



Telecommunications
Industry
Ombudsman



SWEENEY
RESEARCH

Telecommunications Industry Ombudsman Awareness Research Final Report

Date: April 2006



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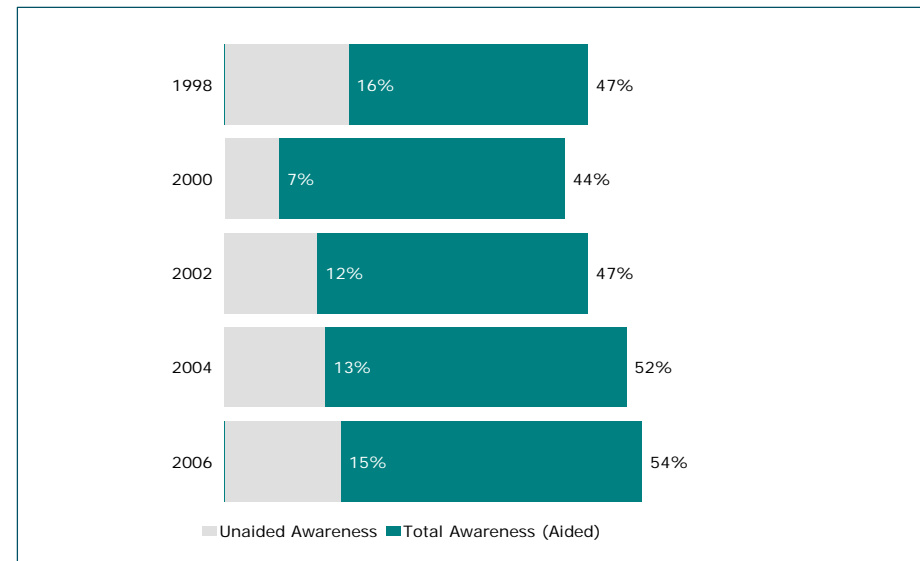
An Assessment

- ◆ This 2006 Awareness research study, conducted on behalf of the Telecommunications Industry Ombudsman (TIO), assesses awareness and understanding of the TIO's role among **domestic consumers**, ethnic groups and small business across Australia. The results are compared with a similar exercise conducted in 2004 and, prior to that, in 2002, 2000 and 1998
- ◆ Spontaneous awareness across specific questions (telephone & internet) show little improvement in terms of recall of the TIO. However, this is in contrast to increases in broad (unprompted) **knowledge of the TIO** which is reflected in the net figures of awareness that have shown incremental improvement.

Total Awareness - Ethnic	Unaided Awareness %	Total Awareness (Aided) %
General (Domestic)	15 (13)	54(52)
General Public Ethnic Groups (Italian/Greek)	9(9)	56(33)
Aboriginal/Torres Strait Islanders	9(16)	47(46)
Other Ethnic Groups	33(14)	51(39)

2004 data in brackets

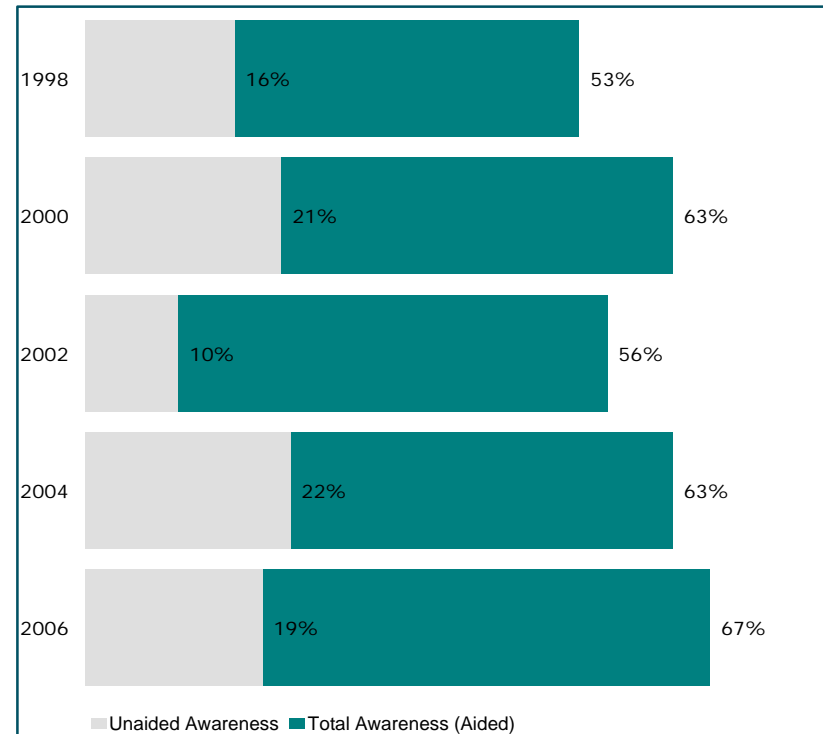
Total Awareness - Domestic



An Assessment

- ▶ As can be seen, total awareness of the TIO has risen across all main respondent groups.

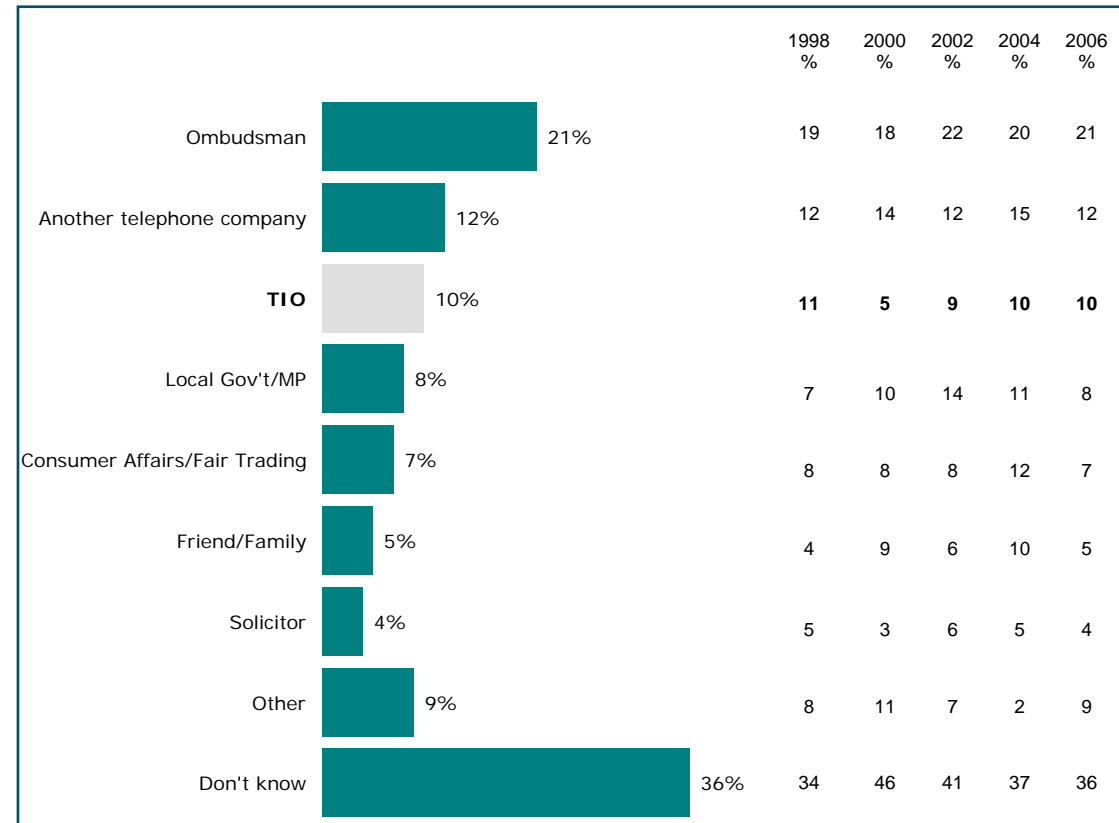
Total Awareness - Business



An Assessment

- ◆ The unaided awareness figures in these charts (see previous page) are based on an amalgamation of responses to several unprompted questions. These unprompted questions, which were put to respondents, covered likely courses of action for problem resolution with telephone and Internet service providers.
- ◆ Among domestic consumers, nomination of the TIO for telephone company problem resolution has held at historical levels (now 10%).
- ◆ Most significantly is that the TIO now stands above Consumer Affairs and Local Government/MP for assistance.

Top of Mind Awareness – Domestic Assistance on a Problem with a Telephone Company



An Assessment

- ◆ Among **ethnic groups**, top of mind awareness of the TIO for telephone problem resolution has risen for other ethnic groups (was 10% now 31%) but fallen for Aboriginal/TSI.
- ◆ Amongst the general public ethnic groups results have held (8%)
- ◆ Note the significance of family and friends in the ATSI & other ethnic groups

- ◆ Among the **small business community** spontaneous nomination of the TIO for telephone company problem resolution has slipped slightly – although it is only 2 percentage points down.

Top of Mind Awareness for Assistance on a Problem with a Telephone Company

Ethnic Groups	General Public Domestic %	General Public Ethnic Groups (Greek/Italian) %	Aboriginal/Torres Strait Islanders %	Other Ethnic Groups %
Ombudsman	21	3	-	9
Another telephone company	12	19	16	20
TIO	10	8	5	31
Local Gov't/MP	8	4	-	5
Consumer Affairs/Fair Trading	7	10	2	23
Friend/Family	5	5	40	19
Solicitor	4	-	-	9
Other	9	17	-	-
Don't know	36	41	49	24

Business	1998 %	2000 %	2002 %	2004 %	2006 %	
Ombudsman	18%	24	19	15	20	18
TIO	14%	12	16	6	16	14
Another telephone company	7%	9	12	14	10	7
Consumer Affairs/Fair Trading	5%	4	4	5	4	5
Telstra	5%	N/A	N/A	N/A	N/A	5
Solicitor	2%	7	3	3	4	2
Friend/Family	1%	1	1	1	2	1
Local Gov't/MP	0%	4	3	1	2	-
Don't know		34	39	49	36	40



An Assessment

- ◆ Sources of awareness for consumers and business were typical (mainstream sources), however, for ethnic groups a range of informal sources are resonating (family & word of mouth).

Sources of Awareness of TIO – Ethnic Groups

	General Public Domestic %	Public Ethnic Groups (Greek/Italian) %	Aboriginal/Torres Strait Islanders %	Other Ethnic Groups %
TV News/Current Affairs Programme	31	34	49	40
Read about/Saw in newspaper	17	26	31	17
Word of mouth/friends/family	13	0	80	32
Through media	12	14	0	0
Radio/Talkback radio	11	2	12	19
A work related issue	8	3	0	0
TV advertisement	5	0	0	0
Telstra/Phone/Internet company told me	5	9	6	30
Aware there is an ombudsman for everything	4	0	0	0
General knowledge	3	4	0	0
Read about	2	0	0	0
Fine print in Yellow Pages/Phone Book	2	2	0	13
Non TV advertisement	2	21	0	0
Government (Federal/State/Local)	0	0	2	0
Non English media	0	0	0	15
TIO Publications/Web	0	0	2	13
Lawyer	0	0	2	6
DCITA	0	0	2	2
Don't know	10	22	0	2

An Assessment

- ◆ Elsewhere, we learn that **consumer** top of mind awareness for the TIO's role in Internet complaint resolution has slipped back to levels seen in 2002 (7%).
- ◆ The use of 'the Ombudsman' descriptor is now the highest of all assistance channels.
- ◆ Awareness of the TIO's role in Internet service provision is limited among all ethnic groups, but is well above the norm among 'other ethnic groups' – double the result from two years ago (14% to 29%).
- ◆ The ATSI segment tend to rely on informal sources for help.
- ◆ Among **small businesses**, the awareness of Ombudsman and computer experts have risen, while the TIO awareness has fallen towards historical low levels.
- ◆ **Domestic** respondents who have heard of the TIO, are more knowledgeable about the TIO's services than 2 years ago.
- ◆ Among **small businesses**, knowledge has slipped across the board from 2 years ago.
- ◆ Across **ethnic groups**, there are some variations this time round...
 - The General Public ethnic groups are equally knowledgeable about the TIO's role as the public at large
 - The ATSI segment appear to be more knowledgeable at this time, while the 'other ethnic' segment are also more knowledgeable than the norm



THE MAIN REPORT



Telecommunications
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Method

- ◆ The study comprises three components...
 - A domestic survey
 - A survey of ethnic groups
 - A small business survey

A) The Domestic Survey

- ◆ For the domestic sample, the questions are placed on an omnibus survey
- ◆ The Year 2006 study was a telephone survey of some 1,200 adults (aged18+) across Australia, with fieldwork conducted in March 2006 by Newspoll
- ◆ The sample structure was as shown opposite
- ◆ Data is weighted to the latest available ABS Census data, to ensure representativeness

DOMESTIC SURVEY – SAMPLE PROFILE	Sample #	Weighted %
Total	1200	100
Male	600	49
Female	600	51
18 – 24	57	9
25 – 34	135	21
35 – 49	382	27
50 +	626	41
NSW	350	36
Vic	300	25
Qld	200	19
SA	150	8
WA	150	10
Tas	50	2
Capital Cities	700	62
Other	500	38



Method

B) Ethnic Group Survey

- ▶ TIO faces particular challenges in delivering its service to Australians of **ethnic** descent (particularly language barriers).
- ▶ To assess awareness of the TIO among ethnic groups, Cultural Partners conducted a telephone survey among Aboriginal and Torres Strait Islanders and other ethnic groups
- ▶ Interviewing was conducted in March 2006, as shown opposite
- ▶ In addition, 61 of the General Public interviews were conducted with adults whose first language is **not** English. It is assumed that these interviews would be skewed to the main ethnic groups in Australia – the Italian and Greek communities

ETHNIC SURVEY – SAMPLE PROFILE	Sample	Proportion
	#	%
Total	200	100
Aboriginal & Torres Strait Islanders	100	50
Vietnamese	20	10
Mandarin – China	20	10
Cantonese – China	20	10
Arabic	20	10
Spanish	20	10



Method

C) Small Business Survey

- ▶ An ad hoc small business survey was also conducted by telephone in March 2006, by Sweeney Research
- ▶ The survey focuses specifically on businesses employing 19 people or fewer
- ▶ A sample of 600 randomly selected small business proprietors were interviewed
- ▶ The sample is drawn from all metropolitan and non-metropolitan regions of Australia. Quotas are set on geographical location and type of business to produce the sample structure as shown opposite

SMALL BUSINESS – SAMPLE PROFILE	Total	Metro	Non-Metro
NSW	99	81	19
Vic	100	80	20
Qld	103	55	48
SA	76	65	11
WA	76	65	11
Tas	47	28	19
NT	47	28	19
ACT	52	52	-
Total	600	454	147

	ANZSIC Division #
Manufacturing	71
Building/Construction	87
Wholesale/Retail	138
Transport/Storage	51
Finance/Property/Business Services	119
Recreation/Personal & Other Services	134
Total sample	600



Section 1:

Awareness of the TIO for Telephone Customer Problem Resolution

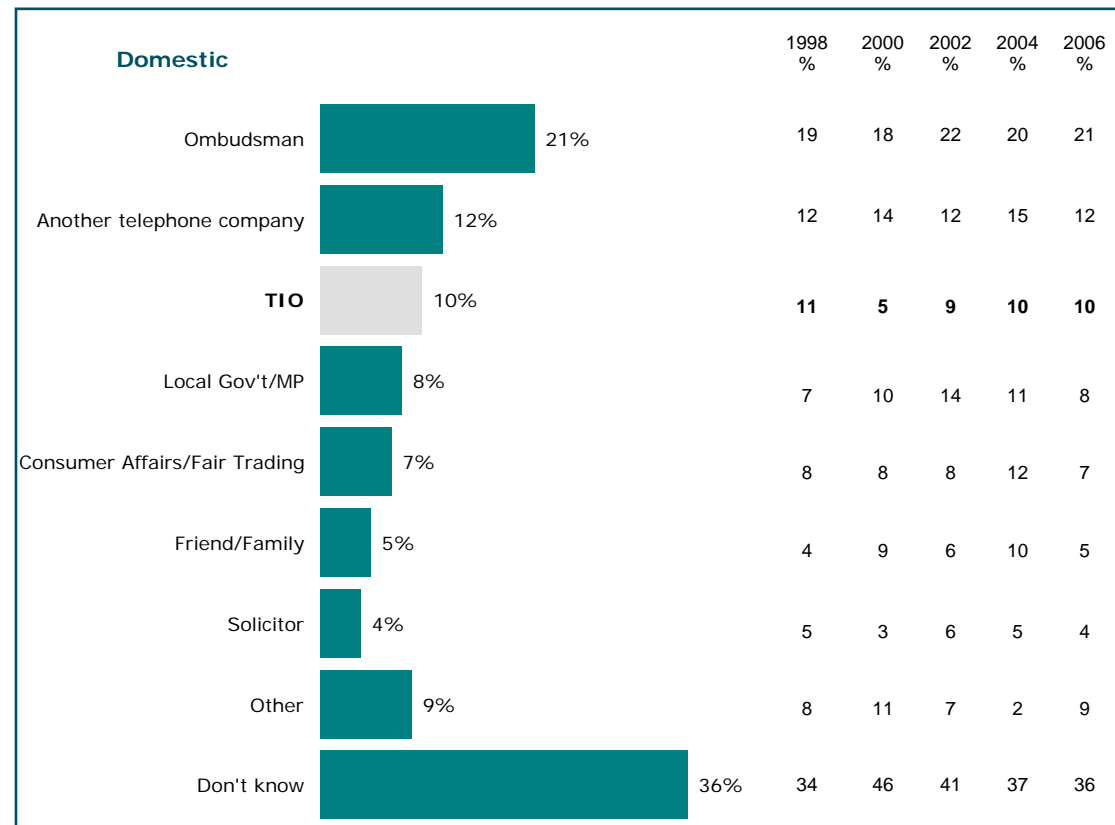
Top of Mind Awareness for Assistance on a Problem with a Telephone Company

- ◆ Our samples of domestic consumers, ethnic groups and small business were asked...

Q. If you had a problem with a telephone company that you were unable to resolve with them yourself and you had to get assistance from someone outside the provider company, who would you be most likely to turn to for assistance? Who else might you consider going to? Anyone else?

- ◆ Spontaneous awareness of the TIO's role in telephone problem resolution has held at historical levels among domestic consumers (now 10%)

- ◆ Most significantly is that the TIO now stands above Consumer Affairs and Local Government/MP for assistance.



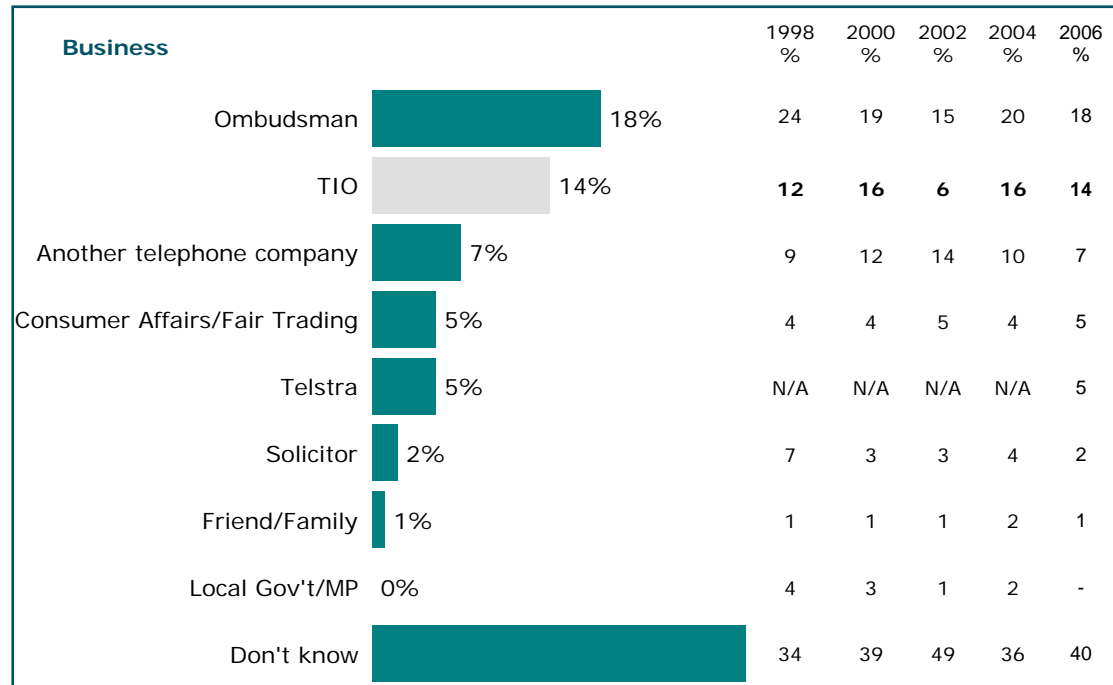
Top of Mind Awareness for Assistance on a Problem with a Telephone Company

- ◆ Among **ethnic groups**, top of mind awareness of the TIO for telephone problem resolution has risen for 'other ethnic groups' (now 31%) but fallen for Aboriginal/TSI.
- ◆ Amongst the general public ethnic groups results have held (8%)
- ◆ Note the significance of family and friends in the ATSI & other ethnic groups

Ethnic Groups	General Public Domestic %	General Public Ethnic Groups (Greek/Italian) %	Aboriginal/Torres Strait Islanders %	Other Ethnic Groups %
Ombudsman	21	3	-	9
Another telephone company	12	19	16	20
TIO	10	8	5	31
Local Gov't/MP	8	4	-	5
Consumer Affairs/Fair Trading	7	10	2	23
Friend/Family	5	5	40	19
Solicitor	4	-	-	9
Other	9	17	-	-
Don't know	36	41	49	24

Top of Mind Awareness for Assistance on a Problem with a Telephone Company

- ◆ Among the **small business community** spontaneous nomination of the TIO for telephone company problem resolution has slipped slightly – although it is only 2 percentage points down.

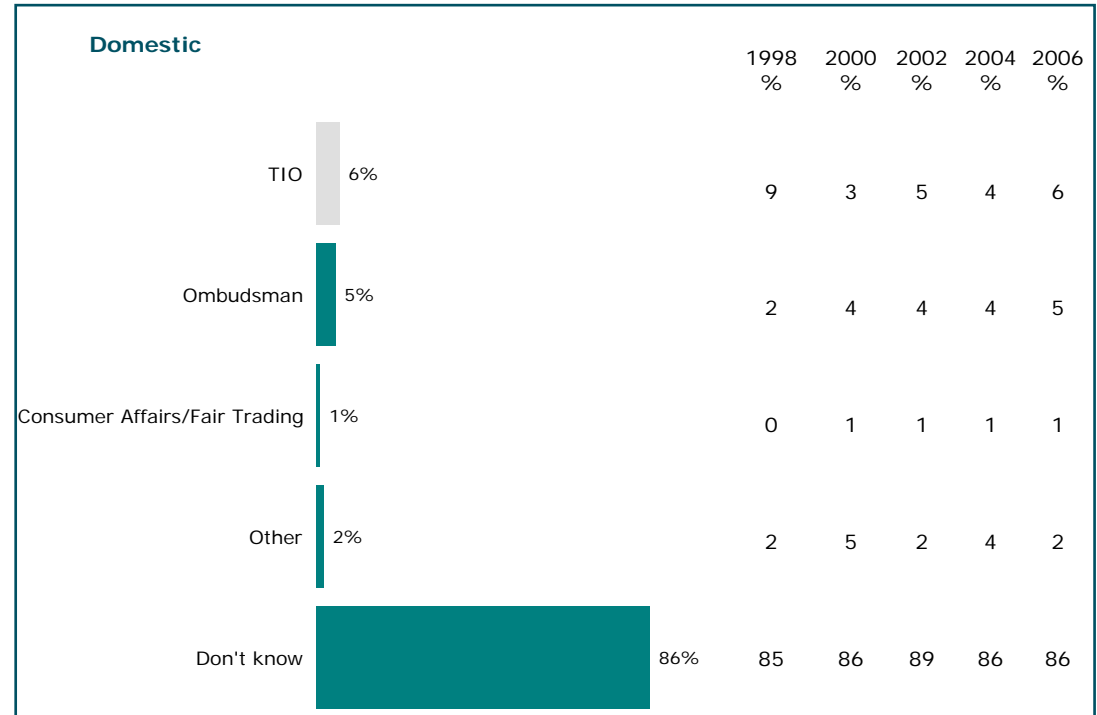


Unaided Awareness of Independent Body for Resolving Customer Complaints Involving Telephone Companies

- ◆ A second question regarding telephone customer complaint resolution was posed to respondents as follows...

Q. The telecommunications industry provides an independent body for resolving customer complaints involving telephone companies. What is that body called?

- ◆ Among **domestic consumers**, awareness of the TIO, as the independent body responsible for customer complaint resolution with telephone companies, is slightly up on the past three surveys.

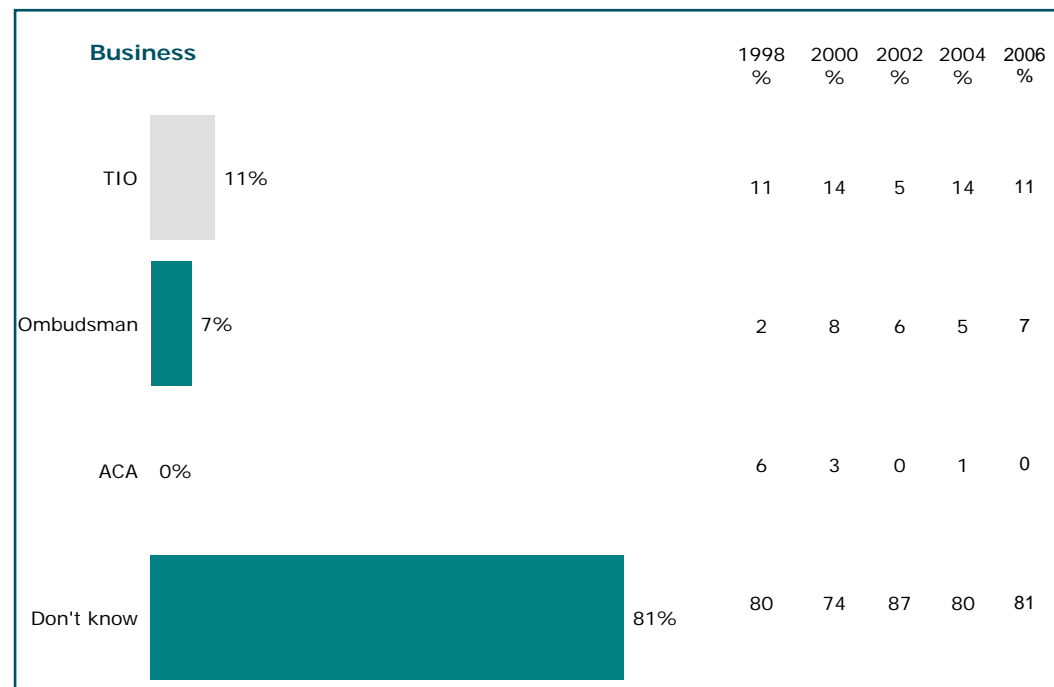


Unaided Awareness of Independent Body for Resolving Customer Complaints Involving Telephone Companies

- Awareness of the TIO's role in telephone complaints is higher among the 'other ethnic group' (for this question). Most significantly is the fact the awareness has decreased within the ATSI segment (13% to 4%).

Ethnic Groups	General Public Domestic	General Public Ethnic Groups (Greek/Italian)	Aboriginal/Torres Strait Islanders	Other Ethnic Groups
	%	%	%	%
TIO	6	2	4	24
Ombudsman	5	4	3	7
Consumer Affairs/Fair Trading	1	1	2	17
Other	2	3	-	-
Don't know	86	90	90	42

- Among **small business**, awareness of TIO on this question has slipped slightly since 2004 – although not to the levels seen in 2002. The broad use of the 'ombudsman' descriptor has risen slightly amongst the business segment





Section 2:

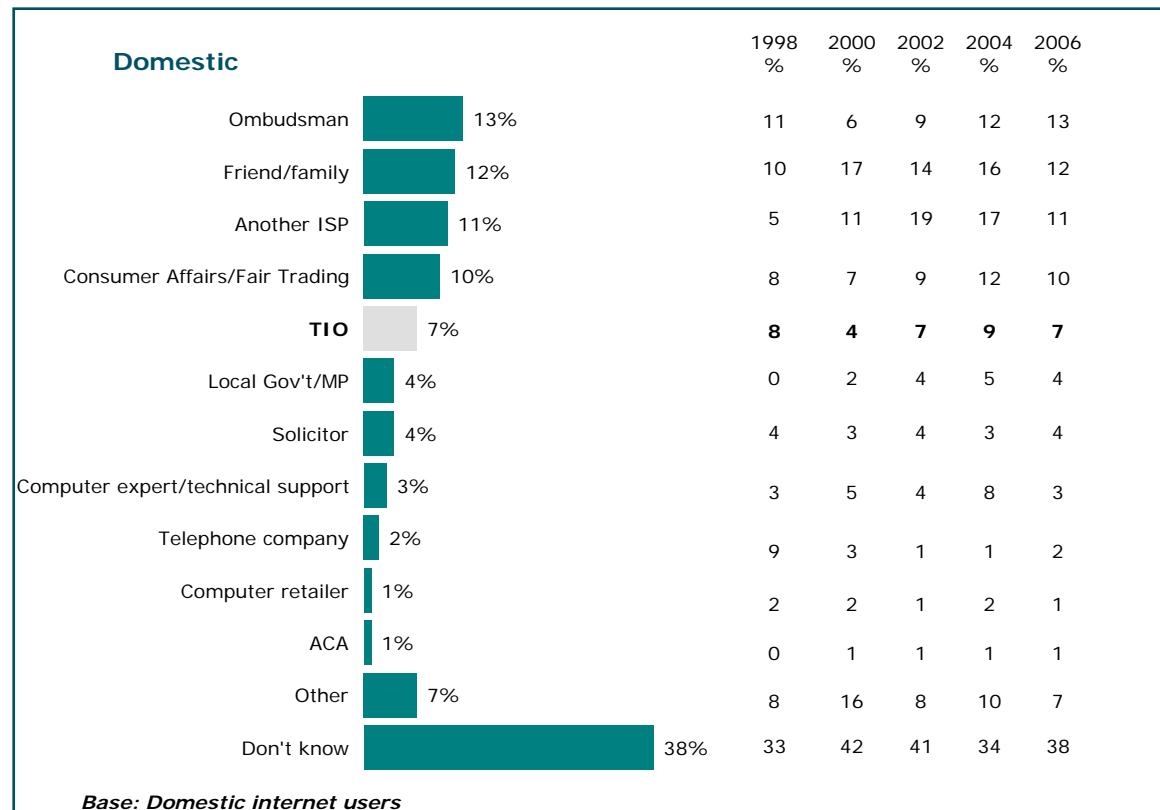
Awareness of the TIO for Internet Customer Problem Resolution

Top of Mind Awareness for Assistance on a Problem with an Internet Service Provider

- Domestic consumers, ethnic groups and small businesses **that have Internet access** were asked...

Q. If you had a problem with an Internet Service Provider that you were unable to resolve with them yourself and you had to get assistance from someone outside the provider company; who would you be most likely to turn to for assistance? Who else might you consider going to? Anyone else?

- Consumer** top of mind awareness for the TIO's role in Internet complaint resolution has slipped back to levels seen in 2002 (7%).
- Note that use of 'the Ombudsman' descriptor is now the highest of all assistance channels.



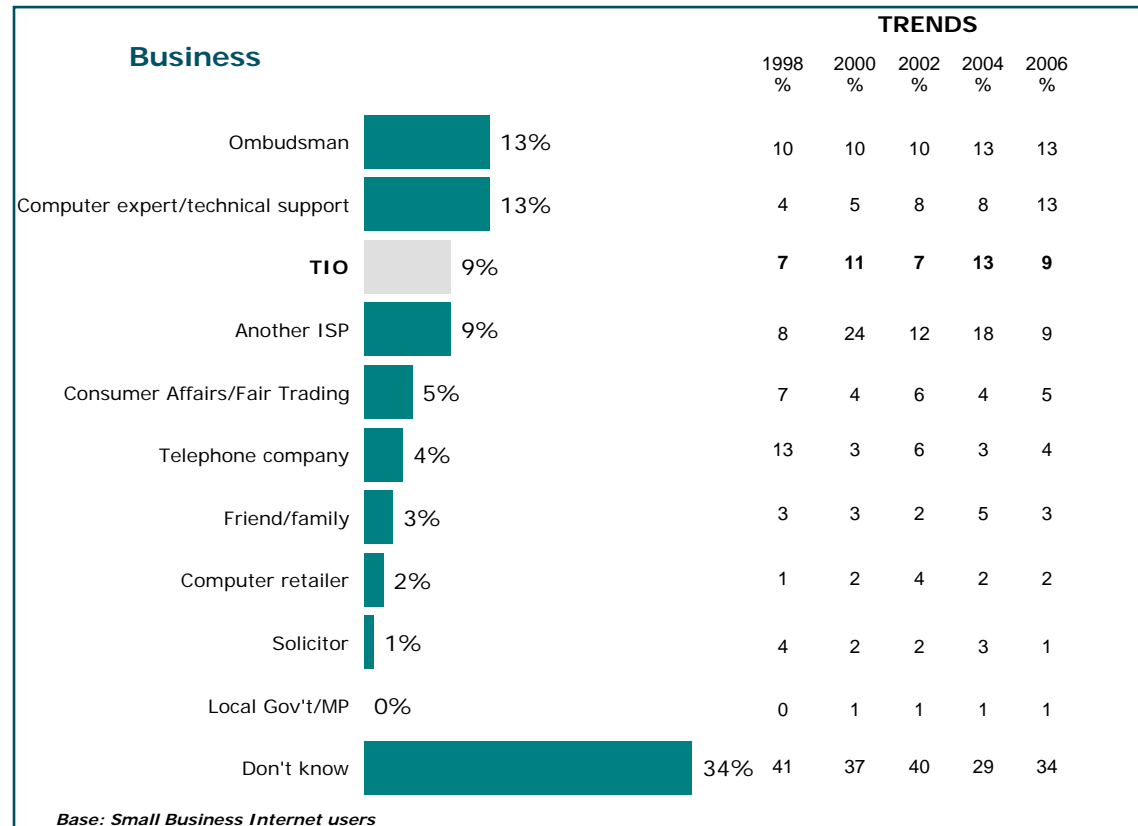
Top of Mind Awareness for Assistance on a Problem with an Internet Service Provider

- ◆ Awareness of the TIO's role in Internet service provision is limited among all ethnic groups, but is well above the norm among 'other ethnic groups' - double the result from two years ago (14% to 29%)
- ◆ The ATSI segment tend to rely on informal sources for help.

Ethnic Groups	General Public Domestic %	General Public Ethnic Groups (Greek/Italian) %	Aboriginal/Torres Strait Islanders %	Other Ethnic Groups %
Ombudsman	13	5	0	7
Friend/family	12	8	18	8
Another ISP	11	7	4	10
Consumer Affairs/Fair Trading	10	13	3	31
TIO	7	6	4	29
Local Gov't/MP	4	3	1	8
Solicitor	4	0	0	7
Computer Expert/Technical Support	3	0	33	12
Telephone Company	2	7	24	5
Computer Retailer	1	1	25	7
ACA/ACMA	1	6	3	10
Other	7	8	4	7
Don't know	38	42	27	22

Top of Mind Awareness for Assistance on a Problem with an Internet Service Provider

- ◆ Among **small businesses**, the awareness of Ombudsman and computer experts have risen, while TIO awareness has fallen towards historical low levels.
- ◆ A range of other sources are noted in the data suggesting that the TIO's internet role could be enhanced.

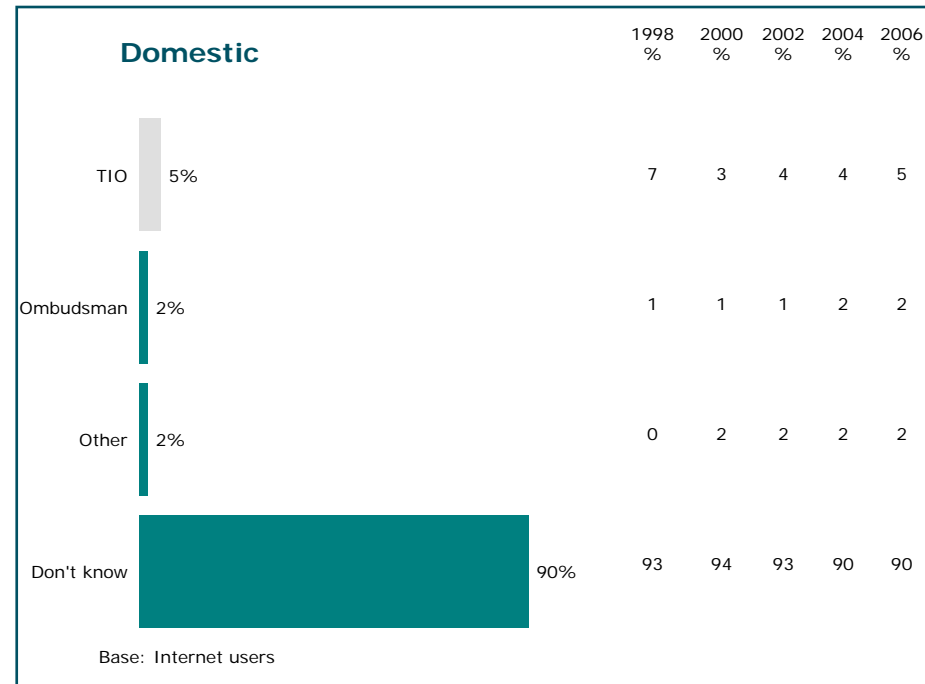


Unaided Awareness of Independent Body for Resolving Customer Complaints Involving Internet Service Providers

- ◆ A second question regarding ISP customer complaint resolution was put to respondents as follows...

Q. The telecommunications industry provides an independent body for resolving customer complaints involving Internet Service Providers. What is that body called?

- ◆ When this less personal version of the question is posed, awareness of the TIO is at similar levels to the past 2 years
- ◆ Among **domestic Internet users**, only 5% nominate the TIO



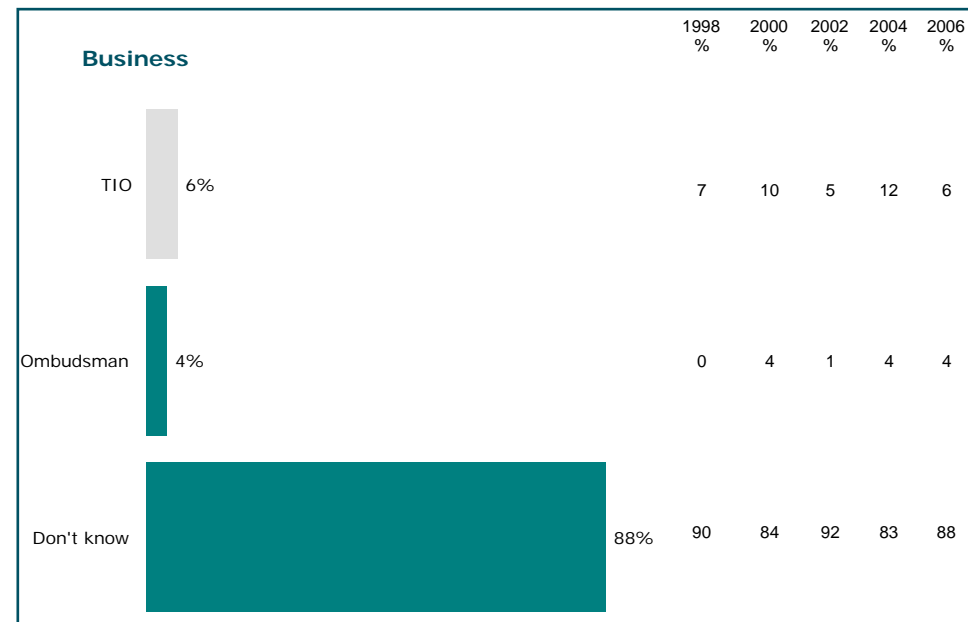
Unaided Awareness of Independent Body for Resolving Customer Complaints Involving Internet Service Providers

- ▶ The TIO's awareness is strongest with 'other ethnic groups' – although it is also above the norm for the ATSI segment
- ▶ ACMA & Consumer Affairs/Fair Trading also gains solid recall with 'other ethnic groups'.

Ethnic Groups	General Public (Domestic)	General Public Ethnic Groups (Greek/Italian)	Aboriginal/Torres Strait Islanders	Other Ethnic Groups
	%	%	%	%
TIO	5	2	6	24
Ombudsman	2	0	3	8
Consumer Affairs/Fair Trading	0	1	3	19
Other	2	6	0	0
ACMA	0	0	1	20
Don't Know	90	91	87	29

Base: Internet users

- ▶ Among **small business Internet users**, nomination of the TIO has fallen back to the levels seen in 2002 (6%)



Base: Small business internet users





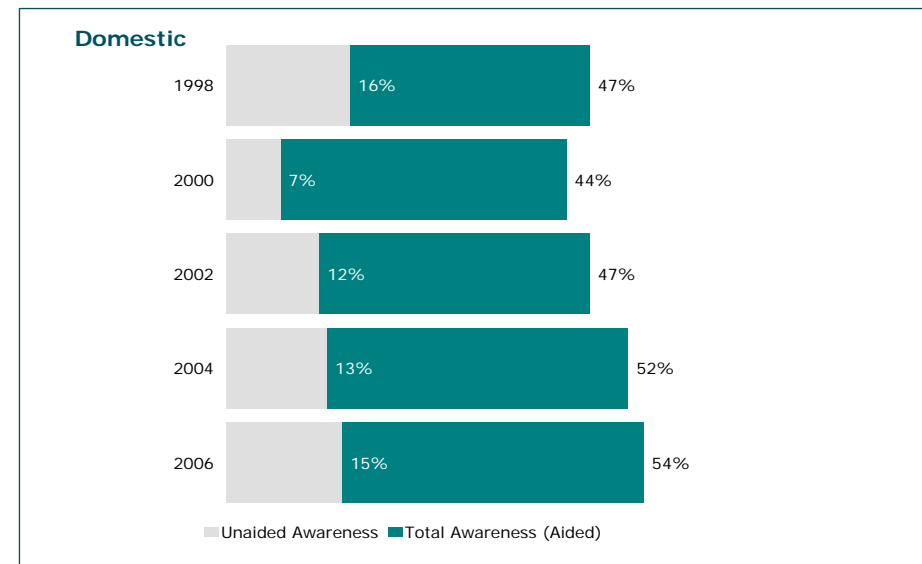
Section 3:

Total Awareness of the TIO

Total Awareness of the TIO

- ◆ Later in the interviews, all respondents were asked whether they had heard of the Telecommunications Industry Ombudsman
- ◆ After aiding, half of domestic consumers (54%) say they have heard of the TIO. As shown, awareness is relatively strong among...
 - Males (60%)
 - Those aged 25-49 years
 - Residents of Tasmania (62%) and NSW (60%)
 - Those with household income in excess of \$60,000 per annum (66%)
- ◆ However, awareness is relatively low among...
 - Queenslanders (47% in total)
- ◆ The trend data reveals an increase in overall awareness of the TIO for the third consecutive survey

Domestic	Unaided Awareness %	Total Awareness (Aided) %
Total	15	54
Male	19	60
Female	11	49
18 – 24	11	43
25 – 34	16	59
35 – 49	20	57
50+	11	53
NSW	15	60
VIC	15	53
QLD	9	47
SA	20	52
WA	16	51
TAS	22	62
Capital Cities	16	53
Regional	13	56
Have a disability	11	55
Do not have a disability	15	54
Household Income		
Under \$30,000 p/a	6	42
\$30,000 - \$59,999 p/a	19	55
\$60,000+ p/a	20	66



Total Awareness of the TIO

- ◆ On the whole, awareness of the TIO varies across the ethnic groups.
- ◆ The `other ethnic' category shows high unaided awareness but lower than normal total awareness
- ◆ Total awareness among general public and other ethnic groups is up on what was recorded in 2004...
 - General public ethnic groups (2004 33%, 2006 56%)
 - `Other ethnic groups' (2004 39%, 2006 51%).

Ethnic	Unaided Awareness %	Total Awareness (Aided) %
General (Domestic)	15	54
General Public Ethnic Groups (Italian/Greek)	9	56
Aboriginal/Torres Straight Islanders	9	47
Other Ethnic Groups	33	51



Total Awareness of the TIO

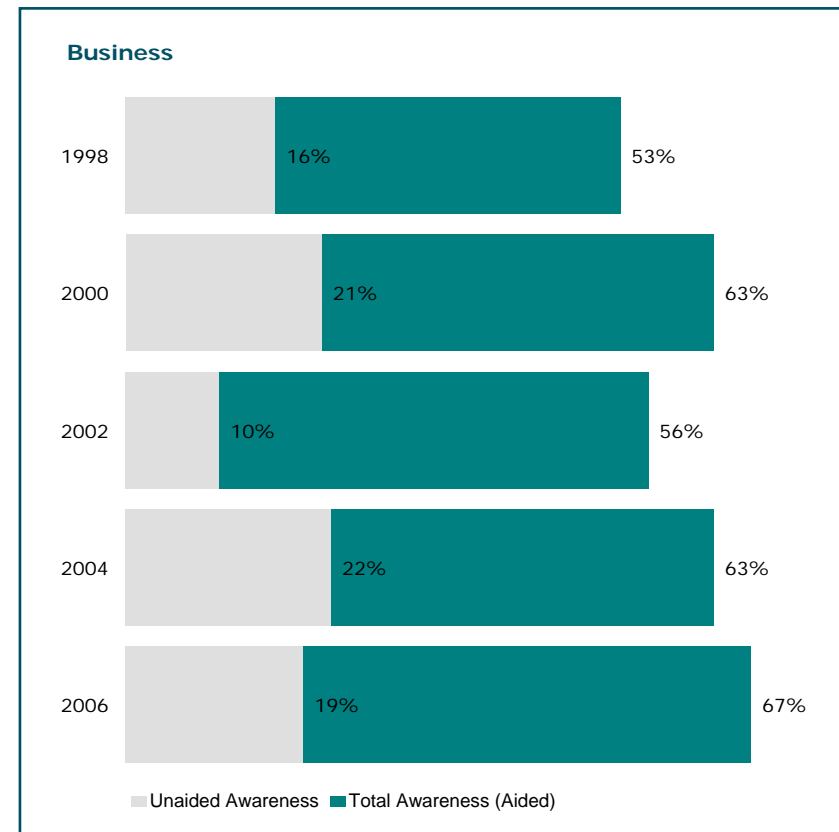
- ◆ Among the **small business** sample, two thirds have heard of the TIO (67%)
- ◆ Total awareness of the TIO is particularly strong among...
 - Victorian businesses (76%) and in SA (79%)
 - Smaller businesses with 1-2 employees (70%)
- ◆ However, total awareness falls to 51% among Western Australian small business proprietors and 57% among their NSW counterparts

Business	Unaided Awareness	Total Awareness (Aided)
	%	%
Total	19	67
NSW	8	57
Vic	23	76
Qld	12	65
SA	36	79
WA	13	51
Tas	23	72
NT	21	74
ACT	19	67
Capital Cities	18	66
Regional	20	71
No. of Employees		
1 – 2	22	70
3 – 4	20	65
5 – 9	13	64
10 - 19	11	62



Total Awareness of the TIO

- ◆ Further analysis reveals relatively strong awareness of the TIO in the financial small business segment (76%), but awareness falls to just 54% among construction small businesses
- ◆ Trends reveal that total awareness of the TIO among small businesses has risen for the 2nd year but unaided awareness has slipped slightly



Sources of Awareness of the TIO

- ◆ For the second time, respondents who said they had heard of the TIO were asked what made them aware of the organisation

- ◆ Five main sources emerge strongest...
 - TV coverage
 - Newspaper coverage
 - Word of mouth
 - Radio coverage/Talkback radio; and
 - Through media (general)

Sources of Awareness	General Public Domestic	Small Business
TV News/Current Affairs Programme	31	38
Read about/Saw in newspaper	17	16
Word of mouth/friends/family	13	14
Through media	12	0
Radio/Talkback radio	11	14
A work related issue	8	5
TV advertisement	5	0
Telstra/Phone/Internet company told me	5	1
Aware there is an ombudsman for everything	4	0
General knowledge	3	5
Read about	2	0
Fine print in Yellow Pages/Phone Book	2	2
Non TV advertisement	2	1
Government (Federal/State/Local)	0	1
Don't know	10	11



Sources of Awareness of the TIO

- ◆ Sources of awareness across the ethnic groups shows a diverse range of media and communication
- ◆ For the ATSI segment key elements include:
 - Word of mouth
 - TV news/programmes
 - Read about
 - Radio
- ◆ For other ethnic groups these four media are important as well as communication from Telstra/Phone or internet company & non English media

Ethnic Groups	General Public Domestic	Public Ethnic Groups (Greek/Italian)	Aboriginal/Torres Strait Islanders	Other Ethnic Groups
	%	%	%	%
TV News/Current Affairs Programme	31	34	49	40
Read about/Saw in newspaper	17	26	31	17
Word of mouth/friends/family	13	0	80	32
Through media	12	14	0	0
Radio/Talkback radio	11	2	12	19
A work related issue	8	3	0	0
TV advertisement	5	0	0	0
Telstra/Phone/Internet company told me	5	9	6	30
Aware there is an ombudsman for everything	4	0	0	0
General knowledge	3	4	0	0
Read about	2	0	0	0
Fine print in Yellow Pages/Phone Book	2	2	0	13
Non TV advertisement	2	21	0	0
Government (Federal/State/Local)	0	0	2	0
Non English media	0	0	0	15
TIO Publications/Web	0	0	2	13
Lawyer	0	0	2	6
DCITA	0	0	2	2
Don't know	10	22	0	2

Base: Aware of TIO

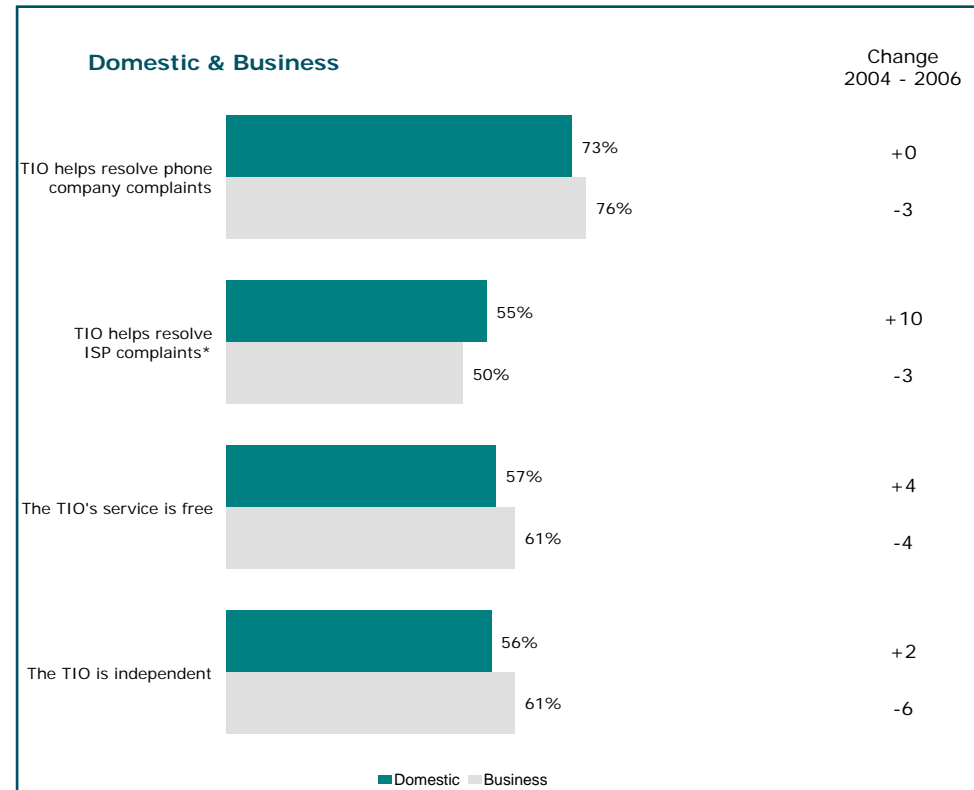




Section 4:
Knowledge of the TIO

Knowledge of the TIO

- ◆ **Domestic respondents** who had heard of the TIO, are more knowledgeable about the TIO's services than 2 years ago.
 - 73% are aware that the TIO helps resolve telephone company disputes
 - 56% are aware of the TIO's independence
 - 57% are aware that the TIO's service is free of charge
 - 55% (of Internet users) are aware that the TIO helps with ISP complaint resolution
- ◆ Among the **small business** sample who had heard of the TIO, results have slipped across the board from 2 years ago.
 - 76% are aware that the TIO helps resolve telephone company disputes
 - 50% (of Internet users) are aware that the TIO helps resolve ISP complaints
 - 61% are aware that the TIO's service is free of charge
 - 61% are aware of the TIO's independence



Knowledge of the TIO

- ◆ Across the **Ethnic respondents** who had heard of the TIO, there are some variations this time around...
 - The General Public ethnic groups are equally knowledgeable about the TIO's role as the public at large
 - The ATSI segment appear to be more knowledgeable at this time, while the 'other ethnic' segment are also more knowledgeable than the norm

Ethnic Groups	General Public Domestic	General Public Ethnic Groups (Greek/Italian)	Aboriginal/Torres Strait Islanders	Other Ethnic Groups
	%	%	%	%
TIO helps resolve phone company complaints	73	69	98	72
TIO helps resolve ISP complaints*	55	48	85	78
The TIO's service is free	57	60	90	66
The TIO is independent	56	58	88	60

Base: Heard of the TIO

* Base: Internet Users/Heard of TIO





Appendix:
The Questionnaire