



accan



The Realise Group

ACCAN MYSTERY SHOPPING ANALYSIS REPORT



MARCH 2017



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BACKGROUND

The Australian Communications Consumer Action Network (ACCAN) is Australia's peak communications consumer organisation representing individuals, small businesses and not-for-profit groups as consumers of communications products and services. ACCAN focuses on goods and services encompassed by the converged areas of telecommunications, broadcasting, the internet and online services, including both current and emerging technologies.

The Realise Group provide mystery shopping services to many of Australia's leading national and international brands and develop programs that help deliver and strengthen brand promises, further develop customer service cultures, increase sales and identify opportunities for improvement.

During December of 2016, ACCAN commissioned a Mystery Shopping project with The Realise Group with two objectives in mind;

1. To assess the information provided by staff in telco customer service stores and through phone customer support lines to the general public in response to different disability-related inquiries.
2. To compare the study to results from a mirror mystery shopping investigation conducted by The Realise Group during April 2014.



SCOPE

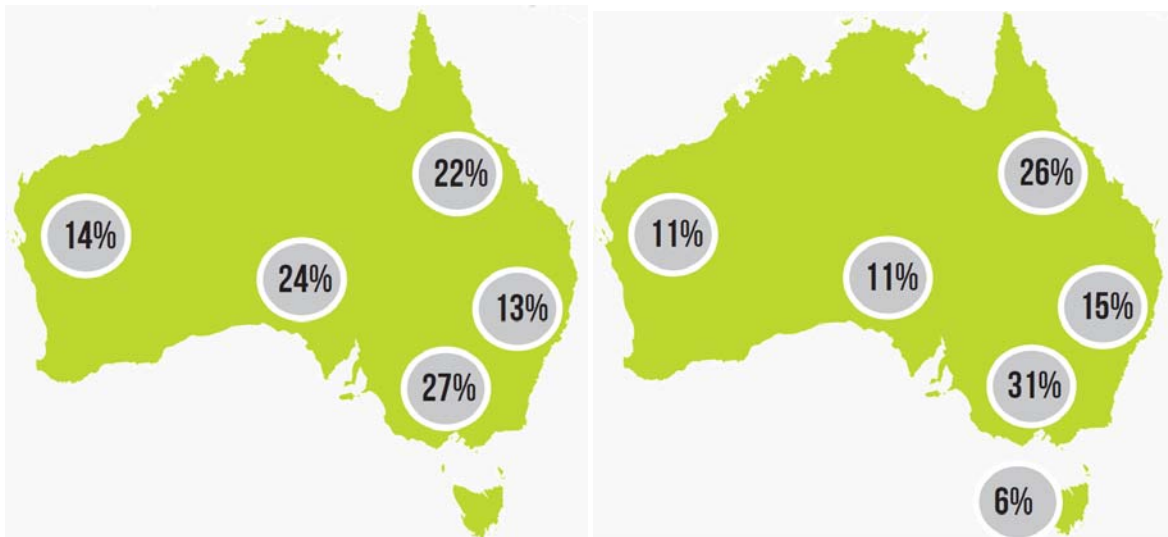
To support the same structure used in the study conducted in 2014, the project was comprised of:

- 100 'Walk-In' visits to telco stores across Australia - specifically Telstra, Optus and Vodafone locations mostly in metropolitan areas.
- 100 phone calls to a combination of Telstra, Optus, Vodafone, TPG and iinet customer support lines.

See below for geographic spread of both Walk-In and Phone call mystery shopping distribution;

Walk-In Mystery Shopping State Allocation

Phone Call Mystery Shopping State Allocation



Mystery shoppers were not required to have a disability to participate in the assignment, nor were they required to bring someone along who had a disability to partake in this assignment. Instead each mystery shopper was provided with a specific enquiry and scenario to follow during their visit or call, made up of a number of typical enquiries by, or on behalf of, people with disabilities.

The Mystery Shoppers were instructed by The Realise Group to take on the pretence that they were making an enquiry on behalf of a family member or someone they knew well. They were to remain open to suggestion and prompt further conversion where appropriate. For example the mystery shoppers were encouraged to prompt the staff member for further information if there was not an immediate information recall, for example "A friend told me there was a special mobile phone or special features for people with physical difficulties" or "I thought there was a special service for deaf people", to give the staff member every opportunity to provide relevant information.



METHODOLOGY

The different scenarios comprised of the following, enquiring about both landlines and mobiles;

Scenario 1: Blind/Visually Impaired (LANDLINE)- “My son/daughter/relative who is blind is moving into his/her own apartment - are there any home phones that would help them?”

Scenario 2: Deaf (LANDLINE) - “My son/daughter/relative who is deaf is moving into his/her own apartment next month. Are there any phone services for deaf people?”

Scenario 3: Hearing Impaired (LANDLINE) - “My elderly parent/grandparent is losing his/her hearing and having difficulty on the phone. Is there anything that can help him/her?”

Scenario 4: Dexterity (LANDLINE) - “My grandmother/grandfather/mother/father has limited hand strength and gets shaky hands. What home phone options could you recommend?”

Scenario 5: Blind/Visually Impaired (MOBILE) - “I’m looking for a mobile phone for my blind son/daughter/parent/relative. Are there any handsets that would suit?”

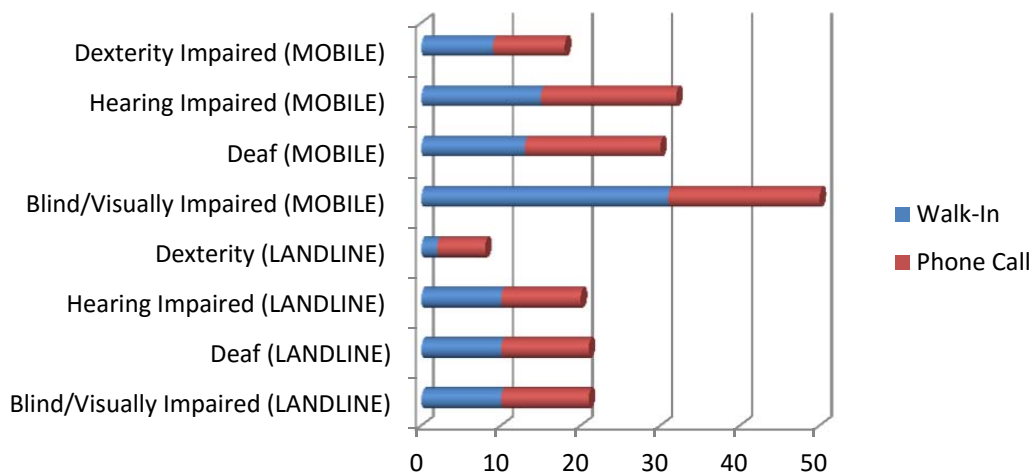
Scenario 6: Deaf (MOBILE) - “My teenage son/daughter/relative is deaf and I want to get him/her a mobile phone. I’m wondering what mobile phones do you have that would suit him/her?”

Scenario 7: Hearing Impaired (MOBILE) - “My elderly parent/grandparent/relative is losing his/her hearing and needs a mobile phone. What do you have that would be good?”

Scenario 8: Dexterity Impaired (MOBILE) - My grandmother/grandfather/mother/father/relative has very limited strength in his/her hands. What mobile phones do you have that would suit him/her?

Each scenario was spread across both Walk-In and Phone Call mystery shop allocations as per the table below;

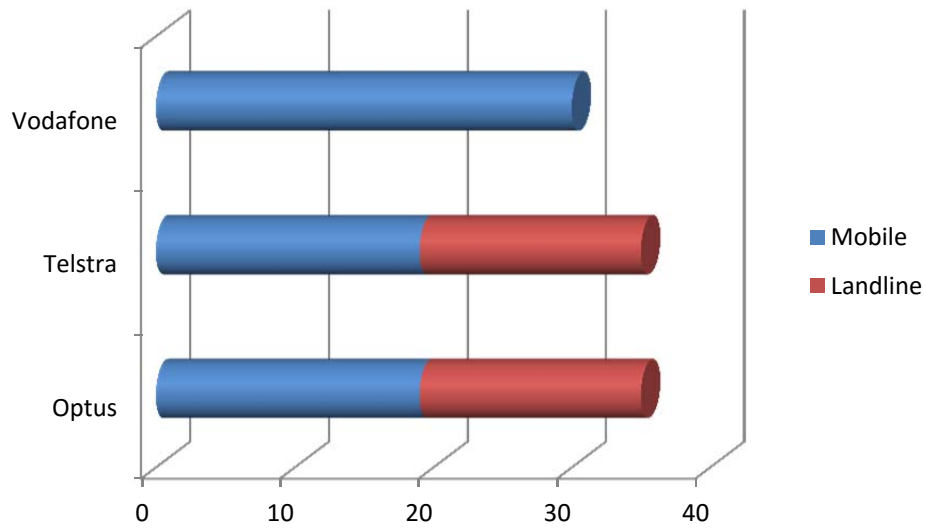
Allocation of Scenario Enquiry for Walk-In and Phone Call Assessments



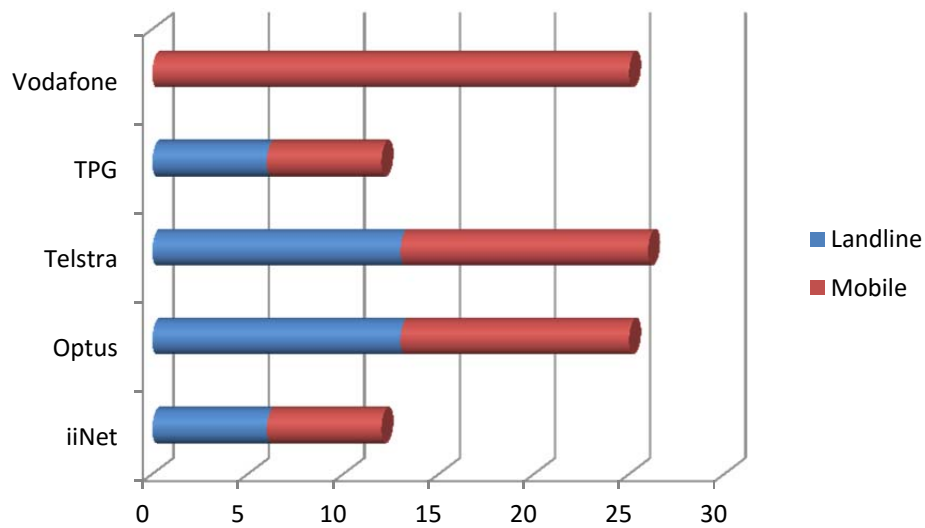


Then the base of the enquiry, being mobile or landline, was spread amongst the telco retailers as per the table below for both Walk-In and Phone Call mystery shopping assessments;

Proportion of Landline and Mobile Based Enquiry for Walk-In Assessments



Proportion of Landline and Mobile Based Enquiry for Phone Call Assessments





SCORING

The mystery shopping survey was scored in line with how many services the staff member could mention in accordance with the specific scenario. The mystery shoppers were provided with a list of products and services currently available according to each telco's official policies or in reference to the law.

A gradient score of 0 to 3 was given for each evaluation, ranging from full points being awarded when the staff member could mention all services/products listed through to no points when no information could be recalled. The number of services available and points allocated to mentioning a specific amount of services was varied and standardised according to the telco involved and the array of services they had on offer.



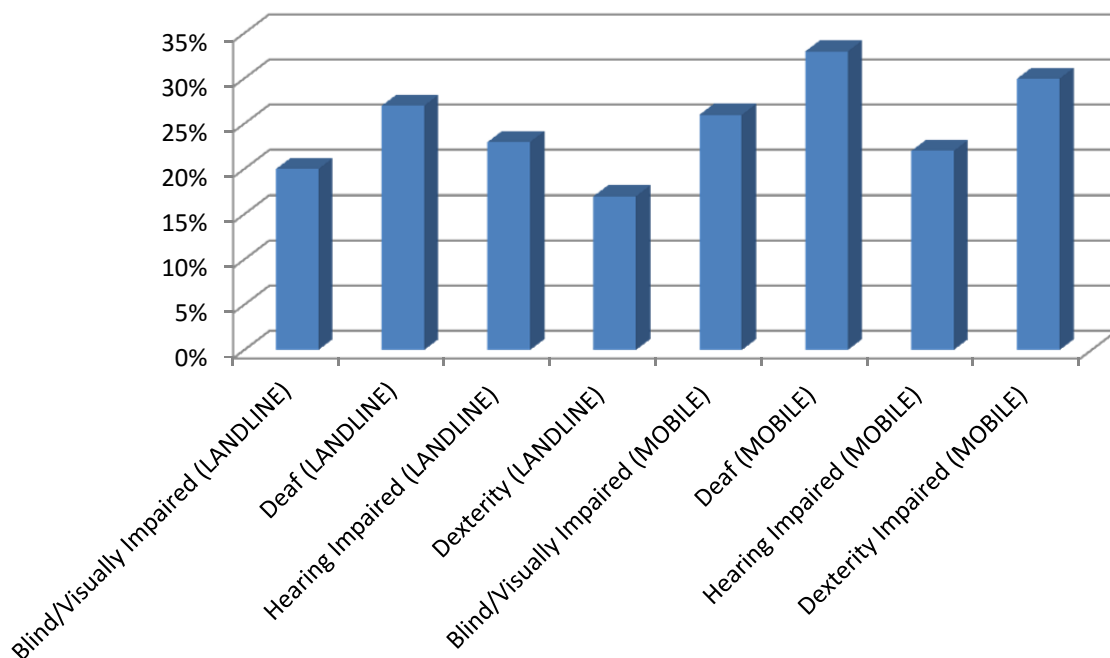
KEY FINDINGS

WALK-IN ASSESSMENTS 2016

OVERALL TAKE OUTS

The overall average achievement rate for Walk-In assessments was 26%. The Deaf scenario where the enquiry was regarding mobile phones achieved the highest rate with 33% and the Dexterity Impairment scenario where the enquiry was regarding landlines had the lowest achievement rate of 17%.

Overall Scenario Achievement Rates for Walk-In Assessments



Comparing results for telephone type, mobile phone enquiries performed slightly better (30%) than landline phone enquiries (23%).

Vodafone was the best performing telco out of the selection of retailers with an average of 30%, followed by Optus with 26% and Telstra with 22%.

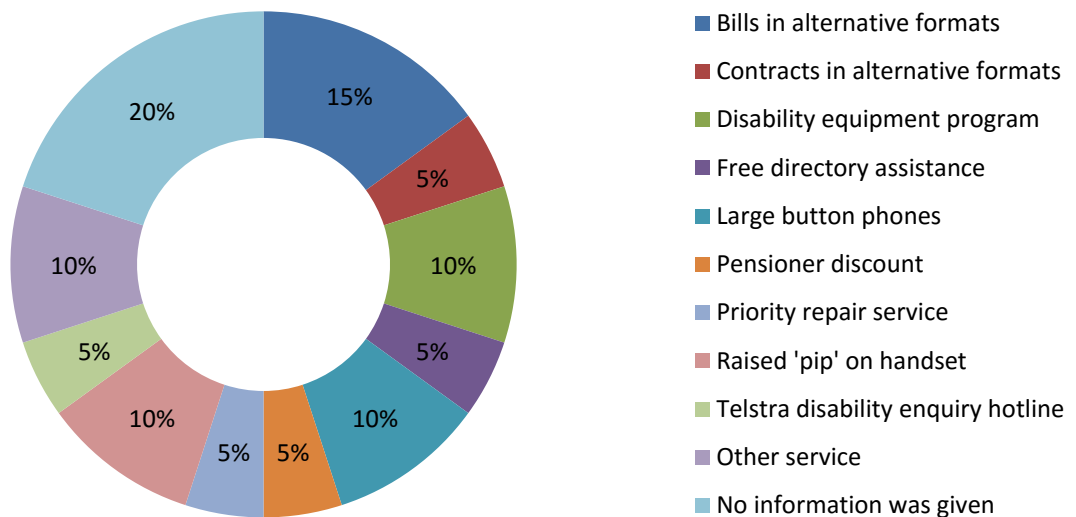
In 33% of Vodafone assessments the staff member could not mention any products or services in response to the shopper enquiry. This was also the case in 37% of Optus assessments and 43% of Telstra assessments.



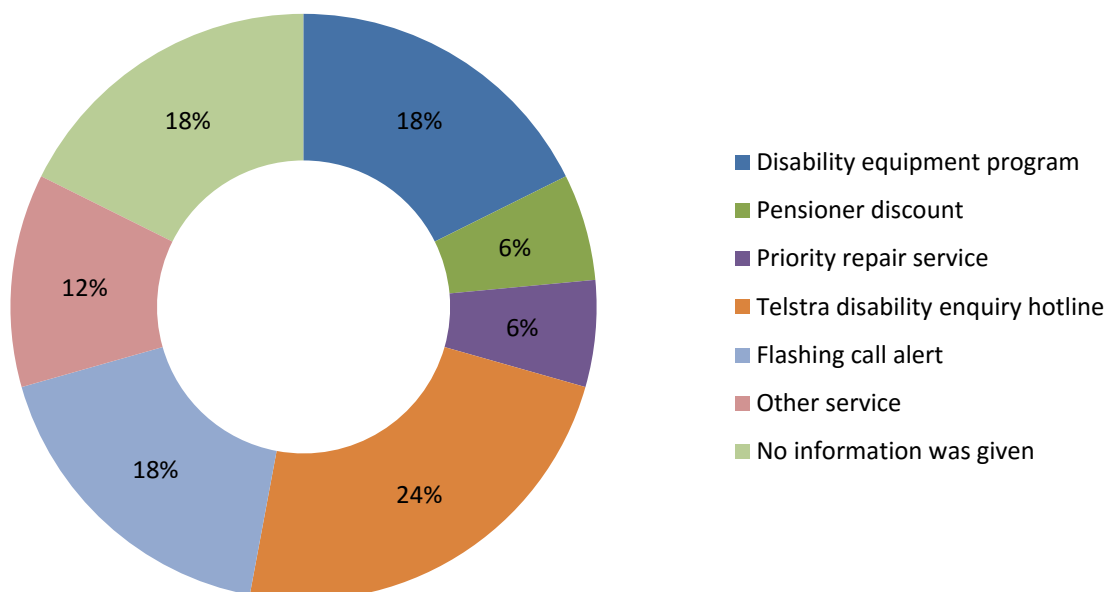
SCENARIO ANALYSIS

When looking specifically at which services were mentioned by staff in Telstra, Optus and Vodafone stores in response to each individual scenario the following can be observed;

Scenario 1: Blind/Visually Impaired (LANDLINE) – 20% of staff could not list any phones or services in response to this enquiry, 15% mentioned that customers could receive bills in alternative formats.

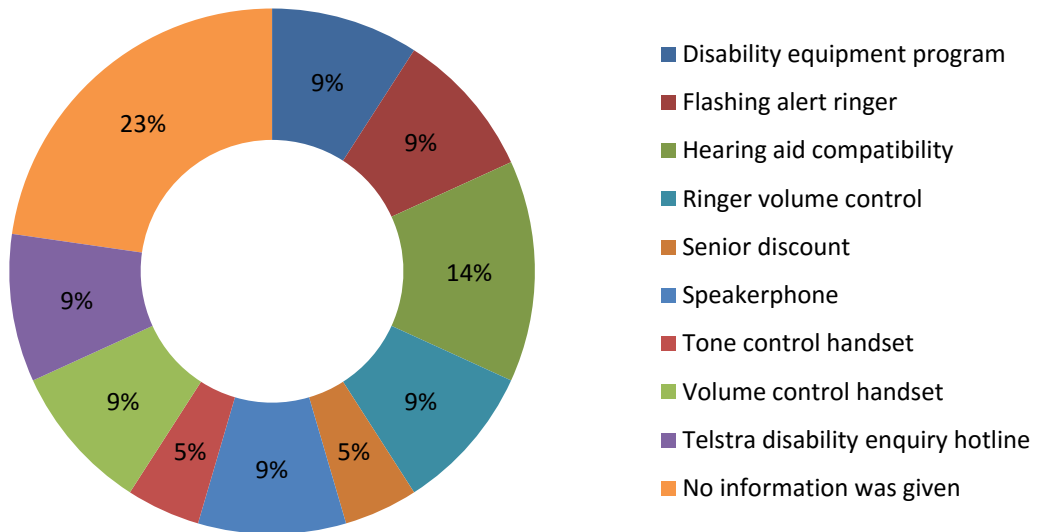


Scenario 2: Deaf (LANDLINE) – 24% of staff mentioned a Telstra disability enquiry hotline in response to this enquiry, 18% could not list any phones or services in response to this enquiry, 18% mentioned the disability equipment program and 18% recalled a flashing call alert feature.



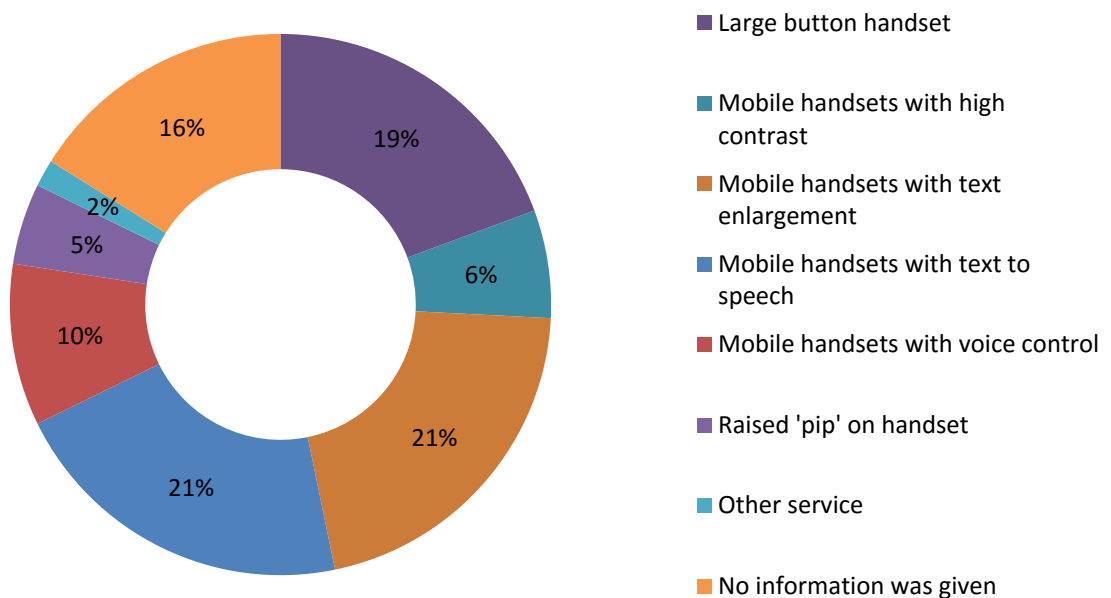


Scenario 3: Hearing Impaired (LANDLINE) – 23% of staff could not list any phones or services in response to this enquiry, 14% mentioned hearing aid compatibility.



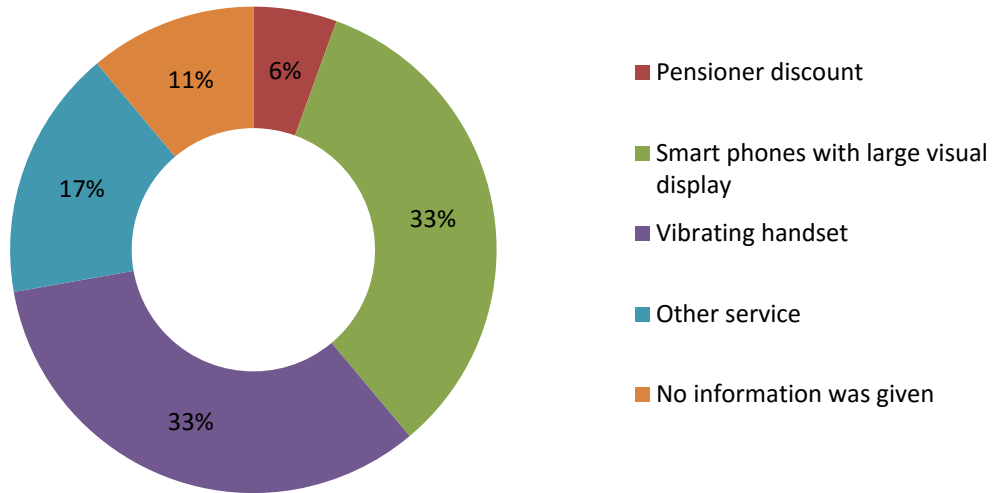
Scenario 4: Dexterity (LANDLINE) - 50% of staff could not list any phones or services in response to this enquiry and the other 50% mentioned large button handsets.

Scenario 5: Blind/Visually Impaired (MOBILE) – 21% of staff mentioned the feature of mobile handsets with text to speech in response to this enquiry, similarly 21% mentioned the feature of text enlargement and 19% mentioned large button handsets.

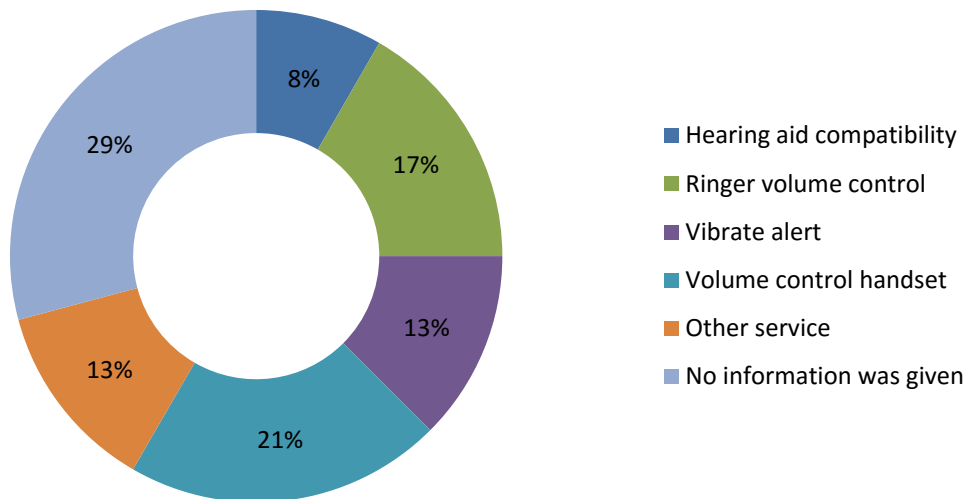




Scenario 6: Deaf (MOBILE) – 33% of staff mentioned the feature of vibrating handsets and 33% mentioned smart phones with large visual displays.



Scenario 7: Hearing Impaired (MOBILE) - 29% of staff could not list any phones or services in response to this enquiry and 21% mentioned the feature of volume controlled handsets.

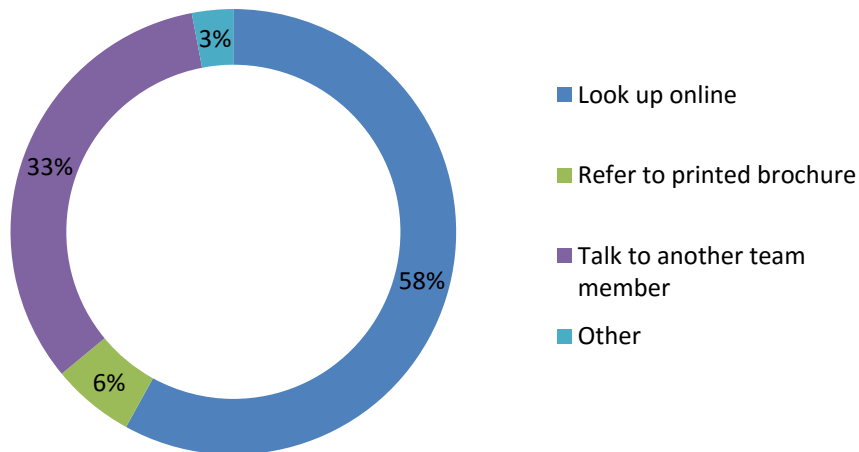


Scenario 8: Dexterity Impaired (MOBILE) - 70% of staff mentioned large button handsets in response to this enquiry and 20% of the staff could not list any phones or services.



REFERRING TO ANOTHER SOURCE

Overall 31% of the staff members mystery shopped in the Telstra, Vodafone and Optus retail stores referred to another source to assist with responding to the enquiry. Of those staff members that did refer to another source 58% chose to look up information online, followed by 33% who talked to another staff member.



PHONE CALL COMPARISON

Overall, Walk-In assessments fared better than Phone Call assessments in staff confidently providing more than one or two options to the customer in response to the initial enquiry by approximately 10%.



VERBATIM COMMENTS

Although staff were friendly, most were simply not able to provide specific information in response to the disability enquiries. Most mystery shoppers were referred to other telco retailers (mostly Telstra) or large department stores such as Big W, JB Hi Fi or ALDI.

Comment Extract 1: “The experience I had was poor. The team member showed me one mobile that was very small and told me that was all they had for elderly people. They then advised me that if I wanted something larger I should go to ALDI as they sell phones with large buttons. They did not seem genuinely interested in resolving my enquiry. They did not consult with a fellow team member to try and find a solution.”

Comment Extract 2: “My overall experience was good. The team member who assisted me advised that they had no knowledge that Vodafone offered any phones specially catering to visually impaired people, however the Alcatel One Touch 2036 3G phone had large buttons and lit up which might be helpful for visually impaired people. The team member also advised me that organisations for the visually impaired may be able to help. They gave me their business card and provided information on phone plans.”

Comment Extract 3: “I made my enquiry and was advised that they couldn’t help. The team member explained that they used to have phones with big buttons but don’t have them anymore. They recommended I visit JB HiFi, the Post Office or Big W.”

Comment Extract 4: “During the interaction the assistant was quite brisk. They advised me that they were very sure they didn’t have any services for hearing impaired persons. When I said that I’d heard about a special service, they said that perhaps it was a different Telstra store.”

Comment Extract 5: “The team member didn’t know anything about the service offered with Optus. They consulted with their manager, who advised me that they have a specialised department who deals with this issue and I’d have to go through Customer Service as it’s not something either of them have been trained in.”

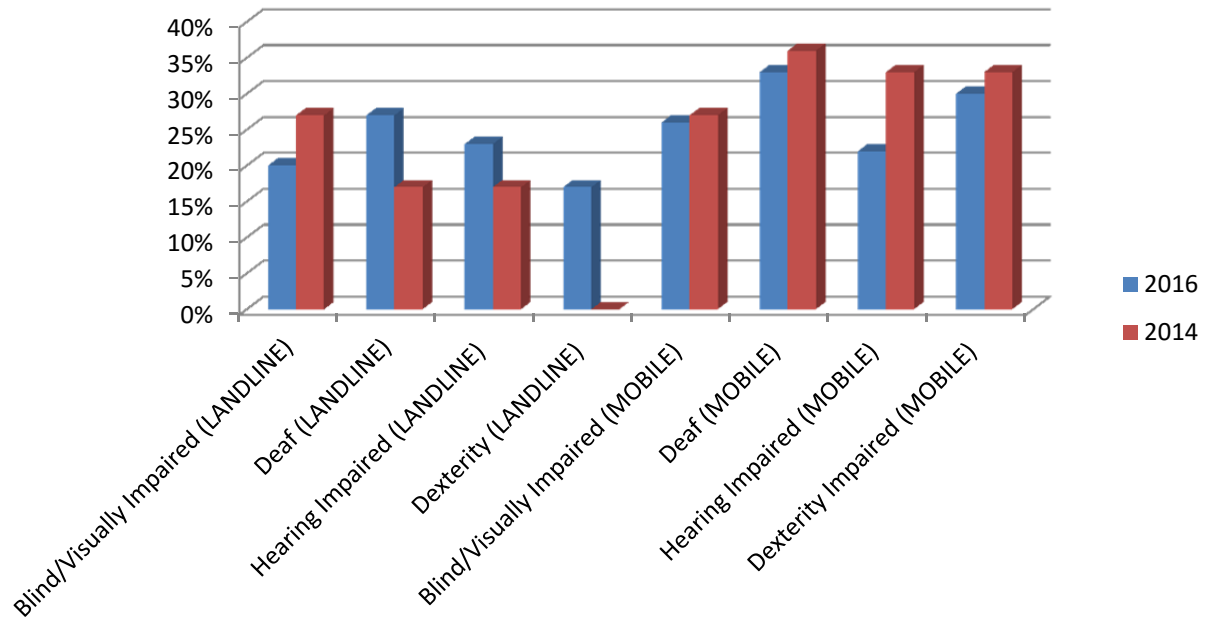
Comment Extract 6: “I was relatively disappointed by my experience. In response to my enquiry, the team member informed me that they did not sell any handsets that would be suitable for my situation. I then prompted them by stating, ‘I thought that there was a special service for people who are blind’, in response they told me I could try googling it.”

Comment Extract 7: “My overall experience visiting the Vodafone store was very good. The store was busy with customers; however a team member assisted me as soon as they became available. On presenting my enquiry, the team member immediately suggested a Huawei P9. They explained that the phone had a text to speech option that would be very helpful for people with a visual impairment. They explained to me that the feature could be selected from settings and whenever the user touched the phone, it would become available, making it easy to use. The team member offered me their business card and phone number advising me that if I needed any more information, I could call them. They also provided me with Vodafone plans on offer.”



2014 COMPARISON

Comparing 2014 results, achievement rates for Walk-In assessments have remained relatively steady with a 2% increase in performance from 24% in 2014 to 26% in 2016. The best and worst performing scenarios have remained the same.



Both Optus and Vodafone slightly improved upon their averages, Telstra experienced an 8% decrease.

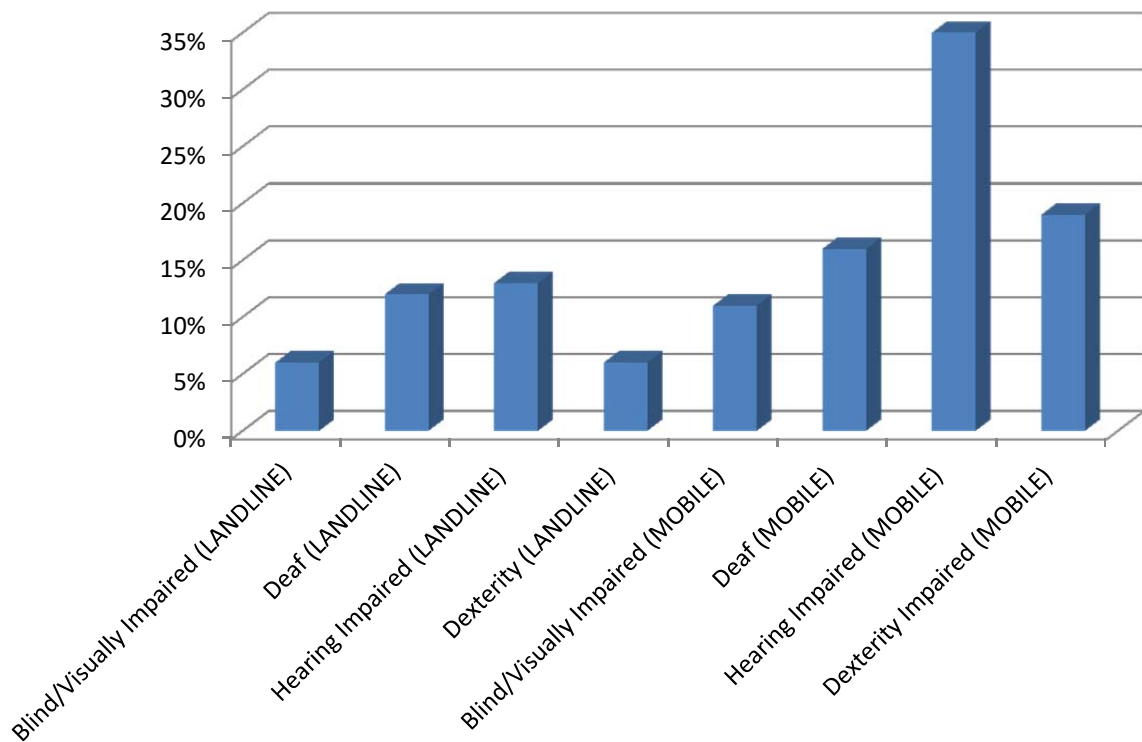
The number of enquires that resulted in no relevant information being provided increased by 7 percentage points to 38% in 2016 from 2014.



PHONE CALL ASSESSMENTS 2016

OVERALL TAKE OUTS

The overall average achievement rate for Phone Call assessments was 16%. The Hearing Impairment scenario where the enquiry regarded mobile phones had the highest achievement rate of 35% and the Dexterity Impairment scenario where the enquiry regarding landlines had the lowest achievement rate of 6%.



Comparing results for telephone type, mobile phone enquiries performed better (20%) than landline phone enquiries (10%).

Vodafone was the best performing telco from the selection of retailers with an average of 25%, followed by Telstra with 19%, Optus with 15%, iinet with 8% and TPG with 0%.

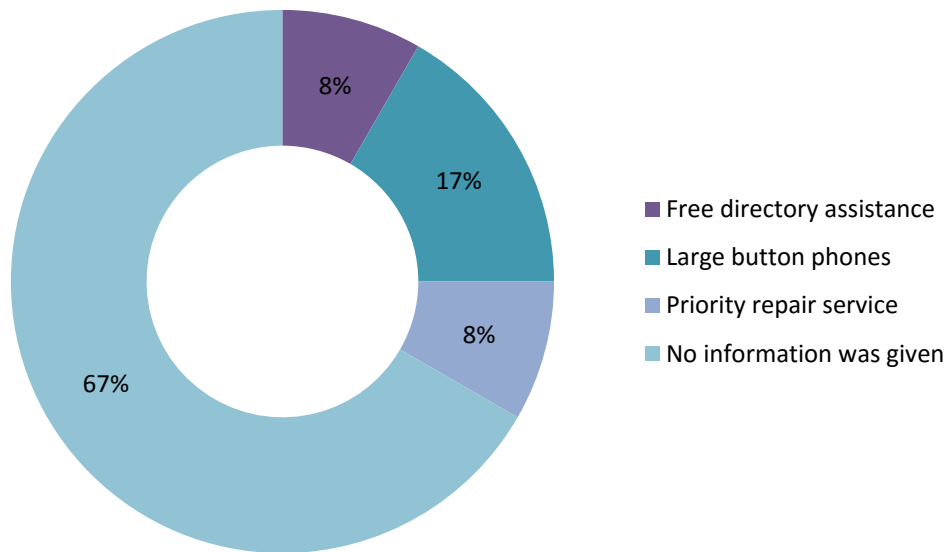
Overall 100% of the phone calls to TPG resulted in no products or services being mentioned, followed by iinet with 83%, Optus with 64%, Telstra with 50% and Vodafone with 44%.



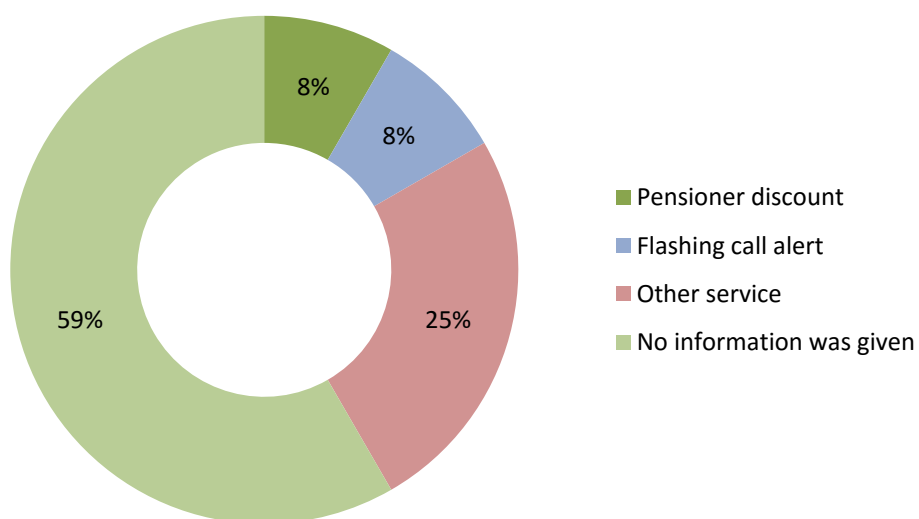
SCENARIO ANALYSIS

When looking specifically at which services were mentioned by staff during calls made to Telstra, Optus, Vodafone, iinet and TPG customer service lines in response to each individual scenario, the following can be observed;

Scenario 1: Blind/Visually Impaired (LANDLINE) – 67% of staff could not list any phones or services in response to this enquiry, 17% mentioned large button phones.

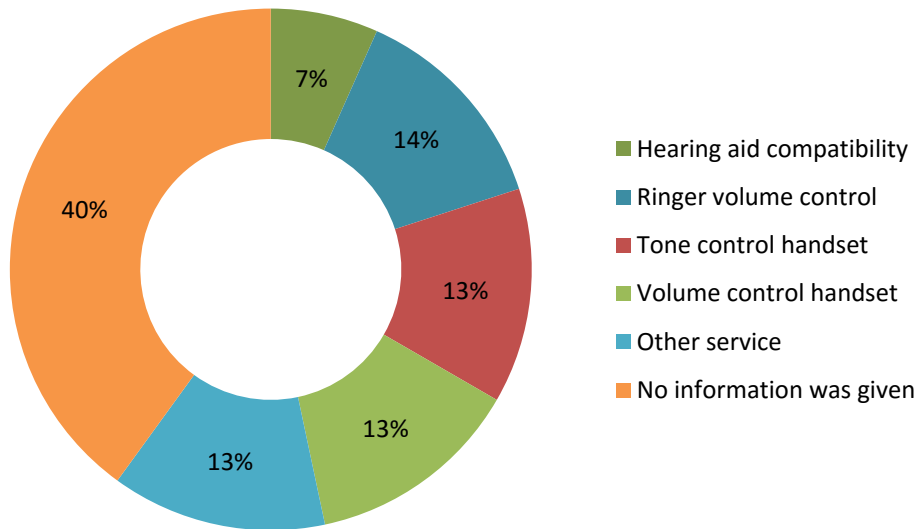


Scenario 2: Deaf (LANDLINE) – 59% of staff could not list any phones or services in response to this enquiry, 25% mentioned other services (such as priority platinum services).

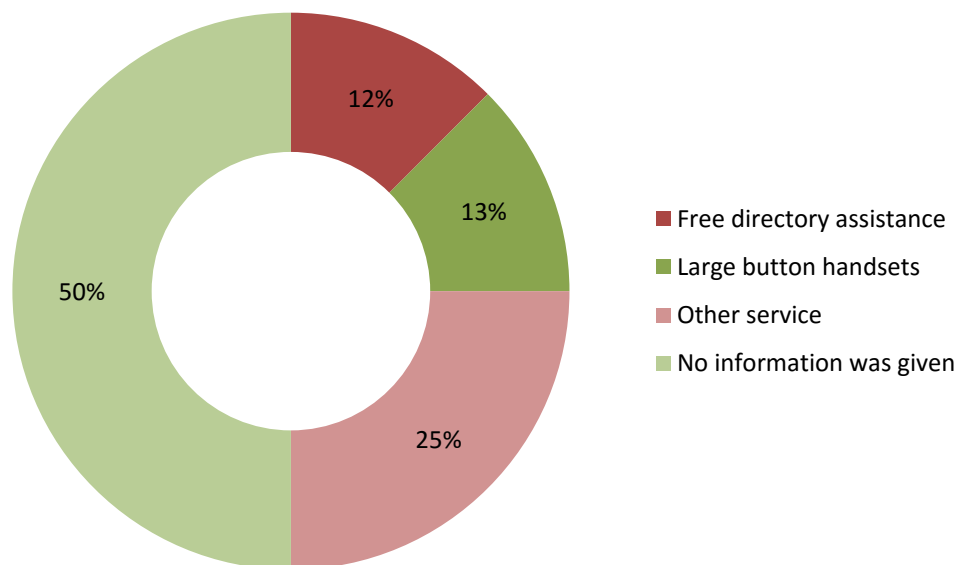




Scenario 3: Hearing Impaired (LANDLINE) – 40% of staff could not list any phones or services in response to this enquiry, 14% mentioned ringer volume control.

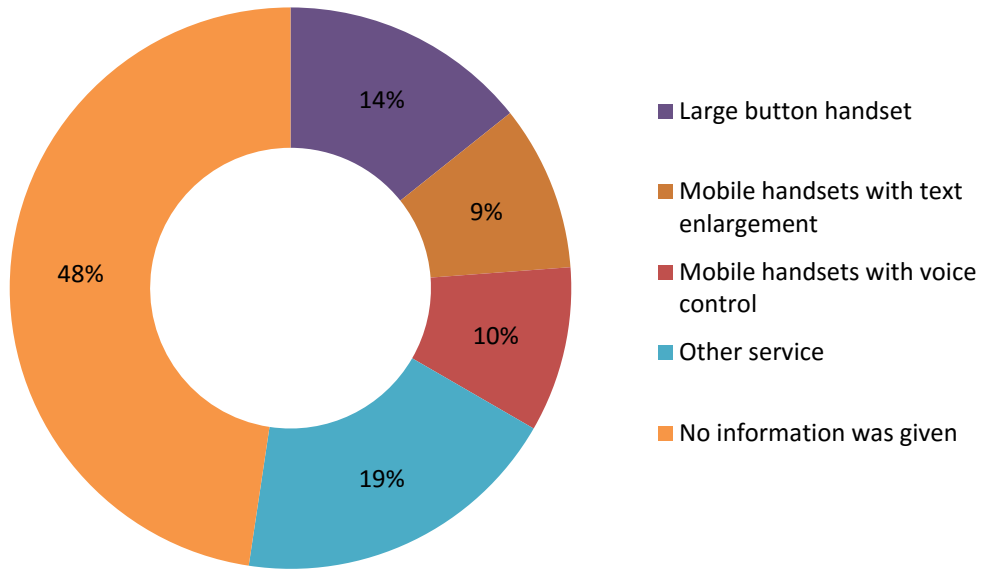


Scenario 4: Dexterity (LANDLINE) - 50% of staff could not list any phones or services in response to this enquiry, 25% mentioned another service (such Priority Assistance or other companies).

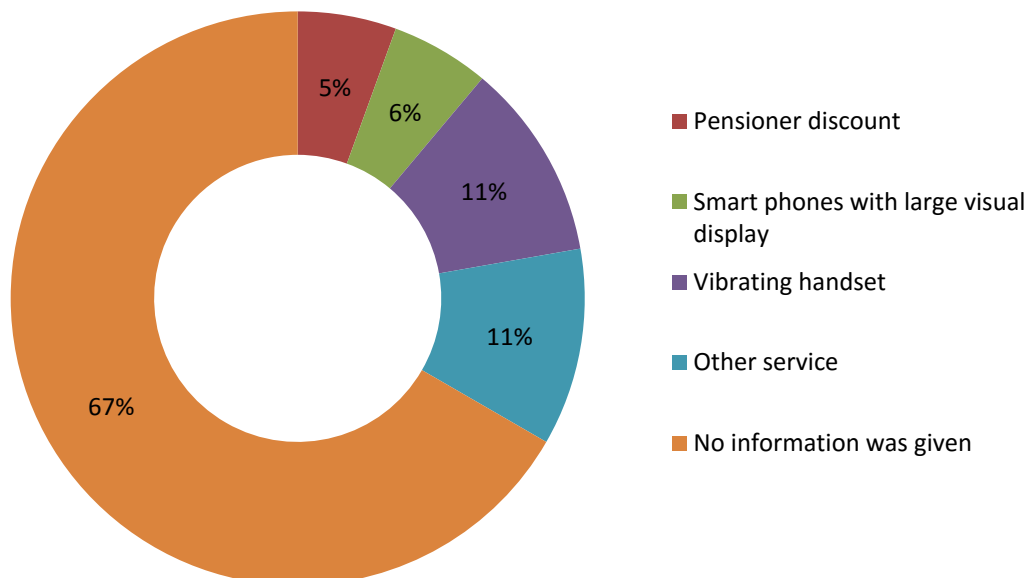




Scenario 5: Blind/Visually Impaired (MOBILE) – 48% of staff could not list any phones or services in responses to this enquiry, 19% mentioned another service (such as Telstra T203 or Kissa).

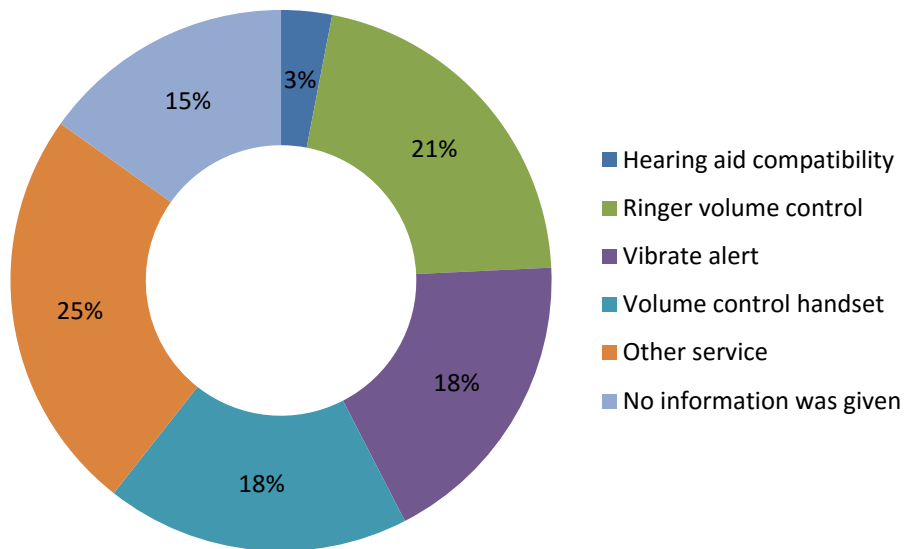


Scenario 6: Deaf (MOBILE) – 67% of staff could not list any phones or services in response to this enquiry, 11% mentioned the feature of vibrating handsets.

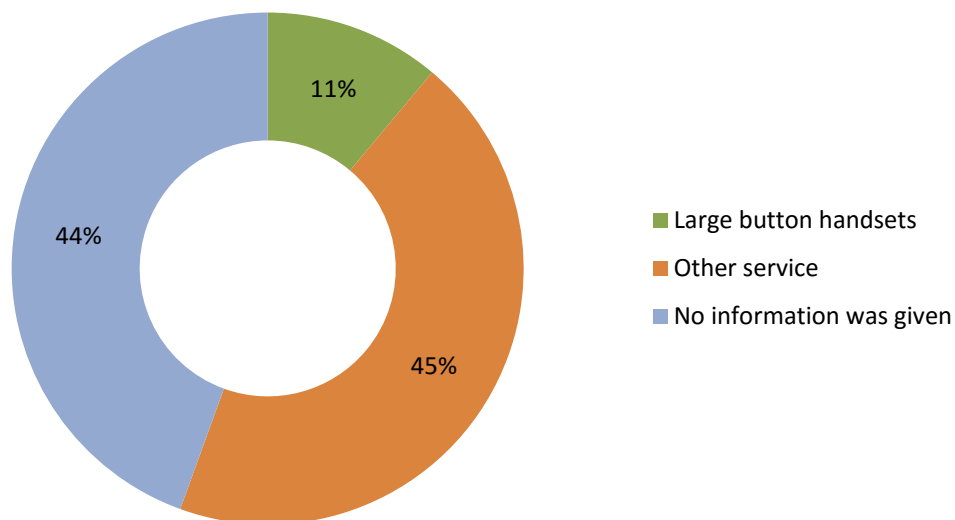




Scenario 7: Hearing Impaired (MOBILE) - 25% of staff mentioned another service (such as relay services, apps and technical support teams), 21% mentioned the feature of ringer volume control.



Scenario 8: Dexterity Impaired (MOBILE) - 45% of staff mentioned other services (such as light phones and large smartphones), 44% could not list any phones or services in response to this query.



Overall 34% of the staff members mystery shopped in the Telstra, Vodafone, Optus, iinet and TPG customer service lines referred to another source to assist with responding to the enquiry.



VERBATIM COMMENTS

Although staff were perceived as mostly friendly and pleasant, most of the time they were unable provide information in response to the array of disability enquiries presented to them, and almost always needed to be prompted by the mystery shopper for more information. In most cases staff were simply unable to assist and would refer the mystery shopper to a telco retail store or electrical retail store such as Harvey Norman, and in some cases provide a 13 36 77 customer care number. TPG operators in particular told the mystery shoppers they do not provide services to people with disabilities.

Overall very few Phone Call assessments resulted in staff confidently providing more than one or two options to the customer (approximately 9%).

Comment Extract 1: “Initially the team member misunderstood my query and started giving me details of plans that were on special at the moment. I informed them that one of my mum’s friends told her there was a special service for people with hearing difficulties. The team member advised me that they were not aware of any service being offered and put me on hold to talk to their supervisor. I was then advised to call 13 36 77 for assistance.”

Comment Extract 2: “The call was answered promptly and I provided my enquiry to the team member. Despite being prompted, the team member advised me that they did not offer any products that would assist my grandparent. The team member advised me that I should perhaps check with Telstra as they believed that would be the only provider who may be able to help.”

Comment Extract 3: “The team member assisted me to the best of their ability but did not provide a lot of information. They advised me that on Smartphones, using the Android operating system, there was an app called ‘Talk Back’ as well as a large font setting.”

Comment Extract 4: “The team member responded to my enquiry with, ‘I’m not sure what to recommend’. They then clarified that they no longer had button handsets and that they didn’t think that a Smartphone would be suitable. I prompted the team member by saying ‘I thought there was a special service for people who are blind’, they said ‘Not really.’ “

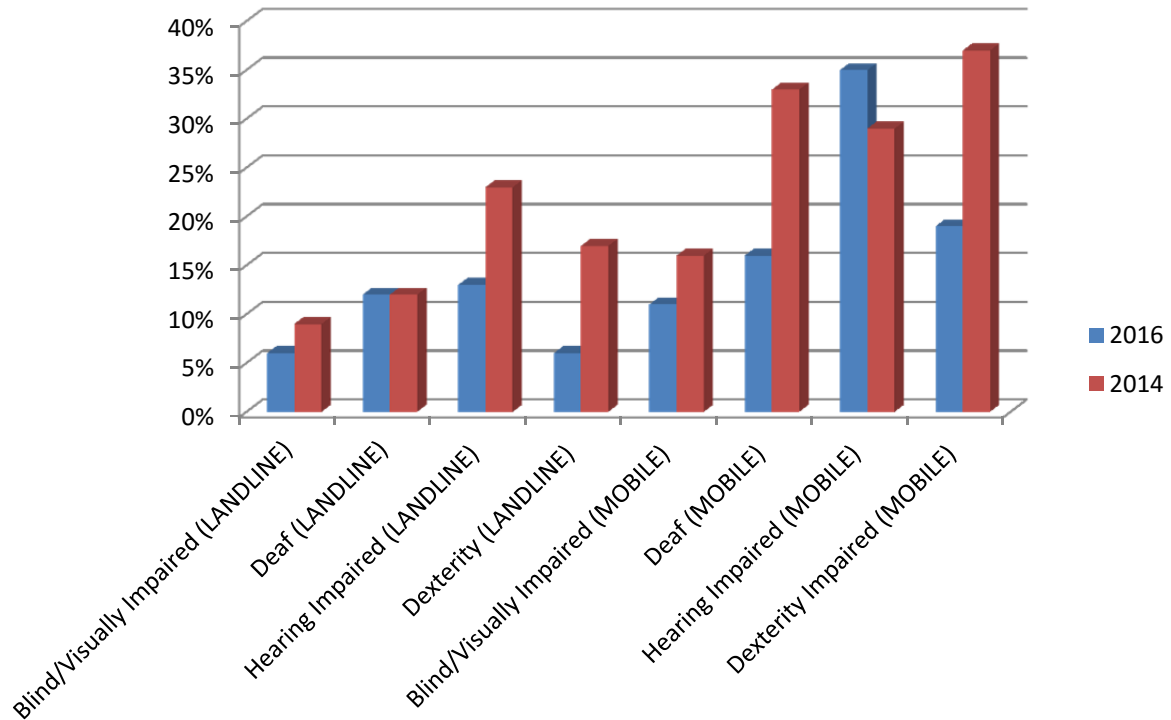
Comment Extract 5: “The staff member suggested I have a look at Telstra as they had ‘clunky phones with large buttons’. They were friendly, however they did not know how to assist me further.”

Comment Extract 6: “They were genuinely interested in assisting me and listened to my enquiry, however despite prompting they informed me that the company had no mobile phone handsets and could offer my relative SIM plans only. They thanked me for my call and wished me a good day.”



2014 COMPARISON

Comparing 2014 results, achievement rates for Phone Call assessments have declined by 6% with a fall from 22% in 2014 to 16% in 2016.



All retailers experienced a decline in their overall average achievement percentages, with the exception of Optus experiencing a 1% increase.

The number of enquires that resulted in no relevant information being provided increased by 11 percentage points to 62% in 2016 from 2014.



CONCLUSIONS

It is very apparent that the responses provided by staff in telco customer service stores and through phone customer support lines to the general public in reply to different disability-related inquiries is at a very poor standard, with combined achievement rates of only 21% in 2016. This rate is actually a 2% drop from the 2014 study.

There are no major outliers when it comes to better performing telco providers. However it is worth noting that every interaction with TPG resulted in no information being provided to the Mystery Shopper.

Overall the amount of assessments that resulted in no information being provided was 50%. This is a 9% increase on 2014 results. This highlights a trend that perhaps this situation is getting worse instead of better.

The Mystery Shopper comments reflect the notion that although staff are mostly friendly and professional, the vast majority are simply unaware of services or facilities available for people with different disabilities. When no information was provided the majority of Mystery Shoppers were simply told they were unaware of any service/facilities available or to contact disability organisations or major retailers for assistance.

This research study, over two static periods within thirty two months of each other, suggest an overwhelming lack of knowledge in disability related products and service assistance within the telecommunications industry. This highlights to two possible issues;

1. The provision of disability related products and services is not a major focus in the telecommunications industry, and
2. Telco staff training, in both call centres and retail outlets, must be drastically improved in order for the general public to be aware of the range of products and service available for those with disabilities.