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# TRRs Report on the Online Survey Conducted on Consumer Experiences on usage of Telecommunications/ICT Services & Products

## June 1 – August 3, 2016 Findings

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### December 2016

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## 1.0 Findings

TRR has conducted and concluded an online regulatory consumer/customer survey on usage of available telecommunications/ICT services and products including mobile services, fixed internet services and also on other general usage experience; in the month of June to beginning of August 2016. The survey targeted all levels and categories of users. The results and outcomes of the survey are explained and described in Section 5.0 of this report.

Considering mobile services across the country, it is evident from this survey and exercise that consumers and, or customers, would like to see and experience a quality service and products offered in the market. Secondly, there is a need for more satisfactory price rates to compliment these services.

It is also very interesting to learn and know that although the price of the services offered are unsatisfactory, overall it is a secondary issue to consumer choice. Network coverage has played a major role on consumer decision making on the choices of the two available mobile network operators.

TRR also noted from the feedback received that, generally, users are pretty much satisfied with the current promotional offers on data services which majority of those participated on this survey have positively indicated to be enjoying the benefits of the offers from the service providers/operators.

Also, given the survey was an online survey, 100% of the participants had access to a form of internet; whether through broadband or fixed internet services.

However, and importantly, more than 80% of these respondents have access to internet through their work places.

It also indicated that both major operators are competing heavily, offering data services to the areas where there is internet access and network available.

*(See also sections 5.1, 5.2 and 5.3 for more information).*

## 2.0 Background and Overview

One of TRR's top priority projects for 2016 is to conduct a regulatory telecommunications/ICT Consumer Survey.

TRR undertook a nation-wide online survey targeting consumers and respective service providers' customers who have already had access to and are using internet services, including

other ICT services such as fixed internet, mobile smart phones and tablets using a 2.5G to 3.5G network. The exercise was undertaken to more fully understand the behavior and attitude of consumers and or customers who are currently using these services and devices. The survey focused particularly on online respondents who submitted their responses through Survey Monkey.

The survey also covered those who have access to, phone (mobile services) and internet services, and also included a section on general information, to obtain feedback from consumers/customers on the services they experiencing and the benefits they are currently enjoying.

The survey examined factors such as:

- The extent to which households/individuals have access to various telecommunications and ICT services;
- Telecommunications and ICT services usage habits and behaviours amongst individuals;
- Satisfaction levels of users with their telecommunications and ICT services;
- Determining the main uses of the internet in Vanuatu;
- Determine usage trend through a year's experience;
- Determine whether consumers are satisfied with the current internet bandwidth speed and its value when using what is available for him and her;
- Report general feedback on any experiences that are new for Regulator's attention.

### 3.0 TRR's Objectives on conducting Regulatory Telecommunications/ICT Consumer Survey

Building on from the contributing factors listed above, TRR purposely carried out this survey to investigate the outcome of the below actions and exercises:

- To understand whether there is positive impact on the roll out of telecommunications services outside of urban areas (rural communities);
- Understand the type of services that is benefiting more of Vanuatu citizens (whether is voice or data) and on the sector that is receiving most benefit from it;
- From our awareness programs in the rural communities, there have not been many complaints to date about the affordability of the service, and whether this is true with the current price regime?
- Whether positive usage is increasing as we have heard a lot on social problems relating to use of mobile phones;
- Understand the behavior pattern of consumers in regards to determination of purchasing telecommunications/ICT devices.

- Monitor how effective consumer use and understanding of TRR's Consumer Protection Regulation which was released towards end of last year (2015).

#### 4.0 Methodology

The online survey was widely distributed through “yumi toktok stret” forum with 28,403 members, “Penama Women’s group” with 51 members, “Walarano facebook” group with 700 members, “West Ambae” mailing list with 203 members, “Seven Day Adventist” mailing list with 308 members, “Yumi toktok Education” with 1,888 members, “ICT in Vanuatu” with 1,650 members and “Sakau Nohe Community” with 229 members.

Given it is a social media group, TRR was mindful of the same number of people that are involved in all groups of social media listed above. Overall, the survey questions were circulated to an estimated population of around 30,000 people; whom we believe have access to internet in and across Vanuatu.

The online survey was out for 2 months (June 01<sup>st</sup> - August 3<sup>rd</sup> 2016). It indicated that the Report will outline experiences during that timeframe. The questionnaire forming the basis of this Survey Report can be viewed at: <http://www.trr.vu/index.php/en/public-register/publications/latest-news/588-trr-consumer-survey>.

From the wider circulation of this online survey across Vanuatu, and as indicated above, this report is based on 150 respondents. TRR provided 2 months for all participants to send in their responses within that timeframe before any assessment and/or analysis was conducted.

All age groups were considered for this survey. Further, the survey catered for mobile services, fixed internet services and other general user experience and knowledge.

In making our analysis, TRR considered the following factors:

- The accuracy of data collected;
- Any existence of bias or identifiable trends; and
- The relevant existence of the data.

Our analysis aimed to confirm, amend, influence and/or recommend action for improvement on TRR's current approach on consumer redress procedures where required, and also its focused on consumer protection initiatives and planned programs in the years to come.

## 5.0 Results and outcome of the survey exercise

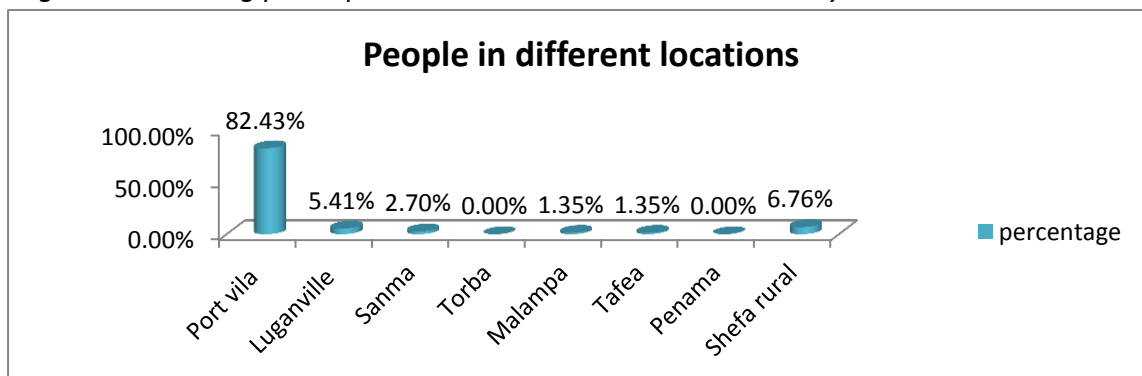
### 5.1 Mobile Services

Of the one hundred and fifty (150) participating individuals, 70% of them were prepaid customers and 30% of them were postpaid. The majority of postpaid customers lived in urban areas, including Port Vila and Luganville. It was verified from the data collected that the consumer age ranged from fifteen (15) years to thirty (30) years, with the majority of them owning a cellphone/mobile phone for personal entertainment and usage. The data collected also indicated that, by owning a mobile phone, it has assisted them on small businesses that they are currently undertaking.

The survey also revealed that consumers or customers' decision on purchasing a handset/mobile phone is largely influenced by the durability of the handset; although pricing is regarded as a secondary contributing factor to having a quality handset. In TRRs assessment, it is indicative that the three main contributing factors contributing to making a decision to purchase a handset are:

- Durability (how long the phone/handset will last);
- Brand and Pricing (handset price); and
- Social/Peer influence

*Figure 1 indicating participations on the online consumer survey*



*Figure 2 indicate reasons of owning a mobile phone*

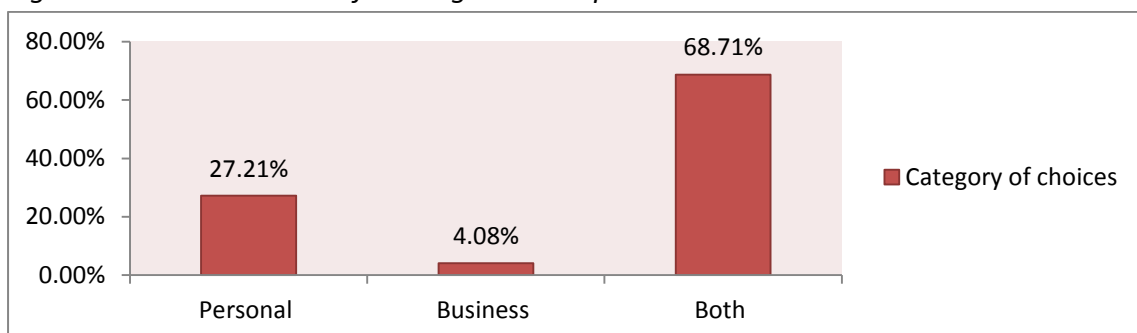
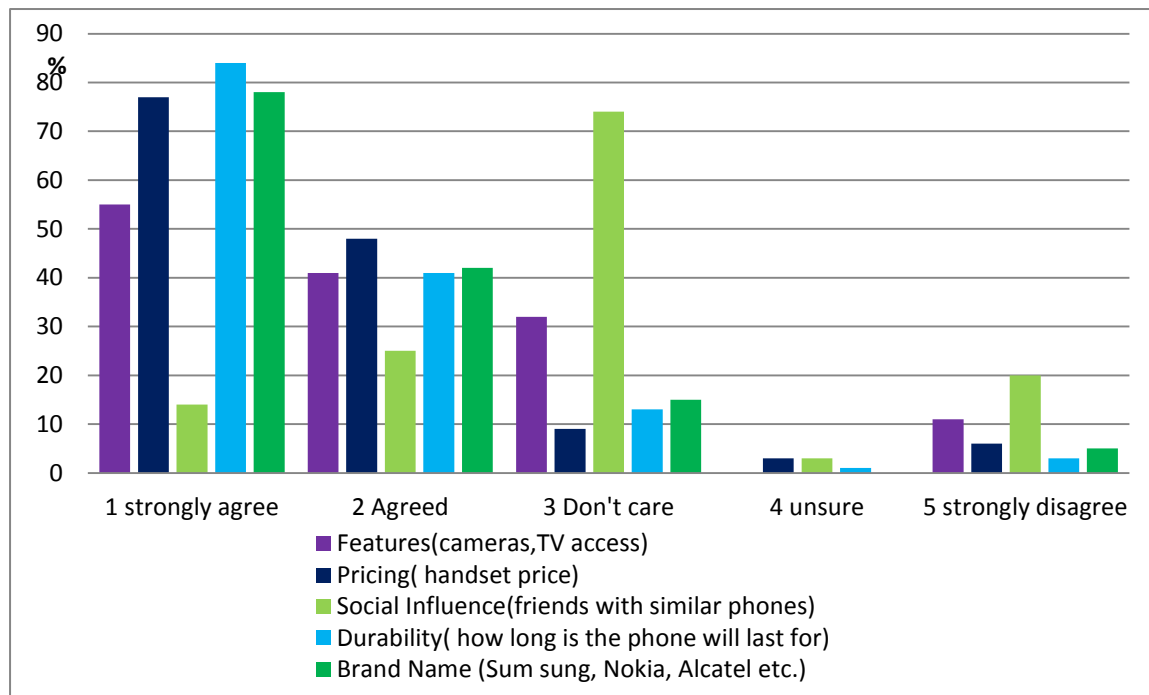


Figure 3 indicate factors contributing to making a decision on purchasing a handset

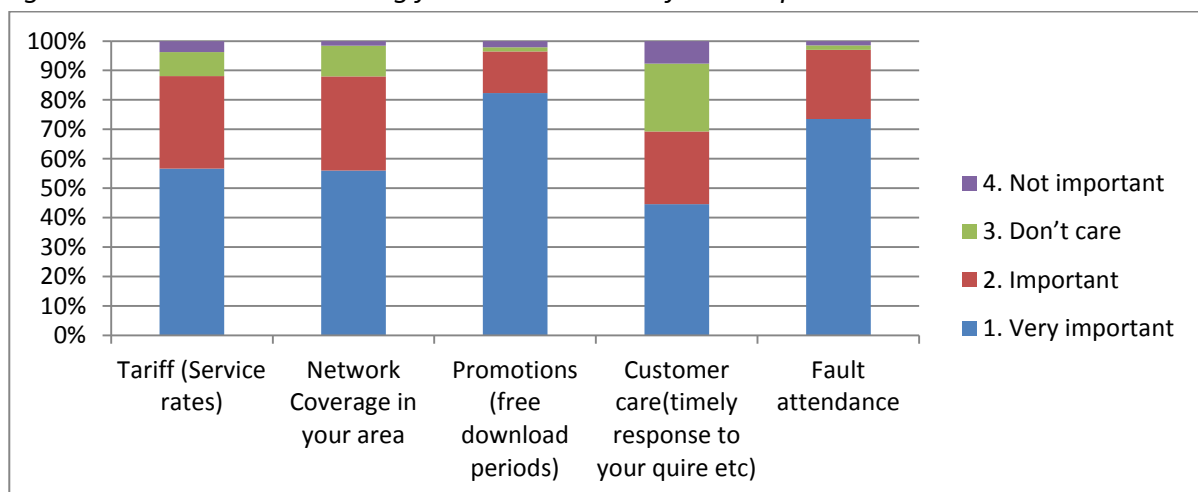


## 5.2 Fixed Internet Services

Interestingly, factors such as service rates, network coverage in respective areas, promotional offers, and customer care and fault attendance by respective operators are key to making a choice as to which operator a consumer will decide to choose when considering a fixed internet service.

Figure 4 below, indicates the contributing factors to a consumers choices of service provider.

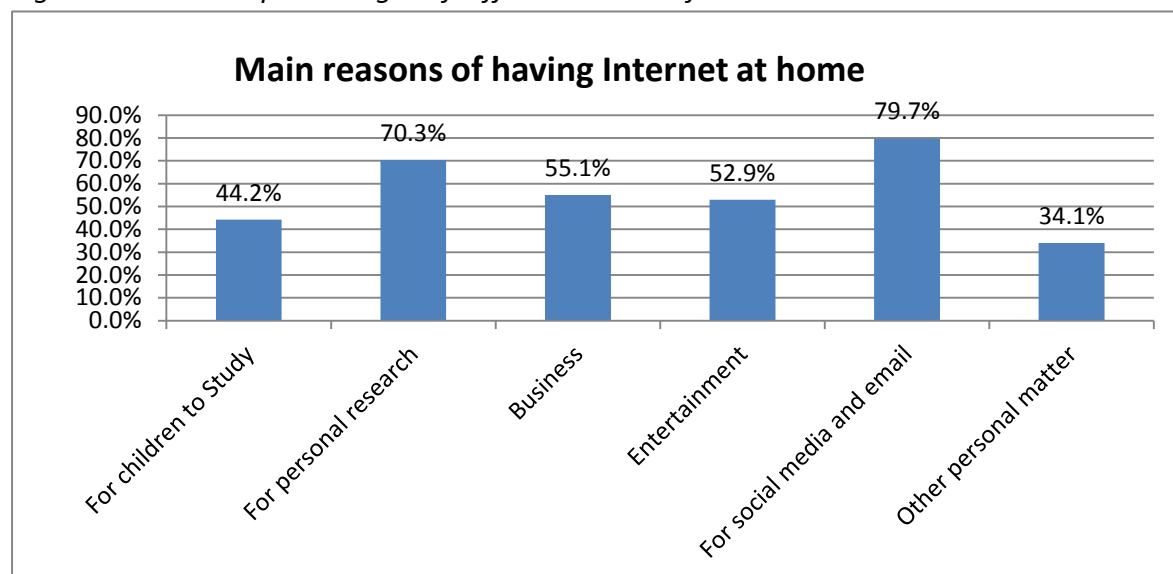
Figure 4 shows the contributing factors to choices of service providers



As shown in figure 5, the different reasons as to why people choose to have internet at home are highlighted. The common reasons are for personal research, social media and as a means of communication through email. There are also other reasons shown in the graph. Each percentage outlined represents the overall population out of one hundred and fifty (150) participants. The rest of the participants for each reason have selected any of the six reasons against their order of preferences.

These figures represent the percentage of users who participated in the survey.

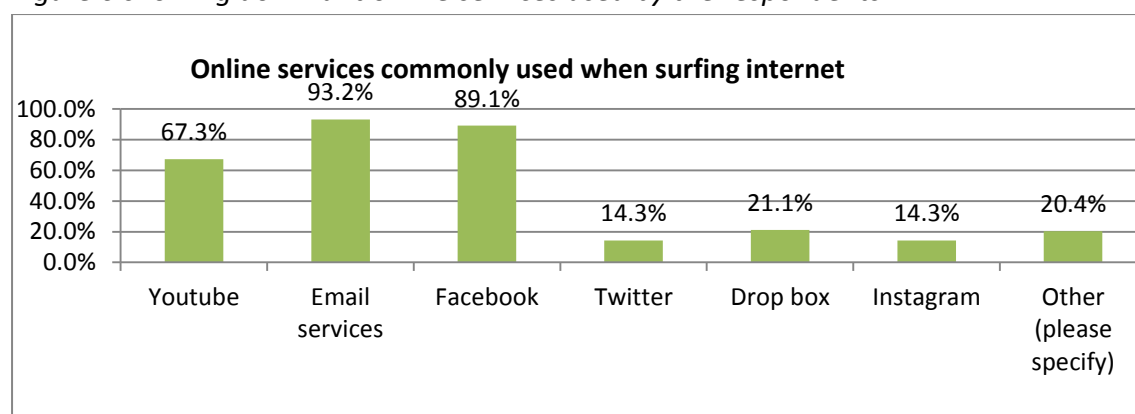
*Figure 5 shows the percentages of different reasons for home internet*



It is indicative to TRR from this research that the majority of the participants go online mainly for email services and to use (free) social media services like Facebook - which took the highest score of 79.7% based on the total number of people that took the survey.

See also Figure 6 for comparison.

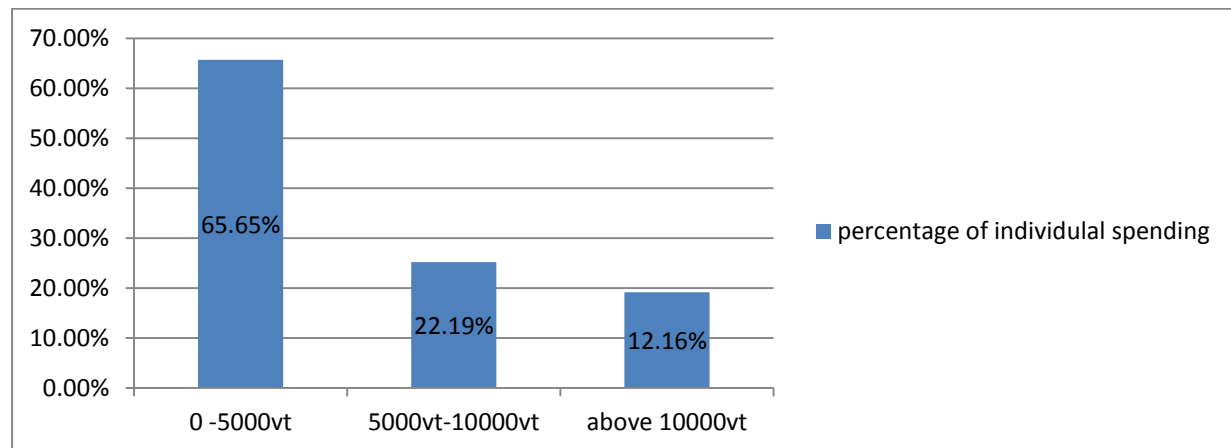
*Figure 6 showing dominant online services used by the respondents*





It was also interesting to note how much an individual is prepared to spend on home internet consumption. From the graph below in Figure 7, it is clear that majority of the customers are those that are *only* willing to spend from 0 vatu to 5,000 vatu. This is an important finding and statistic.

*Figure 7 showing amount of vatu spent on internet at home*

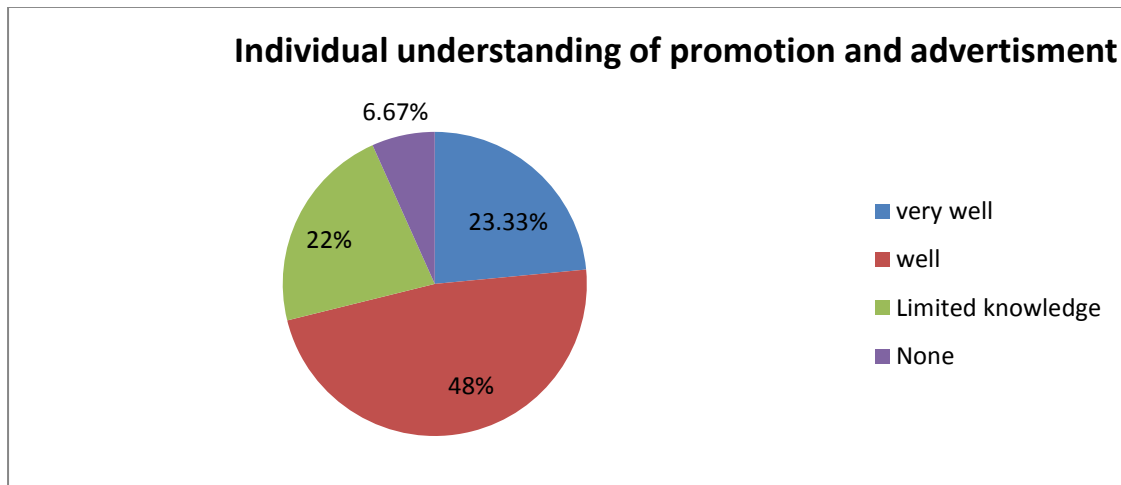


### 5.3 General Consumer Knowledge

Through the consumer awareness programs that TRR has been implementing, and with consumer experiences of different type of services offered in the market, it is indicative that the consumers (customers ) are well informed; particularly customers within urban areas. Customers' involvement and participation in using promotional offers have also contributed to their experience and application of consumer rights and responsibilities. The majority of users of the services have attempted to use promotional offers offered in the market by both mobile operators and internet service providers.

TRR also sought general user information, including how well they understand their responsibilities and rights in reference to the fine prints of advertisements and commitments to terms and conditions of each service offered. It was interesting to note the responses obtained and indicated in Figure 8 below.

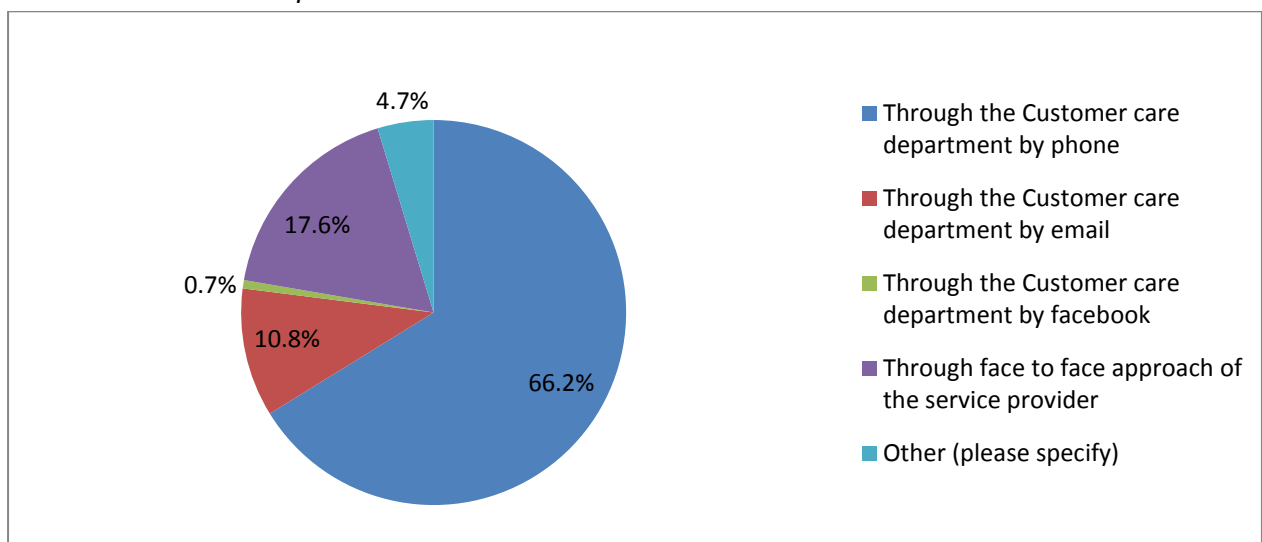
Figure 8 showing how well and limited knowledge they have in regards to advertisements of promotional offers in the market



It is pleasing to TRR to note that more than 50% of the participants have (actually) been reading their terms and conditions of the services they have subscribed for. This also means, the rest of those consumers must now also be empowered to do the same. It is also pleasing to learn that around 80% of the participants are knowledgeable of their service providers' complaint procedures.

How each individual consumer handled their complaint when they had an issue with his or her service provider is outlined in Figure 9 below.

Figure 9 shows how each individual consumer handled their complaint when they had an issue with his or her service provider



Participants were also given an opportunity to provide to TRR their overall level of satisfaction with their service provider(s). From the responses obtained, it is clear that although consumers

are benefiting and enjoying the current available data and mobile services, they still have concerns in relation to overall cost of services and products, the technical support provided to the users, the turnaround time for redress by the operators and also the complaint handling processes involved.

## 6.0 Conclusion

Considering the fact that the use of telecommunications and ICT tools has shown positive progress over years, people have significantly realized the potential of using telecommunications/ICT as an enabler to achieving goals in lives, and it has also become a valuable day-day living tool in human development.

Particularly in Port Vila, the result of the survey depicts that 82% of respondents frequently use telecommunications/ICT in terms of mobile and fixed internet in respect of their daily activities.

Importantly, it also indicates that the active users of telecommunications/ICT are around the age group of 15-30 years, who spend around 3-5 hours per day with telecommunications/ICT devices. In fact, with respect to Figure 6 it shows that young people frequently access face book and other social media whenever they are online.

Though a high number of people participating in promotional activities have good awareness of the product available, and understand the chain of communication to address their issues, there are loop holes that TRR needs to work together with consumers and operators to improve on. These include areas such as network coverage as well as timely operator response to consumer complaints.

TRR is managing the implementation of the Universal Access Policy (UAP) roll out process to achieve 98% coverage by 1 January 2018. In doing so, there are a number of projects that TRR is currently running in parallel, including an audit of coverage network, an audit of quality of services currently offered, and promoting more consumer awareness and protection across Vanuatu.