CAN YOU HEAR ME?

Ranking the customer service of Australia's phone and internet companies

RESEARCH REPORT

Prepared for: Australian Communications Consumer Action Network (ACCAN)

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1. Executive summary.

1.1. Introduction

The 2016/17 Telecommunications Industry Ombudsman (TIO) Annual Report detailed that in that year a total of 158,016 complaints were received, with 76,932 (48.7%) of these being customer service complaints.

The above finding suggests that consumers are generally not receiving adequate customer service from their telecommunications providers – however what is not known is:

1. How the customer service of telecommunications companies compares between providers.
2. How telecommunications providers perform across a range of key customer service metrics, as identified in the Telecommunications Consumer Protections (TCP) Code.
3. The extent to which telecommunications consumers have experienced poor customer service from their current provider.

In order to close these gaps in knowledge, the Australian Communications Consumer Action Network (ACCAN) commissioned primary research to be undertaken with communications consumers across Australia.

- The research comprised an online/CATI survey of n=1,347 communications consumers across Australia.
- Participants were verified to be a customer of one of the ten service providers of interest in this study and had contacted their service provider in the last 12 months.
- Service providers were selected on the basis of estimated market share (taking into account total services in operation) and the sample weighted to reflect the proportion of market share.
- Fieldwork was conducted 26th February – 14th March 2018.

The survey does not attempt to examine the reasons behind any of the differences measured, but simply compares a range of specific metrics across the one thing all providers have in common: customer service.

1.2. Key insights

The results of this study have provided insight into the three areas of interest mentioned above.

1. **How the customer service of telecommunications companies compares between providers.**

   Customer service varies amongst the ten providers in this survey. There are a few providers that sit on either end of the performance spectrum, as outlined below.

   Vodafone and Virgin rate amongst the higher performing providers. Vodafone customers spend less time trying to find a resolution to their question or problem, require fewer contacts with their provider during this process, and are more likely to have their question or problem resolved during the first contact, when compared to customers of all other providers.

   Virgin customers spend less time on the phone being connected to the right person or department, require fewer total contacts with their provider, and are more likely to have their question or problem resolved during the first contact, when compared to customers of all other providers.

   Both Vodafone and Virgin customers rate their respective providers highly on a number of specific customer service elements - being treated with courtesy and in a fair manner, professionalism of staff, and providing relevant and accurate information.

   Telstra rates as a low performing provider - customers require more contacts with their provider to find a resolution and are less likely to have their question or problem resolved during the first contact when compared to customers of all other providers. Telstra customers also rate their provider poorly with regards to the knowledge of customer service staff.

2. **How telecommunications providers perform across a range of key customer service metrics, as identified in the TCP Code.**

   The survey addresses a number of customer service areas identified in the TCP code. Below is a summary.

   Communication between the provider and customer is an area of concern. Customers contacted their provider 2.6 times on average over 21 days. Wait time / response time information and call back options were also not provided to a number of customers, leaving many to suggest that their provider should become more proactive in keeping them informed of the status of their question or problem. Customers also felt the knowledge of customer service staff could be improved.

   Further to this, over half the customers were required to re-provide their case information each time they contacted their provider, and they typically spoke with 3.7 different customer service staff during the process.

   There is a high proportion of customers whose case remains unresolved after the first contact with their provider. In addition, a third of all customers felt dissatisfied with how their query or problem was being handled and as a result escalated their query. Many customers faced barriers when trying to lodge a formal complaint. They either found it difficult to find information on the complaint process or felt discouraged by their provider to raise the matter with the TIO.

3. **The extent to which telecommunications consumers have experienced poor customer service from their current provider.**

   Customers are most critical of their provider keeping them proactively informed, addressing their problem in a timely manner, adhering to timeframes, and having knowledgeable staff. These sentiments have contributed to over half of respondents claiming their overall customer service experience with their provider was not positive.

1.3. Key findings

Provided below is a table that summarises the key findings across a range of customer service metrics.

Please note:

The results for each provider have been tested for significance at the 95% confidence level versus the comparative result for all other providers (combined). Arrows and colour coding have been used to highlight the providers with significantly different results.

Key Findings

Overall experience of customer service.

Overall rating of customer service
Just over half the customers (54%) are not positive about their overall customer service experience with their telecommunications provider. This is comprised of 18% who are negative, and 36% who are neutral about the service they experienced.

Amongst those who feel negative about their overall experience (18%), they:

- spend longer trying to find a resolution to their question or problem (49.8 days versus 21 days for total),
- require more contact with their provider (5.2 times versus 2.6 for total),
- are transferred 3.5 times on the phone (versus 2.9 for total),
- are required to repeat their information 4.3 times (versus 3.7 for total), and
- are less likely to have their question or problem resolved during the first contact (8% versus 58% for total).

Specific elements of customer service.
Customers are most critical of the following customer service elements (average scores out of 10):

- their provider keeping them proactively informed (6.3), Vodafone (7.3) ↑
- their problem being addressed in a timely manner (6.5), Virgin (7.6) ↑
- their provider adhering to timeframes (6.6), Vodafone (7.6) ↑
- the knowledge of staff (6.6). Vodafone (7.7) ↑ Telstra (6.3) ↓

Overall time spent to resolve a question or problem (resolved cases)
Customers report taking 13.3 days (on average) from the first contact with their provider through to finding a resolution.

It takes 1.9 contacts (on average) and 3 transfers on the phone until a resolution is found.
Vodafone (6.2 days) ↓

Method of contact..

Base: Total sample *(n=1,347). Outliers removed.*
B1. Thinking about the most recent question or problem you contacted [PROVIDER] about, which of the following options best describe what the question or problem was?
B39. Approximately how long have you spent trying to resolve this question/problem since it first started? If it is ongoing, how long has it been to date?

Method of initial contact

The level of customer service received varies depending on how customers contact their provider. Visiting a store in person, when compared to other channels (such as phone, email, etc), is a more effective and efficient way of resolving a query – customers spend fewer days communicating with their provider (8 days versus 21 days for total), and require fewer contacts (1.6 times versus 2.6 for total).

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One in three customers (29%) report their query was not dealt with by the person they initially spoke with on the phone. Further to this, 2.9 transfers on the phone were required before being connected to the right person or department.

Time spent from first call to being connected to the right person or department
On average, a customer totals 1.2 hours, over one or more phone calls, before reaching the correct person or department.

Virgin (0.5) ↓

Wait and response times.

Contacting providers by phone)
Of all customers who contacted their provider by phone, less than half (46%) were told the average wait time to be connected with someone to speak to. Around one in four (27%) did not receive this information, and an equal proportion (27%) cannot remember.

Provided wait time information:

TPG/iiNet (60%) ↑

Contacting providers online, via email, social media, or post)
One in six (16%) did not receive information about when to expect a response.

A response was typically received 1.5 days after initial contact online, via email, social media, or post. More specifically, email is the channel with the longest response time at 3.6 days, followed by social media (2.3 days) and submitting a query via web-form (1.3 days). Messenger/online chat receives the quickest response time at 0.7 days.

Call backs.

Call backs offered
While the majority of customers did receive the option for a call back, more than one third of callers (35%) were not offered a call back option.

Provision of timeframe
One in six customers (16%) claim to not have received information about a response timeframe after requesting the call back option, whilst 12% are uncertain whether they were informed of the timeframe or not.

Outcome following call back request
Of those customers requesting call backs, one in six customers (17%) said they did not receive a response at all.

Record keeping.

Case history information

Amongst the customers who needed to speak to their provider on multiple occasions, over half (58%) reported that they needed to re-provide information about their case, typically speaking with 3.7 people.

Resolution.

Resolved vs unresolved

One in five customers (19%) reported unresolved cases at the time of survey. One in ten (10%) customers said their query was ongoing. A similar proportion (8%) had chosen to stop pursuing their query.

First contact resolution

Two in five customers (42%) did not have their question or problem resolved during their first contact with their provider. Customers contacted their provider 2.6 times trying to find a resolution.

Activ8me (1.7) ↓	Telstra (3.0) ↑

Complaints handling.

Escalation of query

Three in ten (30%) customers report escalating their query in at least one form. This includes escalating with their provider (23%) eg. asking to speak with a manager, by lodging a formal complaint with their provider (9%) or lodging a complaint with the TIO (3%).

Discouraging TIO contact

Amongst those who have escalated their query with their provider or lodged a formal complaint with either the provider or TIO, nearly one in three (32%) say their provider discouraged them from taking the matter to the TIO.

Finding complaint process information

Over half (55%) of customers reported that it was difficult to find information on how to lodge a formal complaint with their provider.

A similar proportion of customers (48%) claim that finding information about how to do lodge a formal complaint with the TIO was difficult.

Perceived level of difficulty to raise complaint

Amongst those who have lodged a formal complaint with their provider, when asked about how difficult or easy the process was, every second (50%) customer felt it was difficult.

Timing of proposed solution

As a mandatory requirement, providers must propose a solution to a complaint within three weeks of receiving the formal complaint. Over half (54%) of customers waited more than three weeks for a proposed solution.

Key areas for improvement.

Customers were asked at the end of the survey to identify one key area that could be improved by their provider to enhance customer service. Two in three customers (66%) provided a suggested improvement.

The main themes that resonated throughout the comments are: improving customer service/communication/attitude of staff (40%), timeliness (19%), cost issues (5%), and technology working as it should (2%).

2. Background and objectives.

2.1. Background

The Australian Communications Consumer Action Network (ACCAN) represents small businesses and residential consumers in goods and services offered by telecommunications providers in Australia.

ACCAN acts on behalf of communications consumers by developing evidence based policy and advocacy to government, service providers and the market broadly.

The results from the 2016/17 Telecommunications Industry Ombudsman Annual Report[1] found that customer service continues to be the key complaint issue for communications consumers. These findings illustrate that consumers are choosing external resolution processes as a result of poor customer service standards in the industry.

The broad research hypothesis that can be derived from the above is that consumers are generally not receiving a good level of customer service from their telecommunications providers – however the actual proportion of consumers that have experienced poor customer service with their current provider is not known; nor is an understanding as to how the customer service from providers compares against each other.

In response to the above, ACCAN is seeking insight and understanding in three key areas:

- How the customer service of telecommunications companies compares between providers.
- How telecommunications providers perform across a range of key customer service metrics, as identified in the Telecommunications Consumer Protections (TCP) Code.
- The extent to which telecommunications consumers have experienced poor customer service from their current provider.

With this understanding and insight, the information will be used to help consumers make informed decisions when choosing a service provider. In identifying areas where improvements are needed most, it will help focus ACCAN's advocacy for improvements in customer service.

[1] TIO 2017, 2016-2017 Annual Report: http://www.tio.com.au/__data/assets/pdf_file/0018/250911/Telecommunications-Industry-Ombudsman-Annual-Report-2017.pdf

2.2. Objectives

The following research objectives have been guided by the broader goals above:

- To evaluate and compare the performance of service providers across a range of customer service metrics
- To identify how consumers like to contact their provider, their experience of wait times and the call back option, and their preferences around these
- To determine the number of cases resolved the first time a customer contacts their provider, and to understand the experience of those who require subsequent follow-up
- To measure the amount of time customers spend resolving queries or problems, and how this affects other aspects of their experience
- To measure consumer experience of staff attitudes and their ability to handle queries
- To explore the complaint resolution process, and barriers to consumer access

3. Methodology.

The target population for the research was consumers who were responsible for contacting their telecommunications provider regarding any questions or problems; and they were screened to ensure they had such contact in the 12 months prior to data collection.

A list of ten telecommunications providers - those with the biggest market share, as well as two satellite providers (see Figure 1 below) - were provided by ACCAN. To ensure the results could be analysed at the individual provider level, quotas were imposed for the ten service providers (with a minimum target set of n=30 for the two satellite customer groups) in proportions according to approximate market share. The following Figure outlines the quotas per provider (including a slightly adjusted quota to accommodate the lower than anticipated incidence of some providers), as well as the number of interviews achieved. Quotas by location were set to ensure national representation.

Figure 1. Quotas by provider and number of completed interviews

Provider	Original target	Revised target	Completed interviews
Telstra	200	200	210
TPG / iiNET	200	200	209
Vodafone	150	200	205
Optus	200	200	203
Virgin	150	150*	131
Dodo / iPrimus	100	100	131
Amaysim	150	150*	125
Belong	100	50	73
Activ8me**	30	30	30
Skymesh**	30	30	30
Total	**1,310**	**1,310**	**1,347**

*Revised target was to get as many as possible
** Satellite providers

It is important to note that the survey was conducted across a variety of providers and this may have influenced the results. The providers included in this study vary in terms of the range and number of telecommunications services they offer – fixed broadband, for example, is a key offering for some providers, whilst for others, it may only make up a small proportion of their market, if offered at all. It is possible that those providers with fewer products may also be advantaged, and that those providers offering a wider array of services receive more complex questions which may have driven a substantial proportion of the service/technical-related queries. This can be seen by the variation in results for each individual provider, however such analysis as to the causes of the observed differences are outside the bounds of this survey.

A total of 1,347 interviews were conducted. The majority were conducted online, although the satellite customers were mainly undertaken via CATI (Computer Assisted Telephone Interviewing) to enable targeting of consumers within known satellite service postcodes. The sample was predominantly drawn from proprietary panels, which are comprised of people who opt-in to participate in research studies. These panels are owned and operated by Australian research panel providers.

The questionnaire was designed in consultation with ACCAN. The survey acknowledged that consumers contact their telecommunications providers for a range of reasons, and not just with problems or complaints. Wording was such that respondents were asked to think about the "question or problem" they were contacting their provider about in order to delineate explicitly from complaints in the first instance. The handling of formal complaints lodged with the provider and/or the TIO was asked about separately.

Fieldwork was conducted over the period 26th February – 14th March 2018.

While the key priority of the research was to enable analysis by provider, there was also a requirement to look at the results overall. As quotas had been set to maximise the sample per provider, the data was weighted to ensure the providers were represented in their appropriate market share of the total retail market, across all service types, when combined for the total analysis.

ACCAN provided estimates of market share based on analysis of declared numbers in the most recent company annual reports which was cross checked with the Australian Communications and Media Authority (ACMA) Communications Report 2016[2] for validity against known services in operation. The list of providers was adjusted to include a similarly representative sample of satellite providers. The data was weighted using the following results. Weights for gender, location and age were also applied.

[2] ACMA 2016, Communications Report 2015-16: https://www.acma.gov.au/theACMA/Library/researchacma/Research-reports/communications-report-201516

Figure 2. Number of completed interviews, estimated market share, weights and margins of error.

Provider	Completed interviews	Estimated market share	Weight (re-proportioned to 100%)	Max. margin of error
Telstra	210	52%	54%	±6.8
TPG / iiNET	209	4%	4%	±6.8
Vodafone	205	11%	11%	±6.9
Optus	203	22%	23%	±6.9
Virgin	131	2%	2%	±9.6
Dodo / iPrimus	131	1%	1%	±9.6
Amaysim	125	2%	2%	±8.8
Belong	73	1%	1%	±11.5
Activ8me	30	0.5%	1%	±17.9
Skymesh	30	0.5%	1%	±17.9
Total	**1,347**	**96%**	**100%**	**±2.7**

Tests for statistical significance at a 95% confidence interval have been conducted to determine differences by sub-groups. The majority of the significance testing occurs between providers, and it is important to note, in these cases **the significance testing is between the customers of one provider compared with the customers of all other providers combined.**

These statistical differences are shown in Figures using arrows. In addition to this, the statistical differences that represent a better result for consumers are highlighted in light green, whilst the statistical differences that are worse for consumers are highlighted in light red. This is summarised in the following Figure:

Figure 3. Key: Statistically different results

x% ↑	Result for provider is significantly *higher* than the result for all other providers combined
y% ↓	Result for provider is significantly *lower* than the result for all other providers combined
	Better result for consumers
	Worse result for consumers

Notes on reading this report:

- As mentioned, the target population for the research was customers who have contacted their telecommunications provider about a question or problem in the last 12 months. The results in this report are based on these customers (unless otherwise specified).
- A result based on a small sample size (less than n=30) is indicated in Figures by italicised font and in a graph by a blue square around base size – these results should be interpreted with caution.
- Results may not sum exactly to 100% due to rounding.

- Statistical differences are shown in Figures using arrows (↑ for significantly higher results; and ↓ for significantly lower results)
- Statistical differences that are a better result for consumers are highlighted in light green, whilst the statistical differences that are a worse outcome for consumers are highlighted in light red.

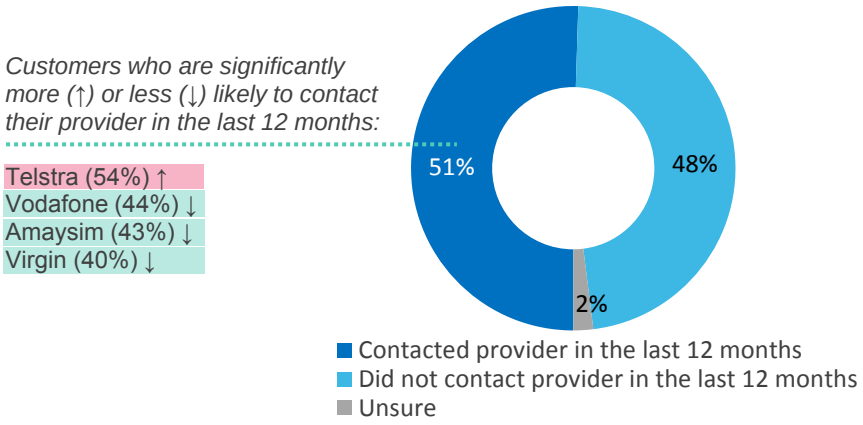
4. Overall experience of customer service.

4.1. Customers contacting their provider

As part of the screening process, all respondents were asked if they had contacted their provider in the last 12 months with a question or problem, with around half (51%) meeting the criterion. Routine contact to pay a bill or top up an account was excluded.

At the provider level, Telstra customers are significantly more likely to contact their provider at 54%, when compared to customers of all other providers. Vodafone (44%), Amaysim (43%), and Virgin (40%) customers are significantly less likely to contact their provider when compared to customers of all other providers.

Figure 4. Customers contacting their provider



Base: All respondents prior to screening out non-qualifiers (n=8,907)
A9. In the last 12 months, which of your providers have you contacted with questions or problems?
Please refer to Figure 41 in Appendix A for detailed results by provider

The remainder of the findings are based on customers who had contacted their provider in the last 12 months as those who hadn't were screened out.

4.2. Overall rating of customer service

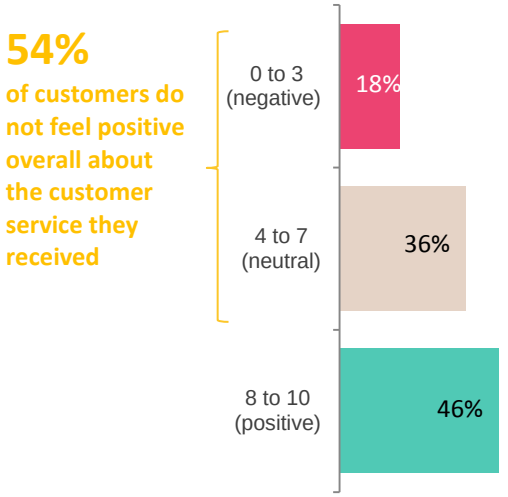
Just over half the customers (54%) are not positive about their overall customer service experience with their telecommunications provider - this is comprised of 18% who are negative, and 36% who are neutral about the service they experienced.

Those who feel negative about their overall experience (18%) spend longer trying to find a resolution to their question or problem (49.8 days versus 21 days for total), require more contacts with their provider (5.2 times versus 2.6 for total), are transferred 3.5 times when they phone their provider (versus 2.9 for total), are required to repeat their information 4.3

times (versus 3.7 for total), and are less likely to have their question or problem resolved during the first contact (8% versus 58% for total).

Positivity is higher amongst those whose query was resolved the first time they contacted their provider.

Figure 5. Overall rating of customer service



	Average time spent trying to resolve query (avg days)	*Average number of contacts*	*Resolved during first contact*	*Average number of transfers on phone*	*Average number of times required to repeat information to staff*
0 to 3 (negative)	49.8	5.2	8%	3.5	4.3
4 to 7 (neutral)	28.1	3.0	51%	2.5	3.4
8 to 10 (positive)	5.9	1.3	83%	1.6	1.9
Total	21.0	2.6	58%	2.9	3.7

Base: Total sample (n=1,347)
B43. Considering the interactions with your provider in relation to your question or problem, overall how would you rate the experience, using a scale of 0 to 10 where 0 is 'Extremely negative' and 10 is 'Extremely positive'? [S/R]
Please refer to Figure 42 in Appendix A for detailed results by provider

4.3. Specific elements of customer service.

This section outlines respondents' experiences of various customer service elements.

Figure 6 shows the mean (average) scores that illustrate the degree to which respondents feel the statements reflect their most recent customer service experience. Taking all providers together, customers are most critical of the following: their provider keeping them proactively informed (6.3), their problem being addressed in a timely manner (6.5), their provider adhering to timeframes (6.6), and the knowledge of staff (6.6).

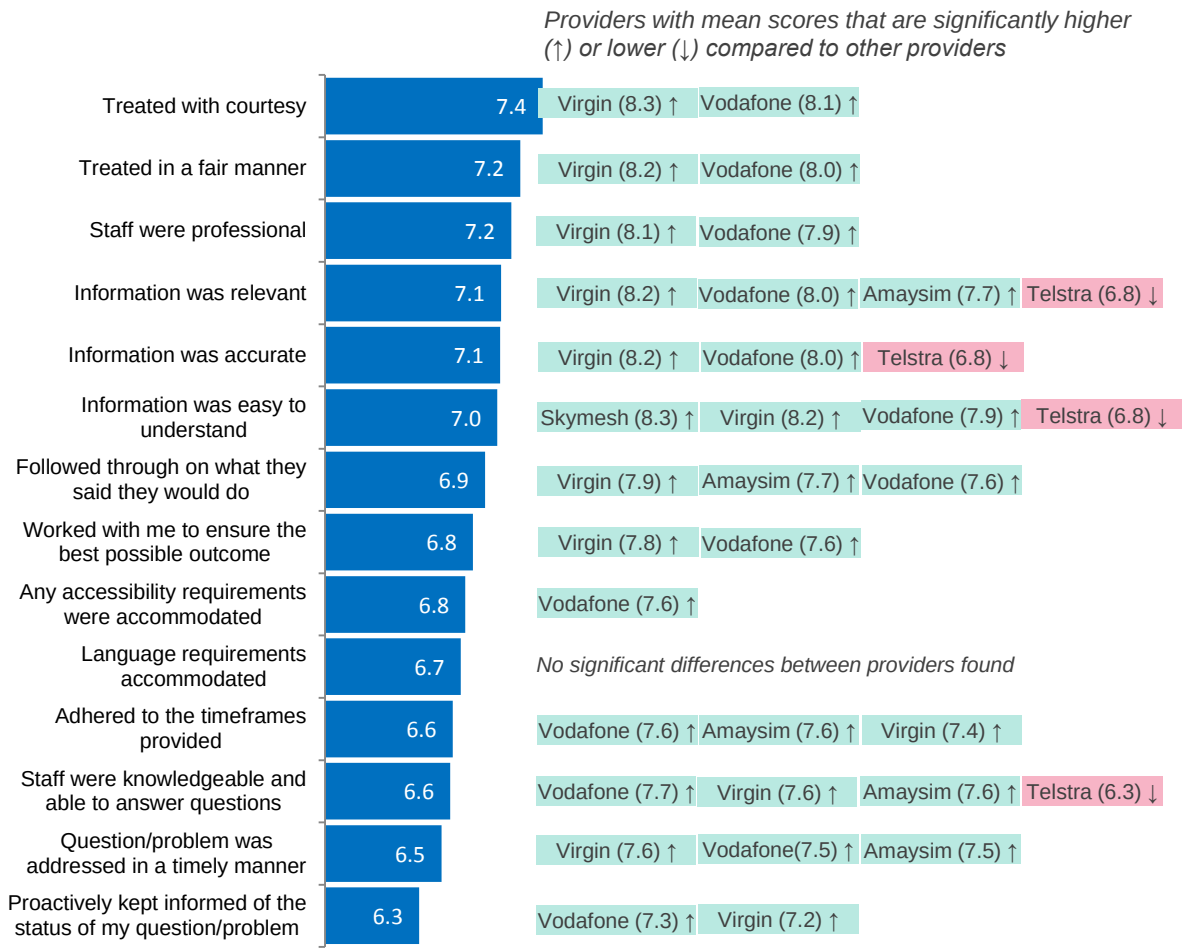
Results vary between providers. Virgin and Vodafone customers are significantly more likely to score their providers more positively across most customer service elements when compared to customers of all other providers. Telstra customers scored their provider significantly lower in knowledge of staff (6.3), the relevancy and accuracy of information

(both at 6.8), and the ease of understanding the information provided (6.8), when compared with customers of all other providers.

Respondents who spoke to a customer representative in person/in-store or those whose query was resolved during their first contact with their provider, are far more likely to positively score their provider across most statements.

Certain groups of customers are more likely to score their provider negatively across most of the customer service elements tested. These include those who made initial contact with their provider via phone, those whose question or problem was not resolved during the first contact, those who escalated their query with their provider or lodged a formal complaint with their provider or the TIO, and those customers who have difficulty reading or understanding written material.

Figure 6. Specific elements of customer service (average scores out of 10)



Base: Total sample (n=1,347)
B42. Thinking about all the contact you had with your provider in relation to your problem or question, please indicate the extent to which each of the below is an accurate reflection of the customer service you received? For each please answer using a scale of 0 to 10 where 0 is 'Not at all accurate' and 10 is 'Extremely accurate'. You can also state that this aspect was not relevant to your question / problem.
Please refer to Figure 43, Figure 44 and Figure 45 in Appendix A for detailed results by provider

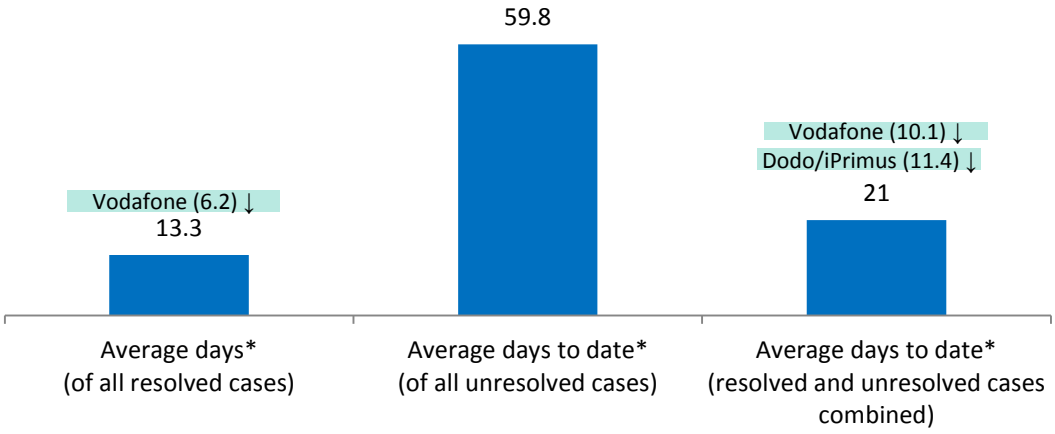
4.4. Overall time spent

For all resolved queries, customers report that it has taken an average of 13.3 days from the first contact with their provider through to resolution. Vodafone customers have a significantly shorter resolution process (6.2 days on average for resolved cases) when compared to customers of all other providers. In addition to taking 13.3 days to resolve a case, it takes 1.9 contacts (on average) and 3 transfers on the phone until a resolution is found.

On the other hand, customers with unresolved issues report spending four times longer than the average resolved case, at 59.8 days to date, which is equivalent to almost 2 months. These customers also contact their provider 5.6 times on average and are transferred 2.7 times on the phone to date.

Combining both resolved and unresolved cases, customers spend an average of 21 days trying to resolve their query with their provider. At the provider level, Vodafone and Dodo/iPrimus customers spend significantly less time resolving their query (10.1 and 11.4 days respectively) when compared to customers of other providers. In addition, customers with resolved and unresolved cases (combined) contact their provider 2.6 times and are transferred on the phone 2.9 times to date.

Figure 7. Overall time spent (average days)



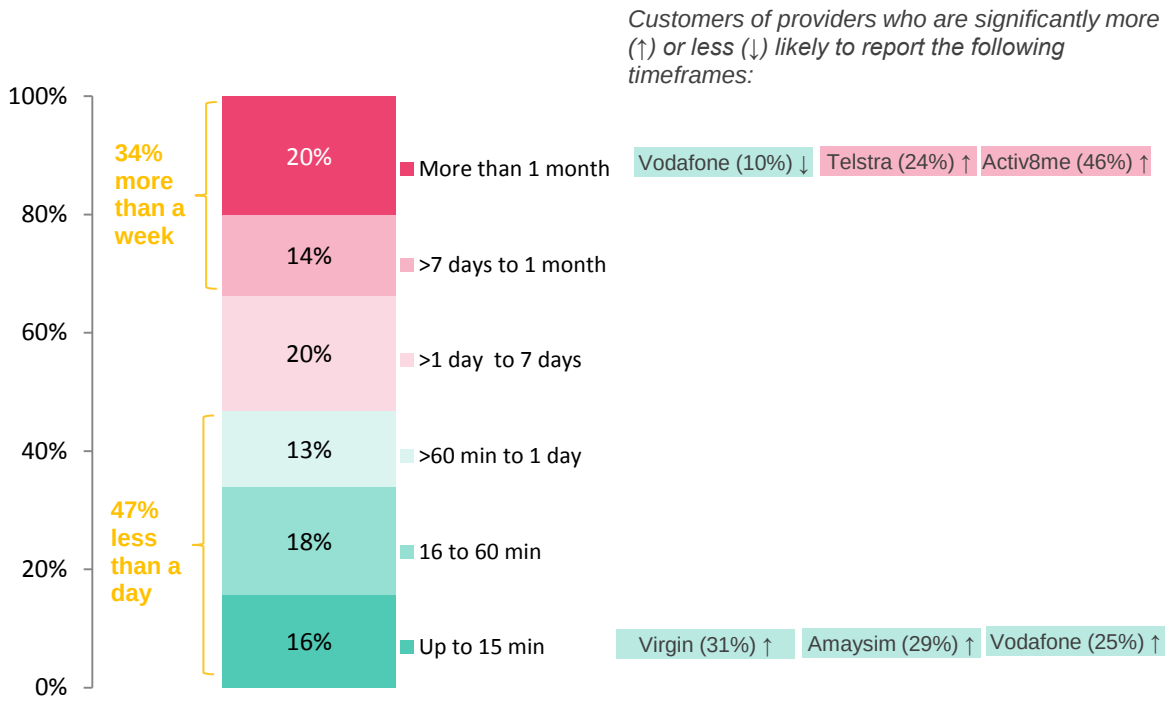
	Average days* (of all resolved cases)	Average days to date* (of all unresolved cases)	Average days to date* (resolved and unresolved cases combined)
Average number of contacts	1.9	5.6	2.6
Average number of transfers on phone	3.0	2.7	2.9

*Base: Total sample (n=1,347) *Outliers removed*
B39. Approximately how long have you spent trying to resolve this question/problem since it first started? If it is ongoing, how long has it been to date?
Please refer to Figure 46 in Appendix A for detailed results by provider

Nearly half (47%) of customers (resolved and unresolved cases combined) indicate they have spent one day or less trying to resolve their query, one in five (20%) have spent between one day and one week, whilst one in three (34%) report that the process has taken over a week. Virgin (31%), Amaysim (29%), and Vodafone (25%) customers are more likely to only spend up to 15 minutes resolving their query when compared to customers of all

other providers. Activ8me (46%) and Telstra (24%) customers are significantly more likely to spend more than a month trying to resolve their query, when compared to customers of other providers. This is less likely for Vodafone customers at 10% when compared to customers of other providers.

Figure 8. Overall time spent (resolved and unresolved cases combined)



Base: Total sample (n=1,347). Outliers removed.
B39. Approximately how long have you spent trying to resolve this question/problem since it first started? If it is ongoing, how long has it been to date?
Please refer to Figure 46 in Appendix A for detailed results by provider

5. Method of contact.

5.1. Types of query

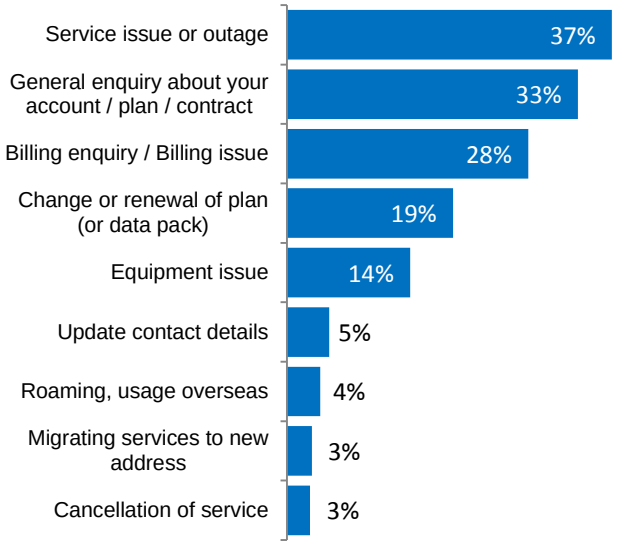
When asked about the reason for the most recent interaction with their provider, most customers report having a service issue/outage (37%), a general enquiry (33%) or a billing issue (28%).

The customer service experience varies quite substantially depending on the type of query. Customers typically spend fewer days trying to change or renew a plan (10.4 days versus 21 days for total) or update their contact details (11.3 days).

Customers are significantly more likely to require more contacts with their provider if their query was related to an equipment issue (4.2 times versus 2.6 for total) or a service issue/outage (3.8 times). Conversely, the number of contacts is significantly less for customers who need to change or renew their plan (1.7 times versus 2.6 for total), update their contact details (1.7 times) or those who have a general enquiry about their account/plan/contract (1.9 times).

The results also vary by provider; please refer to Figure 47 in Appendix A for detailed results.

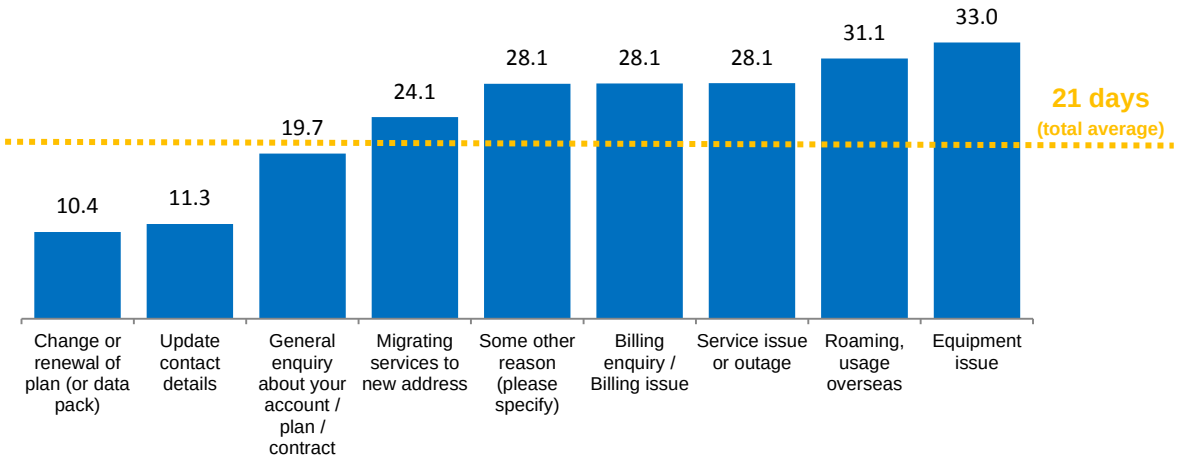
Figure 9. Types of query



	Average time spent trying to resolve query (avg days)	*Average number of contacts*	*Average number of transfers on phone*
Service issue or outage	28.1	3.8↑	3.1
General enquiry about your account / plan / contract	19.7	1.9↓	2.5
Billing enquiry / Billing issue	28.1	2.9	3.0
Change or renewal of plan (or data pack)	10.4↓	1.7↓	2.3
Equipment issue	33.0	4.2↑	2.6
Update contact details	11.3↓	1.7↓	2.6
Roaming, usage overseas	31.1	2.8	3.0
Migrating services to new address	24.1	2.5	4.0
Cancellation of service	34.0	4.4	4.1
Total	**21.0**	**2.6**	**2.9**

Base: Total sample (n=1,347); first person spoken to on phone unable to answer question (n=216). Outliers removed.
NB: Figures may be proportionally higher/lower than the average but are not significantly different due to small base sizes
B1. Thinking about the most recent question or problem you contacted [PROVIDER] about, which of the following options best describe what the question or problem was?
Please refer to Figure 47 in Appendix A for detailed results by provider

Figure 10. Types of query and average time spent trying to resolve query (average days)



Base: Total sample (n=1,347). Outliers removed.
B1. Thinking about the most recent question or problem you contacted [PROVIDER] about, which of the following options best describe what the question or problem was?
B39. Approximately how long have you spent trying to resolve this question/problem since it first started? If it is ongoing, how long has it been to date?

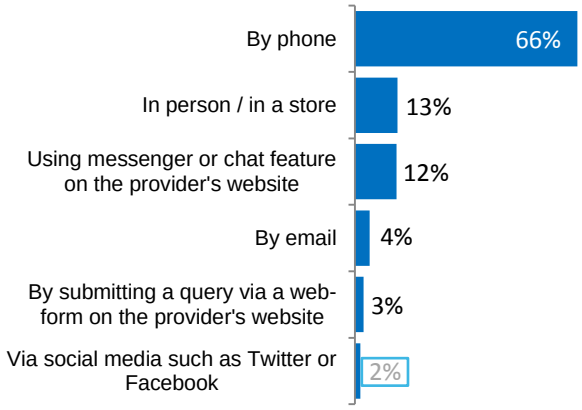
5.2. Method of initial contact

Phoning is the most popular way to first contact their provider for two in three (66%) customers. One in ten customers choose to contact their provider in person (13%) or chat on the website (12%). A smaller proportion of customers choose email (4%), query via web-form (3%), or social media (2%). There are no significant demographic differences evident.

Consumers have substantially different customer service experiences depending on the method of initial contact used. Visiting a store in person is a more effective and efficient way of resolving a query as those who selected this channel spend significantly fewer days communicating with their provider (8 days versus 21 days for total), and require fewer contacts (1.6 times versus 2.6 for total).

The results also vary at the provider level; please refer to Figure 48 in Appendix A for detailed results by provider.

Figure 11. Method of initial contact



	Average time spent trying to resolve query (avg days)	*Average number of contacts*	*% resolved*	*% resolved during first contact*
By phone	23.3	2.7	81%	55%
In person / in a store	8.0↓	1.6↓	87%	74%
Using messenger or chat feature on the provider's website	19.6	2.5	83%	60%
By email	30.1	4.4	60%	55%
By submitting a query via a web-form on the provider's website	20.6	2.1	85%	61%
Via social media such as Twitter or Facebook	*15.5*	*1.8*	*82%*	*61%*
Total	**21.0**	**2.6**	**81%**	**58%**

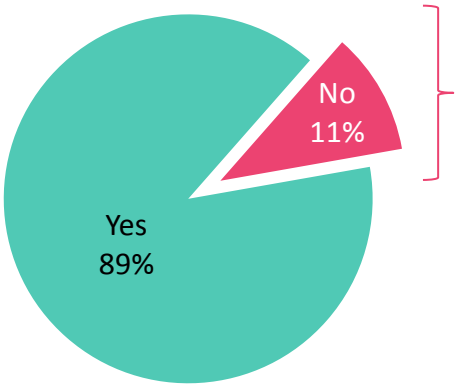
Base: Total sample (n=1,347)
NB sample for 'posting a letter' not shown as base size is n=1. Please note small sample size(s) highlighted in blue and italicised font – results are less than n=30 and should be interpreted with caution.
B2. How did you initially contact your provider about this question or problem?
Please refer to Figure 48 in Appendix A for detailed results by provider

5.2.1. Preferred method of initial contact

The majority (89%) of customers used their preferred method of communication, however one in ten (11%) indicated they did not use their preferred channel. When probed further, this minority group suggested that email (26%), phone contact (23%) or chat feature on website (20%) would have been preferable.

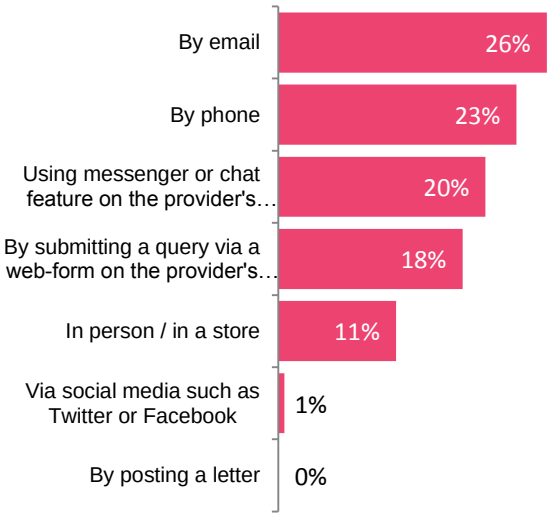
The results vary marginally at the provider level; please refer to Figure 49 and Figure 50 in Appendix A for detailed results.

Figure 12. Was this your preferred method of contact?



Base: Total sample (n=1,347)
B3. Was this your preferred method of communication?
Please refer to Figure 49 and Figure 50 in Appendix A for detailed results by provider

Figure 13. Preferred method of initial contact

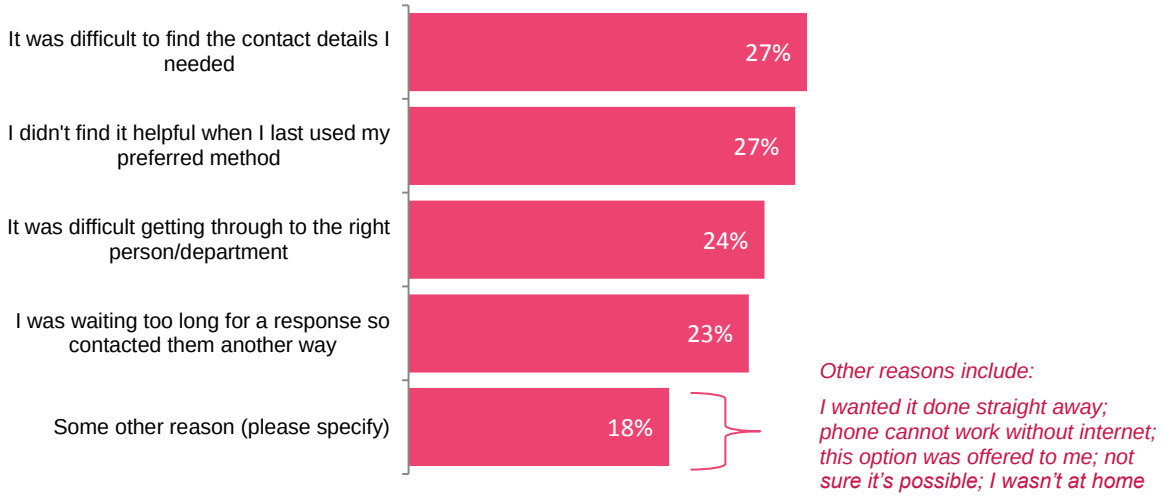


Base: Did not use preferred method of communication in initial contact (n=145)
B4. What would your preferred method have been?

Reasons for not using preferred method

Amongst the customers who did not use their preferred channel of communication, a variety of barriers were identified. One in four (27%) indicate that it was difficult to find the necessary contact details, it wasn't helpful the last time it was used (27%), it was difficult getting through to the right person (24%), or it took too long for a response on a previous occasion so they opted for another method (23%).

Figure 14. Reasons for not using preferred method

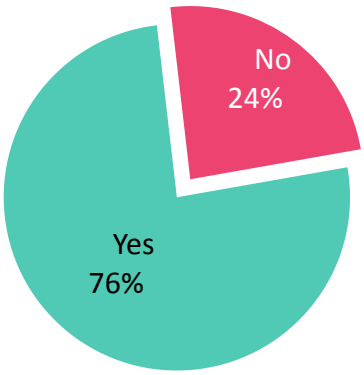


Base: Did not use preferred method of communication in initial contact (n=145)
B5. Why didn't you contact your provider using your preferred method? [M/R]
Please refer to Figure 51 in Appendix A for detailed results by provider

5.2.2. Preferred method of subsequent contact

Of all the customers whose query was not resolved at the time of the survey, or who required subsequent contact before a resolution was found, three in four (76%) state that they were able to use their preferred method when re-contacting their provider. This leaves one in four (24%) using a communication channel that is not preferred. This group is proportionally larger than those who were not able to use their preferred method during their initial contact (24% versus 11%).

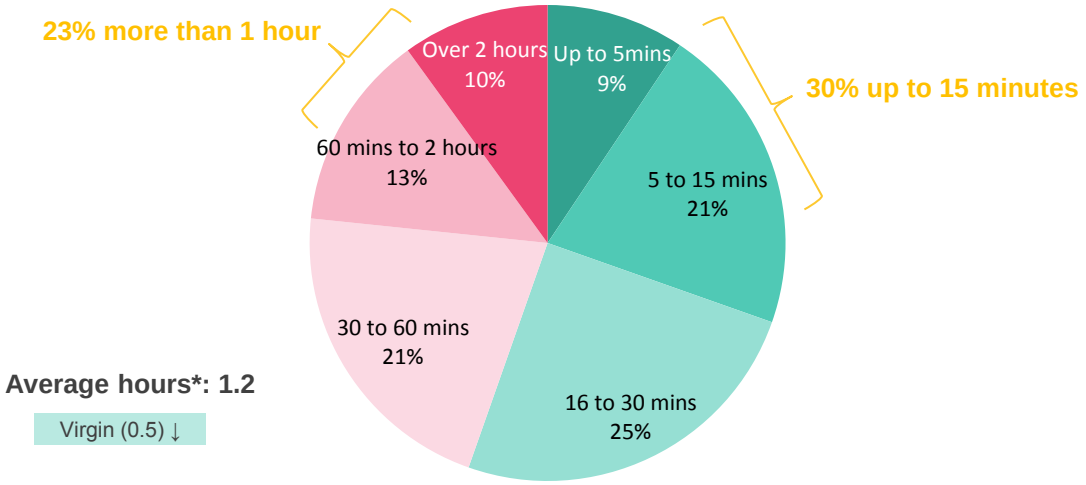
Figure 15. Ability to use preferred method of communication for subsequent contact



Base: Query resolved but required further contact or query unresolved/ongoing (n=497)
B28. Were you able to use your preferred method of communication for all subsequent contact with your provider?
Please refer to Figure 52 in Appendix A for detailed results by provider

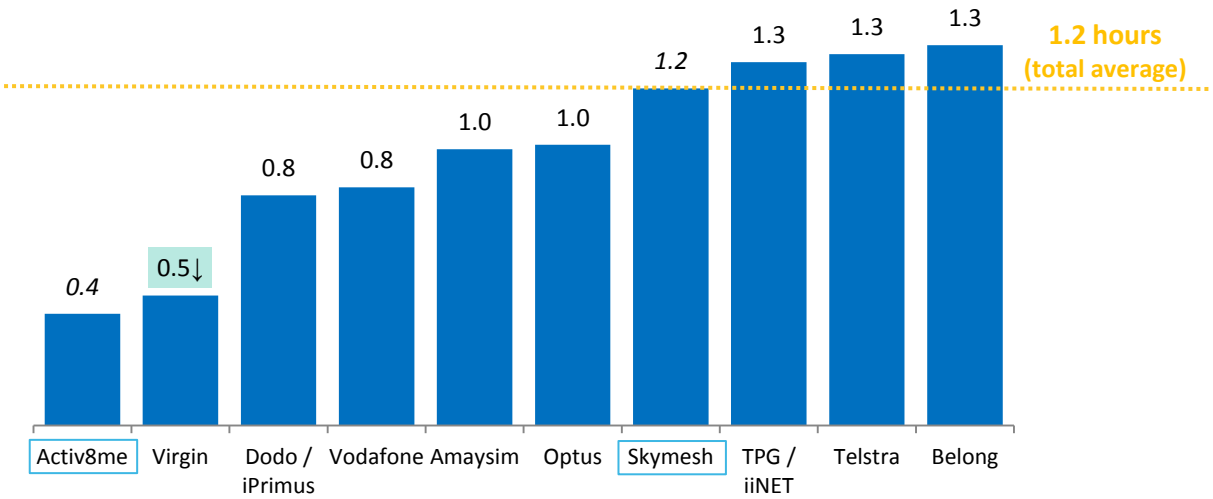
On average, a customer totals 1.2 hours, over one or more phone calls, before reaching the correct person or department. One in three (30%) customers have spent up to 15 minutes, however, one in five (23%) have spent over an hour on the phone in total, before being connected to the correct person/department. Virgin customers spend significantly less time (0.5 hours on average) before connecting to the right person or department when compared to customers of all other providers. Please refer to Figure 53 and Figure 54 in Appendix A for detailed results by provider.

Figure 16. Time spent from first call to being connected to the right person or department



Base: Spoke to someone on phone (n=862) Outliers removed
B16.How much time did you spend on the phone from the time you first called the provider until you were connected to the right person / department? This includes any time spent selecting automated options, being on hold, being transferred, etc. but does not include time between separate calls. IF CODE 1 @ B9 (RECEIVED CALL BACK): Include the time on your initial call when you requested the call back, as well as the call back itself. Please refer to Figure 55 in Appendix A for detailed results by provider

Figure 17. Time spent from first call to being connected to the right person or department (hours) by provider



Base: Spoke to someone on phone (n=862). Outliers removed
NB: Please note small sample size(s) highlighted in blue – results are less than n=30 and should be interpreted with caution.
B16.How much time did you spend on the phone from the time you first called the provider until you were connected to the right person / department? This includes any time spent selecting automated options, being on hold, being transferred, etc. but does not include time between separate calls. IF CODE 1 @ B9 (RECEIVED CALL BACK): Include the time on your initial call when you requested the call back, as well as the call back itself.
Please refer to Figure 55 in Appendix A for detailed results by provider

6. Wait and response times.

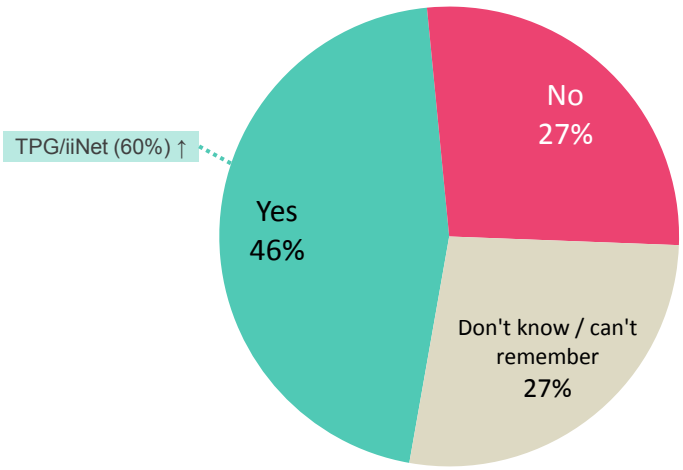
6.1. Contacting providers by phone

6.1.1. Provision of wait time

Of all customers who contacted their provider by phone, less than half (46%) were told the average wait time to be connected with someone to speak to. Around one in four (27%) did not receive this information, and an equal proportion (27%) cannot remember.

Of all the providers, TPG/iiNet (60%) is significantly more likely to inform customers of wait times over the phone when compared to customers of all other providers.

Figure 18. Provision of wait time on phone



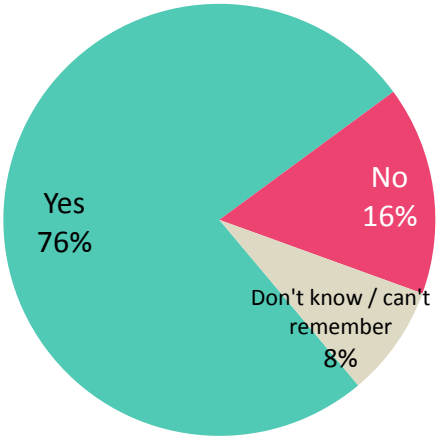
Base: Contacted provider via phone (n=871)
B6. Were you told what the average wait time was to speak to a customer service representative?
Please refer to Figure 56 in Appendix A for detailed results by provider

6.2. Contacting providers online, via email, social media, or post

6.2.1. Provision of response time

Amongst customers who contacted their provider through an online query, email, social media or by post, one in six (16%) report not being given information on when to expect a response. Three in four (76%) recall receiving this information.

Figure 19. Provision of response time

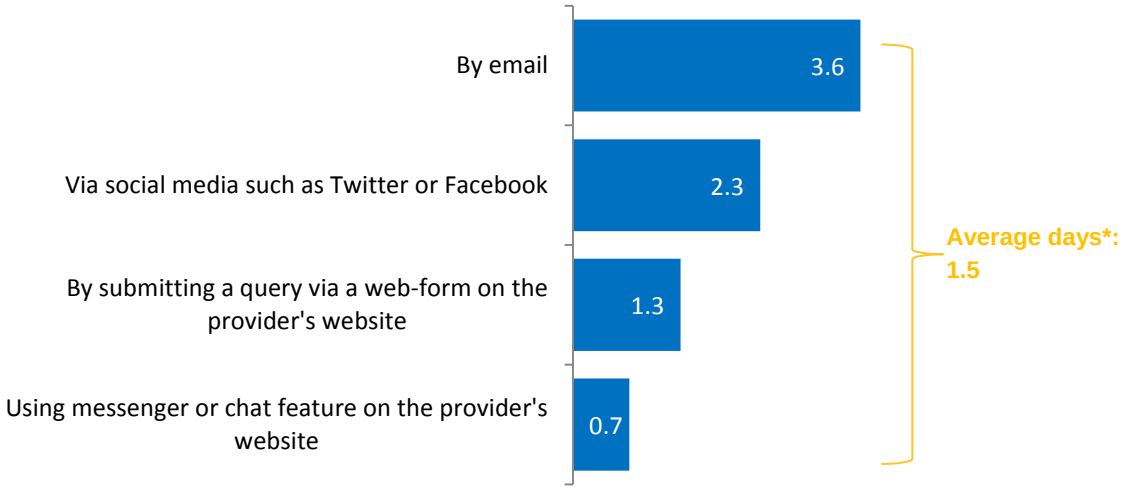


Base: Contacted provider by messenger/chat, web form, email, social media, or post (n=343)
B20. And when you made contact, were you told when you could expect to receive a response?
Please refer to Figure 57 in Appendix A for detailed results by provider

6.2.2. Average response time (days)

On average, it takes 1.5 days for a customer to receive a response after submitting their question or problem through an online query, email, social media, or by post. Email is the channel with the longest response time at 3.6 days, followed by social media (2.3 days) and submitting a query via web-form (1.3 days). Messenger/online chat receives the quickest response time at 0.7 days versus 1.5 for total.

Figure 20. Average response time (days)



Base: Contacted provider by messenger/chat, web form, email, social media or post as per earlier base (n= 340)*
**Outliers removed. NB: Post has been excluded as base size is too small (n=1).*
B21. And after submitting your question or problem, and not including any automated acknowledgments, how long did you actually wait to receive a response?
Please refer to Figure 58 in Appendix A for detailed results by provider

7. Call backs.

7.1. Call backs offered

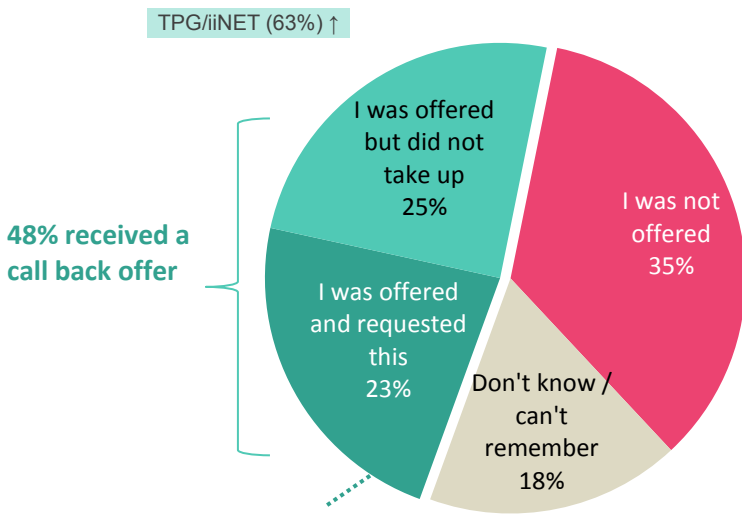
Providers may offer their customers the option of receiving a telephone ‘call back’ instead of waiting on hold to speak to a customer service representative. The call back feature was offered to almost half (48%) of customers who contacted their provider by phone. About one in four (23%) accepted this offer and a similar proportion (25%) did not. Every third caller (35%) wasn’t offered a call back at all. The remaining 18% of customers can’t recall whether or not this option was available.

Amongst the ten providers, TPG/iiNet (63%) is significantly more likely to offer the call back feature when compared to the other providers. Additionally, TPG/iiNet customers are more likely to accept this offer at 40% when compared to customers of all other providers.

There are no significant demographic differences evident.

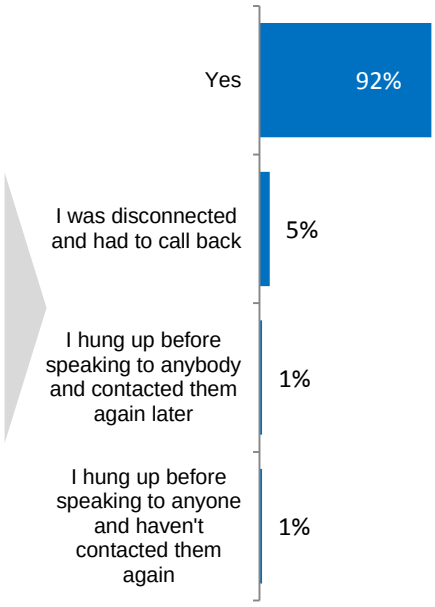
Of all the customers who declined the call back offer or were not offered this feature, nine in ten (92%) decided to stay on the phone. A small proportion of customers report being disconnected and having to call back (5%), having hung up and called back later (1%), or decided to not pursue the call (1%).

Figure 21. Call backs offered



Base: Contacted provider by phone (n=871):
B7. Were you offered an option to receive a call back? And if so, did you take up this option? (Some providers offer to phone customers back instead of waiting on hold).
Please refer to Figure 60 and Figure 61 in Appendix A for detailed results by provider

Figure 22. Decision to stay on phone



Base: Did not select call back option on phone or was not offered option (n=652)
B12. Did you stay on the call you made until you spoke to a person?

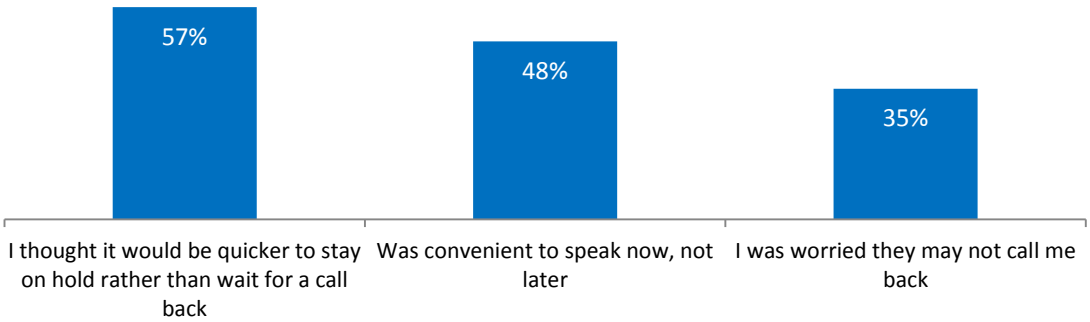
7.2. Reasons for not choosing a call back

There are several reasons that motivate customers to not accept the call back offer. The main reason is the belief that it would be quicker to stay on hold rather than wait for a call back (57%).

Every second customer (48%) in this group was driven by convenience – 'it was convenient to speak now, not later' - whilst one in three (35%) were worried they would not receive a call back.

The results are varied amongst the ten providers; please refer to Figure 62 in Appendix A for detailed results.

Figure 23. Reasons for not choosing call back option



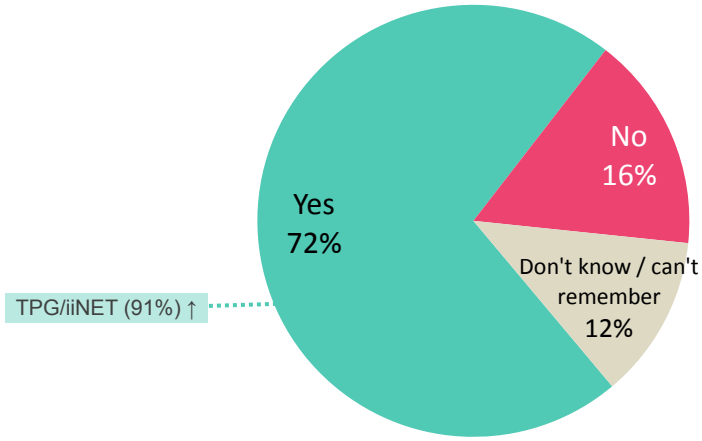
Base: Offered call back option but did not select (n=185)
B11. Why did you choose not to take up the call back option when this was offered to you?
Please refer to Figure 62 in Appendix A for detailed results by provider

7.3. Provision of timeframe

Seven in ten (72%) customers who opted for the call back option via phone received information about when to expect a response. However, 16% claim to not have received this information after requesting the call back option, whilst the remaining 12% are uncertain whether they were informed of the timeframe or not.

As mentioned above, TPG/iiNet are significantly more likely to offer a call back feature to their customers. To the same effect, TPG/iiNet are also significantly more likely to provide information about response timeframes (91%) when compared to customers of all other providers.

Figure 24. Provision of timeframe



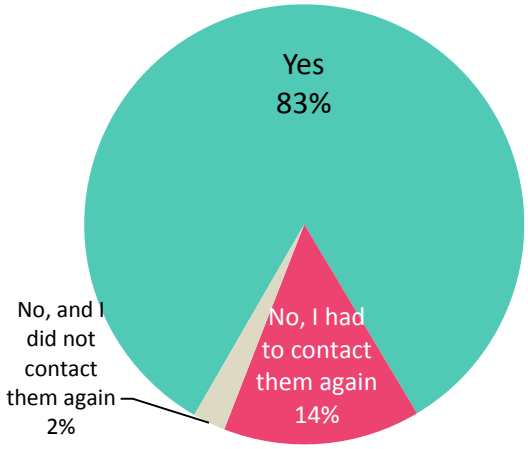
Base: Selected call back option (n=219)
B8. Were you given a timeframe for when this call back would happen?
Please refer to Figure 63 in Appendix A for detailed results by provider

7.4. Outcome following call back request

Of all the customers who requested a call back, eight in ten (83%) received a call back. This high proportion is also reflected across the individual providers. However, 17% of customers said they did not receive a response at all – this is made up of 14% who had to recontact the provider, and 2% who decided to stop pursuing the matter.

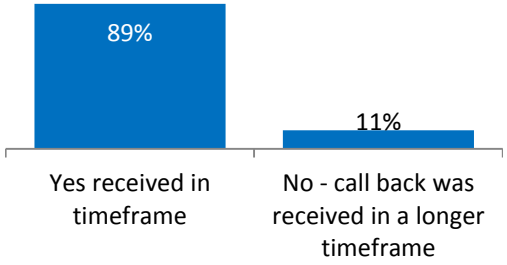
For the majority of customers who did receive a call back, nine in ten (89%) received the call within the advised timeframe.

Figure 25. Received call back



Base: Selected call back option on phone (n=219)
B9. And did you receive a call back?
Please refer to Figure 64 and Figure 65 in Appendix A for detailed results by provider

Figure 26. Received call back within timeframe



Base: Selected call back option on phone and received call back (n=149)
B10. Was this call back within the advised timeframe?

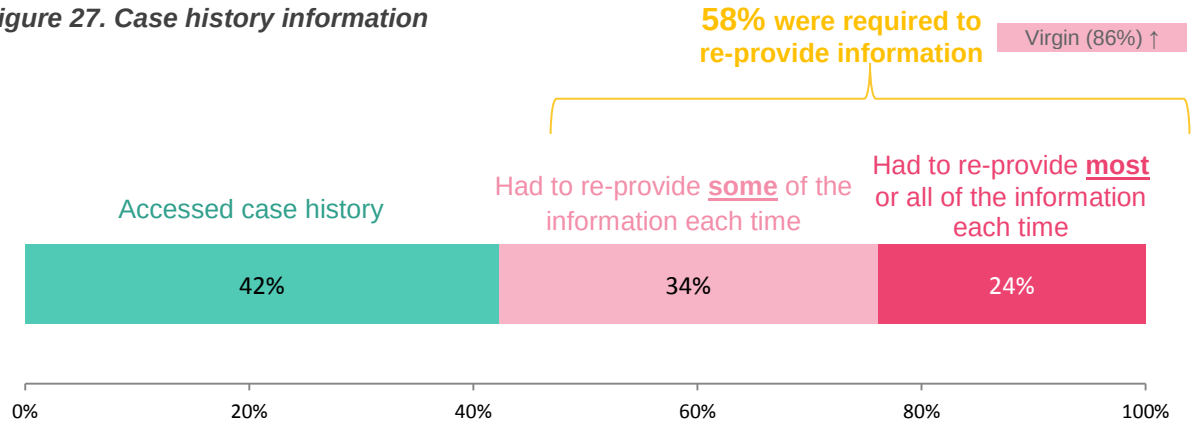
8. Record keeping.

8.1. Case history information

Amongst the customers who needed to speak to their provider on multiple occasions, over half (58%) reported that they needed to re-provide information about their case. This is comprised of 34% needing to re-provide *some* of the information each time and 24% having to re-provide *most or all* of the information each time. Around two in five (42%) report their provider had access to their case information.

Virgin customers were significantly more likely to have to re-provide some or all their case information each time, at 86% versus 58% for total, when compared to customers of all other providers.

Figure 27. Case history information

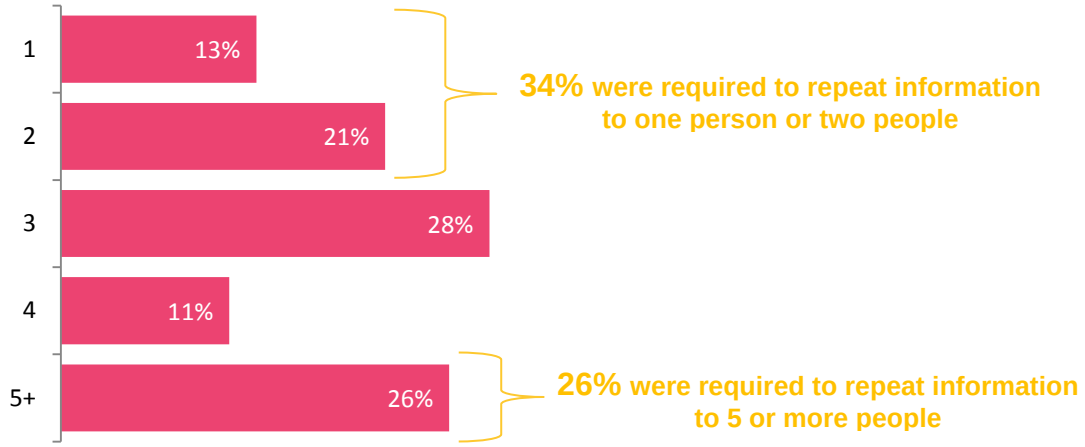


Base: Resolved but required communication on multiple occasions or issue unresolved (n=497)
B29. And each time you re-contacted your provider about this issue, was the person you were dealing with able to access the case history of your question / problem, or did you have to re-provide this information to them?
Please refer to Figure 66 in Appendix A for detailed results by provider

Number of times repetition of information was required

Amongst the 58% of customers who were required to re-provide information each time they spoke with their provider, they had to do this an average of3.7 times. One in three customers needed to re-provide information once (13%) or twice (21%), however one in four (26%) report re-providing information on more than five occasions.

Figure 28. Number of times repetition of information was required



Average (total): 3.7 people

Base: Had to re-provide information (n=280):Outliers removed.
B30. And how many people do you remember needing to repeat your question or problem to during this experience? If you can't remember the exact number, please provide your best estimate.
Please refer to Figure 67 in Appendix A for detailed results by provider

9. Resolution.

9.1. Resolved vs unresolved

Eight in ten (81%) customers report that their query was resolved at the time of survey. Vodafone customers are more likely to report that their query was resolved (89% versus 81% for total) when compared to customers of all other providers.

One in five (19%) customers had unresolved cases at the time of survey, with one in ten (10%) customers reporting that their query is still ongoing, and a similar proportion (8%) have chosen to stop pursuing their query. Customers with unresolved cases are significantly more likely to escalate their query to their provider or lodge a formal complaint with their provider and are also likely to report that their language requirements were not accommodated.

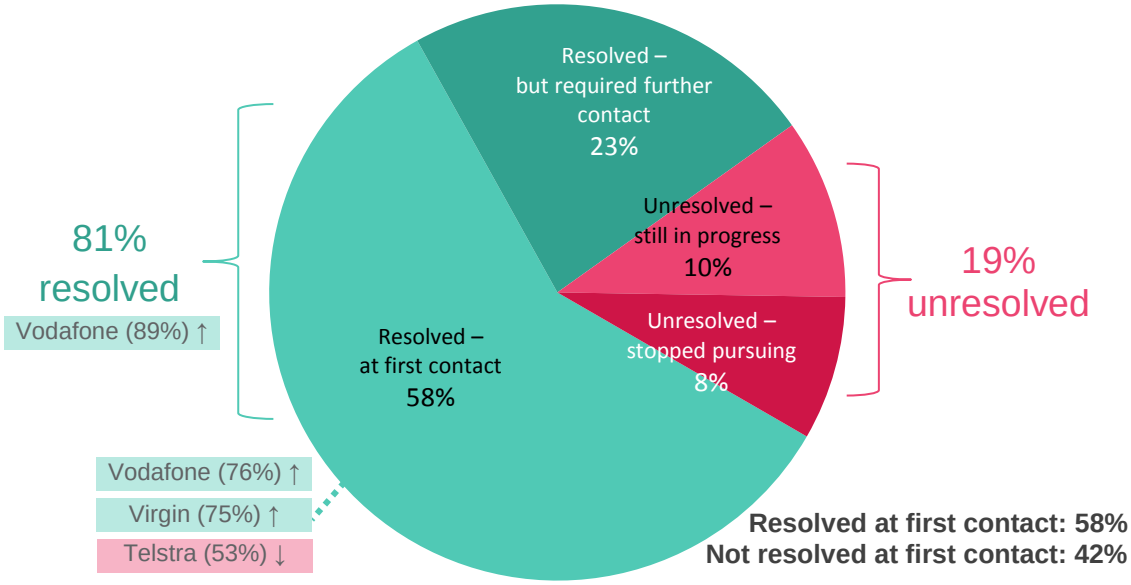
Those who have had their query resolved are more inclined to rate their provider's overall customer service positively.

9.2. First contact resolution

Two in five customers (42%) did not have their question or problem resolved during their first contact with their provider. The remaining 58% said that they did.

Amongst those whose case was resolved at the time of survey, 58% state the query was resolved during the first contact and 23% required further contact before a resolution was made. Vodafone (76%) and Virgin (75%) customers are significantly more likely to have their cases resolved during the first contact when compared to customers of all other providers. Conversely, Telstra (53%) customers are less likely to have their query resolved at the first contact when compared with customers of all other providers.

Figure 29. First contact resolution and subsequent follow-up



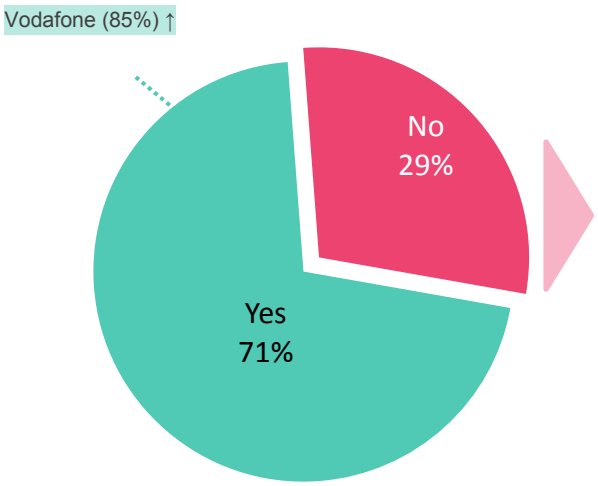
Base: Total sample (n=1,347)
B25. Has your question / problem been resolved?
B26. Was it resolved the first time you contacted your provider?
Please refer to Figure 68 in Appendix A for detailed results by provider

9.3. Resolution by phone and subsequent transfers

Seven in ten (71%) customers who chose to phone their provider report that the person they initially spoke with was able to deal with their query. Of all the providers, Vodafone (85% versus 71% for total) customer service representatives who first answer the phone are significantly more likely to resolve their customer's issue without having to transfer to another representative, and without requiring subsequent contact by the customer, when compared to customers of all other providers.

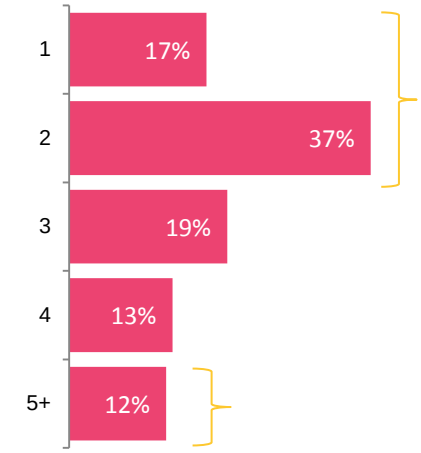
Amongst the one in three customers (29%) whose query was not dealt with by the person they initially spoke with, the average number of transfers that were needed before getting through to the right person or department is 2.9. Within this same group, over half (54%) suggest that they were transferred at least once (17%) or twice (37%) before reaching the correct person or department to help them with their query. One in ten (12%) customers report that they needed to be transferred more than 5 times to reach the correct person or department.

Figure 30. Ability of first person on the phone to deal with query



Base: Spoke to someone on phone (n=862)
B14. Was the person you initially spoke to able to deal with your question or problem?
Please refer to Figure 53 and Figure 54 in Appendix A for detailed results by provider

Figure 31. Number of subsequent transfers



Average number of transfers: 2.9

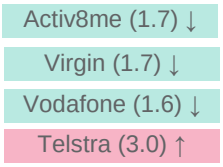
Base: First person spoken to unable to answer question (n=216) Outliers removed.
B15. How many times in total were you transferred to another person / department or had to call other numbers before you got through to someone who could help you? If you can't remember the exact number, please provide your best estimate.

9.4. Average number of contacts

Customers contact their provider 2.6 times on average when trying to find a resolution to their question or problem. Telstra customers are significantly more likely to require more contacts than other customers, at 3 times on average. On the contrary, customers of Activ8me (1.7 times), Virgin (1.7 times), and Vodafone (1.6 times) require significantly fewer contacts with their provider when compared to customers of all other providers.

Figure 32. Average number of contacts (including queries resolved during first contact)

Average number of contacts: 2.6



Base: Total sample (n=1,347). Outliers removed.
B26. Was it resolved the first time you contacted your provider?
B27. Not including your initial contact, how many times have you subsequently contacted your provider about this issue? If you can't remember the exact number, please provide your best estimate
Please refer to Figure 69 in Appendix A for detailed results by provider

10. Complaints handling.

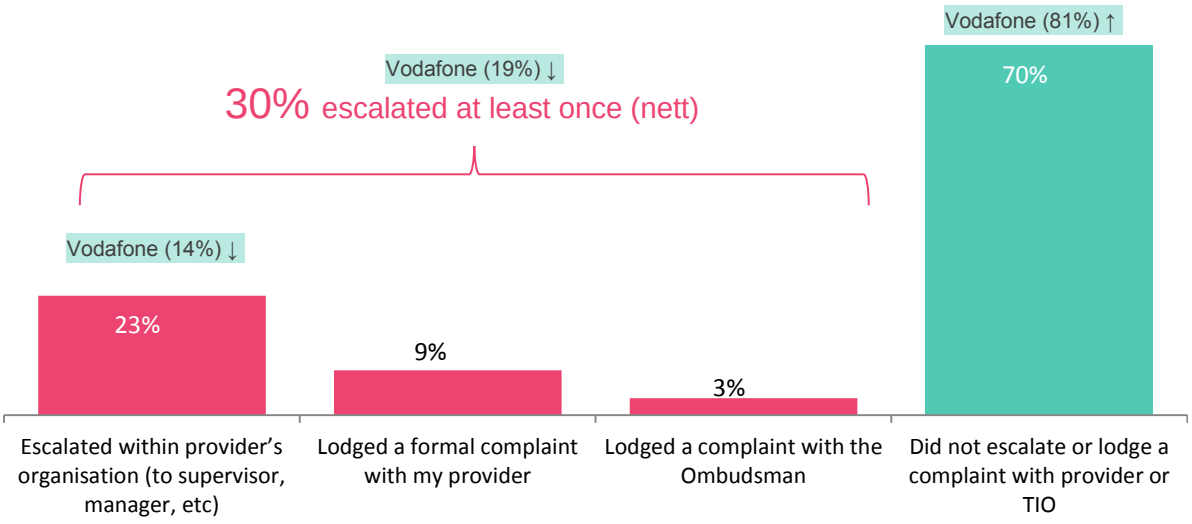
10.1. Escalation of query

Three in ten (30%) customers report escalating their query in at least one form. This includes escalating with their provider (23%) (eg. asking to speak with a manager), by lodging a formal complaint with their provider (9%) or lodging a complaint with the TIO (3%).

Of all the providers, Vodafone customers (19% nett) are least likely to escalate their query or lodge a complaint when compared to customers of all other providers. Those who had to recontact their provider on 5 or more occasions are far more likely to raise a complaint with the TIO (18% versus 3% for total).

There are sub-groups who are more likely to escalate their query in at least one form and this is heightened amongst customers who initially contacted their provider via phone, younger adults (age 18 to 29), those whose language requirements were not accommodated, and those who were required to contact their provider on more than 5 occasions.

Figure 33. Escalation of query



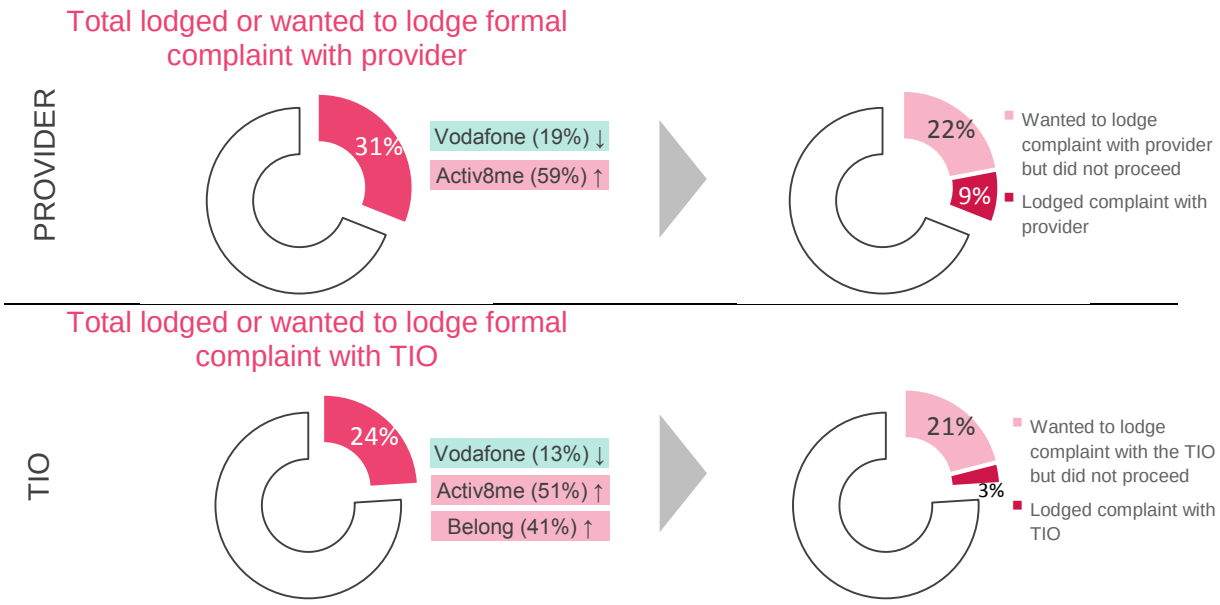
Base: Total sample (n=1,347)
B31. Did you at any time ask that your question / problem be escalated, or did you lodge a formal complaint, either with your provider or with the Ombudsman (TIO - Telecommunications Industry Ombudsman)? [M/R]
Please refer to Figure 70 in Appendix A for detailed results by provider

There are a number of customers who have thought of lodging a complaint and have either gone ahead with lodging the complaint or decided not to for various reasons. Three in ten (31%) customers have lodged or wanted to lodge a formal complaint with their provider, with 22% deciding not to go ahead with the formal complaint. Activ8me customers are significantly more likely to lodge or want to lodge a complaint with their provider (59% versus 31% for total) when compared to customers of all other providers. Vodafone customers are

significantly less likely to lodge or want to lodge a formal complaint with their provider (19% versus 31% for total).

A similar proportion (24%) lodged or wanted to lodge a formal complaint with the TIO, with 21% deciding not to go ahead with the formal complaint. Activ8me (51%) and Belong customers (41%) are more likely to lodge or want to lodge a complaint with the TIO (versus 24% for total) when compared to customers of all other providers. Vodafone customers are significantly less likely to lodge or want to lodge a formal complaint with the TIO (13% versus 24% for total).

Figure 34. Total proportion of customers who lodged complaint to provider or TIO and/or those who wanted to lodge complaint but chose not to



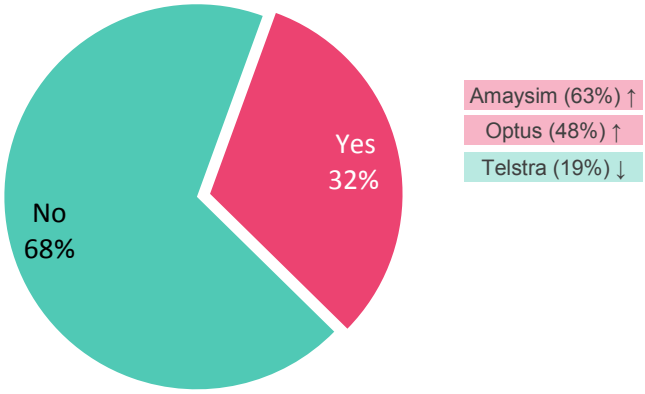
Base: Total sample (n=1,347)
B31. Did you at any time ask that your question / problem be escalated, or did you lodge a formal complaint, either with your provider or with the Ombudsman (TIO - Telecommunications Industry Ombudsman)? [M/R]
B32. At any stage did you want to lodge a formal complaint with your provider about this question / problem, but didn't? [S/R]
B36. At any stage did you want to lodge a formal complaint with the Ombudsman (TIO - Telecommunications Industry Ombudsman) about this issue, but didn't? The TIO provides an independent dispute resolution service for phone and internet complaints. [S/R]
Please refer to Figure 71 in Appendix A for detailed results by provider

10.2. Discouraging TIO contact

Amongst those who have escalated their query with their provider or lodged a formal complaint with either the provider or TIO, nearly one in three (32%) say their provider discouraged them from taking the matter to the TIO.

Amaysim (63%) and Optus (48%) customers are more likely to report they were discouraged, whilst Telstra (19%) customers are less likely to report discrouragement when compared to customers of all other providers. The current survey did not ask respondents to elaborate on *how* their provider discouraged them. This is an area for future research,

Figure 35. Discouraging TIO contact



Base: Escalated query within provider's organisation or lodged formal complaint (provider or TIO) (n=372)
B38. At any time during your dealings with your provider did it feel like they discouraged you from contacting the TIO? [S/R]
Please refer to Figure 72 in Appendix A for detailed results by provider

10.3. Finding complaint process information

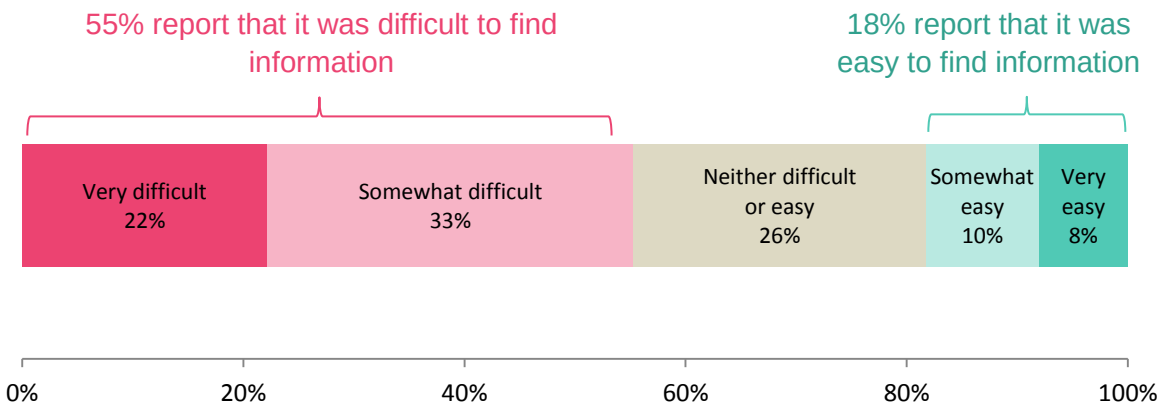
Finding information from the provider on how to lodge a formal complaint with them

Of customers who did, or wanted to, lodge a formal complaint with their provider, over half (55%) reported that it was difficult to find information on how to do this. This is three times more than those who found the information easily (18%). The remaining 26% were neutral.

The high proportion of customers who found it difficult to find information is reflected across most of the providers (none of the differences between providers are significant). Please refer to Figure 73 in Appendix A for detailed results.

Customers who did not feel their language requirements were accommodated were more likely to report difficulty in finding information on how to lodge a complaint.

Figure 36. Accessibility of information regarding lodging formal complaint with provider



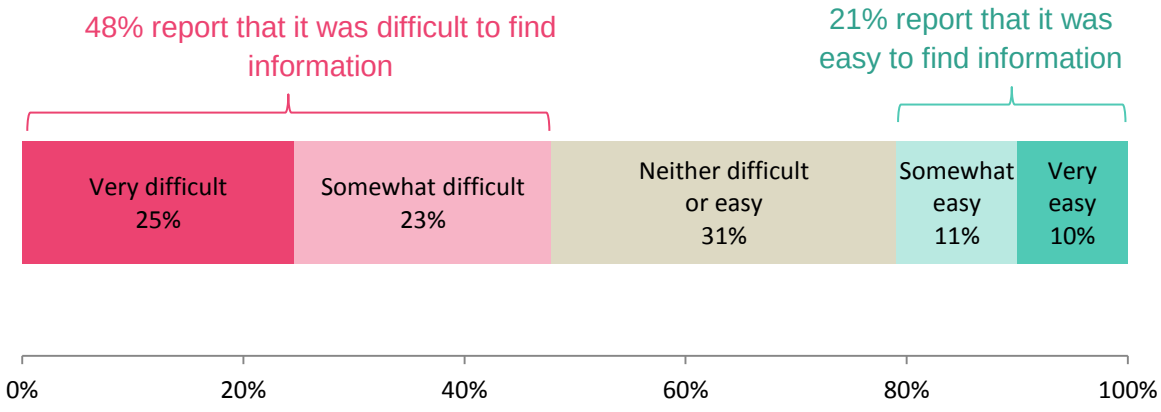
Base: Lodged formal complaint with provider or wanted to. Excludes not applicable (n=378).
B33. And how easy or difficult was it to find the information you needed about how to make a formal complaint to your provider? [S/R]
Please refer to Figure 73 in Appendix A for detailed results by provider

Finding information from the provider on how to lodge a complaint with the TIO

Amongst those who lodged a formal complaint with the TIO, or wanted to but chose not to, nearly half (48%) claim that finding information about how to do so was difficult. A further one in five (21%) found information easily, whilst the remaining 31% felt neutral. These are similar figures to those above.

The high proportion of customers who found it difficult to find information about the complaints process is reflected across most of the providers. Please refer to Figure 74 in Appendix A for detailed results.

Figure 37. Accessibility of information regarding lodging formal complaint with TIO

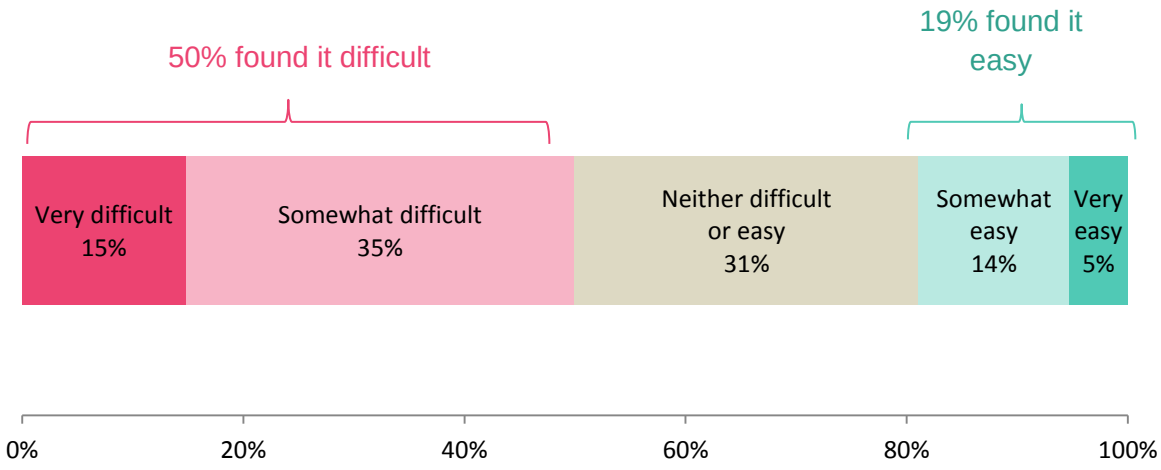


Base: Lodged formal complaint with TIO or wanted to. Excludes not applicable (n=299).
B37. And how easy or difficult was it to find information from your provider about how to make a complaint with the Ombudsman (TIO - Telecommunications Industry Ombudsman)? [S/R]
Please refer to Figure 74 in Appendix A for detailed results by provider

10.4. Perceived level of difficulty to raise complaint

Amongst those who have lodged a formal complaint with their provider, when asked about how difficult or easy the process was, every second (50%) customer felt it was difficult. A further 19% said it was easy and 31% felt neutral about the experience.

Figure 38. Perceived level of difficulty to raise complaint

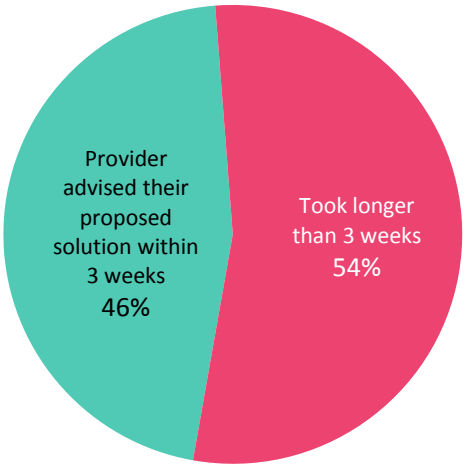


Base: Lodged formal complaint with provider (n=117)
B34. And how easy or difficult was it to actually make the formal complaint to your provider? [S/R]
Please refer to Figure 75 in Appendix A for detailed results by provider

10.5. Timing of proposed solution

As a mandatory requirement, providers must propose a solution within three weeks of receiving a formal complaint. Amongst those who have made a formal complaint with their provider, nearly half (46%) said they received a proposed solution within this mandatory period. This leaves the remaining half (54%) waiting more than three weeks for a proposed solution.

Figure 39.Timing of proposed solution



Base: Lodged formal complaint with provider (n=117)
B35. Providers must propose a solution to your complaint within 3 weeks. Did this happen for you? [S/R]
Please refer to Figure 76 in Appendix A for detailed results by provider

11. Key areas for improvement.

Customers were asked at the end of the survey to identify one key area that could be improved by their provider to enhance customer service. Two in three customers (66%) provided a suggested improvement and the results have been grouped (coded) and ranked in Figure 40 below.

The main themes that resonated throughout the comments are improving customer service/communication/attitude of staff (42%), timeliness (19%); cost issues (5%), and technology working as it should (2%).

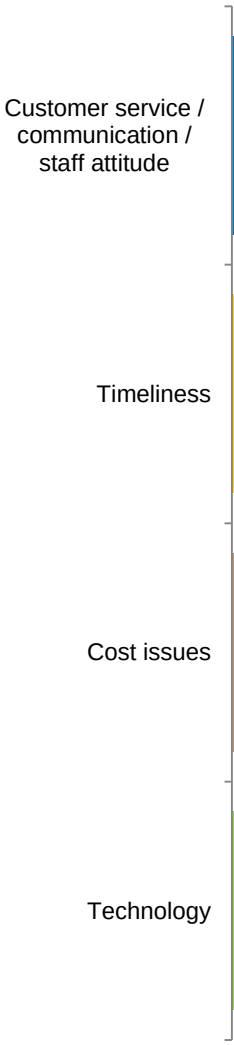
Customer service / communication / attitude of staff (42%) made up the largest proportion, with around one in five (18%) customers stating that language skills required improvement (and this also includes moving call centres to Australia). Telstra customers are significantly more likely to suggest this (24% versus 18% for total), whilst Amaysim (5%) customers are less likely to make this suggestion when compared to customers of all other providers. Other customer service improvements suggested include: improve staff knowledge (6%), proactive and honest communication by staff (4%), and improve customer service in general (4%).

The second largest theme related to timeliness (19%). This is comprised of improving wait times via provision of wait time information or to increase staffing (11%) - Vodafone customers are more likely to suggest this (20% versus 11% for total) when compared to customers of all other providers.

Cost-related issues represent 5% of the results. This includes provision of lower charges and better deals, as suggested by 4% of customers. Telstra customers were more likely to suggest this, at 6%, when compared to customers of all other providers.

The final key theme related to technology with 2% wanting the equipment and services provided to work as they are supposed to.

Figure 40. Key areas for improvement (unprompted, coded responses)



Specific areas for improvement	Total	
►Improve language skills/Move call centre to Australia	18%	Amaysim (5%) ↓ Telstra (24%) ↑
►Improve staff knowledge	6%	
►Improve communications/ Communicate more honestly/proactively	4%	
►Improve their customer service (generic)	4%	
►Improve attitude/not condescending/more understanding of those with less technology knowledge	3%	
►Fix my problem/Do what they say they would do	3%	
►Understand/Listen to my problem	2%	
►Improve their online service portal/email communication	2%	
►Follow up on problems	2%	
►Keep notes/my history on file so I don't have to repeat my story/issue	1%	
►Improve internal communications between departments/More consistent information	1%	
►Improved wait times/more staff/advise wait time	11%	Vodafone (20%) ↑
►Faster customer service/faster problem resolution	7%	
►Less transferring to different people and departments	2%	
►Lower costs/better deals	4%	Telstra (6%) ↑
►Customer loyalty bonuses/pricing/priority	1%	
►Provide equipment/services that work as they are supposed to	2%	

Base: Total sample (n=1,347)
B46. If there was one key area where your provider could improve their customer service, what would that be? [O/E]
NB: Not all suggestions for improvement are reflected in the results above.
Please refer to Figure 77 in Appendix A for the full list and detailed results by provider

Appendix A: Full results

Notes on reading the data and figures in this Appendix:

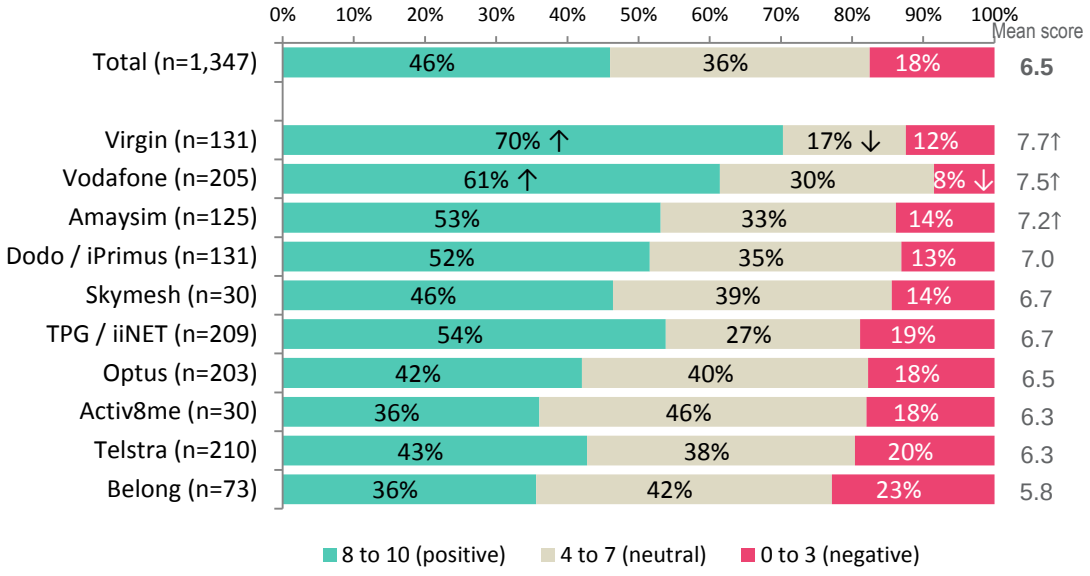
- As mentioned, the target population for the research was customers who have contacted their telecommunications provider about a question or problem in the last 12 months. The results in this report are based on these customers (unless otherwise specified).
- A result based on a small sample size (less than n=30) is indicated in Figures by italicised font and in a graph by a blue square around base size – these results should be interpreted with caution.
- Results may not sum exactly to 100% due to rounding.
- Statistical differences are shown in Figures using arrows (↑ for significantly higher results; and ↓ for significantly lower results).
- Statistical differences that are a better result for consumers are highlighted in light green, whilst the statistical differences that are a worse outcome for consumers are highlighted in light red.

Figure 41. Customers contacting their provider

	Total	Telstra	Optus	Vodafone	TPG / iiNET	Dodo / iPrimus	Virgin	Amaysim	Belong	Activ8me	Skymesh
Base size	*8,907*	4013	2561	1258	1126	553	381	377	163	55	60
Contacted provider in the last 12 months	51%	54% ↑	50%	44% ↓	49%	54%	40% ↓	43% ↓	60%	64%	52%
Did not contact provider in the last 12 months	48%	44% ↓	48%	55% ↑	50%	45%	59% ↑	56% ↑	39%	36%	43%
Unsure	2%	2%	2%	2%	1%	1%	1%	1%	1%	0%	5%

Base: All respondents prior to screening out non-qualifiers
A9. In the last 12 months, which of your providers have you contacted with questions or problems?

Figure 42. Overall rating of customer service



Base: Total sample
B43. Considering the interactions with your provider in relation to your question or problem, overall how would you rate the experience, using a scale of 0 to 10 where 0 is 'Extremely negative' and 10 is 'Extremely positive'? [S/R]

Figure 43. Specific elements of customer service (average scores out of 10)

	Total	Telstra	Optus	Vodafone	TPG / iiNET	Dodo / iPrimus	Virgin	Amaysim	Belong	Activ8me	Skymesh
Base size (n=)	***1,347***	*210*	*203*	*205*	*209*	*131*	*131*	*125*	*73*	*30*	*30*
I was treated with courtesy	7.4	7.2	7.4	8.1 ↑	7.8	7.8	8.3 ↑	7.9	6.9	7.8	8.4
I was treated in a fair manner	7.2	7.1	7.1	8.0 ↑	7.5	7.6	8.2 ↑	7.6	6.4	7.0	7.7
The customer service staff were professional	7.2	7.0	7.0	7.9 ↑	7.4	7.4	8.1 ↑	7.7	6.8	7.3	8.2
The information I was provided was relevant	7.1	6.8 ↓	7.1	8.0 ↑	7.4	7.5	8.2 ↑	7.7 ↑	6.8	7.5	7.8
The information I was provided was accurate	7.1	6.8 ↓	7.1	8.0 ↑	7.2	7.2	8.2 ↑	7.7	6.7	7.3	7.8
The information I was provided was easy to understand	7.0	6.8 ↓	7.0	7.9 ↑	7.3	7.4	8.2 ↑	7.6	6.8	7.5	8.3 ↑
My service provider followed through on what they said they would do	6.9	6.8	6.7	7.6 ↑	7.4	7.4	7.9 ↑	7.7 ↑	6.5	6.9	7.5
My provider worked with me to ensure the best possible outcome	6.8	6.6	6.8	7.6 ↑	7.2	7.2	7.8 ↑	7.5	5.9	6.8	7.3
Any accessibility requirements I have were able to be accommodated – such as information formats, teletext, etc	6.8	6.5	6.9	7.6 ↑	6.9	7.0	7.5	7.5	5.7	6.4	7.4
Any language requirements I have were able to be accommodated	6.7	6.6	6.7	7.3	6.8	7.3	7.0	6.9	6.5	7.3	7.7
My service provider adhered to the timeframes they provided to me	6.6	6.4	6.5	7.6 ↑	7.0	6.9	7.4 ↑	7.6 ↑	6.1	6.5	7.4
Staff were knowledgeable and able to answer my questions	6.6	6.3 ↓	6.5	7.7 ↑	6.9	7.0	7.6 ↑	7.6 ↑	6.6	7.2	7.0
My question/problem was addressed in a timely manner	6.5	6.3	6.4	7.5 ↑	6.6	6.7	7.6 ↑	7.5 ↑	5.7	6.0	7.0
I was proactively kept informed of the status of my question/problem	6.3	6.1	6.3	7.3 ↑	6.6	6.9	7.2 ↑	7.1	5.8	6.4	6.6

Base: Total sample
B42. Thinking about all the contact you had with your provider in relation to your issue or query, please indicate the extent to which each of the below is an accurate reflection of the customer service you received? For each please answer using a scale of 0 to 10 where 0 is 'Not at all accurate' and 10 is 'Extremely accurate'. You can also state that this aspect was not relevant to your question / problem.

Figure 44. Specific elements of customer service (scores 0 to 3)

	Total	Telstra	Optus	Vodafone	TPG / iiNET	Dodo / iPrimus	Virgin	Amaysim	Belong	Activ8me	Skymesh
Base size (n=)	***1,347***	*210*	*203*	*205*	*209*	*131*	*131*	*125*	*73*	*30*	*30*
Scores	**0-3**	**0-3**	**0-3**	**0-3**	**0-3**	**0-3**	**0-3**	**0-3**	**0-3**	**0-3**	**0-3**
	%	%	%	%	%	%	%	%	%	%	%
I was treated with courtesy	9	11	10	4	8	6	6	3	8	0	0
I was treated in a fair manner	11	12	13	3	12	7	7	5	19	14	11
The customer service staff were professional	11	12	11	5	13	8	7	8	9	6	0
The information I was provided was relevant	13	16	12	4	11	9	7	9	8	5	12
The information I was provided was accurate	13	16	10	4	13	14	7	6	16	5	3
The information I was provided was easy to understand	11	14	12	5	10	9	7	7	10	5	0
My service provider followed through on what they said they would do	16	17	17	10	13	14	11	4	13	16	5
My provider worked with me to ensure the best possible outcome	17	19	17	12	15	12	11	9	19	15	9
Any accessibility requirements I have were able to be accommodated – such as information formats, teletext, etc	12	14	11	4	14	12	7	6	23	22	12
Any language requirements I have were able to be accommodated	14	17	11	7	14	12	8	12	18	3	0
My service provider adhered to the timeframes they provided to me	17	20	17	8	14	14	12	12	18	20	9
Staff were knowledgeable and able to answer my questions	18	20	21	8	15	15	11	9	12	15	5
My question/problem was addressed in a timely manner	19	22	20	9	20	16	12	8	22	29	12
I was proactively kept informed of the status of my question/problem	20	23	21	10	19	14	15	14	27	18	29

Base: Total sample
B42. Thinking about all the contact you had with your provider in relation to your issue or query, please indicate the extent to which each of the below is an accurate reflection of the customer service you received?

Figure 45. Specific elements of customer service (8 to 10)

	Total	Telstra	Optus	Vodafone	TPG / iiNET	Dodo / iPrimus	Virgin	Amaysim	Belong	Activ8me	Skymesh
Base size (n=)	***1,347***	*210*	*203*	*205*	*209*	*131*	*131*	*125*	*73*	*30*	*30*
Scores	**8-10**	**8-10**	**8-10**	**8-10**	**8-10**	**8-10**	**8-10**	**8-10**	**8-10**	**8-10**	**8-10**
	%	%	%	%	%	%	%	%	%	%	%
I was treated with courtesy	60	57	58	71	66	66	75	65	51	59	72
I was treated in a fair manner	57	54	55	72	61	60	73	58	45	45	55
The customer service staff were professional	55	52	50	70	63	58	73	60	52	54	69
The information I was provided was relevant	56	54	53	66	59	59	76	67	47	55	63
The information I was provided was accurate	55	51	53	71	57	58	75	62	50	49	55
The information I was provided was easy to understand	51	46	51	67	57	58	75	58	47	58	71
My service provider followed through on what they said they would do	53	51	49	65	61	64	70	57	46	48	57
My provider worked with me to ensure the best possible outcome	52	46	53	65	59	58	71	57	41	57	54
Any accessibility requirements I have were able to be accommodated – such as information formats, teletext, etc	47	43	45	61	52	54	60	61	28	45	51
Any language requirements I have were able to be accommodated	46	44	43	55	52	58	51	54	46	48	54
My service provider adhered to the timeframes they provided to me	49	47	46	65	52	56	65	62	39	48	46
Staff were knowledgeable and able to answer my questions	49	45	46	65	57	56	65	59	49	59	44
My question/problem was addressed in a timely manner	49	48	43	63	52	55	67	60	32	40	45
I was proactively kept informed of the status of my question/problem	44	38	45	60	52	51	58	52	42	46	53

Base: Total sample
B42. Thinking about all the contact you had with your provider in relation to your issue or query, please indicate the extent to which each of the below is an accurate reflection of the customer service you received?

Figure 46. Overall time spent

	Total	Telstra	Optus	Vodafone	TPG / iiNET	Dodo / iPrimus	Virgin	Amaysim	Belong	Activ8me	Skymesh
Base size	***1,347***	*210*	*203*	*205*	*209*	*131*	*131*	*125*	*73*	*30*	*30*
Up to 15 min	16%	12%	17%	25% ↑	19%	23%	31% ↑	29% ↑	12%	18%	15%
16 to 60 min	18%	18%	18%	24%	17%	16%	23%	10%	12%	9%	16%
>60 min to 1 day	13%	13%	13%	11%	17%	14%	10%	17%	14%	4%	7%
>1 day to 7 days	20%	20%	20%	17%	20%	16%	15%	15%	16%	8%	7%
>7 days to 1 month	14%	13%	16%	13%	11%	19%	11%	9%	15%	15%	17%
More than 1 month	20%	24% ↑	16%	10% ↓	16%	12%	10%	19%	31%	46% ↑	37%
Average days*	**21.0**	**24.6**	**19.1**	**10.1 ↓**	**16.7**	**11.4 ↓**	**12.7**	**17.1**	**35.9**	**38.3**	**35.0**
Average days* (of all resolved cases)	**13.3**	**15.4**	**12.7**	**6.2↓**	**7.8**	**9.4**	**10.3**	**11.0**	**28.7**	**37.6**	**35.5**
Average days* (of all unresolved cases)	**59.8**	**67.1**	**49.9**	**46.1**	**74.8**	**27.4**	**29.3**	**44.5**	**64.0**	**41.6**	**33.9**

*Base: Total sample *Outliers removed*
B39. Approximately how long have you spent trying to resolve this question/problem since it first started? If it is ongoing, how long has it been to date?

Figure 47. Types of query

	Total	Telstra	Optus	Vodafone	TPG / iiNET	Dodo / iPrimus	Virgin	Amaysim	Belong	Activ8me	Skymesh
Base size (n=)	***1,347***	*210*	*203*	*205*	*209*	*131*	*131*	*125*	*73*	*30*	*30*
Service issue or outage	37%	43%↑	34%	16%↓	46%	46%	16%↓	17%↓	53%	55%	48%
General enquiry about your account / plan / contract	33%	29%	36%	47%↑	21%↓	38%	44%	46%	39%	37%	30%
Billing enquiry / Billing issue	28%	23%	36%	33%	22%	26%	32%	34%	32%	21%	18%
Change or renewal of plan (or data pack)	19%	16%	15%	37%↑	20%	17%	39%↑	27%	9%	4%	26%
Equipment issue	14%	16%	13%	10%	14%	17%	10%	6%	17%	16%	15%
Update contact details	5%	3%	5%	9%	6%	6%	15%↑	12%↑	7%	14%	4%
Roaming, usage overseas	4%	1%↓	5%	13%↑	1%	2%	7%	10%↑	6%	14%	12%
Migrating services to new address	3%	2%	3%	3%	8%↑	5%	2%	4%	6%	3%	10%
Cancellation of service	3%	3%	3%	4%	1%	2%	1%	0%	4%	4%	0%
Some other reason (please specify)	2%	3%	2%	2%	0%	1%	2%	3%	0%	2%	0%

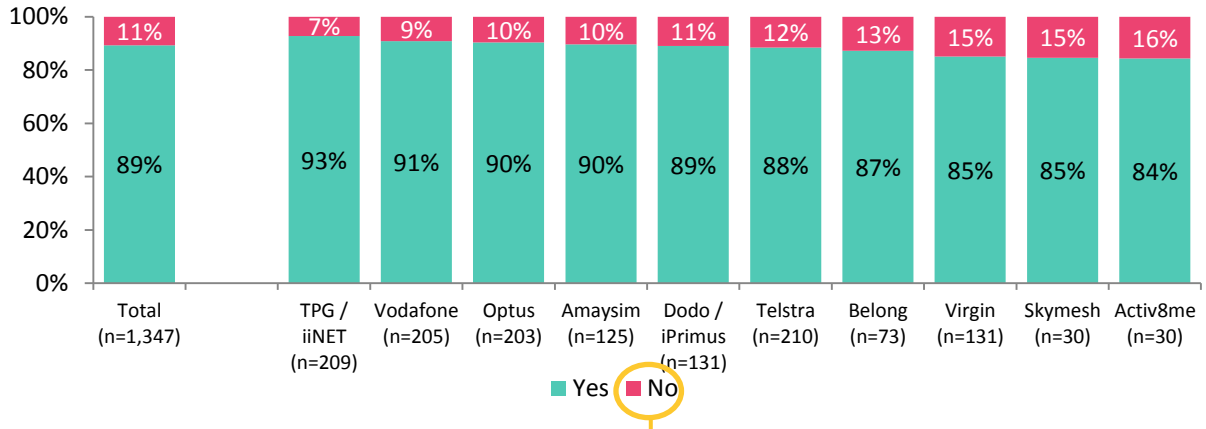
Base: Total sample
B1. Thinking about the most recent question or problem you contacted [PROVIDER] about, which of the following options best describe what the question or problem was?

Figure 48. Method of initial contact

	Total	Telstra	Optus	Vodafone	TPG / iiNET	Dodo / iPrimus	Virgin	Amaysim	Belong	Activ8me	Skymesh
Base size (n=)	***1,347***	*210*	*203*	*205*	*209*	*131*	*131*	*125*	*73*	*30*	*30*
By phone	66%	70%	61%	61%	84%↑	81%↑	59%	32%↓	64%	51%	72%
In person / in a store	13%	13%	10%	25%↑	1%↓	0%↓	18%	0%	1%	0%	3%
Using messenger or chat feature on the provider's website	12%	10%	22%↑	7%	2%↓	8%	10%	38%↑	10%	14%	7%
By email	4%	4%	3%	3%	10%↑	5%	5%	17%↑	12%	16%	9%
By submitting a query via a web-form on the provider's website	3%	3%	1%	3%	4%	4%	4%	7%↑	9%↑	8%	6%
Via social media such as Twitter or Facebook	2%	1%	4%	1%	0%	3%	3%	4%	3%	7%	4%
By posting a letter	0%	0%	0%	0%	0%	0%	0%	0%	0%	3%↑	0%
Some other way (please specify)	0%	0%	0%	0%	0%	0%	1%↑	2%↑	0%	0%	0%

Base: Total sample
B2. How did you initially contact your provider about this question or problem?

Figure 49. Was this your preferred method of contact?



Base: Total sample
B3. Was this your preferred method of communication?

Figure 50. Preferred method of initial contact

	Total	Telstra	Optus	Vodafone	TPG / iiNET	Dodo / iPrimus	Virgin	Amaysim	Belong	Activ8me	Skymesh
Base size (n=)	**145**	*24*	*19*	*18*	*17*	*14*	*19*	*15*	*10*	*4*	*5*
By email	26%	*33%*	*4%*	*33%*	*45%*	*35%*	*14%*	*11%*	*21%*	*35%*	*0%*
By phone	23%	*19%*	*26%*	*36%*	*0%*	*10%*	*29%*	*61%*	*34%*	*0%*	*42%*
Using messenger or chat feature on the provider's website	20%	*14%*	*31%*	*20%*	*47%*	*23%*	*24%*	*14%*	*36%*	*0%*	*35%*
By submitting a query via a web-form on the provider's website	18%	*17%*	*29%*	*0%*	*8%*	*26%*	*20%*	*14%*	*9%*	*22%*	*23%*
In person / in a store	11%	*16%*	*6%*	*0%*	*0%*	*6%*	*13%*	*0%*	*0%*	*43%*	*0%*
Via social media such as Twitter or Facebook	1%	*0%*	*0%*	*6%*	*0%*	*0%*	*0%*	*0%*	*0%*	*0%*	*0%*
By posting a letter	0%	*0%*	*0%*	*0%*	*0%*	*0%*	*0%*	*0%*	*0%*	*0%*	*0%*
Some other way (please specify)	1%	*0%*	*4%*	*5%*	*0%*	*0%*	*0%*	*0%*	*0%*	*0%*	*0%*

Base: Did not use preferred method of communication in initial contact
NB: Please note small sample size(s) highlighted in blue – results are less than n=30 and should be interpreted with caution.
B4. What would your preferred method have been?

Figure 51. Reasons for not using preferred method

	Total	Telstra	Optus	Vodafone	TPG / iiNET	Dodo / iPrimus	Virgin	Amaysim	Belong	Activ8me	Skymesh
Base size (n=)	**145**	*24*	*19*	*18*	*17*	*14*	*19*	*15*	*10*	*4*	*5*
It was difficult to find the contact details I needed	27%	*32%*	*14%*	*25%*	*22%*	*30%*	*40%*	*34%*	*50%*	*20%*	*23%*
I didn't find it helpful when I last used my preferred method	27%	*27%*	*26%*	*30%*	*23%*	*47%*	*19%*	*12%*	*0%*	*41%*	*10%*
It was difficult getting through to the right person/department	24%	*14%*	*46%*	*34%*	*27%*	*36%*	*49%*	*44%*	*0%*	*0%*	*25%*
I was waiting too long for a response so contacted them another way	23%	*26%*	*24%*	*14%*	*43%*	*17%*	*17%*	*27%*	*0%*	*0%*	*0%*
Some other reason (please specify)	18%	Other reasons include: I wanted it done straight away; phone cannot work without internet; this option was offered to me; not sure it's possible; I wasn't at home									

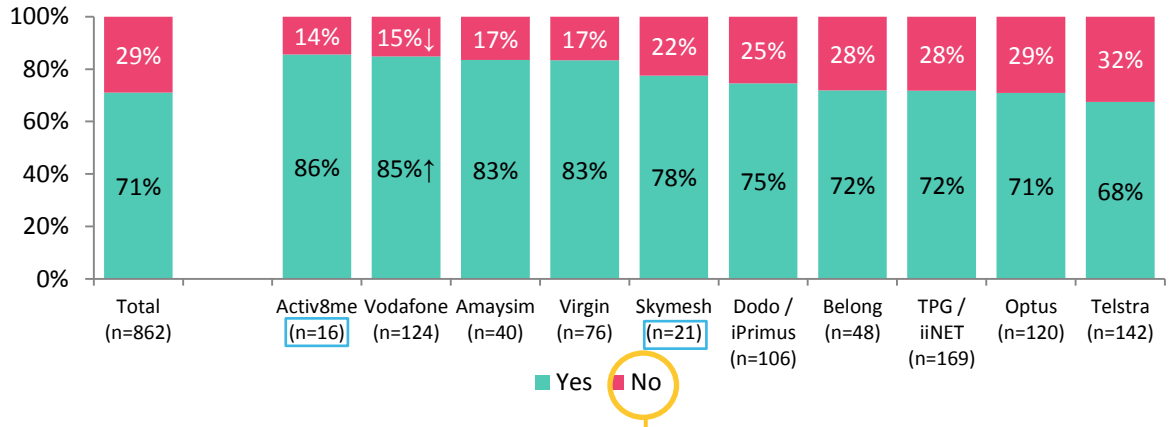
Base: Did not use preferred method of communication in initial contact
NB: Please note small sample size(s) highlighted in blue – results are less than n=30 and should be interpreted with caution.
B5. Why didn't you contact your provider using your preferred method? [M/R]

Figure 52. Ability to use preferred method for subsequent contact

	Total	Telstra	Optus	Vodafone	TPG / iiNET	Dodo / iPrimus	Virgin	Amaysim	Belong	Activ8me	Skymesh
Base size (n=)	497	102	80	49	81	56	32	38	33	11	15
Yes	76%	74%	80%	82%	84%	73%	71%	63%	66%	79%	61%
No	24%	26%	20%	18%	16%	27%	29%	37%	34%	21%	39%

Base: Query resolved but required further contact or query unresolved/ongoing
NB: Please note small sample size(s) highlighted in blue – results are less than n=30 and should be interpreted with caution.
B28. Were you able to use your preferred method of communication for all subsequent contact with your provider?

Figure 53. Ability of first point of person to deal with query



Base: Spoke to someone on phone
NB: Some figures may be proportionally larger/smaller, however the results may not be statistically different due to small base sizes. Please note small sample size(s) highlighted in blue – results are less than n=30 and should be interpreted with caution.
B14. Was the person you initially spoke to able to deal with your question or problem?

Figure 54. Number of subsequent transfers

	Total	Telstra	Optus	Vodafone	TPG / iiNET	Dodo / iPrimus	Virgin	Amaysim	Belong	Activ8me	Skymesh
Base size (n=)	216	48	34	21	47	27	12	5	14	3	5
1	17%	14%	16%	40%	19%	13%	9%	0%	34%	70%	18%
2	37%	39%	35%	21%	30%	42%	44%	45%	14%	0%	82%
3	19%	19%	16%	18%	28%	31%	42%	55%	26%	0%	0%
4	13%	13%	19%	0%	4%	2%	0%	0%	7%	30%	0%
5+	12%	12%	10%	15%	17%	9%	0%	0%	20%	0%	0%
Average number of transfers*	**2.9**	**2.9**	**2.8**	2.4	**2.8**	**2.5**	**2.2**	**2.5**	**3.1**	**1.9**	**1.8**

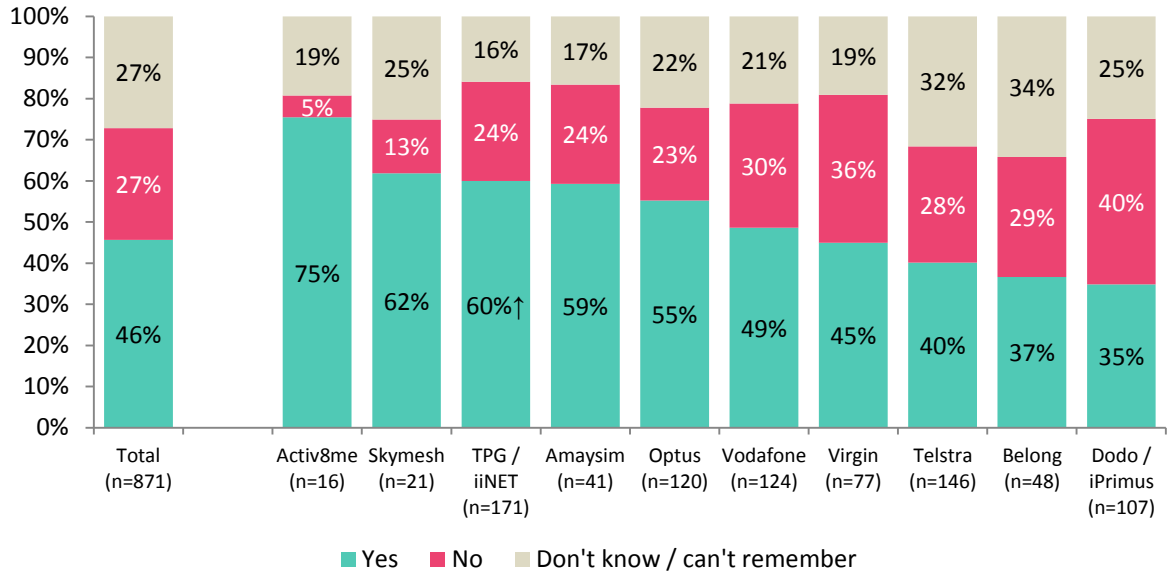
*Base: First person spoken to unable to answer question *Outliers removed*
NB: Please note small sample size(s) highlighted in blue – results are less than n=30 and should be interpreted with caution.
B15. How many times in total were you transferred to another person / department or had to call other numbers before you got through to someone who could help you? If you can't remember the exact number, please provide your best estimate.

Figure 55. Time spent from first call to being connected to the right person or department

	Total	Telstra	Optus	Vodafone	TPG / iiNET	Dodo / iPrimus	Virgin	Amaysim	Belong	Activ8me	Skymesh
Base size (n=)	***862***	*142*	*120*	*124*	*169*	*106*	*76*	*40*	*48*	*16*	*21*
Up to 5 minutes	9%	7%	7%	19% ↑	13%	14%	25% ↑	7%	8%	*17%*	*20%*
6-15 min	21%	19%	20%	29%	23%	30%	30%	29%	22%	*47%*	*20%*
16-30 min	25%	25%	25%	26%	24%	30%	28%	23%	27%	*25%*	*40%*
31-60 min	21%	23%	24%	13%	23%	14%	8%	14%	16%	*0%*	*4%*
>60 min to 2 hours	13%	15%	15%	6%	8%	6%	6%	14%	13%	*11%*	*0%*
Over 2 hours	10%	11%	9%	7%	8%	6%	4%	13%	14%	*0%*	*15%*
Average hours*	**1.2**	**1.3**	**1.0**	**0.8**	**1.3**	**0.8**	**0.5**	**1.0**	**1.3**	***0.4***	***1.2***

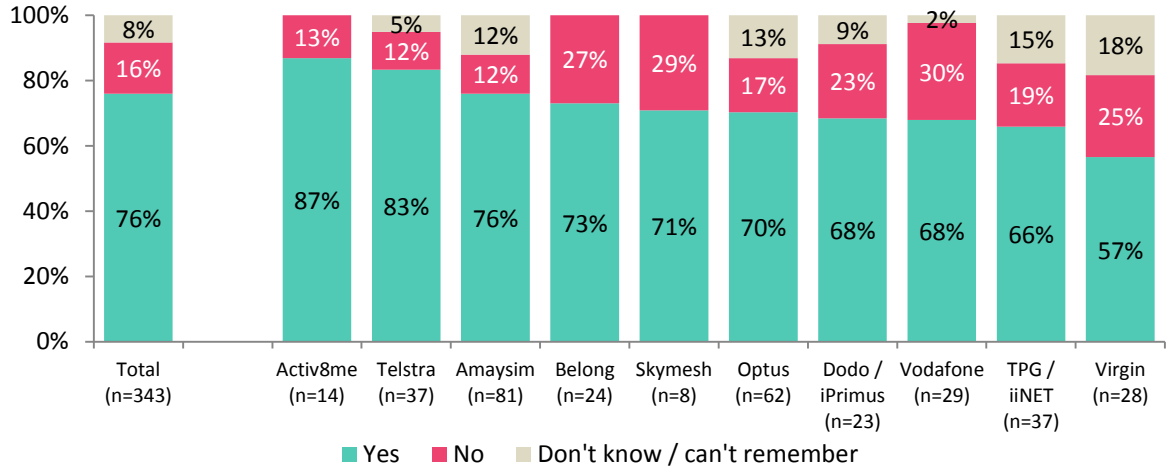
*Base: Spoke to someone on phone *Outliers removed*
B16.How much time did you spend on the phone from the time you first called the provider until you were connected to the right person / department? This includes any time spent selecting automated options, being on hold, being transferred, etc. but does not include time between separate calls. IF CODE 1 @ B9 (RECEIVED CALL BACK): Include the time on your initial call when you requested the call back, as well as the call back itself.

Figure 56. Provision of wait time on phone



Base: Selected to contact provider via phone
NB: Please note small sample size(s) highlighted in blue – results are less than n=30 and should be interpreted with caution.
B6. Were you told what the average wait time was to speak to a customer service representative?

Figure 57. Provision of response time



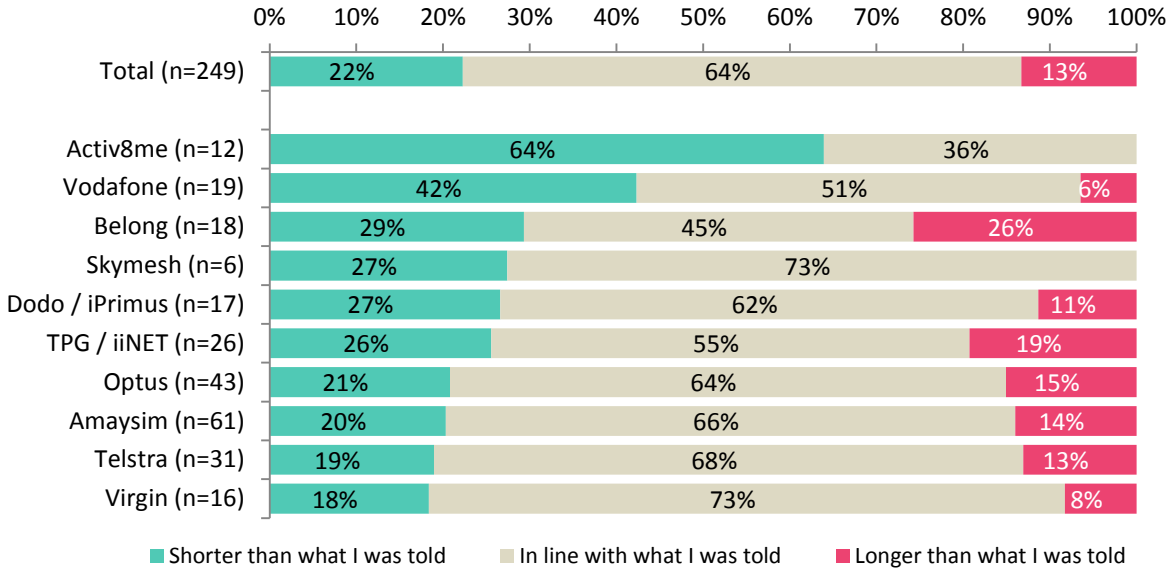
Base: Messenger/chat, web form, email, social media, or post was the selected method of communication
NB: Please note small sample size(s) highlighted in blue – results are less than n=30 and should be interpreted with caution.
B20. And when you made contact, were you told when you could expect to receive a response?

Figure 58. Average response time (days)

	Total	Telstra	Optus	Vodafone	TPG / iiNET	Dodo / iPrimus	Virgin	Amaysim	Belong	Activ8me	Skymesh
Base size (n=)	***340***	*36*	*62*	*29*	*37*	*23*	*28*	*80*	*23*	*14*	*8*
Up to 15 minutes	33%	39%	58% ↑	*24%*	11%	*26%*	*32%*	41%	*9%*	*0%*	*25%*
16 min to 60 min	7%	14%	5%	*10%*	8%	*13%*	*0%*	5%	*9%*	*0%*	*0%*
>60 min to 1 day	25%	17%	19%	*34%*	38%	*22%*	*21%*	20%	*48%*	*14%*	*25%*
>1 day and up to 2 days	15%	14%	3%	*28%*	22%	*22%*	*18%*	13%	*13%*	*36%*	*13%*
>2 days and up to 3 days	9%	8%	2%	*0%*	11%	*4%*	*14%*	15%	*4%*	*14%*	*13%*
More than 3 days	11%	8%	13%	*3%*	11%	*13%*	*14%*	6%	*17%*	*36%*	*25%*
Average days*	**1.5**	**1.4**	**1.6**	***0.8***	**1.7**	***1.3***	***1.8***	**1.0**	***1.7***	***6.8***	***5.1***

Base: Messenger/chat, web form, email, social media, or post was the selected method of communication
**Outliers removed*
NB: Please note small sample size(s) highlighted in blue – results are less than n=30 and should be interpreted with caution.
B21. And after submitting your question or problem, and not including any automated acknowledgments, how long did you actually wait to receive a response

Figure 59. Response received within advised timeframe



Base: Messenger/chat, web form, email, social media, or post was the selected method of communication and advised of response timeframe
NB: Please note small sample size(s) highlighted in blue – results are less than n=30 and should be interpreted with caution.
B22. Was this in line with what you were told the call back / response time would be?

Figure 60. Call backs offered

	Total	Telstra	Optus	Vodafone	TPG / iiNET	Dodo / iPrimus	Virgin	Amaysim	Belong	Activ8me	Skymesh
Base size (n=)	***871***	*146*	*120*	*124*	*171*	*107*	*77*	*41*	*48*	*16*	*21*
Yes - was offered and requested this	23%	19%	25%	29%	40% ↑	15%	14%	22%	19%	*46%*	*32%*
Yes - was offered but did not take up	25%	27%	20%	21%	23%	20%	22%	19%	17%	*31%*	*42%*
NETT - Yes	**48%**	**47%**	**46%**	**50%**	**63% ↑**	**35%**	**36%**	**41%**	**36%**	***77%***	***73%***
No - was not offered	**35%**	**33%**	**38%**	**38%**	**28%**	**48%**	**45%**	**42%**	**33%**	***10%***	***18%***
Don't know / can't remember	18%	20%	16%	13%	8%	17%	18%	17%	31%	*13%*	*8%*

Base: Phone was the selected method of communication
NB: Please note small sample size(s) highlighted in blue – results are less than n=30 and should be interpreted with caution.
B7. Were you offered an option to receive a call back? And if so, did you take up this option? (Some providers offer to phone customers back instead of waiting on hold).

Figure 61. Decision to stay on phone

	Total	Telstra	Optus	Vodafone	TPG / iiNET	Dodo / iPrimus	Virgin	Amaysim	Belong	Activ8me	Skymesh
Base size (n=)	***652***	*118*	*88*	*90*	*106*	*90*	*65*	*31*	*38*	*10*	*16*
Yes - stayed on phone	**92%**	**92%**	**91%**	**96%**	**92%**	**95%**	**90%**	**94%**	**88%**	***92%***	***89%***
No - I was disconnected and had to call back	5%	6%	7%	1%	4%	3%	5%	3%	12%	*8%*	*0%*
No - I hung up before speaking to anybody and contacted them again later	1%	1%	2%	3%	4%	1%	3%	0%	0%	*0%*	*11%*
No - I hung up before speaking to anyone and haven't contacted them again	1%	2%	0%	0%	1%	1%	1%	3%	0%	*0%*	*0%*
NETT - No	**8%**	**8%**	**9%**	**4%**	**8%**	**5%**	**10%**	**6%**	**12%**	***8%***	***11%***

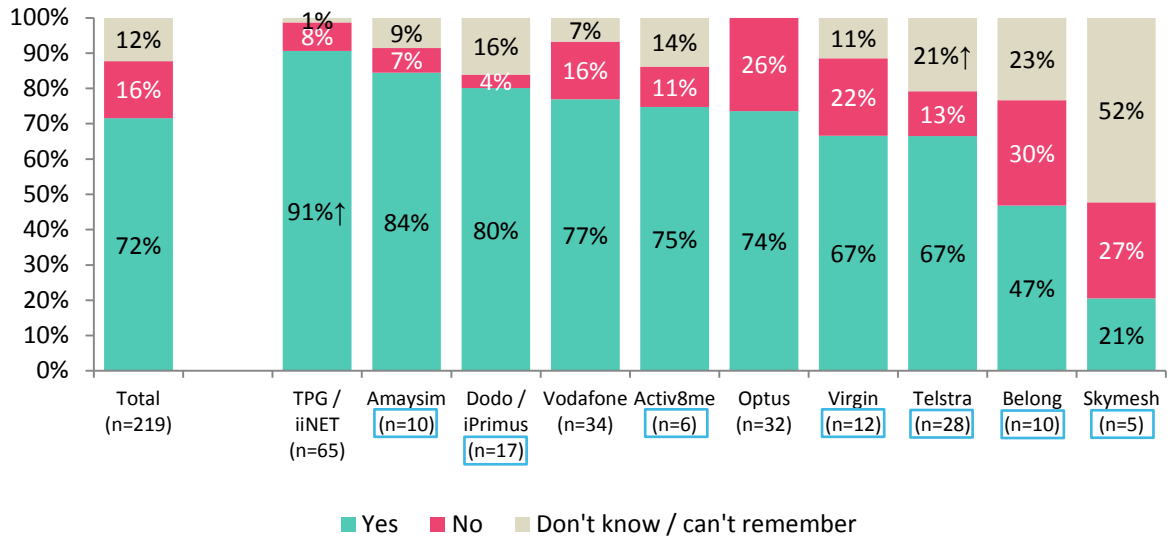
Base: Did not select call back option on phone or was not offered option
NB: Please note small sample size(s) highlighted in blue – results are less than n=30 and should be interpreted with caution.
B12. Did you stay on the call you made until you spoke to a person?

Figure 62. Reasons for not choosing a call back

	Total	Telstra	Optus	Vodafone	TPG / iiNET	Dodo / iPrimus	Virgin	Amaysim	Belong	Activ8me	Skymesh
Base size (n=)	***185***	*38*	*23*	*22*	*37*	*20*	*17*	*7*	*8*	*5*	*8*
I thought it would be quicker to stay on hold rather than wait for a call back	57%	55%	*66%*	*47%*	*69%*	*58%*	*63%*	*85%*	*50%*	*48%*	*41%*
Was convenient to speak now, not later	48%	53%	*34%*	*51%*	*46%*	*42%*	*51%*	*15%*	*18%*	*35%*	*22%*
I was worried they may not call me back	35%	35%	*36%*	*45%*	*26%*	*18%*	*38%*	*15%*	*50%*	*42%*	*37%*

Base: Offered call back option but did not select
NB: Please note small sample size(s) highlighted in blue – results are less than n=30 and should be interpreted with caution.
B11. Why did you choose not to take up the call back option when this was offered to you?

Figure 63. Provision of timeframe



Base: Selected call back option
NB: Please note small sample size(s) highlighted in blue – results are less than n=30 and should be interpreted with caution.
B8. Were you given a timeframe for when this call back would happen?

Figure 64. Received call back

	Total	Telstra	Optus	Vodafone	TPG / iiNET	Dodo / iPrimus	Virgin	Amaysim	Belong	Activ8me	Skymesh
Base size (n=)	219	28	32	34	65	17	12	10	10	6	5
Yes	83%	82%	84%	75%	95%	94%	67%	100%	87%	100%	79%
No, I had to contact them again	14%	13%	16%	25%	4%	6%	33%	0%	13%	0%	21%
No, and I did not contact them again	2%	5%	0%	0%	1%	0%	0%	0%	0%	0%	0%
NETT - No	17%	18%	16%	25%	5%	6%	33%	0%	13%	0%	21%

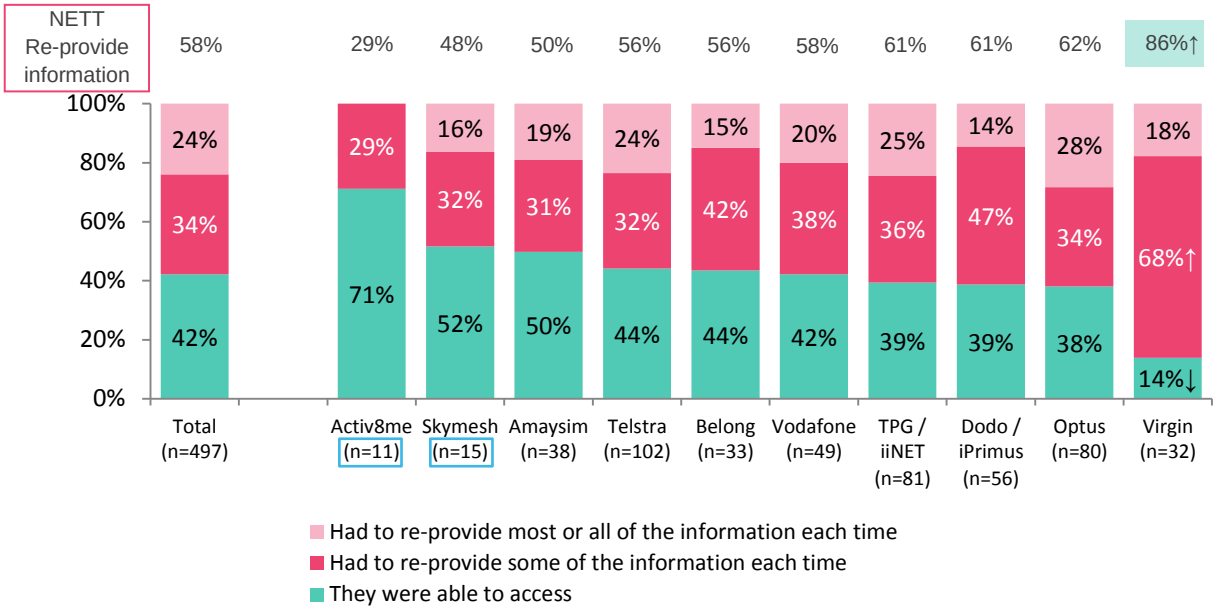
Base: Selected call back option on phone
NB: Please note small sample size(s) highlighted in blue – results are less than n=30 and should be interpreted with caution.
B9. And did you receive a call back?

Figure 65. Received call back within timeframe

	Total	Telstra	Optus	Vodafone	TPG / iiNET	Dodo / iPrimus	Virgin	Amaysim	Belong	Activ8me	Skymesh
Base size (n=)	149	16	22	18	56	14	6	8	4	4	1
Yes	89%	90%	85%	89%	92%	92%	100%	90%	100%	61%	100%
No	11%	10%	15%	11%	8%	8%	0%	10%	0%	39%	0%

Base: Selected call back option on phone and received call back
NB: Please note small sample size(s) highlighted in blue – results are less than n=30 and should be interpreted with caution.
B10. Was this call back within the advised timeframe?

Figure 66. Case history information



Base: Resolved but required communication on multiple occasions or issue unresolved
NB: Please note small sample size(s) highlighted in blue – results are less than n=30 and should be interpreted with caution.
B29. And each time you re-contacted your provider about this issue, was the person you were dealing with able to access the case history of your question / problem, or did you have to re-provide this information to them?

Figure 67. Number of times repetition of information was required

	Total	Telstra	Optus	Vodafone	TPG / iiNET	Dodo / iPrimus	Virgin	Amaysim	Belong	Activ8me	Skymesh
Base size (n=)	***280***	*57*	*44*	*28*	*45*	*33*	*26*	*19*	*17*	*3*	*8*
1	13%	16%	7%	*10%*	5%	8%	*16%*	*8%*	*24%*	*0%*	*33%*
2	21%	20%	17%	*40%*	22%	24%	*32%*	*39%*	*6%*	*34%*	*54%*
3	28%	23%	42%	*25%*	34%	39%	*34%*	*28%*	*12%*	*66%*	*12%*
4	11%	10%	18%	*4%*	11%	7%	*4%*	*7%*	*20%*	*0%*	*0%*
5+	26%	31%	15%	*21%*	27%	22%	*15%*	*18%*	*32%*	*0%*	*0%*
Average*	3.7	4.0	3.5	*3.2*	3.8	3.5	*2.9*	*3.0*	*3.8*	*2.7*	*1.8*

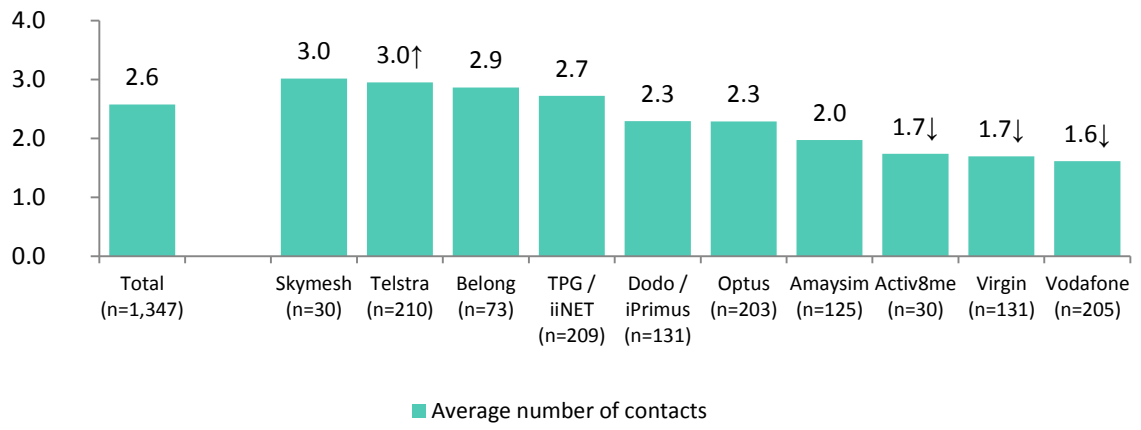
*Base: Had to re-provide information *Outliers removed*
NB: Please note small sample size(s) highlighted in blue – results are less than n=30 and should be interpreted with caution.
B30. And how many people do you remember needing to repeat your question or problem to during this experience? If you can't remember the exact number, please provide your best estimate.

Figure 68. First contact resolution and subsequent follow-up contact

	Total	Telstra	Optus	Vodafone	TPG / iiNET	Dodo / iPrimus	Virgin	Amaysim	Belong	Activ8me	Skymesh
Base size (n=)	***1347***	*210*	*203*	*205*	*209*	*131*	*131*	*125*	*73*	*30*	*30*
Resolved – at first contact	58%	53% ↓	59%	76% ↑	61%	58%	75% ↑	69%	54%	68%	49%
Resolved – but required further contact	23%	26%	23%	13% ↓	24%	27%	11% ↓	11% ↓	25%	11%	19%
NETT – resolved	**81%**	**79%**	**82%**	**89% ↑**	**85%**	**86%**	**86%**	**81%**	**79%**	**79%**	**68%**
Unresolved – still in progress	10%	11%	12%	6%	4% ↓	11%	4%	15%	11%	10%	15%
Unresolved – stopped pursuing	8%	10%	6%	5%	11%	3%	10%	5%	11%	11%	17%
NETT - unresolved	**19%**	**21%**	**18%**	**11% ↓**	**15%**	**14%**	**14%**	**19%**	**21%**	**21%**	**32%**

Base: Total sample
B25. Has your question / problem been resolved?
B26. Was it resolved the first time you contacted your provider?

Figure 69. Average number of contacts (including queries resolved during first contact)



Base: Total sample. Outliers removed.
NB: Some figures may be proportionally larger/smaller, however the results may not be statistically different due to small base sizes.
B26. Was it resolved the first time you contacted your provider?
B27. Not including your initial contact, how many times have you subsequently contacted your provider about this issue? If you can't remember the exact number, please provide your best estimate

Figure 70. Escalation of query

	Total	Telstra	Optus	Vodafone	TPG / iiNET	Dodo / iPrimus	Virgin	Amaysim	Belong	Activ8me	Skymesh
Base size (n=)	***1,347***	*210*	*203*	*205*	*209*	*131*	*131*	*125*	*73*	*30*	*30*
Escalated within provider's organisation	23%	24%	26%	14% ↓	19%	21%	16%	16%	28%	28%	23%
Lodged a formal complaint with my provider	9%	9%	8%	6%	6%	6%	8%	14%	14%	21%	16%
Lodged a complaint with the Ombudsman (TIO)	3%	3%	4%	1%	2%	6%	1%	1%	8%	3%	10%
NETT – escalated at least once	**30%**	**31%**	**33%**	**19%↓**	**24%**	**28%**	**21%**	**29%**	**42%**	**46%**	**39%**
No, none of the above	**70%**	**69%**	**67%**	**81%↑**	**76%**	**72%**	**79%**	**71%**	**58%**	**54%**	**61%**

Base: Total sample

B31. Did you at any time ask that your question / problem be escalated, or did you lodge a formal complaint, either with your provider or with the Ombudsman (TIO - Telecommunications Industry Ombudsman)? [M/R]

Figure 71. Total proportion of customers who lodged complaint to provider or TIO and/or those who wanted to lodge complaint but chose not to

	Total	Telstra	Optus	Vodafone	TPG / iiNET	Dodo / iPrimus	Virgin	Amaysim	Belong	Activ8me	Skymesh
Base size (n=)	***1,347***	*210*	*203*	*205*	*209*	*131*	*131*	*125*	*73*	*30*	*30*
Total lodged or wanted to lodge formal complaint with provider	31%	32%	34%	19% ↓	26%	26%	22%	35%	45%	59% ↑	31%
Wanted to lodge but didn't lodge formal complaint with provider	22%	23%	25%	13% ↓	21%	20%	14%	22%	31%	38%	15%
Total lodged or wanted to lodge formal complaint with TIO	24%	24%	29%	13% ↓	22%	19%	15%	28%	41% ↑	51% ↑	24%
Wanted to lodge but didn't lodge formal complaint with TIO	21%	21%	25%	12% ↓	20%	14%	14%	26%	32%	48% ↑	34%

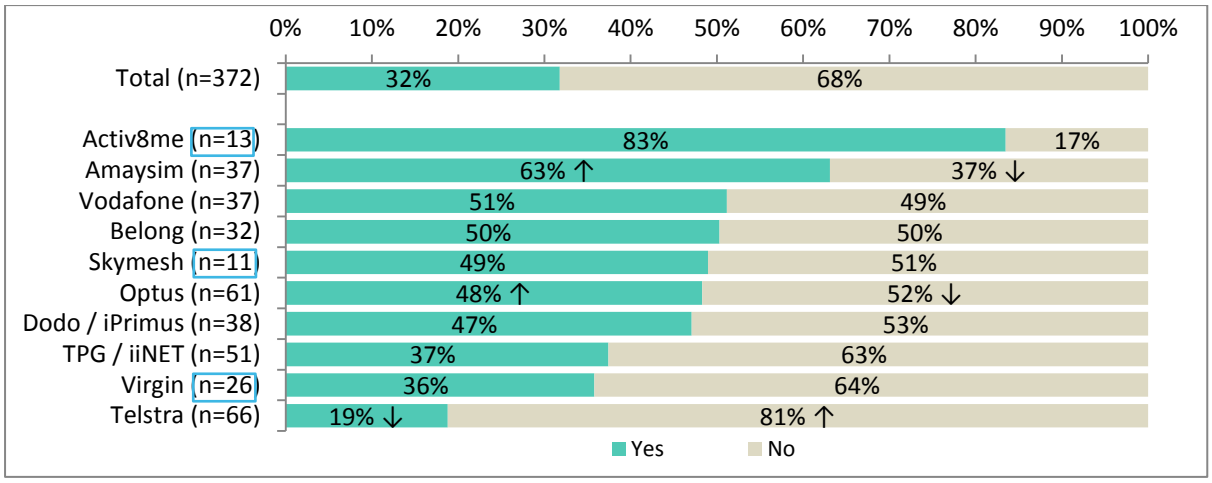
Base: Total sample

B31. Did you at any time ask that your question / problem be escalated, or did you lodge a formal complaint, either with your provider or with the Ombudsman (TIO - Telecommunications Industry Ombudsman)? [M/R]

B32. At any stage did you want to lodge a formal complaint with your provider about this question / problem, but didn't? [S/R]

B36. At any stage did you want to lodge a formal complaint with the Ombudsman (TIO - Telecommunications Industry Ombudsman) about this issue, but didn't? The TIO provides an independent dispute resolution service for phone and internet complaints. [S/R]

Figure 72 Discouraging TIO contact



Base: Escalated query within provider's organisation or lodged formal complaint (provider or TIO)
NB: Some figures may be proportionally higher but are not significantly different due to small base sizes. Please note small sample size(s) highlighted in blue – results are less than n=30 and should be interpreted with caution.
B38. At any time during your dealings with your provider did it feel like they discouraged you from contacting the TIO (Telecommunications Industry Ombudsman)? [S/R]

Figure 73. Accessibility of information regarding lodging formal complaint with provider

	Total	Telstra	Optus	Vodafone	TPG / iiNET	Dodo / iPrimus	Virgin	Amaysim	Belong	Activ8me	Skymesh
Base size (n=)	***378***	*63*	*65*	*37*	*55*	*34*	*25*	*42*	*32*	*16*	*9*
Very difficult	22%	24%	21%	15%	25%	17%	23%	28%	27%	*13%*	*0%*
Somewhat difficult	33%	34%	36%	17%	29%	33%	36%	37%	19%	*47%*	*24%*
NETT - difficult	**55%**	**58%**	**57%**	**32%**	**54%**	**50%**	**60%**	**65%**	**46%**	***60%***	***24%***
Neither difficult or easy	26%	27%	22%	46%	27%	23%	15%	17%	29%	*8%*	*15%*
Somewhat easy	10%	8%	12%	8%	11%	15%	21%	14%	19%	*21%*	*45%*
Very easy	8%	6%	10%	14%	8%	12%	4%	4%	6%	*11%*	*16%*
NETT - easy	**18%**	**15%**	**22%**	**23%**	**19%**	**27%**	**26%**	**18%**	**25%**	***33%***	***61%***

Base: Lodged formal complaint with provider or wanted to. Excludes not applicable.
NB: Please note small sample size(s) highlighted in blue – results are less than n=30 and should be interpreted with caution.
B33. And how easy or difficult was it to find the information you needed about how to make a formal complaint to your provider? [S/R]

Figure 74. Accessibility of information regarding lodging formal complaint with TIO

	Total	Telstra	Optus	Vodafone	TPG / iiNET	Dodo / iPrimus	Virgin	Amaysim	Belong	Activ8me	Skymesh
Base size (n=)	299	48	54	25	44	26	17	33	27	14	11
Very difficult	25%	24%	28%	24%	21%	22%	16%	20%	16%	31%	0%
Somewhat difficult	23%	19%	27%	27%	18%	18%	43%	53% ↑	33%	22%	46%
NETT - difficult	**48%**	**43%**	**54%**	**51%**	**39%**	**40%**	**59%**	**73%**	**49%**	**53%**	**46%**
Neither difficult or easy	31%	38%	18%	38%	41%	28%	13%	16%	31%	18%	28%
Somewhat easy	11%	9%	16%	7%	10%	17%	15%	9%	14%	8%	0%
Very easy	10%	10%	12%	4%	10%	15%	13%	3%	7%	22%	26%
NETT - easy	**21%**	**18%**	**27%**	**11%**	**20%**	**32%**	**28%**	**12%**	**21%**	**30%**	**26%**

Base: Lodged formal complaint with TIO or wanted to. Excludes not applicable.
NB: Please note small sample size(s) highlighted in blue – results are less than n=30 and should be interpreted with caution.
B37. And how easy or difficult was it to find information from your provider about how to make a complaint with the Ombudsman (TIO - Telecommunications Industry Ombudsman)? [S/R]

Figure 75. Perceived level of difficulty to raise complaint

	Total	Telstra	Optus	Vodafone	TPG / iiNET	Dodo / iPrimus	Virgin	Amaysim	Belong	Activ8me	Skymesh
Base size (n=)	117	18	16	14	11	9	10	17	12	6	4
Very difficult	15%	16%	12%	24%	6%	7%	0%	14%	15%	15%	0%
Somewhat difficult	35%	30%	45%	35%	47%	38%	36%	56%	26%	0%	52%
NETT - difficult	50%	46%	57%	59%	53%	46%	36%	70%	41%	15%	52%
Neither difficult or easy	31%	32%	30%	28%	37%	28%	42%	30%	32%	15%	38%
Somewhat easy	14%	16%	8%	14%	9%	27%	22%	0%	19%	54%	0%
Very easy	5%	7%	5%	0%	0%	0%	0%	0%	8%	16%	10%
NETT - easy	19%	22%	13%	14%	9%	27%	22%	0%	27%	70%	10%

Base: Lodged formal complaint with provider
NB: Please note small sample size(s) highlighted in blue – results are less than n=30 and should be interpreted with caution.
B34. And how easy or difficult was it to actually make the formal complaint to your provider? [S/R]

Figure 76. Timing of proposed solution

	Total	Telstra	Optus	Vodafone	TPG / iiNET	Dodo / iPrimus	Virgin	Amaysim	Belong	Activ8me	Skymesh
Base size (n=)	117	18	16	14	11	9	10	17	12	6	4
Provider advised their proposed solution within 3 weeks	46%	32%	64%	56%	52%	66%	74%	79%	95% ↑	77%	62%
Took longer than 3 weeks	54%	68%	36%	44%	48%	34%	26%	21%	5% ↓	23%	38%

Base: Lodged formal complaint with provider
NB: Please note small sample size(s) highlighted in blue – results are less than n=30 and should be interpreted with caution.
B35. Providers must propose a solution to your complaint within 3 weeks. Did this happen for you? [S/R]

Figure 77. Key areas for improvement (unprompted, coded responses)

Key themes
- ►Customer service / communication / staff attitude (42%)
- ►Timeliness (19%)
- ► Cost issues (5%)
- ► Technology (2%)

	Total	Telstra	Optus	Vodafone	TPG / iiNET	Dodo / iPrimus	Virgin	Amaysim	Belong	Activ8me	Skymesh
Base size	***1,347***	*210*	*203*	*205*	*209*	*131*	*131*	*125*	*73*	*30*	*30*
Nothing needed/Good service	23%	20%	26%	26%	27%	25%	33%	30%	22%	27%	29%
►Improve language skills/Move call centre to Australia	18%	24% ↑	14%	12%	11%	14%	10%	5% ↓	5%	6%	4%
►Improved wait times/more staff/advise wait time	11%	9%	10%	20% ↑	14%	6%	7%	18%	20%	3%	14%
►Faster customer service/faster problem resolution	7%	6%	10%	5%	8%	11%	5%	2%	9%	0%	0%
►Improve staff knowledge	6%	6%	6%	4%	6%	5%	5%	3%	7%	0%	2%
►Improve communications/ Communicate more honestly/proactively	4%	5%	3%	4%	3%	4%	3%	3%	4%	7%	3%
►Lower costs/better deals	4%	6% ↑	2%	1%	1%	2%	1%	1%	2%	4%	9%
►Improve their customer service (generic)	4%	3%	5%	4%	3%	1%	1%	1%	3%	6%	0%
►Improve attitude/not condescending/more understanding of those with less technology knowledge	3%	4%	2%	3%	3%	1%	2%	4%	2%	4%	4%
►Fix my problem/Do what they say they would do	3%	3%	3%	1%	3%	5%	4%	2%	5%	5%	0%
►Provide equipment/services that work as they are supposed to (eg no drop outs, stated contract speeds etc)	2%	3%	2%	1%	1%	2%	0%	0%	6%	2%	9%
►Understand/Listen to my problem	2%	2%	4%	2%	1%	2%	4%	1%	1%	0%	0%
►Improve their online service portal/email communication	2%	2%	3%	2%	2%	2%	3%	1%	1%	2%	15%
►Follow up on problems	2%	2%	2%	0%	3%	0%	2%	0%	1%	0%	2%
►Less transferring to different people and departments	2%	1%	4%	0%	0%	1%	2%	0%	0%	0%	0%
►Keep notes/my history on file so I don't have to repeat my story/issue	1%	2%	0%	1%	4%	2%	3%	0%	1%	0%	0%
►Customer loyalty bonuses/pricing/priority	1%	0%	3%	0%	1%	0%	1%	0%	0%	0%	0%
►Improve internal communications between departments/More consistent information	1%	1%	1%	0%	0%	0%	0%	1%	0%	0%	0%
Other	6%	4%	6%	12%	8%	12% ↑	12%	10%	8%	9%	10%
Don't know/unsure	7%	8%	3%	4%	7%	10%	7%	19% ↑	11%	24% ↑	5%

Base: Total sample
B46. If there was one key area where your provider could improve their customer service, what would that be? [O/E]

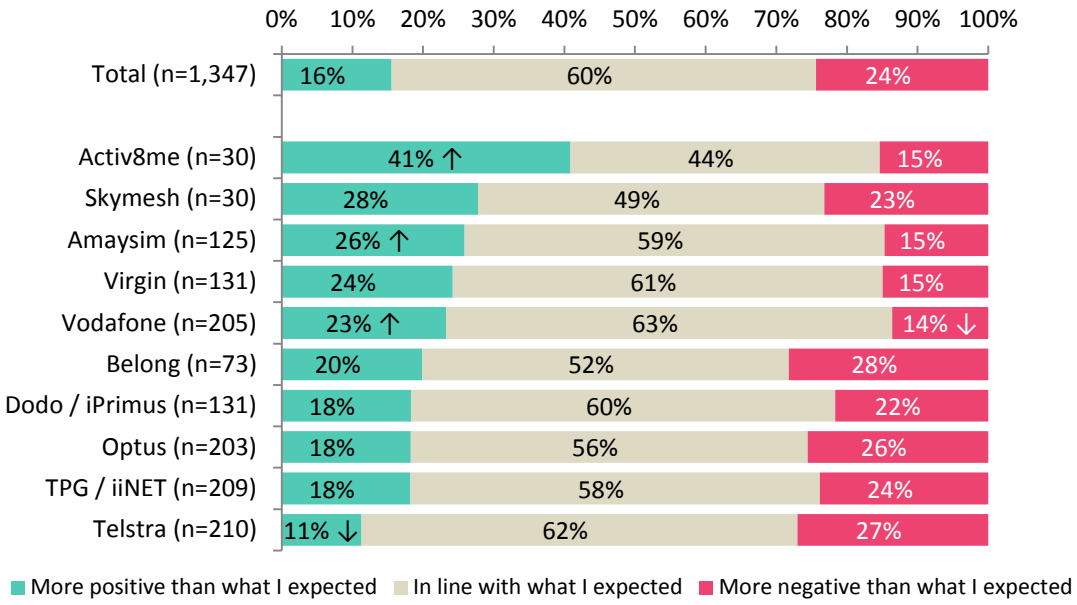
NB: Customer expectations

The survey also included questions that asked if specific activities / events were in line with customer expectations. These questions were asked in relation to:

- overall rating of customer experience
- the total time spent on the phone from the first contact through to reaching the right person or department;
- response times; and
- the total time spent trying to find a resolution with the provider

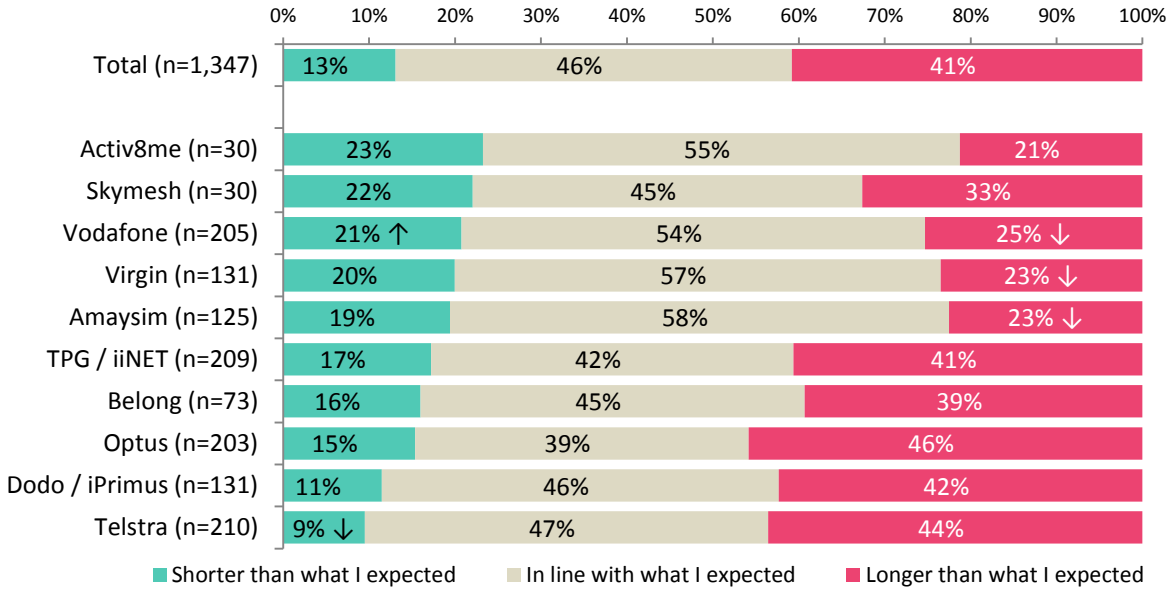
The results have been included below.

Figure 78 Overall expectations



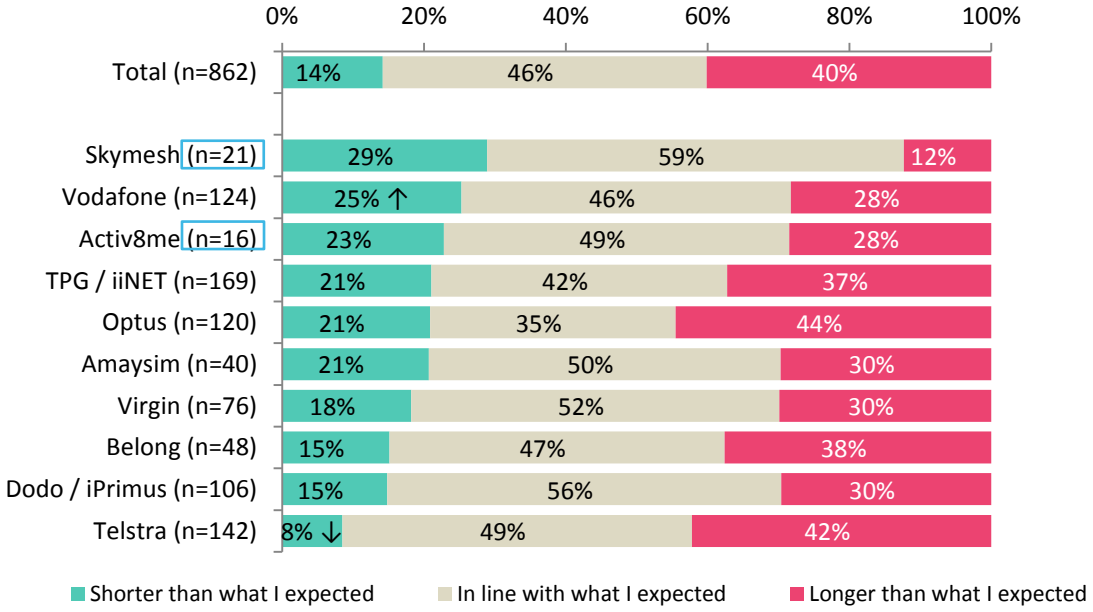
Base: Total sample
B44. Is this experience in line with what you expected it would be when you first contacted your provider? [S/R]

Figure 79 Time expectations



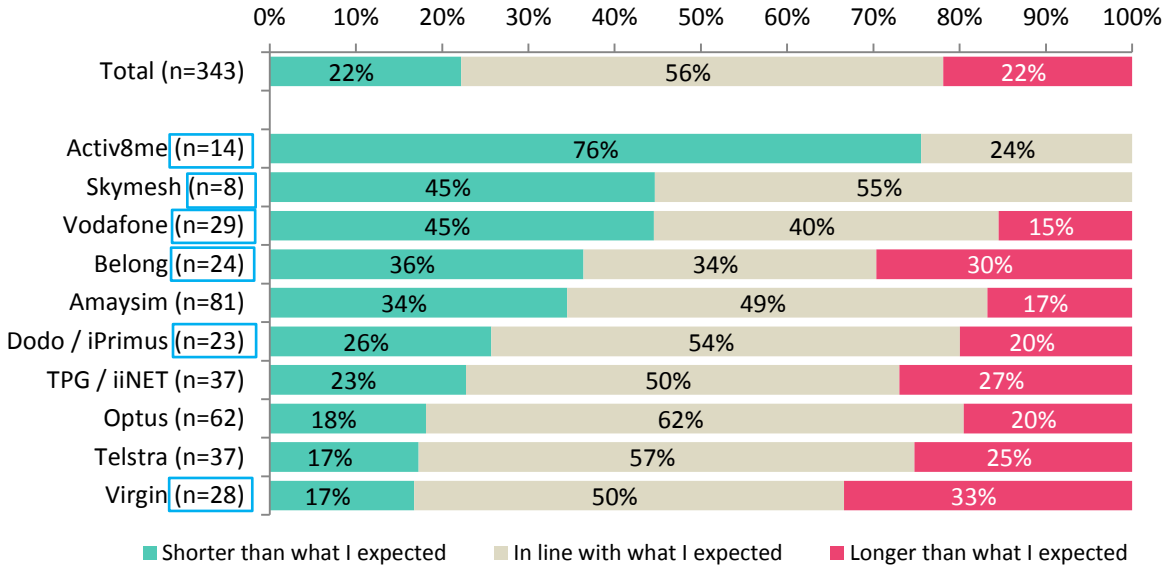
Base: Total sample
NB: Figures may be proportionally higher/lower but are not significantly different due to small base sizes
B40. Was this in line with what you had expected it would be when you first contacted your provider?

Figure 80 Phone experience expectations



Base: Spoke to someone on phone
NB: Some figures may be proportionally larger/smaller, however the results may not be statistically different due to small base sizes. Please note small sample size(s) highlighted in blue – results are less than n=30 and should be interpreted with caution.
B17. Was this time in line with what you expected it would be when you initiated the call?

Figure 81 Expectations of online query, email, social media, and post experience



Base: Messenger/chat, web form, email, social media, or post was the selected method of communication
NB: Please note small sample size(s) highlighted in blue – results are less than n=30 and should be interpreted with caution.
B23. Was the actual time it took to receive a response in line with what you thought it would be when you submitted your question / problem?

Appendix B: Sample profile.

	Total	Telstra	Optus	Vodafone	TPG / iiNET	Dodo / iPrimus	Virgin	Amaysim	Belong	Activ8me	Skymesh
Base size	***1,347***	*210*	*203*	*205*	*209*	*131*	*131*	*125*	*73*	*30*	*30*
Age											
18 to 29	21%	16% ↓	27%	30% ↑	19%	17%	22%	28%	46% ↑	18%	19%
30 to 49	47%	46%	56% ↑	38%	40%	36%	44%	40%	38%	46%	29%
50+	32%	37% ↑	17% ↓	32%	41%	47% ↑	35%	32%	17% ↓	37%	52%
Gender											
Male	55%	53%	64%	55%	53%	48%	48%	50%	55%	55%	71%
Female	45%	47%	36%	45%	47%	52%	52%	50%	45%	45%	29%
Location											
NSW/ACT	34%	28% ↓	39%	49% ↑	38%	33%	36%	32%	37%	38%	16%
VIC	25%	26%	28%	17%	18%	20%	16%	26%	27%	18%	25%
QLD	20%	22%	20%	12%	14%	18%	20%	24%	14%	15%	29%
SA	7%	8%	4%	9%	6%	13%	12%	4%	8%	15%	0%
WA	11%	13%	6%	8%	23% ↑	8%	10%	8%	14%	3%	12%
TAS	2%	3%	1%	2%	1%	6%	2%	0%	0%	4%	7%
NT	1%	0%	2%	3%	0%	2%	5%	6%	0%	7%	12%
Area											
Capital city	64%	56% ↓	72%	78% ↑	72%	56%	81% ↑	71%	70%	49%	20% ↓
Rest of AU	37%	44% ↑	28%	22% ↓	28%	44%	19% ↓	29%	30%	51%	80% ↑
HH income											
<$41,599	25%	27%	22%	24%	28%	33%	23%	21%	24%	27%	20%
>$104,000	18%	17%	20%	22%	22%	19%	24%	17%	17%	17%	8%
Vulnerable groups (impairments / difficulties with…)											
Hearing	6%	8%	3%	4%	6%	9%	6%	7%	5%	42% ↑	15%
Vision	3%	3%	4%	2%	3%	6%	4%	7%	11% ↑	7%	11%
Reading / understanding written material	1%	1%	0%	2%	1%	3%	2%	5% ↑	5%	10% ↑	7%
Communicating in English	1%	1%	1%	1%	0%	2%	4%	1%	0%	0%	0%
NETT – yes to at least one	10%	11%	7%	8%	10%	14%	13%	17%	20%	48% ↑	28% ↑