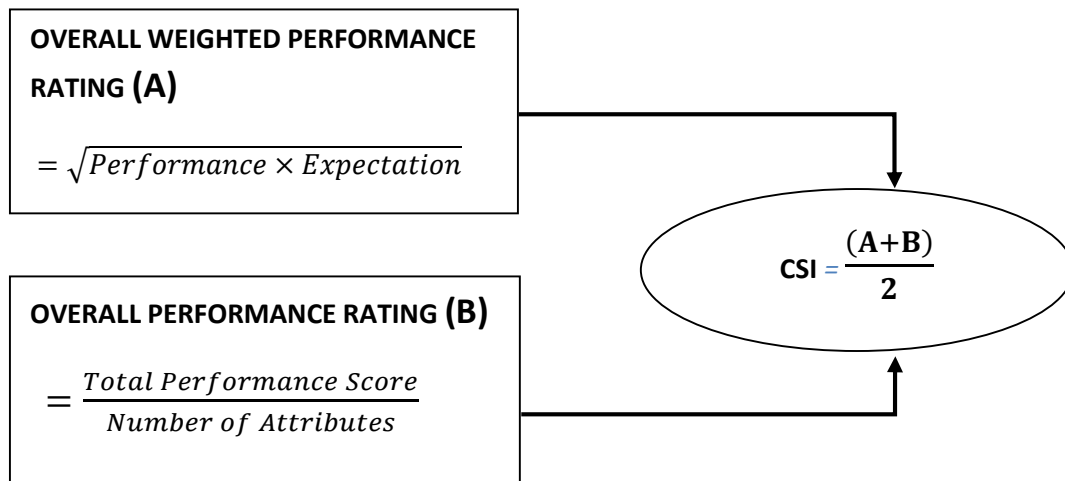
The survey contained questions related to service attributes unique to service type. These attributes are then asked to be rated against two (2) key measures - performance based on experience and expectation based on importance using a 5-point Likert scale (1 being the least score and 5 being the highest score). These will then allow the identification of Mean Performance and Mean Importance.

Rate as 1 - Extremely not important	Rate as 1 - Completely dissatisfied
Rate as 2 - Somewhat not important	Rate as 2 - Somewhat dissatisfied
Rate as 3 - Neutral	Rate as 3 - Neutral
Rate as 4 - Somewhat important	Rate as 4 - Somewhat satisfied
Rate as 5 - Extremely important	Rate as 5 - Extremely satisfied

Consumer Satisfaction Model

For consistency and trend analysis, this survey adopted the following methodology of calculating the Consumer Satisfaction Index (CSI) and Service Quality Gap (SQG).

- a. CSI was derived from the sum of the Mean Weighted Performance rating and the mean overall Performance rating, which are then divided by two. The calculation model is as follows;



The definition and scale breakdown is as follows;

Table 3: CSI Scale and Definition

Rate	Interval	Percentage of Percentile	Description
1	1.00-1.80	20.00-36.00	Poor
2	1.81-2.60	36.01-52.00	Fair
3	2.61-3.40	52.01-68.00	Good
4	3.41-4.20	68.01-84.00	Very good
5	4.21-5.00	84.01-100.00	Excellent

- b. SQG is the gap between consumers' experience and expectation. This calculation ascertains areas that need further improvement and require service providers to take necessary measure to improve their products and services. SQG is calculated on each service metric for a service type by calculating the difference between Mean Performance (P_{sm}) and Mean Expectation (E_{sm}) for a particular service metric (sm) as shown in the formula below:

$$SQG_{sm} = P_{sm} - E_{sm} \quad \text{where } SQG = [< 0, 0, > 0]$$

$SQG > 0$ indicates expectation exceeded

$SQG = 0$ indicates expectation met

$SQG < 0$ indicates expectation not met

To facilitate interpretation of the SQG analysis, a matrix of scatter plot is produced. The matrix consists of four (4) quadrants as below;

- A- High Importance and High Satisfaction
 - indicates expectations met
- B- Low Importance and Low Satisfaction
 - indicates expectations not met
 - areas to be improved
- C- High Importance and Low Satisfaction
 - indicates expectations not met
 - areas to be improved
- D- Low Importance and High Satisfaction
 - indicates expectations exceeded

Fieldwork

Fieldwork for this survey started on 27 January 2015 and ended on 19 May 2015.

CONTENTS AND SCOPE OF THE SURVEY

In this survey, we seek the views of respondents on service providers' performance and how it can be improved. The content of the survey is divided into three major parts;

1. Measuring service providers' performance based on respondents' expectation and experience on six (6) criteria as follows:

Table 4: List of Attributes by Criteria (Broadband Services)

Criteria	Attributes
Service Quality	1. Adequate geographical network coverage
	2. Quality of broadband connection
	3. Quality of speed while uploading
	4. Quality of speed for download
	5. Quality of speed for video streaming
	6. Problems were resolved within a reasonable timeframe
	7. Ease and promptness of service activation/reactivation
	8. Mode of payment
Product Information	1. Services provided are as advertised
	2. Accessibility of product information
	3. Accuracy and clarity of product information
	4. Adequate information provided by at the point of sales
	5. Up-to-date information on latest plan/packages
	6. Clear terms and condition provided to consumer
Customer Service	1. Easy to contact
	2. Easy to speak to customer service officers
	3. Easy to contact service provider's free hotline (1-800)
	4. Handles customer in a friendly and professional manner
	5. Promptness in responding to issue
	6. Easy to understand agent's instructions
	7. Agent updates on the unresolved reported problem
	8. Confidentiality and security in your transactions
Billing	1. Accuracy of bill
	2. Clarity of bill statement
	3. Access to bill
	4. Time taken to update payment to account
	5. Accessibility to monitor the quota usage

Charges	1. Reasonable charges
	2. Reasonable installation setup charges
Delighting Consumers	1. Reward and redemption for loyal consumer
	2. Attractive complementary services
	3. Compensation rebate offered when service is down

Table 5: List of Attributes by Criteria (Mobile Cellular Services)

Criteria	Attributes
Service Quality	1. Adequate geographical network coverage
	2. Can receive/make calls without/minimum interference
	3. Availability of value added services
	4. Value added services are activated based on consent
	5. Problems were resolved within a reasonable timeframe
	6. Ease and promptness of service activation/reactivation
	7. Ease of self-service activation via USSD or SMS
	8. Availability of modes of reloading
	9. Mode of payment
Product Information	1. Services provided are as advertised
	2. Accuracy and clarity on international roaming services
	3. Accessibility of product information
	4. Accuracy and clarity of product information
	5. Adequate information provided at the point of sales
	6. Up-to-date information on the latest plan/packages
	7. Clear terms and condition provided to consumer
Customer Service	1. Easy to contact
	2. Easy to speak to customer service officers
	3. Easy to contact service provider's free hotline
	4. Handles customer in a friendly and professional manner
	5. Prompt in responding to issue
	6. Easy to understand agent's instructions
	7. Agent updates on the unresolved reported problem
	8. Confidentiality and security in your transactions
Billing (postpaid)	1. Accuracy of bill
	2. Clarity of bill statement
	3. Access to bill
	4. Time taken to update payment to account
Billing (prepaid)	1. Accuracy of call and data charges
	2. Accuracy of information in the on-line bill statement
	3. Accuracy of credit balance displayed via USSD or SMS
	4. Accessibility to airtime balance

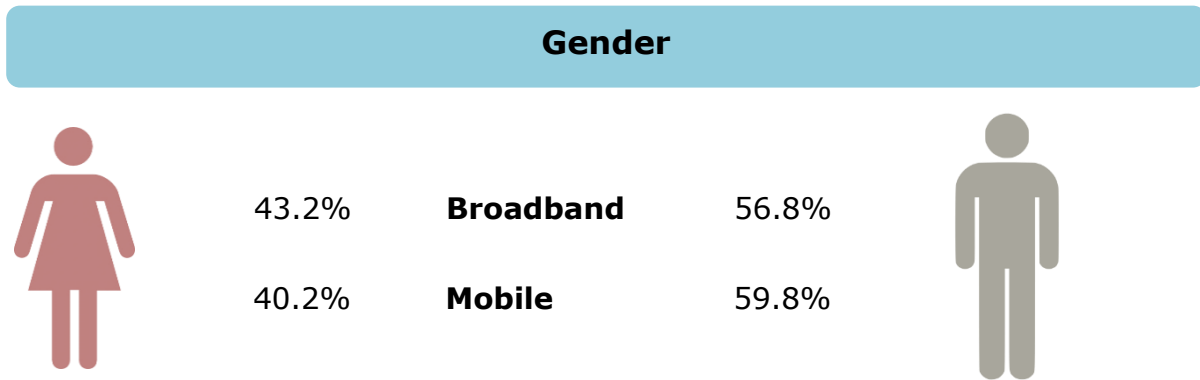
Charges (postpaid)	1. Accuracy and clarity on international roaming charges
	2. Reasonable call plans, rates and charges
	3. Reasonable charges for additional services
Charges (prepaid)	1. Accuracy and clarity on international roaming charges
	2. Reasonable call rates and charges
	3. Reasonable charges for additional services
	4. Credit are deducted based on actual usage
	5. Reasonable prepaid validity period
Delighting Consumers	1. Reward and redemption for loyal consumer
	2. Attractive complementary services
	3. Compensation rebate offered when service is down

In previous surveys, only five (5) criteria were measured, 'Delighting Consumer' is a new criteria to be measured, which relates to loyalty and rewards for consumers. This is seen as part of service providers' role to continuously offer higher value added services to their customers.

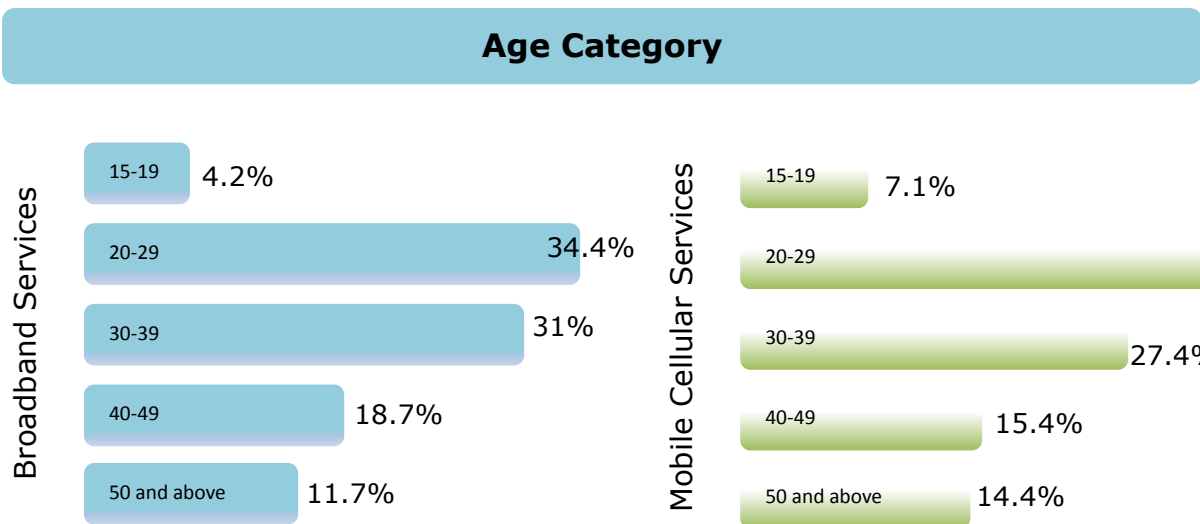
2. Assessing consumers' preferences on service and products quality based on five dimensions;
 - Responsiveness
 - Assurance
 - Tangible
 - Empathy
 - Reliability
3. Consumers' experience with service providers' customer service.

RESPONDENTS PROFILE

The respondents' profile in this survey are shown in the following chart:



For broadband services, males accounted for 56.8%, while females 43.2%. Although there were more male in mobile services (59.8%), the ratio of males against females in both services was relatively same.

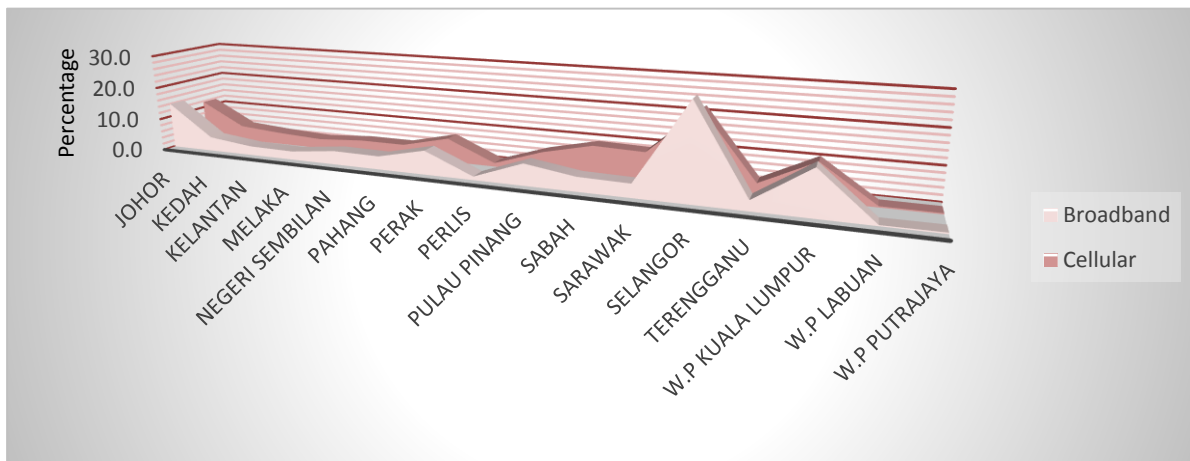


For both services, age group 20-29 had the highest percentage of consumers, followed by age groups 30-39 and 40-49.

Usual State of Residence

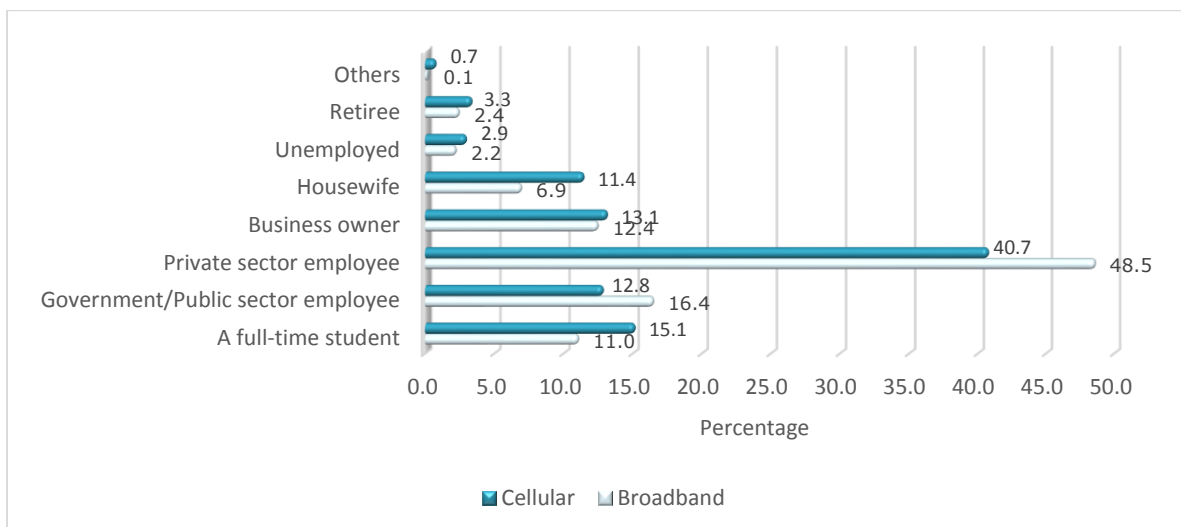
The usual state of residence is defined as the state in which respondents has stayed in the past six months or expected to stay for at least six month.

Selangor had the highest percentage of consumers for both services followed by Johor and W.P Kuala Lumpur. These were followed by Perak, Pulau Pinang, Kedah, Sabah, Sarawak and Pahang.



Occupation

Chart below shows the respondents' occupation distribution in CSS 2015. The private sector had the highest percentage of consumers for both services.

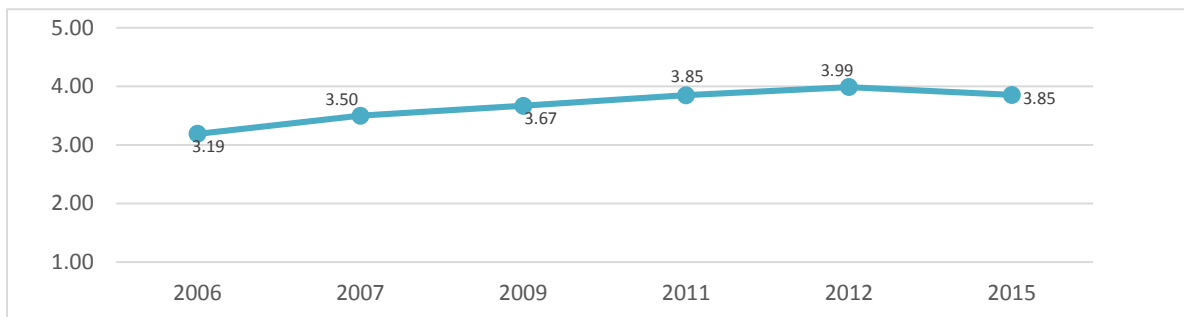


BROADBAND SERVICES

There was a decline of 0.14 in the CSI score for broadband services compared with the previous survey conducted in 2012. The decline is partly due to change in users' behaviour from passive towards more interactive Internet use. This drives demand for higher bandwidth and better quality of service. Findings show respondents require improvements in service quality, specifically coverage, broadband connection and download speed.

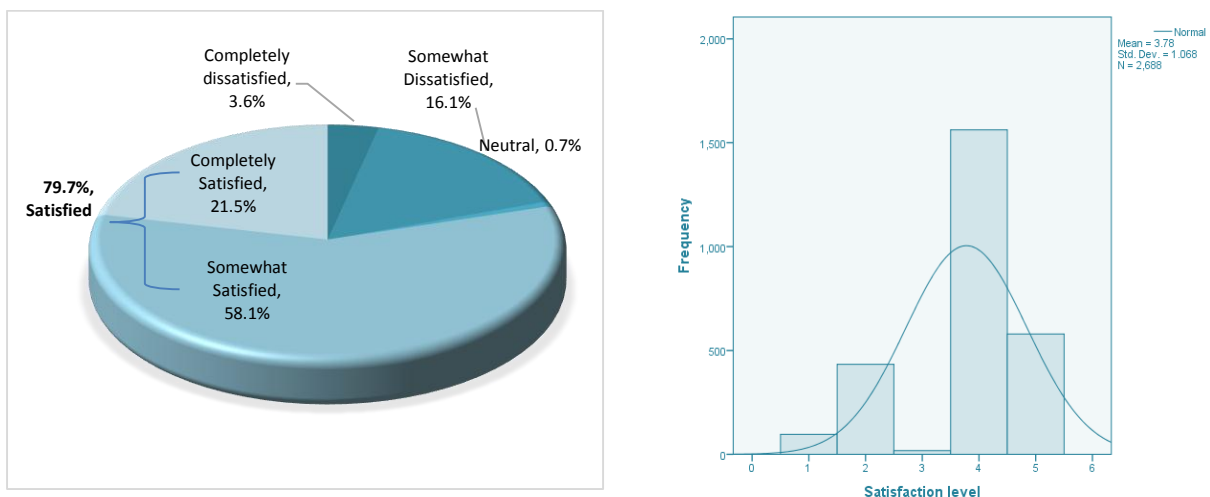
Nevertheless, service providers have put in continuous effort in improving their services to meet consumers' expectation. This is reflected with consistent increment in the CSI score from 2006 to 2012 (Figure 2).

Figure 2: Comparisons of CSI Score (2006 to 2015)



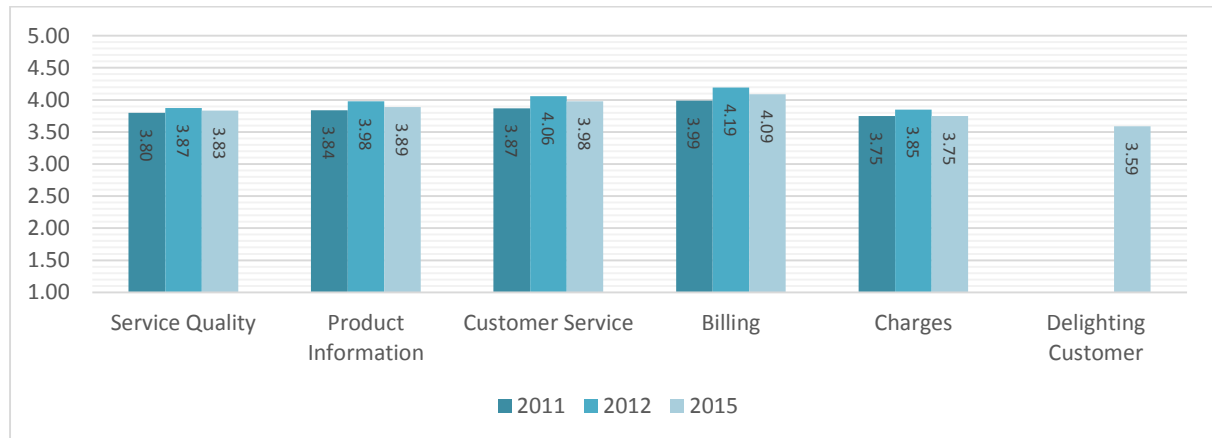
Based on the CSS 2015, only 3.6% of the respondents were completely dissatisfied with their service providers. About 80% of the respondents were satisfied with the overall broadband experience provided by their service providers. A detailed breakdown of the consumers' satisfaction level is shown in Figure 4 on how consumers' satisfaction is distributed.

Figure 3: User Experience



CRITERIA AND ATTRIBUTES

Figure 4: CSI by Criteria (2011-2015)



The overall CSI score in CSS 2015 has not surpassed 4.00 for all criteria measured except for billing.

In terms of charges, respondents were somewhat satisfied with the charges vis-a-vis service quality at a score of 3.75, which is relatively lower compared to other criteria measured.

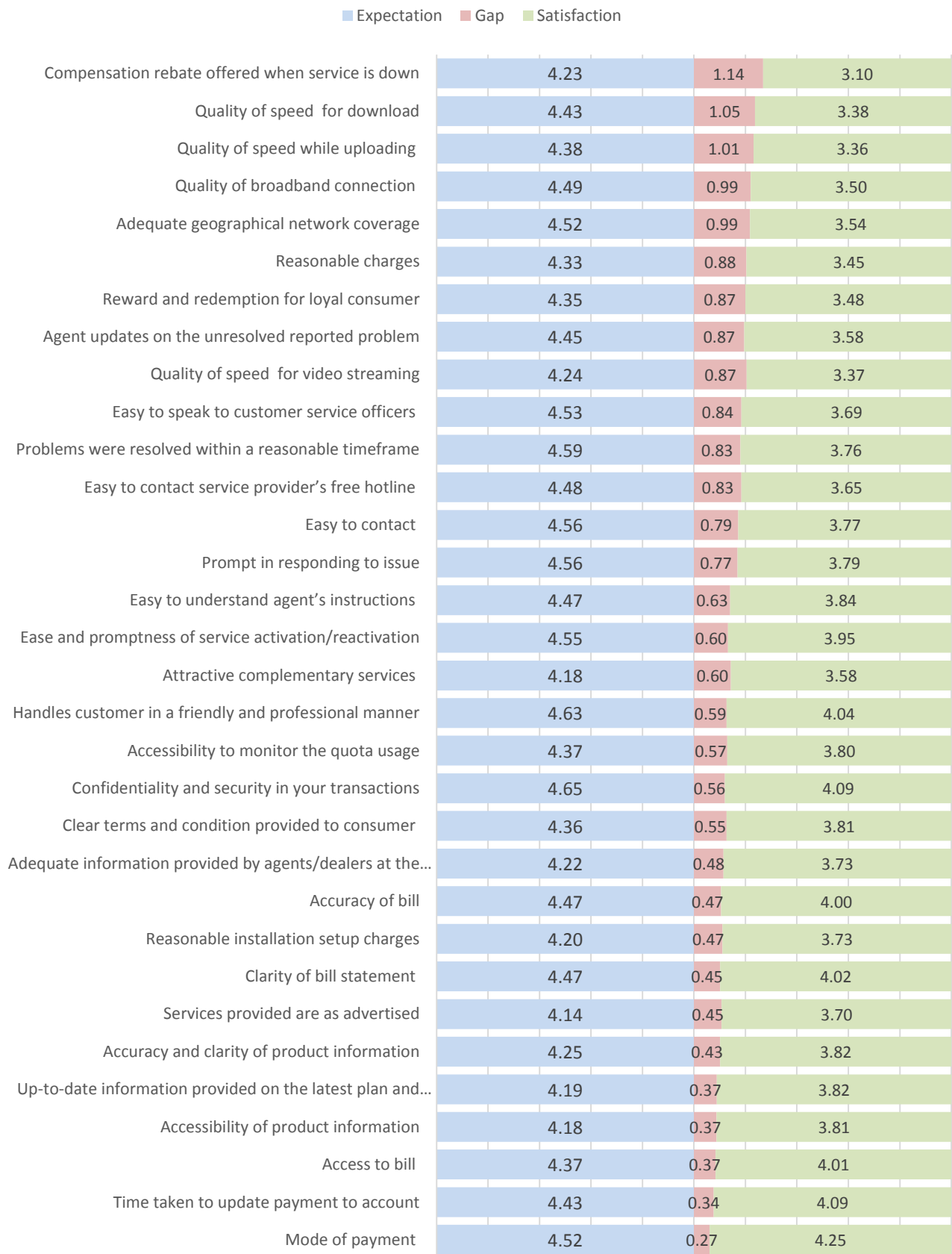
For CSS 2015, one criteria has been added to measure service providers' ability to exceed their consumers' expectations. It was assessed based on three (3) attributes. This criteria scored the lowest among the other criteria with a CSI score of 3.59.

Meanwhile, other criteria recorded good performance with CSI score ranging from 3.89 to 4.09.

Service Quality Gap (SQG)

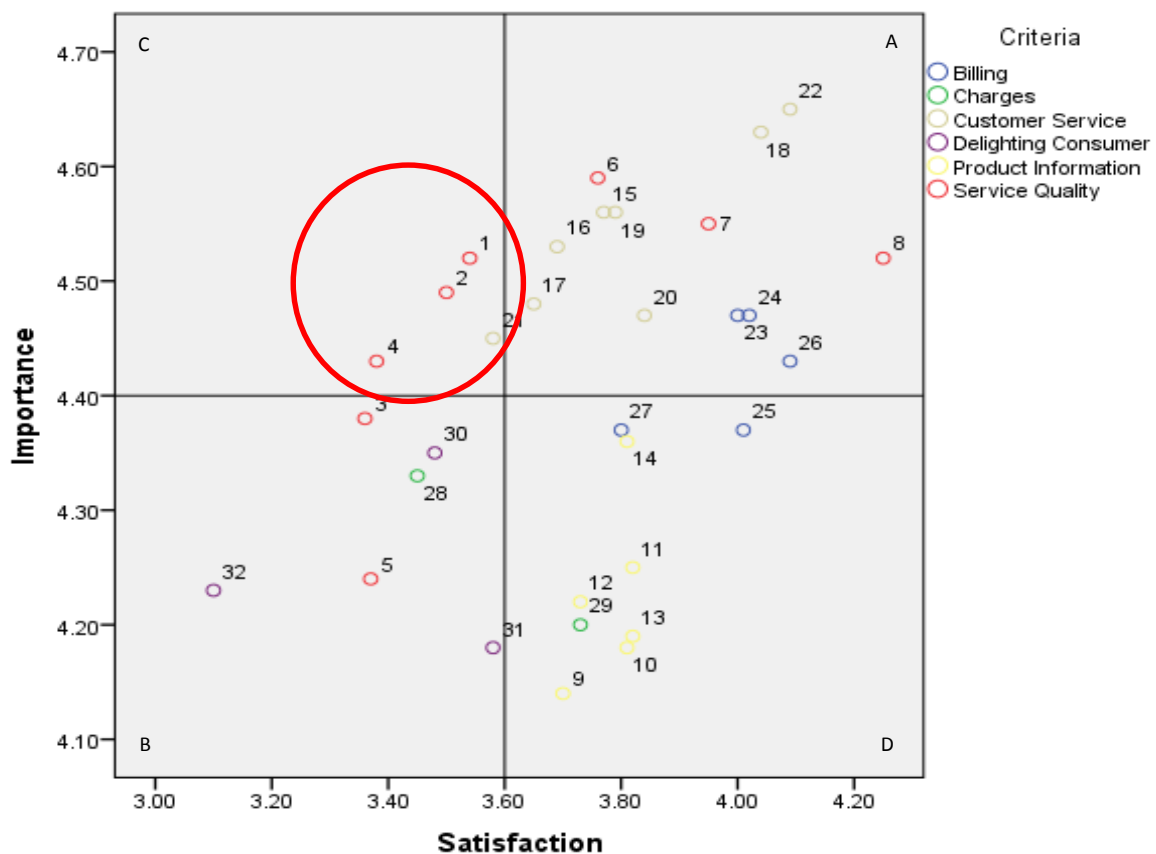
The SQG analysis shows the difference between how important an attribute is to the respondent and how satisfied one is with that attribute. Results found that the average gap for the 32 attributes measured were -0.67. According to the SQG analysis, the negative value indicates that consumers' expectation in all attributes measured is not met. Nevertheless, respondents' satisfaction level is high towards their service providers with a satisfaction score between 3.15 and 4.20. Figure 6 illustrates the gap for all attributes measured.

Figure 5: Service Quality Gap



Based on the gap analysis, consumers' gap between expectation and satisfaction on compensation rebate when service is down is rather high compared to other attributes measured. This shows that compensation offered by the service providers is somewhat insufficient. This was closely related with the highest gap in service quality mainly in speed quality while uploading and downloading, quality broadband connection and adequate network coverage. According to CSS 2015, consumers expect service providers to increase bandwidth quality and maintain stable connection. In addition, they also expect service and product quality to be balanced with reasonable charges.

To facilitate interpretation of the SQG analysis, an Importance-Satisfaction matrix is plotted (Figure 7).



1. Adequate geographical network coverage; 2. Quality of broadband connection; 3. Quality of speed while uploading; 4. Quality of speed for download; 5. Quality of speed for video streaming; 6. Problems were resolved within a reasonable timeframe; 7. Ease and promptness of service activation/reactivation; 8. Mode of payment; 9. Services provided are as advertised; 10. Accessibility of product information; 11. Accuracy and clarity of product information; 12. Adequate information provided by agents/dealers at the point of sales; 13. Up-to-date information provided on the latest plan and packages; 14. Clear terms and condition provided to consumer; 15. Easy to contact; 16. Easy to speak to customer service officers; 17. Easy to contact service provider's free hotline (1-800); 18. Handles customer in a friendly and professional manner; 19. Prompt in responding to issue; 20. Easy to understand agent's instructions; 21. Agent updates on the unresolved reported problem; 22. Confidentiality and security in your transactions; 23. Accuracy of bill; 24. Clarity of bill statement; 25. Access to bill; 26. Time taken to update payment to account; 27. Accessibility to monitor the quota usage; 28. Reasonable charges; 29. Reasonable installation setup charges; 30. Reward and redemption for loyal consumer (Redeem points, Voucher and etc); 31. Attractive complementary services (Special plan offer and etc); 32. Compensation rebate offered when service is down;

As shown in Figure 7, the quadrants are divided according to importance (high/low), and satisfaction (high/low), this is used to rank areas of improvements based on priorities;

- 1st priority in quadrant C: This quadrant consists of attributes that are highly important but has low satisfactory. They need a more intense attention that requires actions for improvements.
- 2nd priority in quadrant B: This quadrant consists of attributes that are relatively less important in the eyes of consumers and attained low satisfactory. These attributes should be re-examined and perhaps resources be transferred to improve its performance.
- 3rd priority in quadrants A and D: This quadrants consists of attributes that have high satisfactory regardless of its importance. These attributes need to be continuously monitored to ensure satisfactory level is maintained.

The matrix above shows that the average satisfaction score is 3.60. There are 10 attributes which fall below this average score (quadrant B and C). Attributes in quadrant C will be the main focus to be improved. It is useful for service providers to measure the demand for their services delivered. The attributes are as follows:

1. Adequate geographical network coverage;
2. Quality of broadband connection;
3. Agent updates on the unresolved reported problem; and
4. Quality of speed for download.

The attributes are mainly related to coverage and quality of service. Consumers expect better performance in the related attributes as both usage and need has increased.

On the other hand, below are six (6) other attributes which also fall below the average score but are less important (quadrant B):

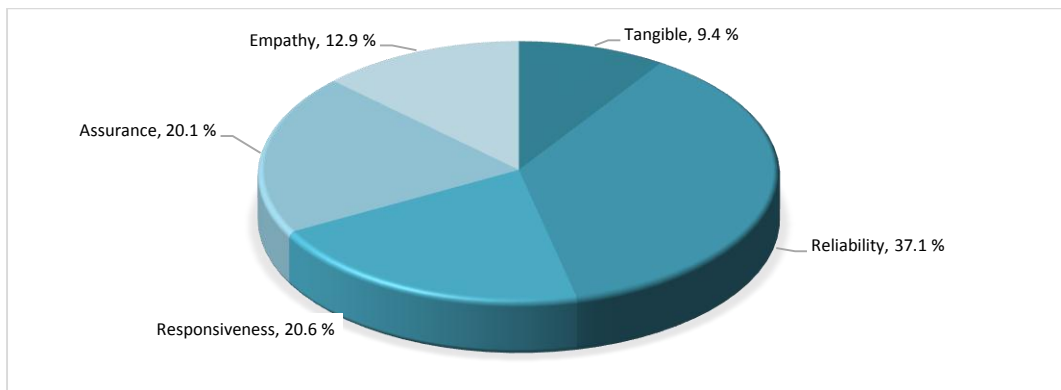
1. Quality of speed while uploading;
2. Reward and redemption for loyal consumer;
3. Reasonable charges;
4. Quality of speed for video streaming;
5. Compensation rebate offered when service is down; and
6. Attractive complementary services.

PRODUCTS AND SERVICES

In order to identify consumers' preferences in services received and study their needs, respondents were asked on their preferred products and service quality based on five (5) dimensions:

1. Responsiveness - Willing to help customers and provide prompt service;
2. Assurance - Knowledge and courtesy of the service providers' employees as well as their ability to convey trust and confidence in delivering the needs of their customers;
3. Tangible - Accuracy and appeal of tangible products and services offered by the broadband service providers such as physical facilities, packaging, information etc.;
4. Empathy - Caring, personalized attention provided by service providers to its customers; and
5. Reliability - Ability to deliver service as promised dependably and accurately.

Figure 6: Dimensions of Products and Service quality

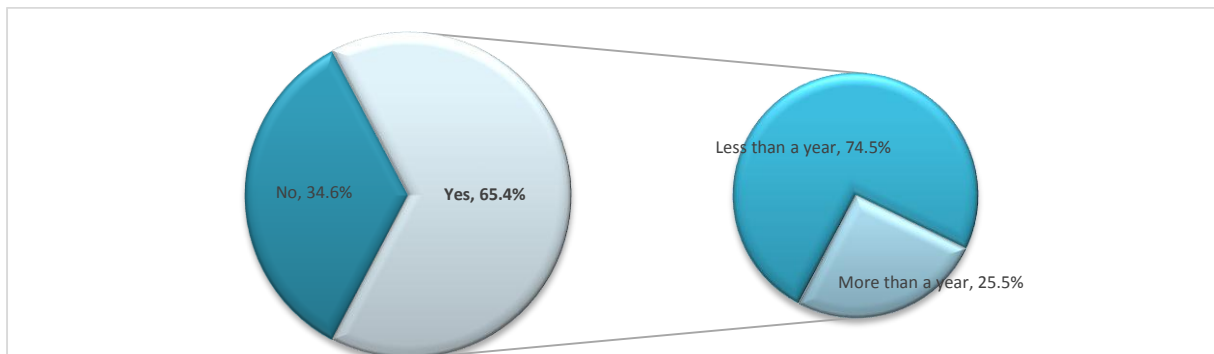


Based on the findings, majority of the respondents have chosen "Reliability" as the top ranked important products and service quality. These were followed by responsiveness, assurance, empathy and last but not least tangible.

CUSTOMER SERVICE

Customer service is important to an organization because it is often the only medium of contact a customer has with a company. Therefore, respondents were asked how frequently they have visited the customer service centre, time taken for their calls to be answered and their satisfaction level.

Figure 7: Visit Customer Service



About 65.4% of the respondents interviewed have visited service providers' customer service centre while 34.6% have no experience at all. Majority of them have visited the customer service in less than a year with more than half of them visited as recent as less than three (3) months.

Figure 8: Visit Customer Service Centre in a Year

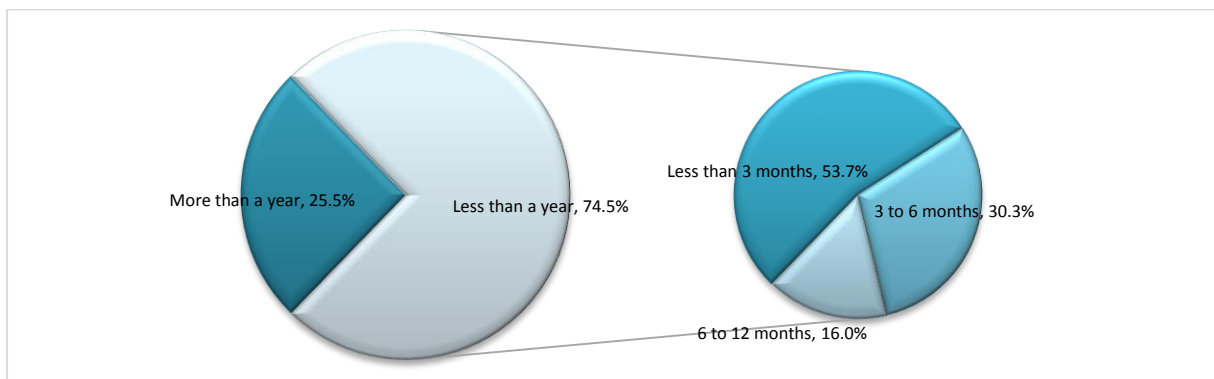
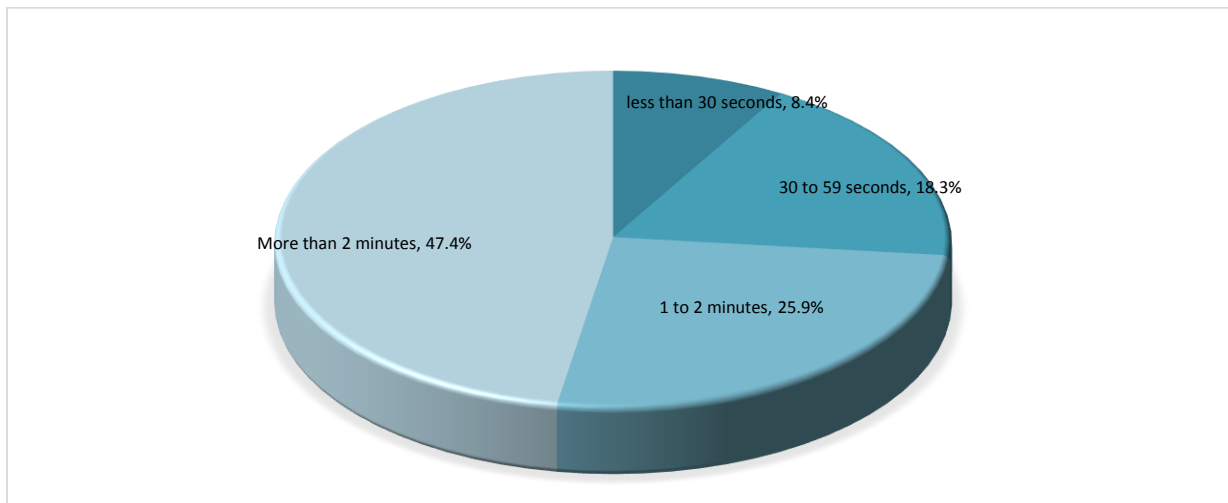
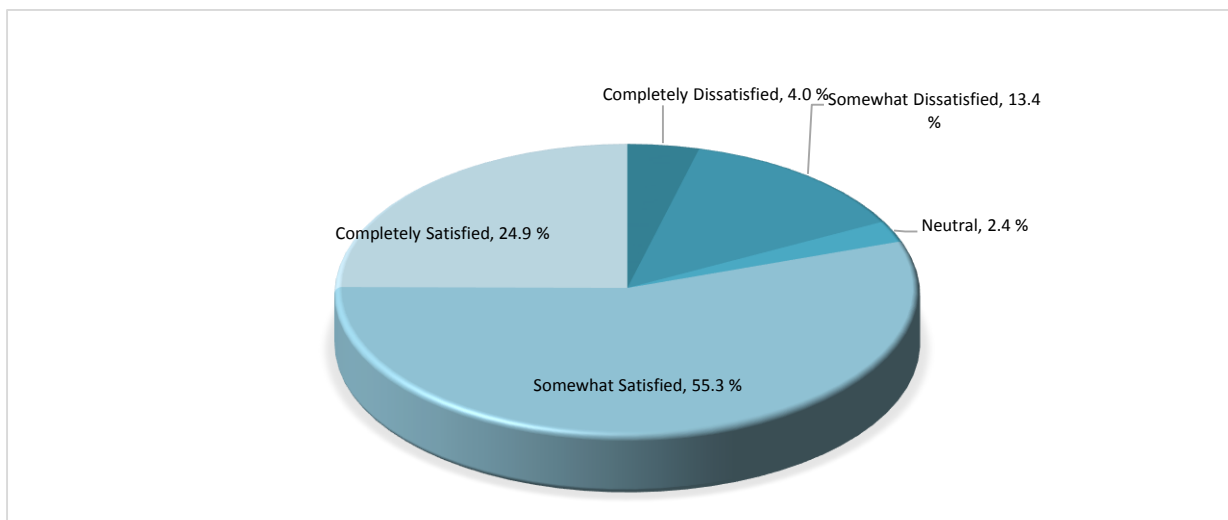


Figure 9: Waiting Time



Meanwhile for service providers' call centre, it is found that more than 70% of users said that their service providers took more than one (1) minute for a telephone call to be answered.

Figure 10: Consumers' Experience - Customer Service Centre



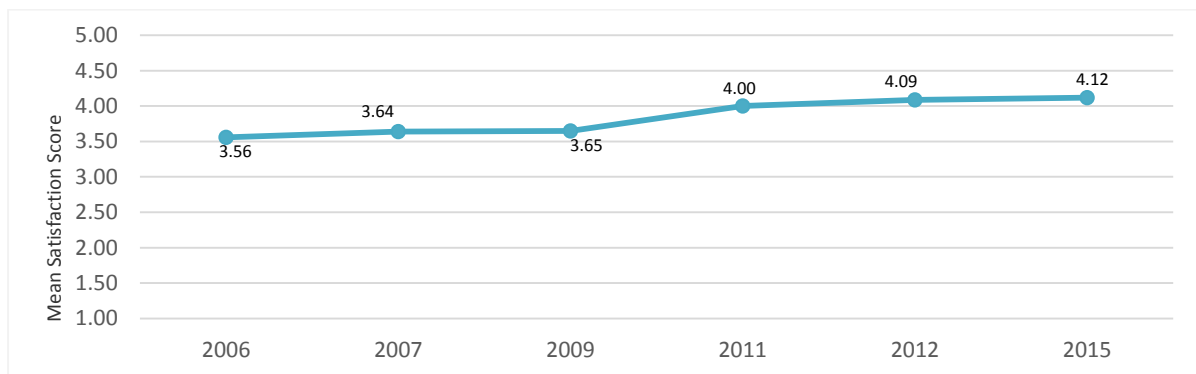
In terms of satisfaction, majority of respondents are satisfied with the customer service, with only 4% of the respondents who were not satisfied at all.

MOBILE CELLULAR SERVICES

The number of mobile cellular subscriptions as at 31st December 2014 was 44.9 million with 81.9% being on prepaid plan and the remaining on postpaid plan. In CSS 2015, 85.7% of the respondents are prepaid consumers and 14.3% postpaid consumers.

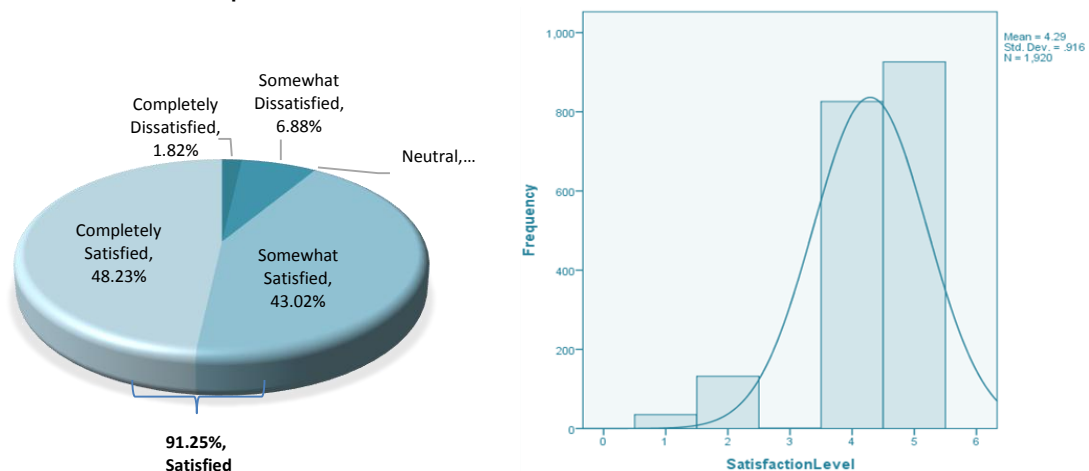
Figure 13 shows that the CSI has been consistently increasing marginally. In CSS 2015, the CSI increased to 4.12 from 4.09 in 2012.

Figure 11: Comparison of CSI (2006 to 2015)



Majority of respondents (91.2%) were satisfied with their overall experience on services provided by their service providers with only 1.8% of the respondents feeling completely dissatisfied. It is indeed important to consider this minority group who were not satisfied with the services received especially with current intense competition in the mobile cellular services market. Continuous effort plays a huge role in maintaining a high customer satisfaction level.

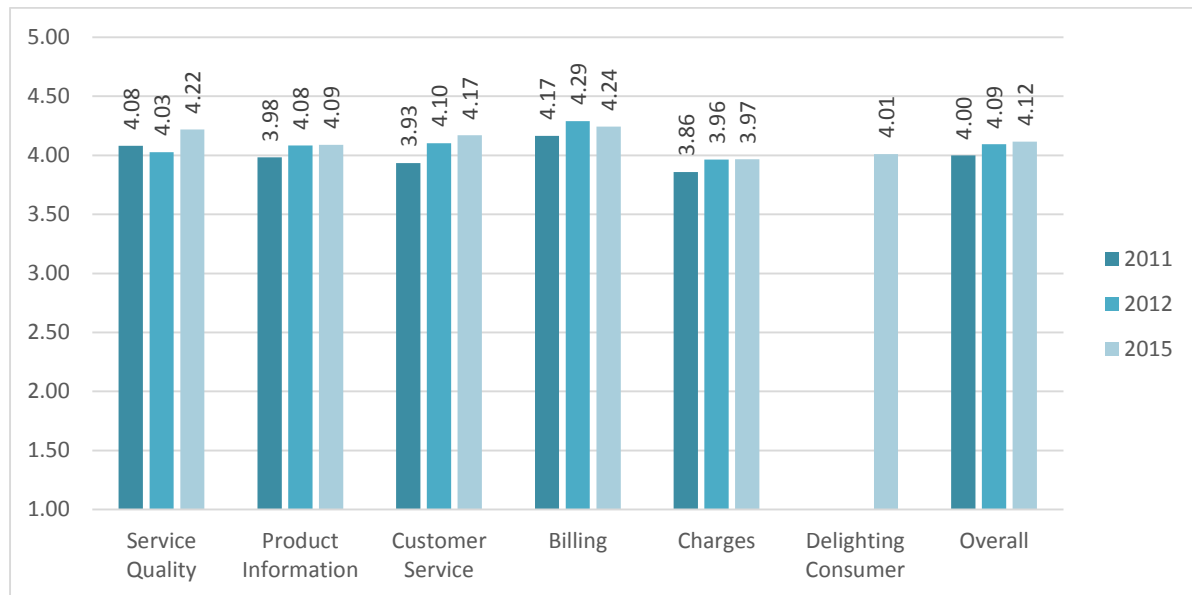
Figure 12: User Experience



"The gap between satisfied customers and completely satisfied customers can swallow a business." --Harvard Business Review, November/December 1995.

CRITERIA AND ATTRIBUTES

Figure 13: CSI by Criteria (2011-2015)



Overall, each criteria has improved in 2015. The scores for billing and charges are based on the proportion represented by prepaid and postpaid market share which is 85.7% and 14.3% respectively.

In CSS 2015, criteria for service quality has shown a notable improvement compared to 2012 with a CSI score of 4.22. This reflects the service providers' effort in providing a better service after being marked among the lowest score in 2012. Billing continues to record the highest CSI since 2011.

Mobile cellular services scored relatively low for Charges compared with other criteria which are ranging from 4.09 to 4.24.

Service Quality Gap (SQG)

The SQG analysis shows the difference between how important an attribute is to the respondent and how satisfied they are with that attribute. Figure 17 illustrates the gap for all attributes measured. Results found that the average gap for all 42 attributes measured for mobile cellular services were -0.29. This average of SQG in mobile cellular services is far lower compared to broadband services.

Figure 14: Service Quality Gap

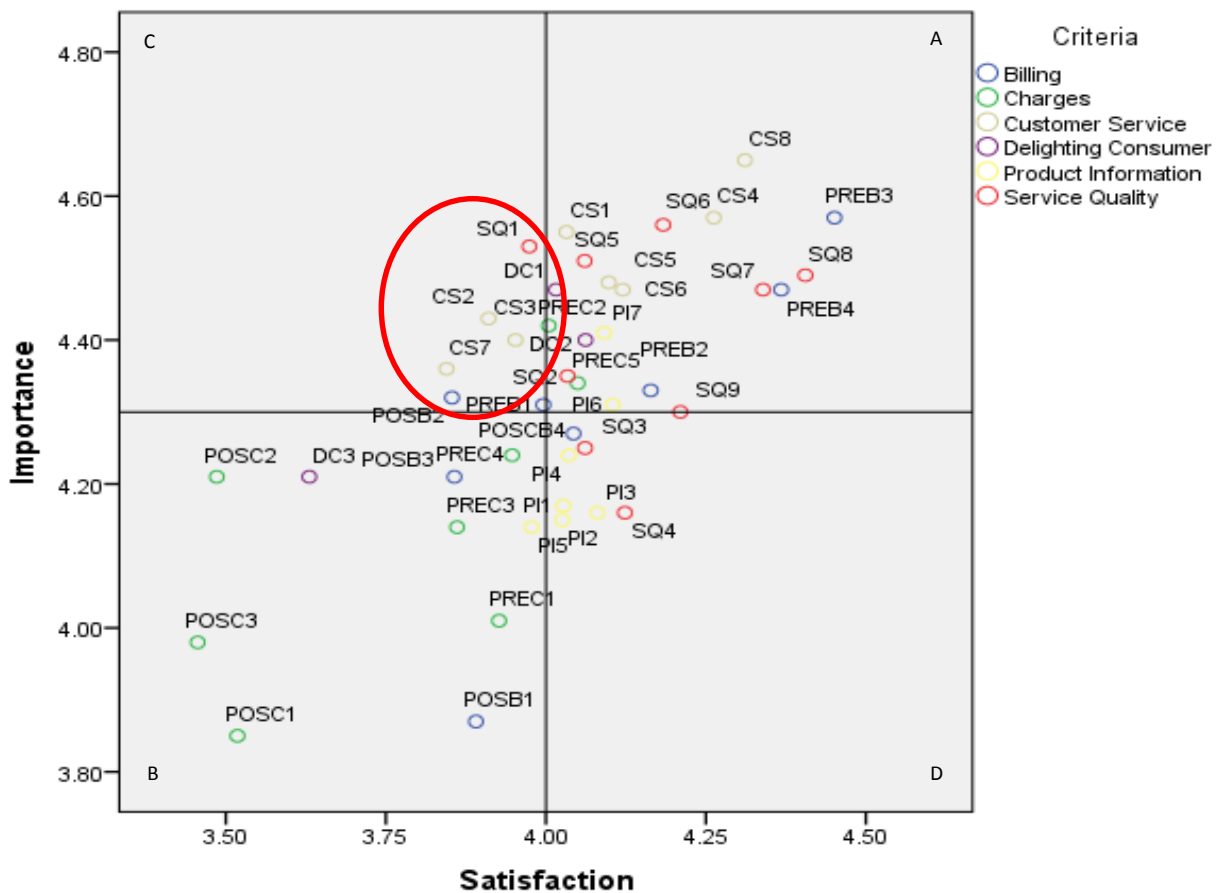
	Importance	Gap	Satisfaction
Reasonable call plans, rates and charges	4.21	0.72	3.49
Compensation rebate offered when service is down	4.21	0.58	3.63
Adequate geographical network coverage	4.53	0.56	3.97
Reasonable charges for additional services (postpaid)	3.98	0.52	3.46
Easy to speak to customer service officers	4.43	0.52	3.91
Easy to contact	4.55	0.52	4.03
Agent updates on the unresolved reported problem	4.36	0.52	3.84
Clarity of bill statement	4.32	0.47	3.85
Reward and redemption for loyal consumer	4.47	0.45	4.02
Problems were resolved within a reasonable timeframe	4.51	0.45	4.06
Easy to contact service provider's free hotline	4.40	0.45	3.95
Reasonable call rates and charges	4.42	0.42	4.00
Prompt in responding to issue	4.48	0.38	4.10
Ease and promptness of service activation/reactivation	4.56	0.38	4.18
Access to bill	4.21	0.35	3.86
Easy to understand agent's instructions	4.47	0.35	4.12
Confidentiality and security in your transactions	4.65	0.34	4.31
Attractive complementary services	4.40	0.34	4.06
Accuracy and clarity on international roaming charges (postpaid)	3.85	0.33	3.52
Clear terms and condition provided to consumer	4.41	0.32	4.09
Can receive/make calls without any/minimum interference	4.35	0.32	4.03
Accuracy of call and data charges	4.31	0.31	4.00
Handles customer in a friendly and professional manner	4.57	0.31	4.26
Credit are deducted based on actual usage	4.24	0.29	3.95
Reasonable prepaid validity period	4.34	0.29	4.05
Reasonable charges for additional services (prepaid)	4.14	0.28	3.86
Time taken to update payment to account	4.27	0.23	4.04
Up-to-date information provided on the latest plan/packages	4.31	0.21	4.10
Accuracy and clarity of product information	4.24	0.20	4.04
Availability of value added services	4.25	0.19	4.06
Accuracy of information provided in the on-line bill statement	4.33	0.17	4.16
Adequate information provided at the point of sales	4.14	0.16	3.98
Services provided are as advertised	4.17	0.14	4.03
Ease of self-service activation via USSD or SMS	4.47	0.13	4.34
Accuracy and clarity on international roaming services	4.15	0.12	4.03
Accuracy of credit balance displayed via USSD or SMS	4.57	0.12	4.45
Accessibility to airtime balance	4.47	0.10	4.37
Mode of payment	4.30	0.09	4.21
Availability of modes of reloading	4.49	0.08	4.41
Accuracy and clarity on international roaming charges (prepaid)	4.01	0.08	3.93
Accessibility of product information	4.16	0.08	4.08
Value added services are activated based on consent	4.16	0.04	4.12
Accuracy of bill	3.87		3.89

Even though the average gap for mobile cellular services is negative which indicates that consumers' satisfaction is not met, an attribute in billing (accuracy of bill) exceeded consumers' expectation.

Based on the gap analysis, consumers' gap between expectation and their satisfaction on reasonable call, plan and rates for Postpaid is rather high compared to other attributes measured. Followed by, compensation during downtime and good network coverage which are among attributes with a wide gap.

To facilitate interpretation of the SQG analysis, an Importance-Satisfaction matrix is plotted (Figure 18).

Figure 15: Importance-Satisfaction Matrix



Key: SQ1. Adequate geographical network coverage, SQ2. Can receive/make calls without/minimum interference, SQ3. Availability of value added services, SQ4. Value added services are activated based on consent, SQ5. Problems were resolved within a reasonable timeframe, SQ6. Ease and promptness of service activation/reactivation, SQ7. Ease of self-service activation via USSD or SMS, SQ8. Availability of modes of reloading, SQ9. Mode of payment, PI1. Services provided are as advertised, PI2. Accuracy and clarity on international roaming services, PI3. Accessibility of product information, PI4. Accuracy and clarity of product information, PI5. Adequate information provided at the point of sales, PI6. Up-to-date information on the latest plan/packages, PI7. Clear terms and condition provided to consumer, CS1. Easy to contact, CS2. Easy to speak to customer service officers, CS3. Easy to contact service provider's free hotline, CS4. Handles customer in a friendly and professional manner, CS5. Prompt in responding to issue, CS6. Easy to understand agent's instructions, CS7. Agent updates on the unresolved reported problem, CS8. Confidentiality and security in your transactions, POSB1. Accuracy of bill, POSB2. Clarity of bill statement, POSB3. Access to bill, POSB4. Time taken to update payment to account, PREB1. Accuracy of call and data charges, PREB2. Accuracy of

information in the on-line bill statement, PREB3. Accuracy of credit balance displayed via USSD or SMS, PREB4. Accessibility to airtime balance, POSC1. Accuracy and clarity on international roaming charges, POSC2. Reasonable call plans, rates and charges, POSC3. Reasonable charges for additional services, PREC1. Accuracy and clarity on international roaming charges, PREC2. Reasonable call rates and charges, PREC3. Reasonable charges for additional services, PREC4. Credit are deducted based on actual usage, PREC5. Reasonable prepaid validity period, DC1. Reward and redemption for loyal consumer, DC2. Attractive complementary services, DC3. Compensation rebate offered when service is down.

As shown in Figure 18, the quadrants are divided according to importance (high/low), and satisfaction (high/low), that will be used to rank areas of improvements based on priorities;

- 1st priority in quadrant C: This quadrant consists of attributes that are highly important but has low satisfactory. They need a more intense attention that requires actions for improvements.
- 2nd priority in quadrant B: This quadrant consists of attributes that are relatively less important in the eyes of consumers and attained low satisfactory. These attributes should be re-examined and perhaps resources be transferred to improve its performance.
- 3rd priority in quadrants A and D: This quadrants consist of attributes that have high satisfactory regardless of its importance. These attributes need to be continuously monitored to ensure the satisfactory is maintained.

The matrix above shows that, respondents' satisfaction level is high towards their service providers with scores between 3.50 to 4.50 and mean satisfaction score of 4.00. All attributes with high importance (quadrants A and C) are rated 3.80 and above. However, there are more than 10 attributes falling below the average score of 4.00. Below are attributes that need more focus and necessary improvement measures to be taken:

1. Adequate geographical network coverage;
2. Easy to speak to customer service officers;
3. Easy to contact service provider's free hotline;
4. Agent updates on the unresolved reported problem;
5. Charges on postpaid and prepaid; and
6. Billing on postpaid

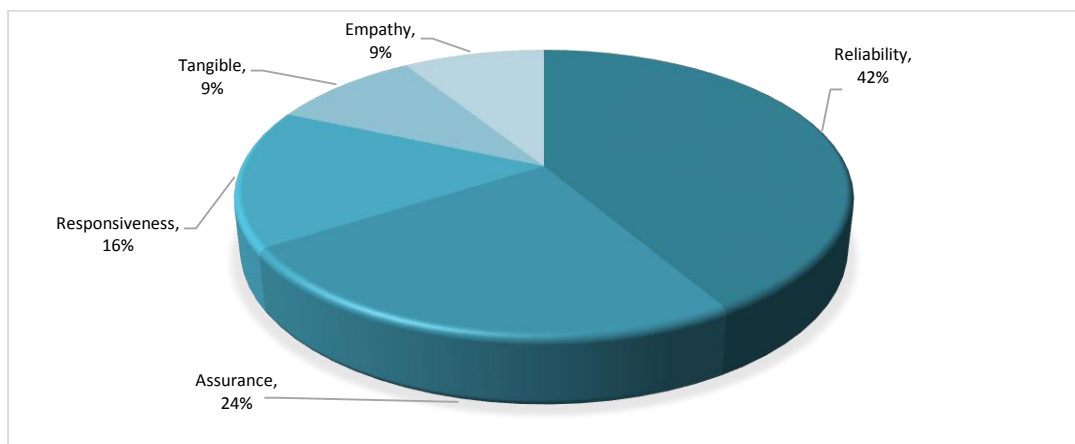
These attributes highlight the area of concerns that are highly significant to consumers. They are mainly associated to coverage, customer service billing and charges.

PRODUCTS AND SERVICES

The five (5) dimensions on consumers' preferences on products and service quality are as follows:

1. Responsiveness - Willing to help customers and provide prompt service;
2. Assurance - Knowledge and courtesy of the service providers' employees as well as their ability to convey trust and confidence in delivering the needs of their customers;
3. Tangible - Accuracy and appeal of tangible products and services offered by the broadband service providers such as physical facilities, packaging, information etc;
4. Empathy - Caring, personalized attention provided by service providers to its customers; and
5. Reliability - Ability to deliver service as promised dependably and accurately.

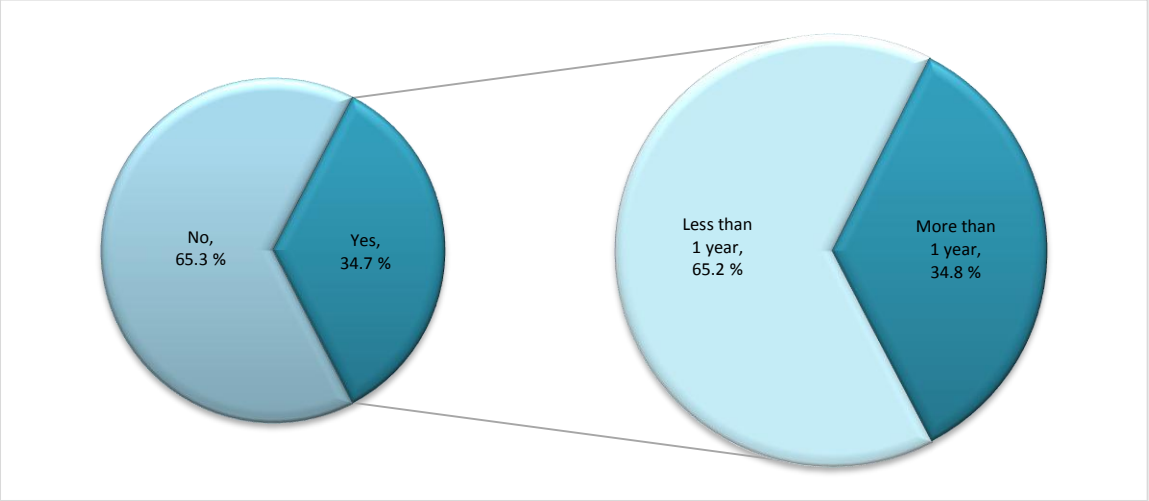
Figure 16: Dimensions of Products and Service Quality



Respondents believe that 'reliability' is the most important products and service quality. This is followed by 'assurance' which focuses on the courtesy and knowledge of the service providers to give confidence and trust in delivering the needs of their customers.

CUSTOMER SERVICE

Figure 17: Visit Customer Service



According to the responses received, only 34.7% of the respondents visited the customer service in less than one (1) year of which, 65.2% visited as recent as less than three (3) months.

Figure 18: Visit Customer Service Centre in a Year

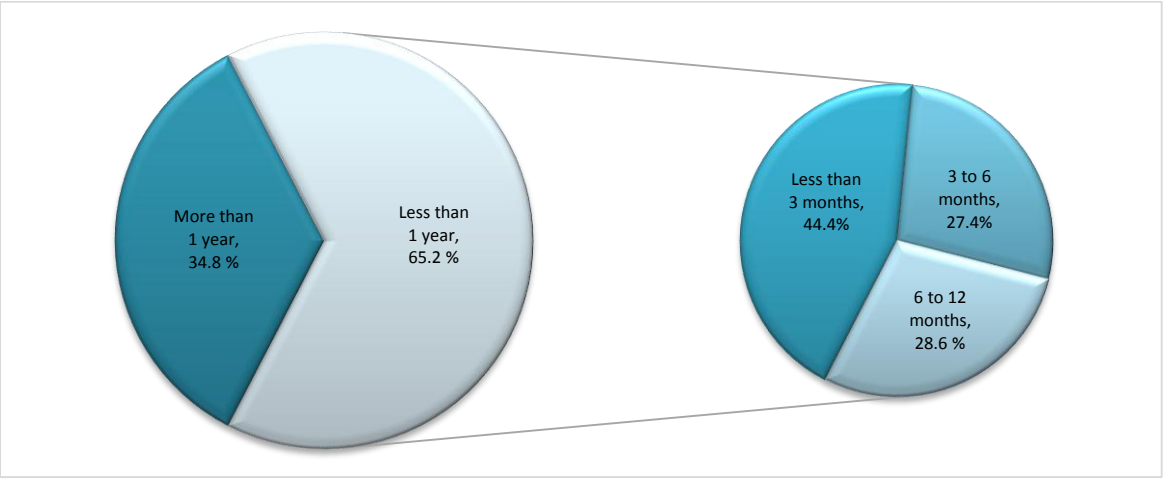
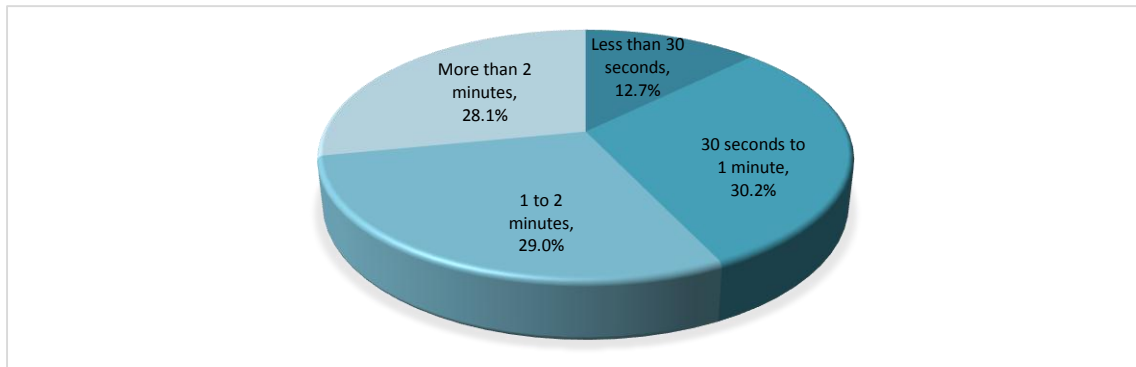
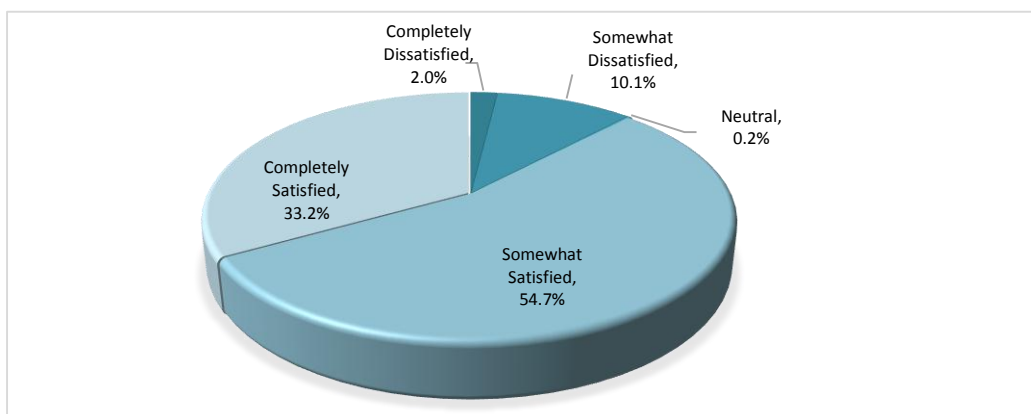


Figure 19: Waiting Time



According to Gerrit Antonides, the effect of information was relatively positive for waiting time shorter than 20 seconds, however, for waiting time longer than 90 seconds, the effect of information become more negative than the control condition.¹ 42.9% of the respondent said that their call has been attended in less than 1 minute while 28.1% experience a waiting time of more than 2 minutes. This large percentage could be among the reasons for dissatisfaction (12.1%) as illustrated in Figure 20.

Figure 20: Consumer's Experience - Customer Service Centre



Respondents were generally satisfied with the customer service with a small fraction of 2% respondents feeling not satisfied at all.

¹ Gerrit, A. et al (2002). Consumer Perception and Evaluation of Waiting time: A Field Experiment. Journal of Consumer Psychology, Vol.12 No.3, pg.193-202. Retrieved from <http://www.rug.nl/staff/p.c.verhoef/conspsych2001.pdf>

CONCLUSION

CSS 2015 shows that the consumer satisfaction index for mobile cellular services has been improved slightly compared to the previous survey. However, the index for broadband services had marginally decreased.

The decline in CSI score for broadband services is due to increasing demand for bandwidth as consumers behavior change from passive Internet use towards more interactive use. Thus, according to the findings of CSS 2015, there is a wider gap in consumers' satisfaction and expectation in quality of speed while uploading and downloading, quality of broadband connection and adequate geographical network coverage.

While consumers' expectation with both services is generally high, service providers should focused on further improving consumers' experience. This is to ensure that consumers receive value for money and good quality of services from their service providers. Based on CSS 2015, service providers mainly for broadband services need to improve on network quality.

In addition, service providers should emphasise on enhancing the quality of service for their customer support, technical support and call centre agents. According to the CSS 2015, consumers' expectation on call centre agents are that they must be skilled at resolving both the general issues as well as finding effective solutions to more complex problems.

Eventually, service providers should put continuous effort in improving their services to accumulate positive interactions throughout a customer's lifecycle.

In conclusion, CSS 2015 showed that consumers were satisfied with their service providers for both broadband and mobile cellular services. The findings show that consumers were more satisfied with mobile cellular services (91.2%) compared with broadband services (79.7%).

REFERENCE

1. See J. G. Miller, The 1983 Manufacturing Futures Project: Summary of North American Survey Responses & Preliminary Report. Retrieved from <http://sloanreview.mit.edu/article/what-does-product-quality-really-mean/>

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