

CUSTOMER SATISFACTION AND PERCEPTION SURVEY - 2009

PREPARED FOR:



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EXECUTIVE SUMMARY

INTRODUCTION

This survey presents the main findings of a Customer Satisfaction and Perception Survey carried out to determine public's satisfaction and perception of CCK; to determine the Licensees'/ Stakeholders' satisfaction and perception of CCK ;and thirdly consumer satisfaction with the services provided by the service providers to the consumers i.e. the 'end-users'.

The survey was conducted in two stages:

Stage 1 – Qualitative Research was conducted amongst Consumers/Public and Licensees/Stakeholders. A total of 10 Focus groups were conducted amongst the public. The groups were conducted in the key urban areas and spread across most of the regions in Kenya.

In addition a total of 15 In-depth Interviews were conducted amongst the licensees and 5 interviews amongst the Stakeholders.

Stage 2 – A national survey was carried out amongst males and females aged 14 to 65 years in Kenya's urban and rural areas. A total of 1120 interviews were conducted – 552 in the urban areas and 568 in the rural areas. The data was re-weighted at the analysis stage to make it representative of the Kenyan population which according to Kenya National Bureau of Statistics (KNBS) is estimated at about 25% urban and 75% rural.

EXECUTIVE SUMMARY

I. Key Findings – Licensees/ Stakeholders’ Perceptions and Satisfaction with CCK

- i. Virtually all Licensees and Stakeholders were aware of CCK. A majority –about three-quarters - came to know of CCK through their work as it involved contact with CCK for various reasons.
- ii. The licensees/Stakeholders were well-informed of the role of CCK. Reference was made to its role of being “a regulator of the Communications Industry” (94%), “approves Licensees for Media Houses, Radio and Television Stations” (39%) and “ensures fair play amongst the organizations in the communications industry” (27%).
- iii. The Licensees/Stakeholders’ overall ratings of CCK were quite favorable. One of the biggest perceived achievements of CCK was that “CCK has made communication much easier” (28%). CCK was also commended for having “kept in touch with the developments in the communication industry” (17%) and for “being fair to all players in the market” (16%).

However there was some concern amongst the Licensees/ Stakeholders who believe that CCK is not working independently i.e. it was alleged that it is being controlled by ‘outside forces’. In addition CCK was perceived to favor some of the players in the market. Reference was also made to delays in issuing of licenses and frequencies.

There were suggestions for CCK to reduce bureaucracy, to act independently, control the price of communications services, to create awareness of its role amongst the public and to involve/update the Licensees/ Stakeholders on new developments in the market.

The licensees and Stakeholders would like CCK to hold seminars and workshops where ideas can be exchanged/ shared, where Licensees can bring up some of the issues affecting their businesses and where some of the stakeholders can also contribute to the workshops as they have expertise in the field of communication.

In terms of expectations from a regulatory body such as CCK, respondents reiterated the need for Transparency, Accountability, Professionalism and on Building a partnership with their customers and Stakeholders. The need for CCK to work independently and to protect the consumers/ customers was also emphasized.

- iv. The Customer Satisfaction Index (CSI) was calculated based on their ratings of key attributes of importance according to the Licensees and Stakeholders. The CSI was 74% as compared to 68% in the previous survey, thus indicating some improvement in customer satisfaction levels.

CCK generated a remarkable Image Perception Index (IPI) of 79.7% among the Licensees/ Stakeholders – this is an increase of about 6% over the IPI achieved in the previous survey (72.7%). Thus there is an improvement in the perceptions of CCK among the Licensees/ Stakeholders.

- v. Over 90% of the Licensees and Stakeholders had seen/heard the recent CCK advertising - virtually all of them mentioned the Television advertising whilst 50-60% mentioned the Radio and Newspaper advertising respectively.

II. Key Findings – Consumers

Consumer Perceptions and Satisfaction with CCK

- i. Spontaneous awareness of CCK was fairly low. Only 18% of the consumers mentioned CCK spontaneously as compared to 28% for Central Bank of Kenya and KEBS respectively. However upon prompting, CCK's awareness increased to 53%.
- ii. CCK is best known as an organization which "regulates/controls the telecommunication communication industry" –almost 80% mentions. In addition it is known to "give licenses to Media Houses/ Radio Stations /Television Stations" – particularly in urban areas (Urban- 47%, Rural -28%, Total -34%). Small numbers were aware that CCK "controls/ approves radio frequencies".

It must be noted that none of the consumers were aware that CCK gives licenses to Courier/ Transport Companies and Postal services.

- iii. The most frequently mentioned source of awareness of CCK was through advertising (60%) - the recent CCK television advertising "Tumetoka mbali" referring to 10 years of existence of CCK and featuring the comedian Churchill generated high mentions (32%) followed by the respective Radio advertising (21%).
- iv. CCK generated favorable spontaneous comments for the progress it has made in the last few years in the telecommunication industry i.e. it has 'Revolutionized the telecommunication industry' (20%), 'has given out licenses to an increasing number of radio and TV stations' (19%), and "controls the contents of programmes broadcasted on the radio' (21%).
- v. In terms of dislikes, consumers complained about CCK being "biased in giving out frequencies to investors/ prospective clients" (20%) and "CCK has the power to ban TV and Radio stations" (13%). Reference was made to past incidents/ news when some media owners were denied radio frequencies and a prospective Mobile Phone operator was denied license to operate. Both parties were said to have struggled before they finally got the respective licenses.
- vi. CCK was rated favorably for its image perception and achieved an Image Perception Index of 76.4% which can be described as favorable. It was rated favorably for being "a financially stable institution", "a reliable organization", "has embraced modern technology".
- vii. CCK achieved a favorable Customer Service Satisfaction Index (CSI) of 88.4% - this is remarkable in absolute terms as well as in comparison with the CSI in previous survey (75%). CCK was commended particularly for allowing new players in the telecommunications market – particularly the Mobile Phones Operators -, for enforcing rules of fair play among operators and approving the right equipment to be used by operators.

Consumer Satisfaction with Service Providers in the Communication Industry

- i. Mobile telephony (99%), Postal Services (90%) and Fixed Line telephone (83%) services were among the most frequently mentioned methods of communication consumers were aware of.
- ii. Mobile telephony was the most widely used communication method in urban as well as rural areas –total usage level was 87%. The extent of use of Telephone Fixed Lines, Wireless Phones, Premium Rate services, Email/Internet, Courier services and Postal services respectively was comparatively low.
- iii. Among the users of the respective communication methods, Mobile telephony generated the highest level of satisfaction and generated a mean score of 8.2 on a 10-point scale. Postal Services and Telephone Fixed Line Services generated the poorest ratings respectively.
- iv. Customer satisfaction with Service Providers Used:

The table below summarizes the Customer satisfaction Index and Customer Service Index for the respective communication methods used:

	Telephone (fixed Line)	Wireless Phone	Mobile Phone	Premium Rate Service	Email/Internet Service	Courier Service	Postal Service
Customer Satisfaction Index	66%	74%	79%	-	64%	81%	74%
Customer Service Index	63%	70%	79%	61%	74%	78%	67%
Overall satisfaction (10-point scale)	5.9	6.1	8.2	5.3	6.2	6.3	5.7

Note:

Customer satisfaction Index includes all aspects of customer care ranging from handling of complaints, billing issues, ease of getting through to customer help lines etc. This question was not asked to Premium Rate Service users as most of the attributes were not applicable.

Customer Service Index refers specifically to particular aspects of customer care, for example "Ease of accessing a customer care staff", "politeness and helpfulness of customer care staff", "accuracy of information provided" etc.

Overall Satisfaction on a 10-point scale refers to respondents' rating of CCK "taking everything into consideration about CCK"

Introduction

Background

The Communications Commission of Kenya (CCK) is the independent regulatory authority for the communications industry in Kenya. Its role is to license and regulate telecommunications, radio communication and postal/courier services in Kenya.

CCK was established in February 1999 by the Kenya Communications Act, 1998. With the enactment of the Kenya Communications (Amendment) Act, 2009, the Commission now has the mandate to regulate broadcasting, the conduct of e-commerce and electronic transactions and can now set up the universal service fund for the industry. With effect from January, 2009 the Commission effectively became a converged regulator with broadcasting, multi-media and e-transactions falling under its expanded mandate.

The Commission plays a critical role in the liberalization of Kenya's postal and telecommunication sectors. CCK is the gateway that encourages private investment in the sector and provides for the rights and obligations of both operators and consumers. The licensing of new players has given the consumer greater choice. CCK encourages private investment in the sector and provides for the rights and obligations of both operators and consumers. The liberalization of the communications market has given the consumer greater choice of communication products and services.

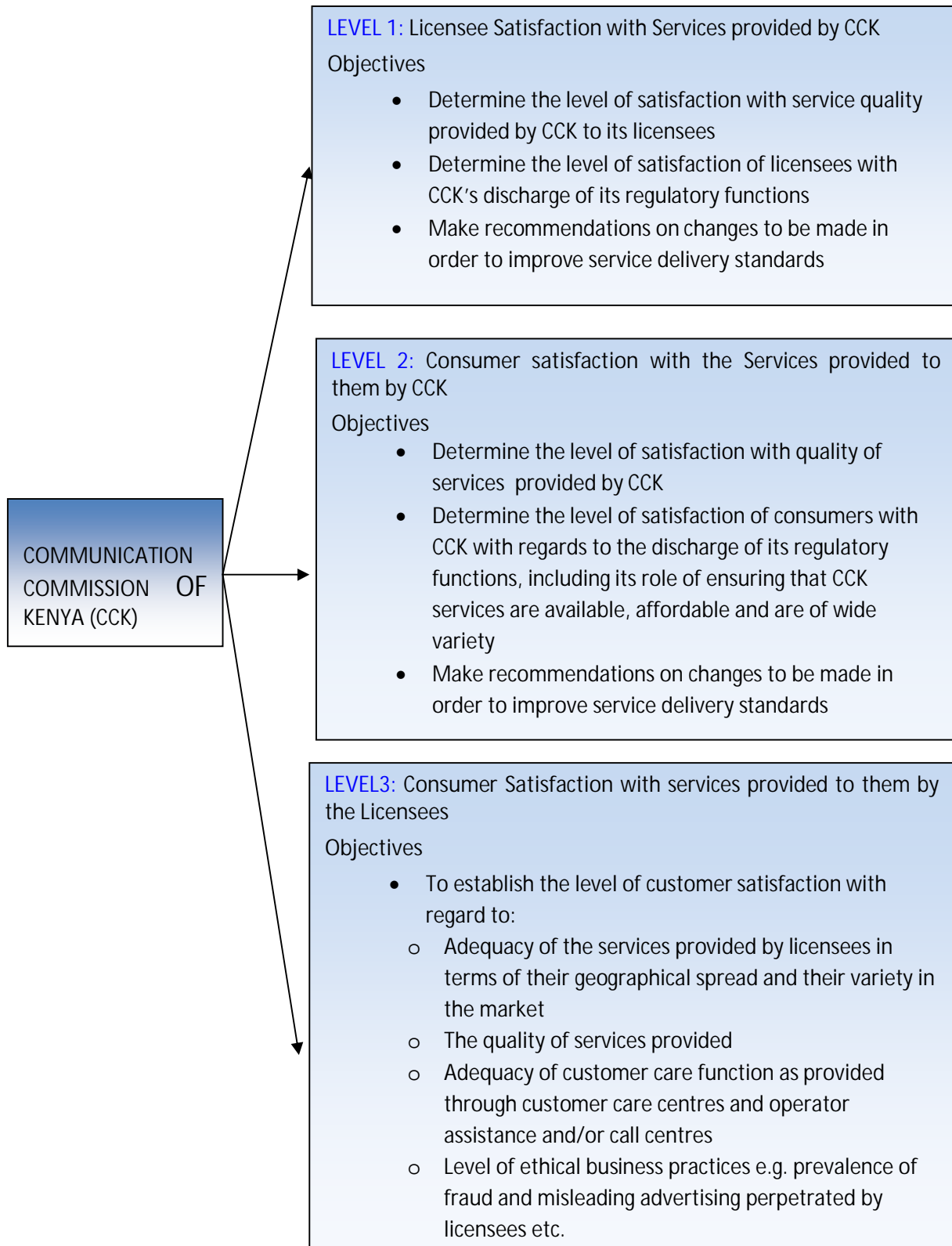
CCK's core functions are as follows:

- Licensing (telecoms and postal/courier) operators
- Regulating tariffs for monopoly areas such as postal services.
- Establishing interconnection principles
- Type-approving communications equipment
- Protecting consumers with regard to the quality, price and variety of communications services
- Managing the radio frequency spectrum
- Licensing and regulating broadcasting services
- Facilitating e-commerce and e-transactions
- Formulating telecommunication numbering schemes and assigning them to network operators; and
- Implementing Universal Service Obligation for both postal and telecommunication services.

CCK carried out a Baseline Customer Satisfaction and Perception Survey in the year 2006 using the services of an external market research organization and some action was taken based on the findings and recommendations of the research. The Commission decided to repeat the survey to establish the progress that has been made on the recommendations of the Baseline Survey conducted previously i.e. in 2006 and ARMS was commissioned to carry out the research.

Research Objectives

PART 1: CUSTOMER SATISFACTION SURVEY



Specific Objectives of the Customer Satisfaction Survey were:

- a) To determine the responsiveness of the Commission to its licensees and service providers and that of licensees to their customers
- b) To determine the effectiveness of its regulatory functions as perceived by both Licensees and the Consumers
- c) To establish whether consumers feel that services provided by Licensees are adequate in terms of their geographic spread and their variety in the market
- d) To determine whether consumers feel that the quality of the services provided is acceptable
- e) To establish the level of satisfaction with CCK in terms of professionalism; speed of service; sufficiency and relevance of information provided; and effectiveness of procedures
- f) To determine the level of satisfaction with quality of services provided, accessibility of services, courtesy of staff, responsiveness, courtesy and timeliness

OBJECTIVES:

To determine:

- Level of public / stakeholder awareness and their knowledge about CCK and its role
- Public perception of CCK and the reasons behind the perception including the sources of information influencing this perception and how it impacts on the image/reputation of CCK
- Stakeholders' perceptions on the manner in which the Commission discharges its mandate
 - Awareness and Knowledge of CCK
 - Source(s) of awareness of CCK
 - Opinion of CCK as a regulatory body
 - Likes/ dislikes/ improvements suggested
 - Attribute ratings

Specific Objectives of the Perception Survey are:

- a) To establish the level of public/stakeholder awareness and their knowledge about CCK and its role
- b) To assess the public perception of CCK and the reasons behind the perception including the sources of information influencing this perception and how it impacts on the image/reputation of the Commission
- c) To establish the stakeholders perception on the manner in which the Commission discharges its mandate
- d) To assess the level of awareness in regard to CCK role and services
- e) To assess above objectives in relation to licensees, the public and other stakeholders e.g. media, government, suppliers, consumers of ICT services.
- f) Based on the findings of CCK customer service charter to make recommendations on what can be done to improve the reputation and service delivery standards of CCK.

Research Methodology

This research was carried out in two stages:

Stage 1 – Qualitative Research

Stage 2 – Quantitative Research

Stage 1: Qualitative Research

This stage of the research was carried out using the method of Focus Group Discussions amongst consumers/public and In-depth interviews amongst Licensees/Stakeholders.

Consumers

A total of 10 Focus groups were conducted amongst males and females in age groups 18-24 yrs 25- 34 yrs and 35-44yrs respectively.

Note: The Focus groups provide qualitative information and are in no way meant to provide nationally representative information. The intention is to reach a diverse set of consumers, particularly by age groups and regions so that the information generated can shed some light on regional issues which might be of importance to CCK in its strategic planning in addition to determining the needs and aspirations of different age groups, particularly the younger age groups who tend to have high expectations, are more inquisitive especially in the new developments in the communications industry and want 'to move with times' – particularly with mobile phone features and in the internet /ICT world.

It is usually difficult for people in the most upper socio-economic class (i.e. the A's) to attend groups partly due to their busy schedules and sometimes due to lack of interest. In terms of research of this nature, it is believed that the lifestyle and habits of the B socio-economic group is quite similar to those of the A's and thus their views are taken as being representative of the AB's.

Similarly in terms of age-groups, it is believed in the research world that the views of the teenagers (say 14-17yrs) are represented by the 18- 24 yrs group, most of whom would not be working, thus having no personal savings and their status in terms of lifestyle would be fairly similar. The same applies to the older age-group i.e. age group 35-44yrs represent the views of the 45+yrs. It must be borne in mind that the bulk of the Kenyan population - about 60% - is between the ages of 15-35yrs.

Contd.....

The Focus groups were spread regionally among different age-groups as follows:

Nairobi	4 groups	Male C2D, 18-24 yrs, Female BC1, 25-34 yrs Male BC1, 35-44 yrs, Female C2D 25-34 yrs
Central Province	1 group	Female C1C2 ,35-44 yrs
Eastern Province	1 group	Male C2D, 25-34 yrs
Rift valley Province	1 group	Male C1C2, 18-24 yrs
Nyanza Province	1 group	Male C2D ,25-34 yrs
Western Province	1 group	Female C2D, 25-34 YRS
Coast Province	1 group	Female BC1, 18-24 yrs
Total	10 groups	5 Male groups, 5 Female groups

The group discussions were conducted by trained moderators who used an unstructured Discussion Guide to steer the discussions. A screening questionnaire was used at the recruitment stage in order to ensure the attendance of suitable individuals i.e. those who were aware of CCK. The discussions were held at central venues hired in the respective regions.

Licensees and Stakeholders

A total of 20 In-depth interviews were conducted – 15 interviews with Licensees and 5 interviews with Stakeholders. The in-depth interviews were carried out by specially trained personnel. Appointments were made in advance with the person dealing with CCK issues within the respective organizations. As was the case with group discussions, the in-depth interviews were conducted using an unstructured Discussion Guide.

The Licensees and Stakeholders interviews were representative of the various operators i.e.

Licensees

- Broadcasters,
- Organizations with Frequency licenses
- Licensees under unified Licensing Scheme
- Telecommunication Contractors
- Telecommunication Equipment vendors
- Licensees under old Licensing Regime - Mobile, ISP, PRS etc.
- Business Processing Outsourcing

Stakeholders

- Electronic Media Owners- Radio/ Television
- Ministry of Information
- ICT Consumer Organization
- Partner Institution
- CCK Suppliers

Stage 2: Quantitative Research

Having captured the key drivers of customer relationship in the qualitative research, the actual satisfaction measurement was undertaken through quantitative research using Face to Face Interviews at household level. The aim was to quantify the findings of qualitative research and confirm the extent to which respondents held various perceptions to establish customer satisfaction levels.

A structured questionnaire which was designed taking into consideration the findings of the qualitative research was used at this stage of the survey. The Field teams comprising experienced field interviewers were briefed thoroughly on the survey i.e. question by question before commencing on the actual fieldwork. During the briefing, some dummy runs of the interview were conducted to test the flow of questions. The dummy interviews were also conducted in Kiswahili. A Pilot Study was undertaken for two days to ensure a smooth flow and understanding of each question and the final Field Questionnaire prepared accordingly. The questionnaire was translated into Kiswahili to administer amongst respondents who were not literate in English.

A total of 1120 interviews were conducted in urban and rural areas. The sample was distributed across the 8 administrative regions and quota set for randomly selected sub-locations in each region. Within each sub-location a central point was selected by the supervisor. The actual household to call at was determined by the second digit of the date on the day of the interview. The Kish Grid Method was used to identify the respondent to be interviewed at the household level. All along, the interviewer followed a random route procedure by always walking to his left. A total of 10 interviews were conducted per sampling point.

The Structure of sample interviewed was as follows:

	Urban	Rural	Total	Re-weighted
Nairobi	136	21	157	105
Central	44	77	121	138
Eastern	55	102	157	174
Coast	94	145	239	107
Rift valley	80	90	170	264
Nyanza	52	72	124	169
Western	71	41	122	134
North Eastern	20	20	40	52
Total	552	568	1120	1143

For the purpose of this study, all city councils, municipal councils, town and urban councils, all district headquarters and trading centres with a minimum population of 2000 people were classified as urban as per Kenya National Bureau of Statistics classification. Anything outside this definition was classified as a rural area.

Data Analysis

The sample interviewed for quantitative survey was split almost equally between urban and rural sectors (almost half urban and half rural). The data had thus to be re-weighted to correct the urban-rural proportions to make it representative of Kenya's population i.e. about 25% urban and 75% rural population.

Data has thus been re-weighted and analyzed by urban/rural sectors, by area/region, social class, gender, age group and in total.

Fieldwork Timing

Qualitative Research was conducted between 24th. June, 09 and 4th August, 09

Quantitative Research was conducted between 29th July and 25th August, 09.

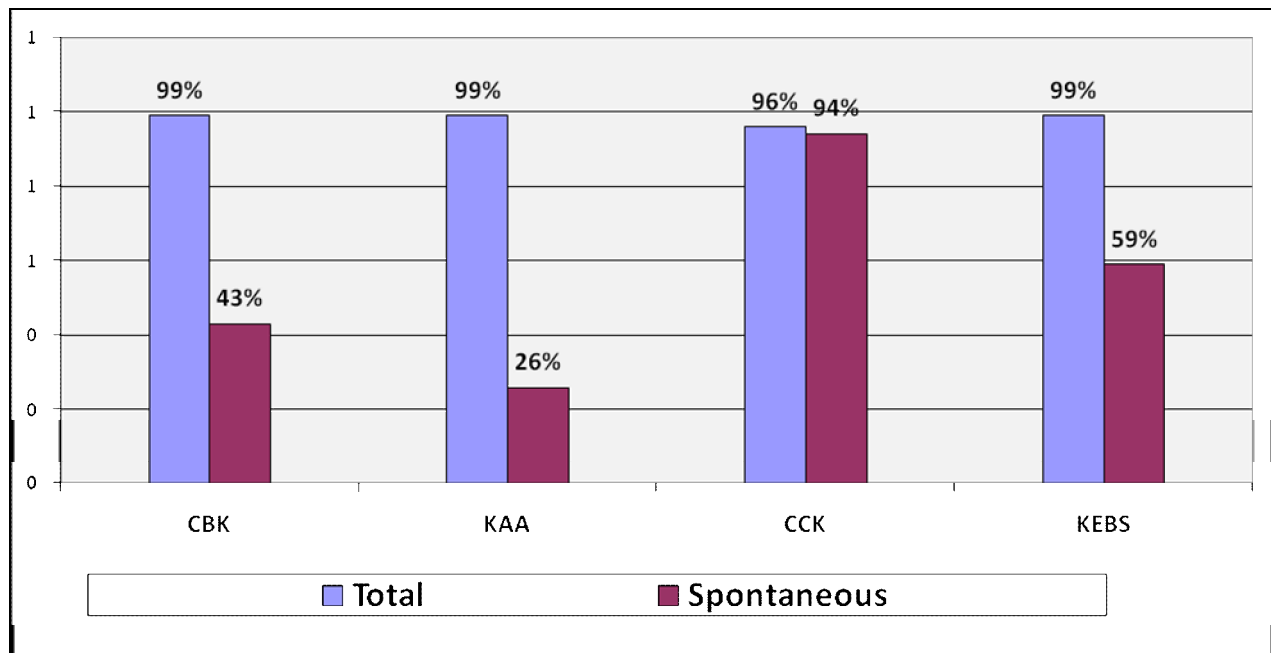
PART 1: PRINCIPAL FINDINGS –LICENSEES/STAKEHOLDERS

During the preparation of this research exercise, the possibility of establishing spontaneous recall of CCK vis-à-vis other regulatory bodies operating in Kenya was considered to be a useful measure of the standing of CCK versus other similar organizations amongst Licensees/stakeholders as well as the consumers. Qualitative research carried out initially established that among the 4 most frequently mentioned regulatory bodies:

- Central Bank of Kenya (CBK)
- Kenya Airports Authority (KAA)
- Communication Commission of Kenya (CCK)
- Kenya Bureau of Standards (KEBS)

1. General Awareness of Regulatory Bodies

1.1 Awareness of Regulatory Bodies/Authorities operating in Kenya



Total mentions suggest that respondents who were from the business community and involved directly or indirectly with the telecommunication industry were aware of virtually all the regulatory bodies referred to i.e. Central Bank of Kenya (CBK), Kenya Airports Authority (KAA), Communication Commission of Kenya (CCK), Kenya Revenue Authority (KRA) and Kenya Bureau of Standards (KEBS).

Bearing in mind that the sample selection for this research required interviews with a company representative dealing with CCK, spontaneous mentions of CCK were significantly high – 94% as compared to around 60% for KEBS and 43% for CBK. KAA generated the least spontaneous mentions -26%.

1.2 Source of Awareness of CCK

Three-quarters of the respondents had heard of CCK at their work place. Substantial proportions mentioned Television and Radio advertising

	Total	Licensee	Stakeholder	Three-quarters of the respondents had heard of CCK at their work place. Substantial proportions mentioned Television and Radio advertising.
Base	100	75	25	
Radio Advertising	39%	36%	48%	
TV Advertising	56%	50%	74%	
Other Advertising	18%	18%	17%	
Open days	1%	1%	0%	
Word of Mouth	9%	11%	4%	
Through my work	73%	73%	74%	

1.3 When CCK Advertising was last seen

	Total	Licensee	Stakeholder
Base	56	38	18
Within the last one month	79%	82%	72%
1-3 months ago	21%	18%	28%

A majority of the respondents had seen CCK advertising 'in the last one month' -this refers to the recent CCK advertising campaign celebrating 10 years of CCK's existence.

1.4 Most efficiently managed Regulatory Body – Rank Ordering

	Most efficiently run organisation			Total of 1 st /2 nd choices
	First Choice	Second Choice	Third Choice	
Central Bank of Kenya (CBK)	20%	22%	23%	42%
Kenya Airports Authority (KAA)	4%	19%	20%	23%
Communication Commission of Kenya (CCK)	43%	24%	17%	67%
Kenya Revenue Authority (KRA)	20%	19%	21%	39%
Kenya Bureau of Standards (KEBS)	11%	15%	18%	26%

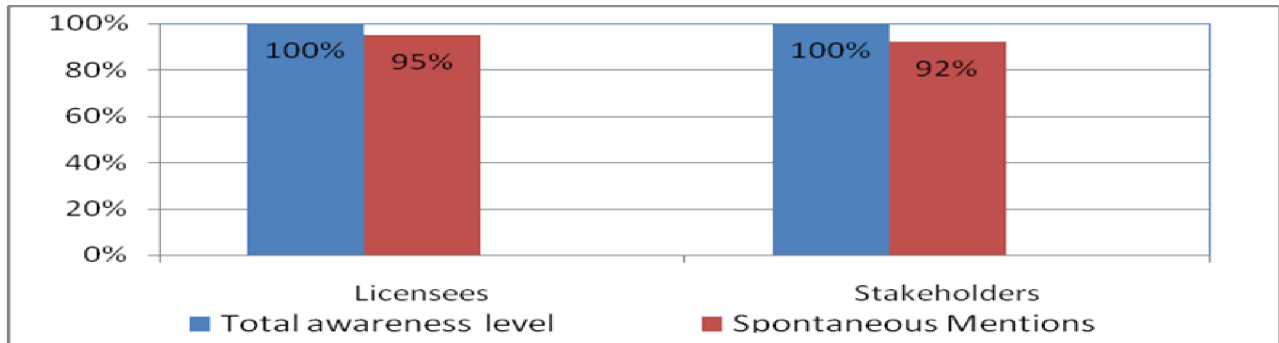
Note: It must be borne in mind that the respondents selected for the interviews in the respective organizations were dealing with CCK i.e. they were the contact persons dealing with CCK for their business needs as and when the need arises, thus there might be an element of bias with regard to their responses.

The Licensees and stakeholders being in the business environment seemed knowledgeable about the respective organizations and were able to rank order the regulatory organizations.

It is interesting to note that CCK was perceived to be one of the best run organizations (1st/2nd choices) by a notable two-thirds of the Licensees/stakeholders sampled. CBK and KRA emerged with almost equal ratings and thus shared the second choice. KAA and KEBS were among the organizations with poorer ratings.

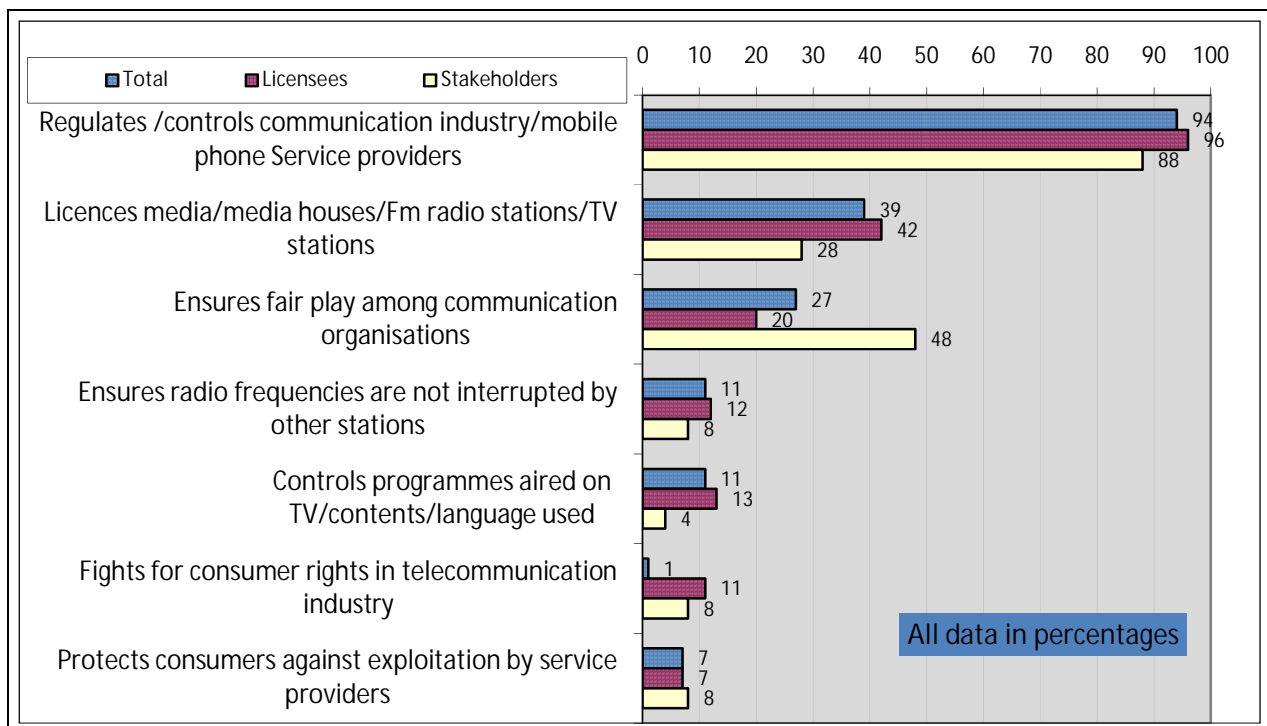
2. Communication Commission of Kenya (CCK)

2.1 Awareness Level of CCK (Q 2)



CCK generated a notably high spontaneous awareness amongst the Licensees and Stakeholders.

2.2 Perceived Role of CCK (Q9)



The Licensees and stakeholders seemed well aware of the CCK role. Virtually all Licensees and Stakeholders - over 90% - referred to one of the key roles i.e. "Regulates the communication industry". A substantial proportion of almost 40% mentioned the fact that CCK licenses the various Media houses and Radio/TV stations. Just over a quarter of the respondents – more Stakeholders- described CCK's role that it ensures fair play amongst organizations in the communication industry.

2.3 Key Expectations from a Communications Regulatory Body

	Total	Licensees	Stakeholders
	101	76	25
Be accountable and transparent (treating all players equally)	64%	62%	72%
They should be professional in their service delivery	50%	51%	44%
Should be building partnerships	50%	50%	52%
Should be creative and innovative, technology-wise	46%	42%	56%
Responsive to market needs	35%	32%	44%
They should be fast in dealing with issues brought to their attention	35%	39%	20%
Should be independent from outside forces	25%	24%	28%
Should protect the consumers	18%	16%	24%
Issuance of licenses should be fast (efficiency)	14%	14%	12%
Be accessible to customers	14%	14%	12%

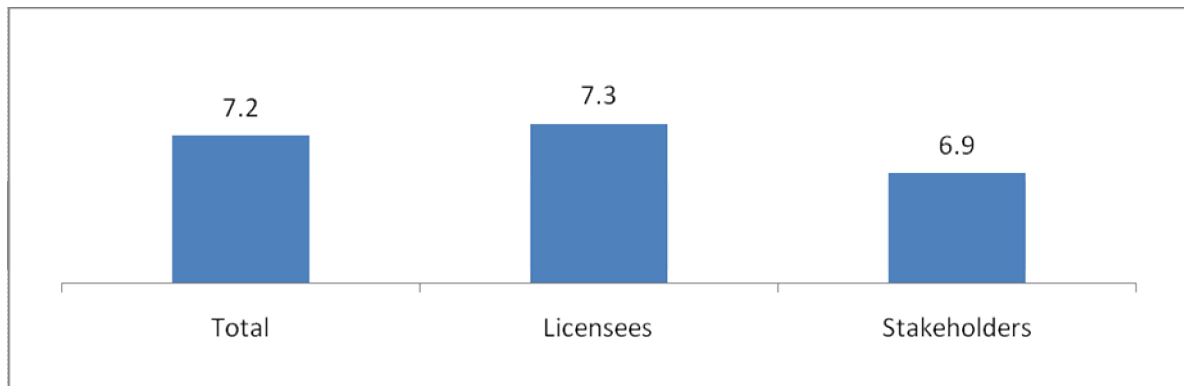
The pattern of responses suggests that the licensees and Stakeholders were used to a professional business environment in dealing with their suppliers, customers and service providers, thus among the important factors were transparency, efficiency, honesty and mutual trust among the respective partners. Thus their expectations from a regulatory body such as CCK dealing in telecommunications seemed to re-emphasize the desired qualities of any professionally run organization i.e.

- Accountability and Transparency –stressed more by stakeholders
- Professionalism
- Partnership Building between CCK and Licensees/ Stakeholders
- Innovative in the communication technology and responsive to needs of the market –more mentions amongst stakeholders
- Exercise independent decision-making/ should not be controlled by others

The above attributes referred to would directly improve some of the concerns respondents had raised under the section of Spontaneous 'Dislikes of CCK' – section 3.3, for example some of the dislikes mentioned such as "They are not independent," "Favor some players", "Delay in issuing of licenses and frequencies" are likely to be solved with the practice of Accountability, Transparency, Professionalism etc.

3. Attitudes towards CCK

3.1 Overall Opinion of CCK (Mean Scores based on 10-Point Scale -Q7)



In market research it is important to establish the overall image of an organization or a product. Overall opinion means that the respondent gives an opinion based on his/ her perceptions of the organization i.e. "taking everything into consideration about an organization" and is usually based on the parameters the respondent considers are important for the organization. The parameters could be different for different sectors in the sample.

The above overall ratings of CCK were based on a 10-point scale i.e. ranging from "very poor" (score 1) to "very good" (score 10). Mean scores were then compiled from the ratings.

As shown in the chart above, the Licensees' ratings of CCK are marginally better than the Stakeholders' ratings. The aspects considered by the respondents in rating CCK are indirectly generated from other attitudinal questions covered in the research.

Overall ratings of CCK were quite favorable amongst both the sectors i.e. the Licensees and the Stakeholders respectively.

3.2 Spontaneous Likes of CCK (Q 8a)

	Total	Organization Type	
		Licensees	Stakeholders
Base: Total sample	101	76	25
Has made communication easier	28%	25%	36%
They keep communication up to date	17%	18%	12%
They are nonpartisan i.e. are fair to all players	16%	17%	12%
The professional and etiquette of the staff	14%	13%	16%
Quick service delivery	12%	12%	12%
Has gotten rid of monopoly	9%	9%	8%
Prompt payment to suppliers	3%	0%	12%
Don't Know/No Answer	10%	9%	12%

In total a majority of 90% of the respondents expressed some like about CCK –some expressed a single like whilst others expressed multiple likes.

CCK was commended for making communication easier by almost 30% of the respondents – especially amongst the Stakeholders (36%). Smaller proportions (ranging from 10% -18%) appreciated CCK “for being “fair in their dealings”, “professional”, “efficient” and “ for liberalizing the telecommunication market”.

Note: Professionalism and Efficiency were among the key qualities this group expected from an organization such as CCK. (See previous section 2.3 Expectations of a Telecommunication Regulatory Body)

3.3 Spontaneous Dislikes of CCK (Q8b)

	Total	Licenses	Stakeholders
Base: Total sample	101	76	25
They are not independent	17%	18%	12%
Favor some players	12%	12%	12%
Delay in issuing of licenses and frequencies	10%	12%	4%
They do not make themselves known to the general public	9%	9%	8%
They are corrupt	7%	7%	8%
Do not honor customer service commitment agreement as per their service charter	5%	4%	8%
There is so much bureaucracy followed before one is served	6%	7%	4%
There is so much bureaucracy followed before one is served	6%	7%	4%
They are not efficient and effective on updating the stakeholders	4%	1%	12%
They are very rigid	4%	3%	8%
They are not consumer protective	3%	1%	8%
They have relaxed in controlling content in the media	3%	4%	0%
The cost of licenses is high	3%	4%	0%
Slow in serving customers	2%	3%	0%
Do not control programme timing	1%	1%	0%
They disappointed Kenyans during elections (banned live broadcasts)	1%	0%	4%

Although a majority of respondents expressed like for CCK (previous section), there was concern about certain issues related to CCK – although each of the concerns were expressed by fairly small proportions of respondents.

Almost a fifth of the respondents were of the opinion that “CCK is not an independent organization” i.e. it is being controlled by other outside forces. There were similar comments made in the Qualitative Research carried out earlier and it was alleged that “CCK is controlled by the government and other powerful individuals”.

Among the other comments made were that CCK favors some players in the market and there were delays in issuing licenses. Another concern expressed was that the public was not aware of CCK and its role in the communication industry.

3.4 Proposed Improvements in CCK (Q8c)

	Total	Licensee	Stakeholder
BASE: Total sample	101	76	25
They reduce bureaucracy in the service delivery	14%	11%	24%
Advertise themselves so that people can know more about CCK and its role to people	12%	14%	4%
Be independent for efficient delivery of service	12%	13%	8%
Follow right procedures for licensing	10%	13%	0%
To update stakeholders effectively with sufficient information	9%	8%	12%
To control price in telecommunications	7%	5%	12%
Improve audio and visual reception (Radio and TV)	7%	7%	8%
Repossess all frequencies licensed and are not utilized	5%	7%	0%
Get involved in corporate social responsibilities	5%	4%	8%
Bring more competitors	4%	5%	0%
To regulate languages (content) used in broadcasting	3%	4%	0%
Encourage investors to invest in rural areas	2%	0%	8%
Don't Know/No Answer	17%	14%	24%

The suggestions made for improvement mostly dealt with correcting the dislikes expressed in the previous section and were each mentioned by a small proportion of respondents.

In addition the second comment above emphasizes the need to educate the consumers on the role of CCK. The recent CCK television advertising featuring the comedian Churchill was successful in creating the awareness of CCK and it is proposed that the second phase of the proposed advertising campaign should focus on creating awareness on the actual role of CCK. To show some continuity in the communication between the two phases of the advertising campaign, it is proposed that using the same comedian i.e. Churchill be considered to play a role in the second phase of the advertising campaign.

Another important issue which needs to be addressed is “to reduce the level of bureaucracy in the service delivery by CCK” – there were comparatively higher mentions amongst the Stakeholders.

It is interesting to note that the above suggestions are indirectly incorporated in the section on “Expectations from a Regulatory Telecommunication Body” (See section 2.3), for example “Bureaucracy ” can be reduced through “Transparency”, “Efficiency can be practiced through “Professionalism” etc.

Thus reducing bureaucracy, practicing impartiality and creating awareness on the role of CCK are among the most desired improvements among this group of licensees and Stakeholders.

3.5 CCK Attribute ratings – Importance of Service vs. Performance (Q10)

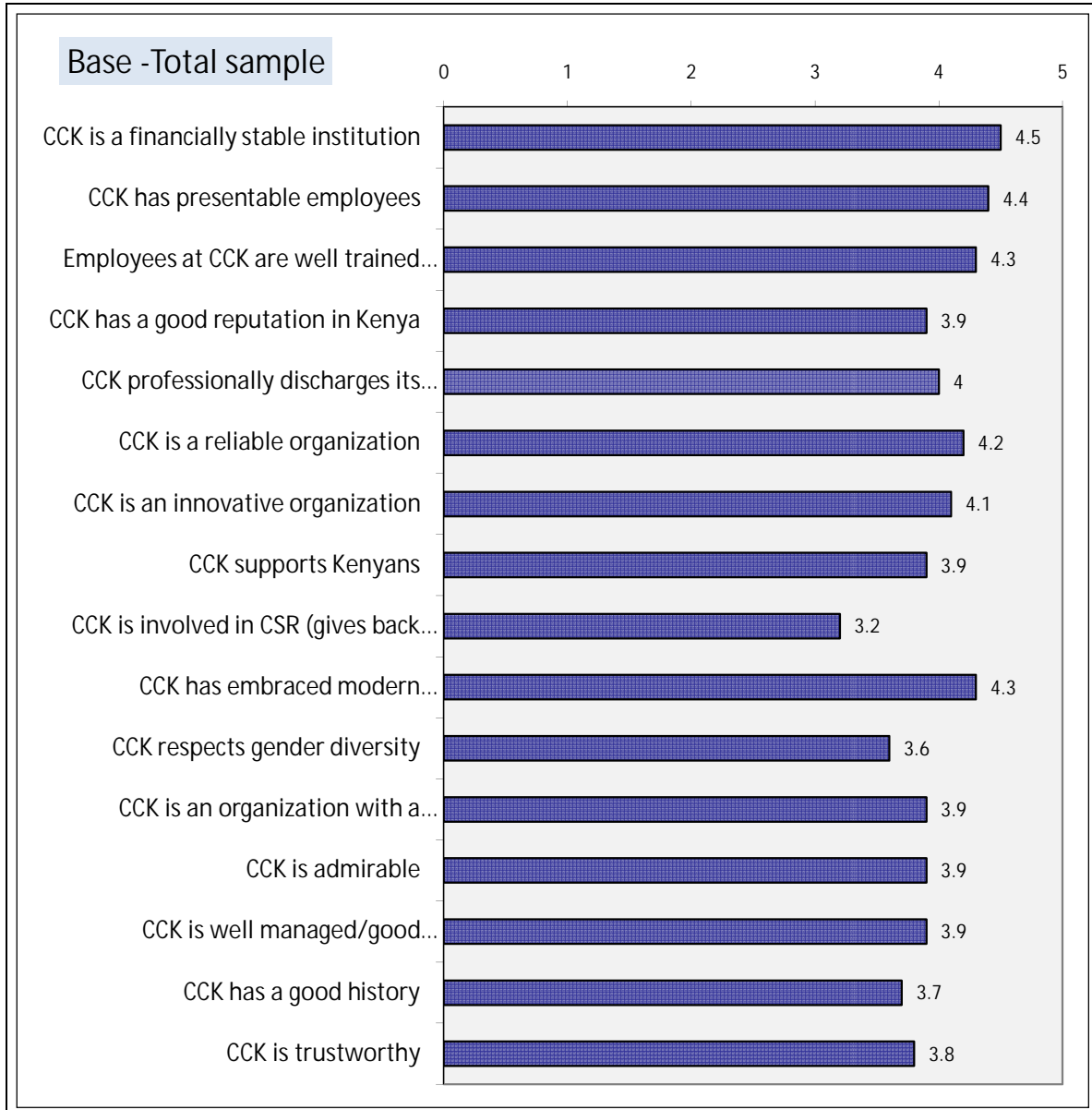
The table below summarizes the perceived level of importance and the level of satisfaction among licensees/ stakeholders for each service attribute, by calculating mean scores from ratings obtained on a 5-point scale. The achieved scores were then aggregated and converted to a percentage which is the CCK Licensees/ Stakeholders’ Satisfaction Index for the period under survey.

Importance of Service vs. Performance (Q12/13) BASE: Total sample	Expectation	Actual rating	Difference
CCK enforces rules of fair play among Operators	4.7	3.9	0.8
CCK is able to control prices of communication to reasonable levels	4.1	3.5	0.6
CCK approves the right equipment to be used by operators	4.7	4.2	0.5
CCK ensures enough players/ competitors operate in the market	4.1	3.8	0.3
CCK professionally discharges its mandate	4.6	4.1	0.5
CCK is effective in ensuring adherence to rules and regulations	4.7	4	0.7
CCK is responsive to the needs of the market	4.6	4	0.6
CCK acts promptly in the discharge of its mandate	4.5	4	0.5
CCK provides sufficient information to stakeholders	4.6	3.6	1.0
CCK informs licensees what services are available/offered	4.6	3.6	1.0
CCK provides relevant information to stakeholders	4.5	3.5	1.0
CCK provides effective channels for licensees’ complaints	4.5	3.6	0.9
CCK has a simple application process for licensees	4.3	3.5	0.8
CCK regularly advertises its list of licensees	4	3.3	0.7
CCK has convenient license fee payment process	4.2	3.5	0.7
CCK Operates honestly in its dealings with licensees	4.4	3.6	0.8
CCK explains clearly the procedure for one to apply for a license	4.4	3.8	0.6
CCK mediates between disputing licensees	4.3	3.6	0.7
CCK defines license parameters	4.4	4	0.4
CCK acts independently from government or any other body	4.2	3.3	0.9
CCK controls the quality/content/language of Radio programmes	4	3.7	0.3
CCK controls the quality and content of programmes aired on TV	4	3.7	0.3
Total possible score:	96.4	81.8	
Calculation of Service Satisfaction Index: Alternative 1: (as per previous survey)			Previous Survey Rating
(Actual Performance/Maximum score)%= (81.8/ 110) %		74.36%	86%
Alternative 2: (Actual Performance./ Expectation) % = (81.8/96.4) %		84.85%	

Generally all service attributes were perceived to be ‘quite/ very important’ to the Licensees/ Stakeholders who were quite satisfied with the Commission’s professionalism in discharging its mandate and averagely satisfied with the publication of its list of licensees. From the summary of ratings above, it is evident that the respective gaps in CCK ratings versus expectations are slightly high for:

“Provides sufficient information to stakeholders”	“Acts independently from government or any other body”
“Informs licensees what services are available offered”	“Provides effective channels for licensees’ complaints”
“Provides relevant information to stakeholders”	“Has a simple application process for licensees”

3.6a. CCK Image and Perceptions (Q 14) –Mean Scores based on 5-Point Scale



CCK gained highest ratings for “being financially stable” (Score 4.5 on a 5-point scale) and for “having presentable employees” (Score 4.4), “embracing modern technology” (Score 4.3) and “employees being well-trained in their roles” (Score 4.3). CCK generated poor ratings for “being involved in CSR activities” (Score 3.2), “for respecting gender diversity” (Score 3.6) “has a good history” (Score 3.7).

Thus CCK needs to ensure that its CSR activities are well covered by the media through the PR agencies. Among CCK’s strengths are its employees – “well trained and presentable”, it is “up to date with modern technology”, “reliable” and “an innovative organization”.

3.6b. CCK Image and Perceptions (Q 14) – by Licensees and Stakeholders

	Maximum Rating/score	Actual rating	Licensees	Stakeholders
CCK is a financially stable institution	5.0	4.5	4.5	4.8
CCK has presentable employees	5.0	4.4	4.3	4.6
Employees at CCK are well trained in their jobs	5.0	4.3	4.3	4.3
CCK has a good reputation in Kenya	5.0	3.9	4	3.8
CCK Professionally discharges its mandate	5.0	4	4	3.8
CCK is a reliable organization	5.0	4.2	4.2	4.3
CCK is an innovative organization	5.0	4.1	3.9	4.7
CCK supports Kenyans by ensuring fairness by services providers in communication industry.	5.0	3.9	3.9	3.8
CCK is involved in corporate social responsibility activities (gives back to society)	5.0	3.2	3.2	3
CCK has embraced modern technology	5.0	4.3	4.2	4.6
CCK respects gender diversity	5.0	3.6	3.6	3.7
CCK is an organization with a universal outlook	5.0	3.9	3.9	3.8
CCK is admirable	5.0	3.9	3.8	4
CCK is well managed/good leadership	5.0	3.9	3.9	4
CCK has a good history	5.0	3.7	3.7	3.8
CCK is trustworthy	5.0	3.8	3.8	3.8
Total	80	63.6	63.2	64.8
Image Perception Index -2009	100	79.5	79%	81%
Image Perception Index -2009: Total sample				79.5%
Image Perception Index -2007: Total sample	100			72.7%

CCK gained very favorable ratings for the following perception attributes:

- “CCK is financially stable”
- “CCK has presentable employees”
- “Employees at CCK are well trained in their jobs”
- “CCK is a reliable organization”
- “CCK is an innovative organization”

CCK **performed poorly** for:

- “CCK is involved in corporate social responsibility activities”

CCK Image Perception Index

Thus the Image Perception Index was calculated to be 79.5% as compared to 73% in the previous survey. This indicates some improvement in the Image Perception Index amongst Licensees and Stakeholders over the previous findings.

4. Contact with CCK

4.1 Extent of making Contact with CCK and Reasons

	Total	Licensee	Stakeholder
Total Sample	101	76	25
Proportion made contact with CCK in the last year	80%	78%	88%
No. made contact with CCK	81	59	22
Frequency registration	7%	8%	5%
License renewals	25%	31%	9%
Licensing of ISPs	6%	5%	9%
Complaint about the security of M-PESA transactions	1%	0%	5%
We are their suppliers	6%	2%	18%
License application	40%	49%	14%
Went to give a quotation	6%	2%	18%
Asking for additional frequencies	4%	5%	0%
Incorrect invoicing	4%	5%	0%
Complaint on interference, overlap of frequencies	14%	17%	5%
Service inquiries	14%	8%	27%
Applying for tender	6%	2%	18%
Type approval	5%	7%	0%
Business matters	5%	3%	9%

80% of all respondents- particularly the Stakeholders had made contact with CCK “in the last year”. The main reasons for contacting CCK were related to License applications and License renewals by Licensees. Smaller proportions of Licensees registered complaints on frequency interference/overlap of frequencies and the stakeholders made inquiries on services offered by CCK.

4.2 Departments Visited at CCK

	Total	Licensee	Stakeholder
BASE	81	59	22
Licensing Compliance and Standards	74%	88%	36%
Frequency Spectrum Management	41%	51%	14%
Consumer Affairs	10%	5%	23%
Finance and Accounts	23%	22%	27%
Procurement	9%	0%	32%

Three quarters of respondents - mostly Licensees dealt with the Licensing Compliance and Standards Department (88% of Licensees) and around 40% (mostly Licensees -51%) liaised with Frequency Spectrum Management Department.

The stakeholders mostly dealt with Licensing Compliance and Standards Department and Procurement Departments.

4.3 Satisfaction with CCK Customer Services – by Department

	Licensing Compliance & Standard Dept.	Frequency spectrum management	Consumer Affairs	Finance and accounts
Base	60	33	8	19
Ease of accessing the right person	4.6	4.4	4.5	4.5
Politeness and helpfulness of person dealing with you	4.7	4.4	4.8	4.4
Language used is appropriate	4.8	4.6	4.6	4.6
Accuracy & reliability of information provided	4.4	3.8	4	4.1
Ability to solve problems quickly	4	3.5	4	4.1
Staff listen to you when you have a problem	4.4	4	4.5	4.2
Staff able to resolve problem	4.1	3.7	4	4.1

The ratings of the Licensing Compliance and Standards and Consumer Affairs departments were generally quite favorable.

However the respective ratings were relatively low for Frequency Spectrum Management particularly for the attributes:

“Accuracy and reliability of information provided”

“Ability to solve problems quickly”

“Staff able to resolve problems”

4.4 Extent to which the Issues/Problems were Resolved

	First Reason	Second Reason	Third Reason	Total
No. of instances where CCK departments contacted (100%)	81 (100%)	42 (100%)	14(100%)	137 (100%)
Prop. were successful i.e. their problems/ queries were solved or addressed	69 (85%)	21 (50%)	8 (57%?)	98 (72%)

Among the key reasons for making contact with CCK were license applications, license renewals, complaints on interference/overlap of frequencies and service enquiries (see section 4.1). A majority of them (almost three-quarters) were successful in resolving the respective issues with CCK.

5. Advertising Awareness of CCK

5.1 Level of Advertising Awareness of CCK

	Total	Licensee	Stakeholder
Total	101	76	25
Prop. Seen/heard CCK advertising	92%	89%	100%
No. seen/heard CCK advertising	93	68	25
Radio	51%	56%	36%
TV	95%	94%	96%
Newspaper	59%	59%	60%
Internet café	5%	6%	4%
Magazine	6%	6%	8%
Brochures	19%	16%	28%
Billboards	15%	19%	4%

Over 90% of the licensees/ stakeholders had seen/heard advertising of CCK. Virtually all of them mentioned that they had come into contact with a CCK advertisement via Television and a substantial proportion mentioned newspaper (60%) and radio advertisements (more of Licensees-56%). Smaller proportions recalled having seen Billboards and Brochures (Chukua Hatua) respectively.

5.2 Message Communicated by CCK Advertising

i) Radio

	RADIO			The key message communicated by the CCK radio advertising was largely associated with: <ul style="list-style-type: none"> • CCK 10th anniversary celebrations • CCK's achievements in the 'past 10 years' • Consumer rights in the telecommunication industry.
	Total	Licensees	Stakeholders	
No. heard CCK Radio advertising	47	38	9*	
10th anniversary celebration	43%	47%	2	
Consumer right in the telecommunication industry	23%	21%	3	
There is nothing for free in this country	2%	3%	-	
CCK as watchdog authority	9%	11%	-	
Broadcasting frequencies	2%	3%	-	
Media bill	6%	5%	1	
CCK achievements	30%	26%	4	
About fiber optic cable importance	2%	3%	-	

* Raw Data (i.e. not percentage –due to a small base number -9))

ii) Television

	TELEVISION			
	Total	Licensees	Stakeholders	
No. saw CCK Television Advertising	88	64	24	<p>The key message communicated by the CCK television advertising was largely associated with:</p> <ul style="list-style-type: none"> • How communication has developed - “Tumetoka Mbali” • CCK 10th anniversary celebrations • “Chukua Hatua” campaign has been educating / informing consumers about warranty e.g. when buying mobile phones.
10th anniversary celebration	22%	17%	33%	
Radio frequency allocation parameters	3%	2%	8%	
Information about Corporate Social Responsibility	1%	0%	4%	
Chukua Hatua informing consumers about warranty	17%	16%	21%	
How communication has developed Tumetoka Mbali	47%	47%	46%	
The role of CCK in the ICT industry	8%	11%	0%	
Media bill	13%	14%	8%	

iii) Newspaper

	NEWSPAPER			
	Total	Licensees	Stakeholders	
No. saw CCK advertising in Newspaper	55	40	15	<p>As shown in table on left hand side, recall of the newspaper advertising did not generate as much information as compared to Radio and Television advertising.</p> <p>Among the message recalled were:</p> <ul style="list-style-type: none"> • The history of CCK and its achievement • Licensing procedure and types of licenses • Consumer protection i.e.
Licensing procedures and types of licenses	16%	20%	7%	
Consumer protection by ensuring warranty for communication	15%	10%	27%	
Tender notices	5%	0%	20%	
Ensuring fair play in the communication industry as a core	5%	8%	0%	
The importance of ICT sector in advancing the economy	2%	3%	0%	
The history of the company & its achievements	25%	28%	20%	
Media Bill	13%	18%	0%	
Call for stakeholders opinion	2%	3%	0%	
About fiber optic cable importance	2%	3%	0%	
Taking up Corporate Social Responsibility	2%	0%	7%	

The overall message recalled from exposure to CCK advertising (television, radio and newspaper) was associated with:

- 10 yrs of CCK’s existence
- Achievements CCK has made in the “last 10 years”/ history of the Company
- Consumer rights with respect to the telecommunication industry
- How communication has developed “Tumetoka Mbali”

5.3 Attribute Ratings of the CCK Advertising (5-Point Scale)

	Radio	TV	Newspaper
Overall Opinion	4.3	4.2	3.9
Simple and easy to understand	4.5	4.6	4.3
Informative	4.6	4.6	4.4
Eye catching/ Appealing	4.3	4.5	4.2
Easy to remember/memorable	4.4	4.5	4.2

Respondents' ratings of CCK advertising seen was established on a 5-point scale ranging from "Like it very much" to "Dislike it very much" and mean Scores were compiled from the information generated.

The overall ratings of the advertising seen/heard were quite favorable although the Radio and Television advertising for CCK was rated marginally better than the newspaper advertisement.

Thus taking into account the comprehension and contents of message communicated by the CCK advertisement on different media indicates that Television and Radio advertisements generated better recall of the message communicated and marginally better ratings "overall", "for being informative", "being simple and easy to understand" "for being eye catching" and "being easy to remember".

5.4 Awareness of Consumer Outreach Education Program

	Total	Licensee	Stakeholder
Base: Total sample	101	76	25
Prop. Aware of Consumer Outreach Program	44%	41%	60%
Base: No. Aware of Consumer Outreach Program	44	29	15
Ask for warranty in any communication gadget	27%	17%	47%
Quality of services from telecommunication services	27%	31%	20%
Consumer protection	25%	24%	27%
Information on services provided	16%	17%	13%
Frequency spectrum management	5%	7%	0%
Media Bill	5%	3%	7%
Customer service charter – communications service standards (e.g. how they respond to customers within set deadlines	2%	3%	0%
Use of internet	2%	3%	0%
About the unified licenses	2%	3%	0%
Disposing off of radioactive materials	2%	0%	7%

A sizeable proportion of the respondents seemed to be aware of the consumer Outreach Program, particularly amongst the Stakeholders – 60% aware of the program as compared to 41% of the Licensees.

The Education Program information referred to was to: "ask for warranty for any communication gadget", "on the quality of telecommunication services" and "on Consumer protection respectively".

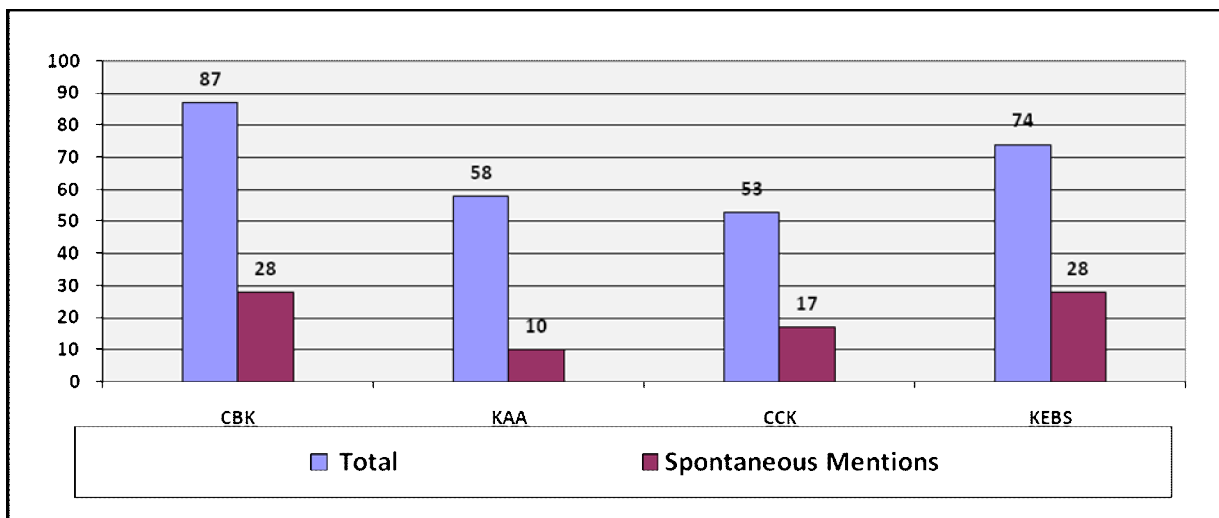
END OF LICENSEES'/STAKEHOLDERS' REPORT

PART 2: PRINCIPAL FINDINGS – CONSUMERS

Section 1: Consumer Perceptions and Satisfaction with CCK

1. General Awareness of Regulatory Bodies

1.1 Awareness of Regulatory Bodies/Authorities operating in Kenya



Respondents recruited to participate in Qualitative Research carried out earlier in the form of Focus Group Discussions established that in addition to CCK, Central Bank of Kenya (CBK), Kenya Airports Authorities (KAA), Kenya Revenue Authority (KRA) and Kenya Bureau of Standards (KEBS) were among the most frequently mentioned Regulatory Bodies operating in Kenya. One of the pre-conditions for one to qualify to be invited to the groups was that they were aware of CCK. The organisations which generated fairly high mentions were then adapted for inclusion in the Quantitative Survey Questionnaire.

In order to establish a comparative measure of awareness of CCK vis-à-vis other regulatory bodies operating in Kenya, respondents were asked to recall names of any regulatory bodies they were aware of in addition to CCK. Qualitative research carried out earlier in the form of focus Group Discussions established Central Bank of Kenya (CBK), Kenya Airports Authorities (KAA) and Kenya Bureau of Standards (KEBS) being among the most frequently mentioned organisations, and were thus among the key organisations included in the quantitative research.

From the survey carried out, CBK and KEBS were among the most popularly known regulatory authorities known to Kenyans – the respective spontaneous mentions were around 30% and the respective total awareness levels (i.e. including prompting) ranged from 74% to 87%. Comparatively CCK and KAA generated spontaneous mentions of only 17% and 10% respectively and total mentions (including prompting) of around 53-58% respectively.

1.2 Best Run Regulatory Body – Rank Ordering

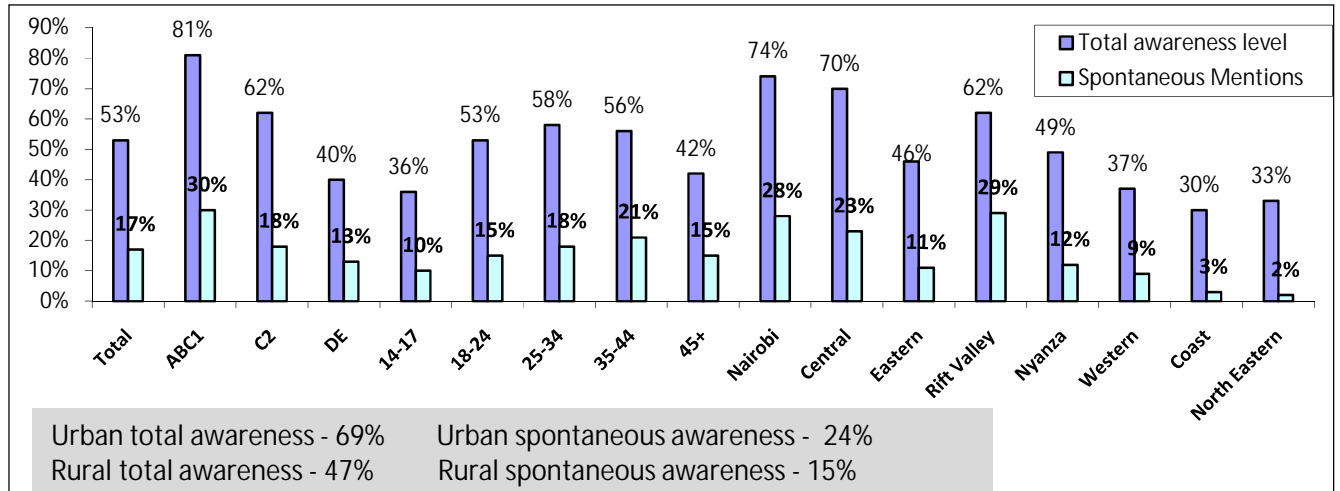
	Best run Organisation			Total 1 st /2 nd choices
	First Choice	Second Choice	Third Choice	
Central Bank of Kenya (CBK)	22%	10%	9%	32%
Kenya Airports Authority (KAA)	5%	11%	8%	16%
Communcation Commission of Kenya (CCK)	6%	11%	13%	17%
Kenya Bureau of Standards (KEBS)	10%	9%	7%	19%
Don't Know/ No answer	50%	52%	55%	

Overall consumers are not very knowledgeable about regulatory bodies operating in Kenya. It is only Central Bank of Kenya which seems to be better known than the other organisations and was rated better than others. The pattern of ratings indicates that CBK, KAA and KEBS achieved fairly similar ratings in terms of being well run organisations.

A majority of respondents did not respond to the question as they did not have adequate knowledge of the respective regulatory bodies.

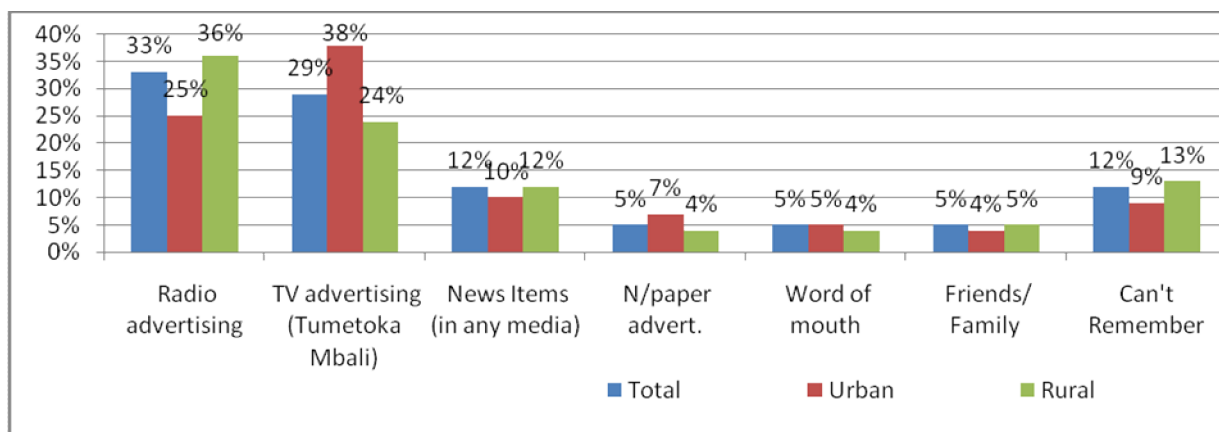
2. Communication Commission of Kenya

2.1 Awareness of CCK



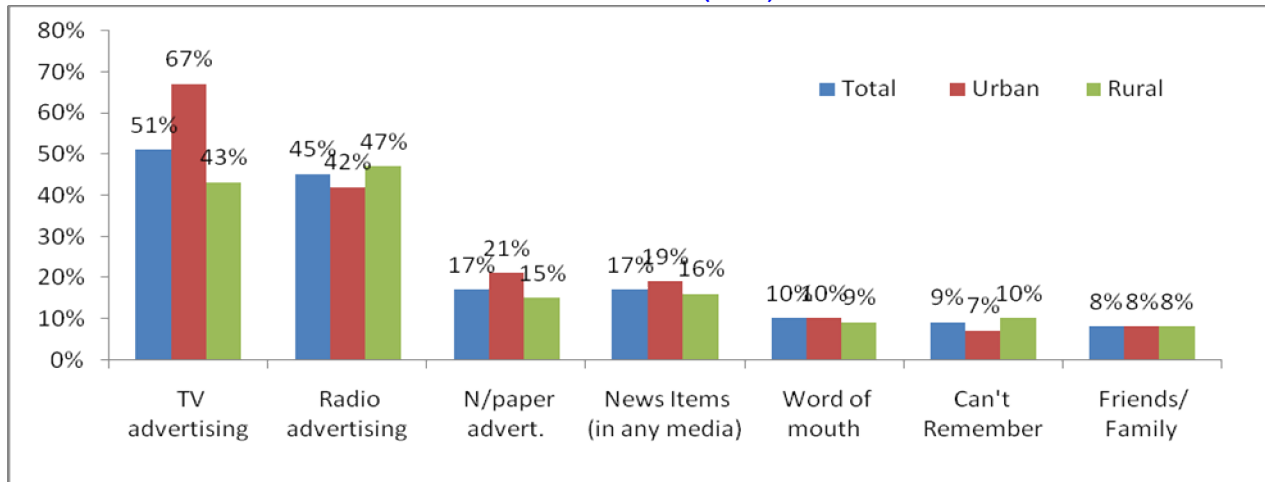
The awareness of CCK was highest amongst ABC1's (81%) and in Nairobi, Central and Rift Valley regions respectively. The CCK awareness level was comparatively higher in urban areas (69% urban vs. 47% rural), and amongst age-groups 18-24 yrs, 25-34yrs and 35-44yrs respectively. CCK awareness level was notably higher in urban areas than in rural areas.

2.2 Source of awareness of CCK -First Mention (Q8d)



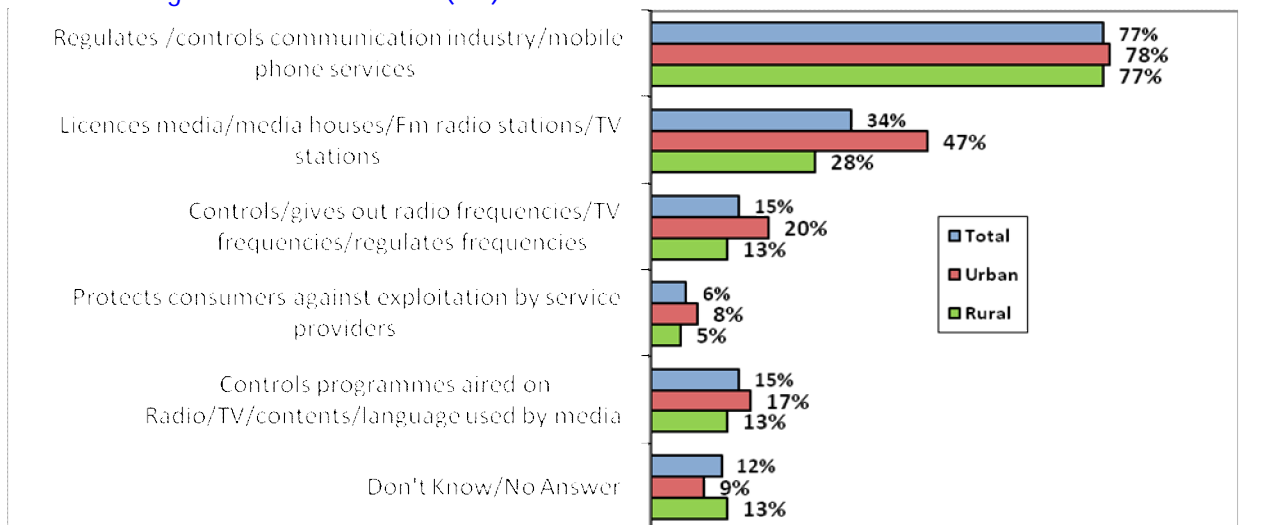
Almost 60% of the respondents claimed to have become aware of CCK mainly by having seen/ heard the CCK advertising on television, radio and newspapers respectively. A third of the respondents referred to the recent Television advertising which has been on air- 'Tumetoka mbali'. The recent CCK radio advertising was also referred to by almost a fifth of the respondents who were aware of CCK.

2.3 Source of awareness of CCK - Total Mentions (Q8d)



Television and Radio advertising were the most common sources of awareness of CCK – television advertising generated notably high level of mentions amongst the urban sector -67% total mentions. Radio advertising was mentioned by fairly equal proportions of the urban and rural respondents.

2.4 Knowledge of CCK/CCK's Role (Q9)

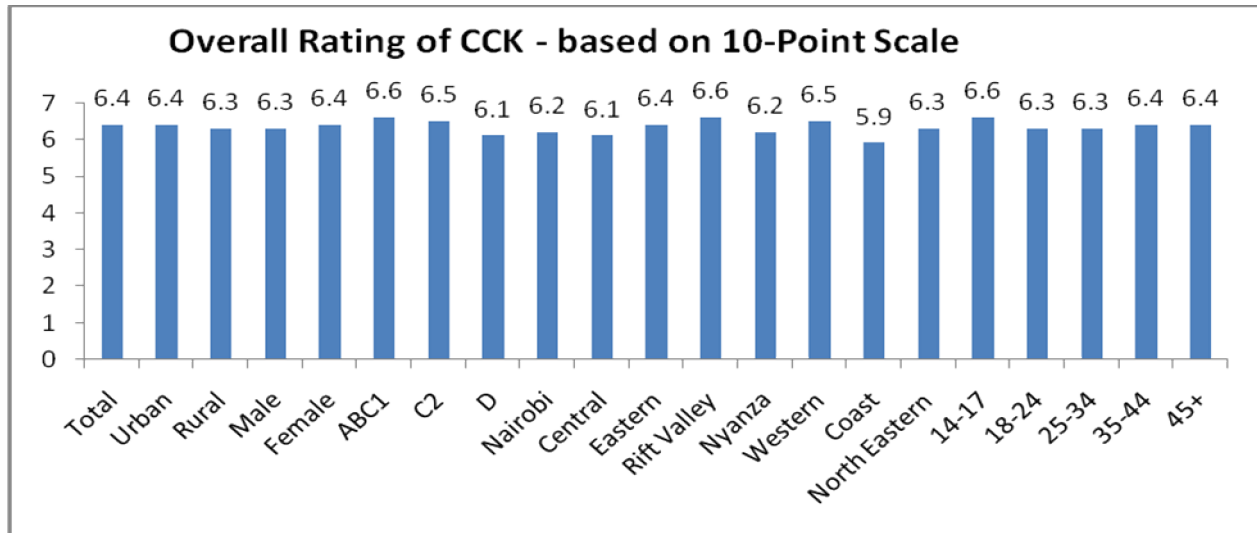


The level of awareness of one of the roles of CCK was quite impressive i.e. “CCK regulates/controls the telecommunication communication industry” –almost 80% spontaneous mentions. About a third stated that CCK licenses the operators i.e. media houses, radio stations and television stations – the number of urban mentions were notably higher than rural mentions.

Smaller proportions - 15% - mentioned that “CCK assigns and regulates radio frequencies” and “controls programs aired on radio and television” respectively. Mentions of the consumer role which is aimed at safeguarding the rights of the consumer were notably low – only 6% mentions. Qualitative research also indicated clearly the lack of awareness of the available avenues through which a consumer can register complaints with CCK about services offered by any telecommunication service provider or courier company.

3. Attitudes towards CCK

3.1 Overall Opinion of CCK



Respondents were asked to give their overall rating of CCK on a 10-point scale (Ranging from “Very poor” to “Very good”); mean scores were compiled from the respective ratings and are summarized in the chart above.

Overall ratings of CCK were quite favorable amongst the respective demographic sub-groups – the ratings were marginally higher in Rift valley, Western and Eastern regions and amongst age groups 14-17yrs and amongst ABC1/C2’s respectively.

The overall rating was 6.4 in the current survey (2009) as compared to 5.8 in the previous survey (2007). Thus there has been a fair improvement in the overall rating of CCK.

3.2 Spontaneous Likes of CCK (Q 8a)

All respondents aware of CCK were asked if there was anything at all they liked about CCK. Their responses were recorded and later coded for analysis. A respondent can respond by expressing a single like or multiple likes. All respondents who expressed at least one like were counted as "proportion expressed like".

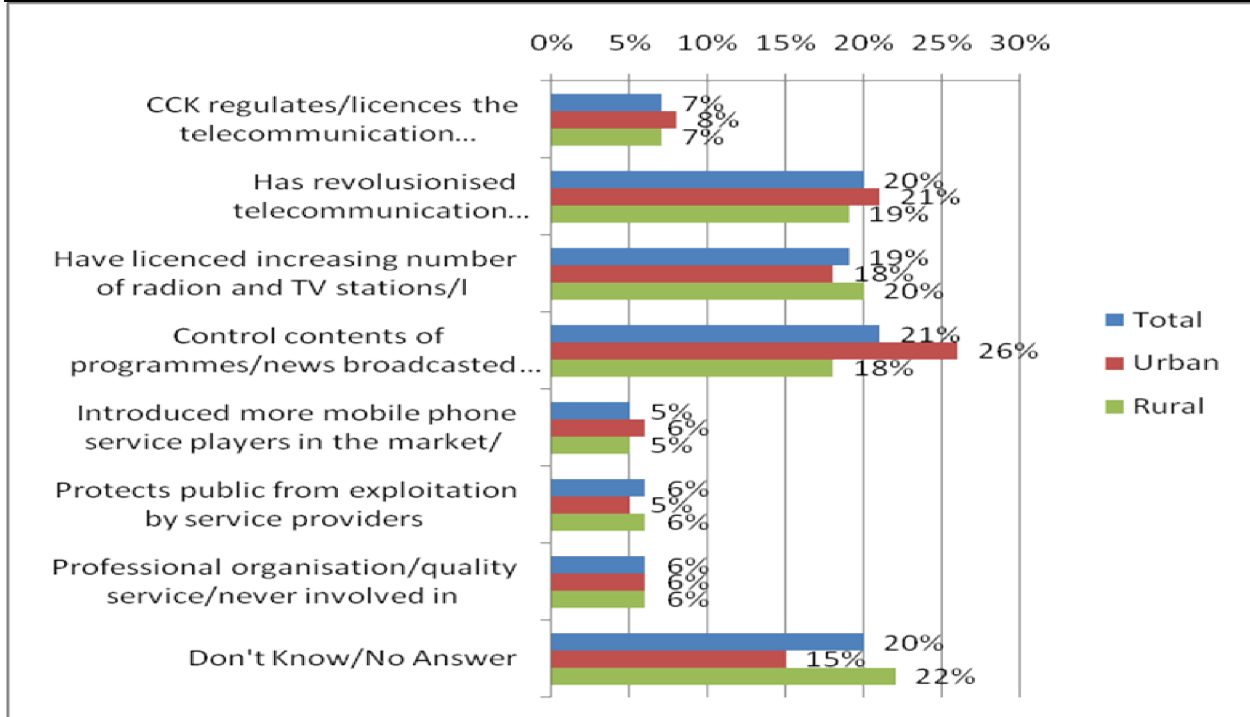
Similarly under the section on dislikes respondents were asked if there was anything at all they disliked about CCK. The procedure used to establish the level of dislike for CCK was as above for "Likes" i.e. All respondents who expressed at least one dislike were counted as "proportion expressed dislike".

It must be borne in mind that the same respondent can express a like as well as a dislike for CCK – i.e. they can express a positive aspect of CCK but at the same time they can also express a negative aspect of CCK for example one likes CCK for "liberalizing the telecommunication industry by allowing more players in the market" but the same person also dislikes CCK for "not acting independently i.e. it is controlled by some powerful individuals".

Note: The above is only an example of one person expressing a positive as well as a negative comment about an organization.

The chart below summarizes the some of the key likes expressed by respondents:

Proportion of respondents expressed like for CCK was 80% - this proportion is within the expected range (80-90%) in such surveys..



CCK was liked by about a fifth of the respondents respectively for:

‘Revolutionized the telecommunication industry’

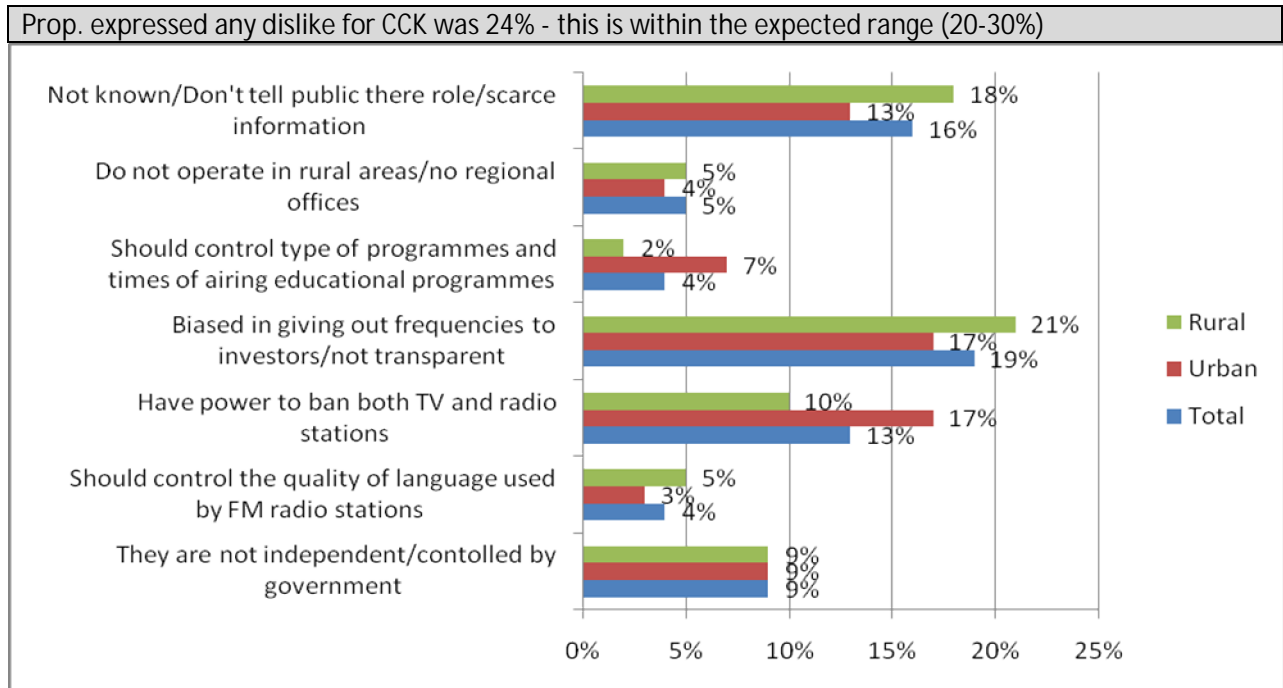
‘For giving out licenses to an increasing number of radio and TV stations’

‘For controlling the contents of programmes broadcasted on the radio’.

The pattern of mentions was fairly similar among the urban and rural sectors.

3.3 Dislikes of CCK (Q8b)

Note: Please refer to the previous section on how proportions who expressed like for CCK was calculated. The same rule applies in this section.



About a quarter of all respondents expressed at least one dislike for CCK. This proportion is within the expected level in such surveys (20-30%).

Among the key complaints made were:

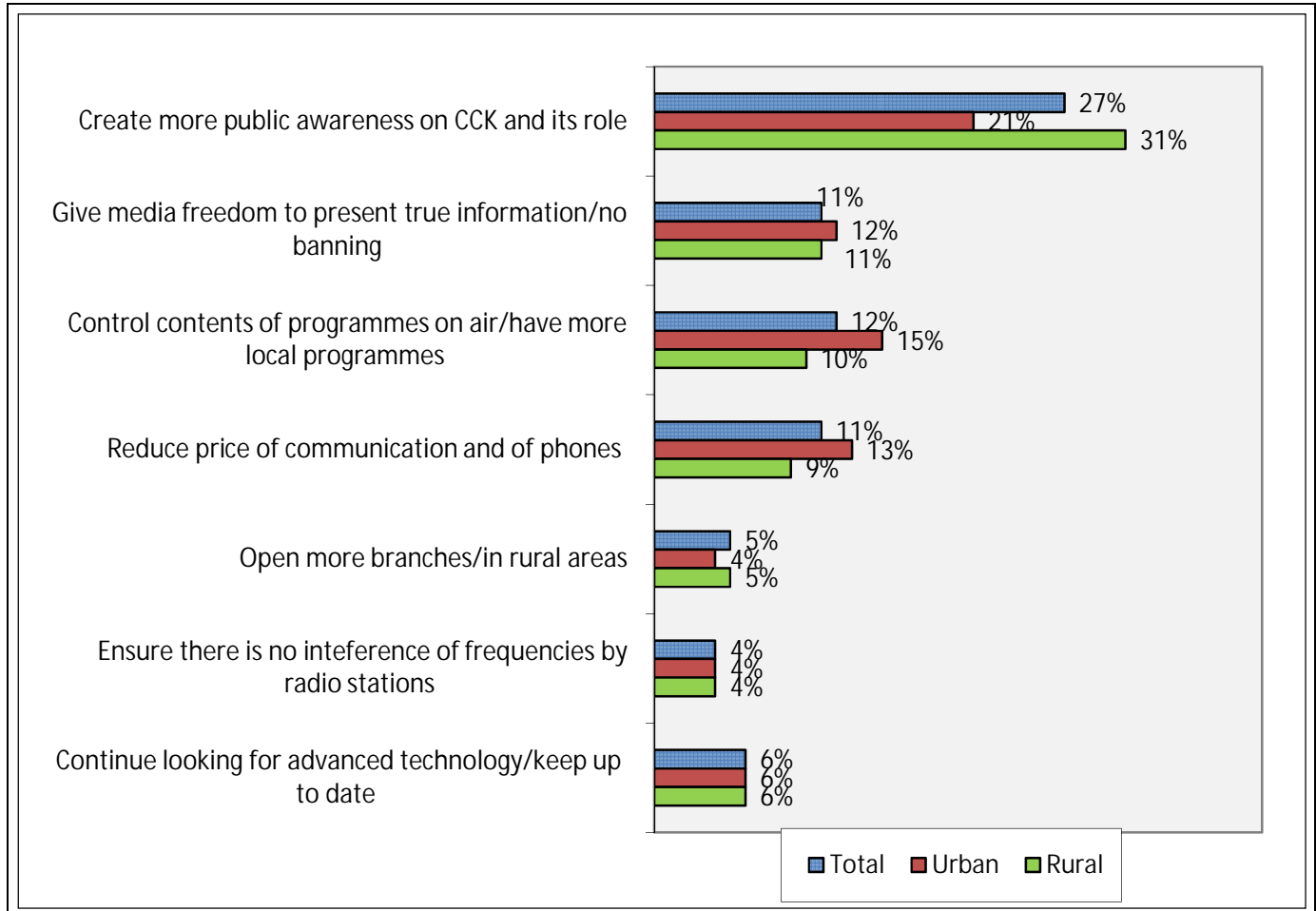
‘CCK was biased in giving out frequencies to investors/ prospective clients’ – almost 20% mentions”

‘CCK has the power to ban both TV and Radio stations’ – 13% total mentions, higher urban mentions (17%) – this was mentioned in reference to some incidents earlier when some Media Houses and Radio Stations were banned from broadcasting.

The above complaints were also made in some of the consumer focus groups carried out earlier. Smaller proportions also mentioned that CCK is not an independent organization and is controlled by the government.

3.4 Proposed Improvements in CCK (Q8c)

Base: Total Aware of CCK

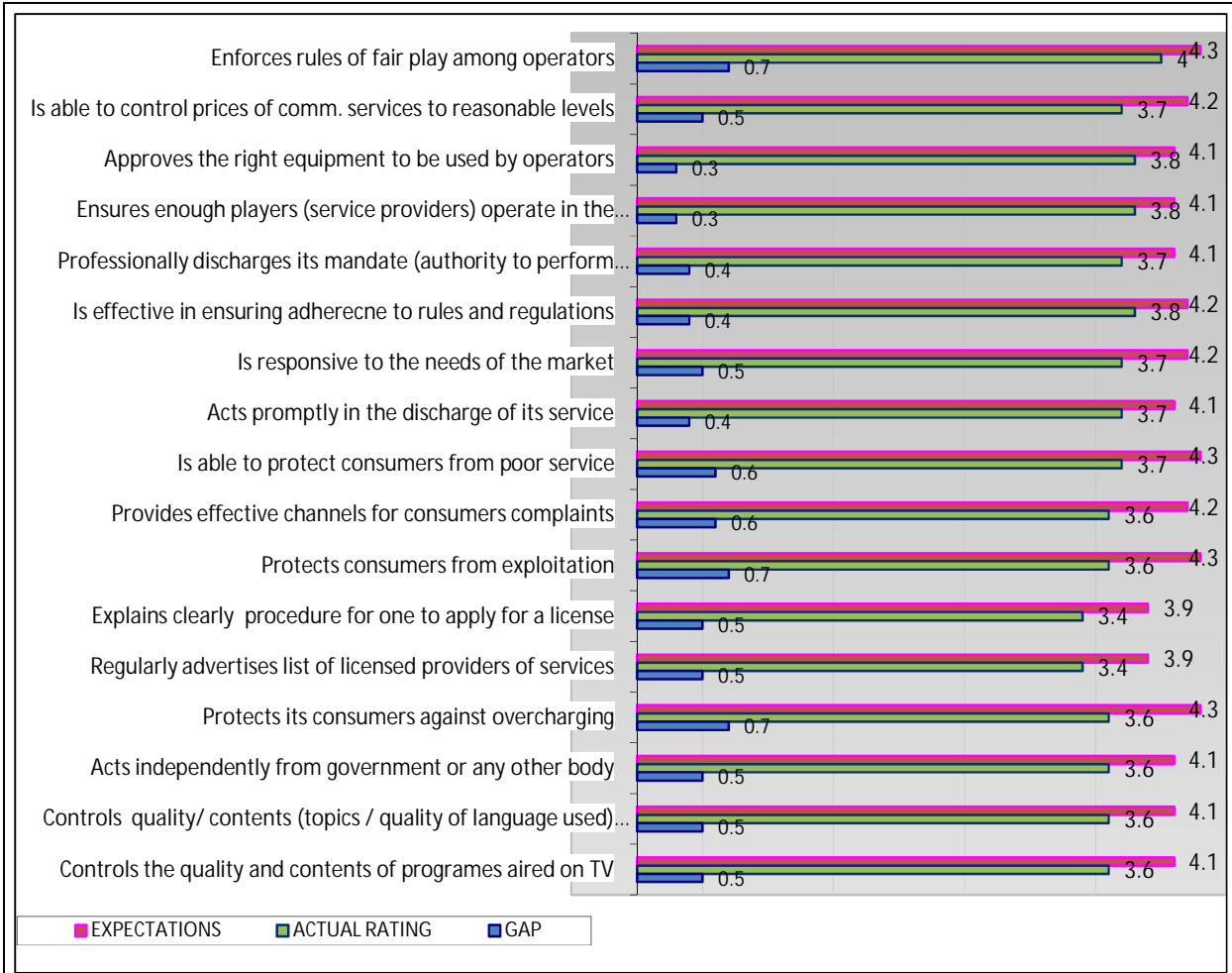


Among the key suggestions made by the consumers was the need to create more public awareness on CCK and its role – particularly amongst the respondents in the rural areas. Smaller proportions also urged CCK to give the media the freedom to broadcast true information and there were requests that CCK should oversee/ control the contents of some of the programmes aired on Radio and TV stations.

These suggestions are consistent with the findings of the qualitative research which established that consumers were concerned with the kind of language used by most of the FM radio stations and the kind of topics discussed were quite sensitive and embarrassing for older people especially when they are travelling in matatus with their family members – in the morning and evenings. It was reported that virtually all matatus that all/most “matatus” are always tuned to Classic FM station – this being one of the FM stations consumers complained about.

3.5a CCK Service Satisfaction Ratings–Importance of Service vs. Actual Performance (Q10)

Base: Total Aware of CCK



As shown in the graph above, consumer ratings of CCK were fairly close to expectations for most attributes – the attributes for which the difference between expectations and performance was comparatively high was for:

- “CCK enforces rules of fair play among operators”
- “CCK protects consumers from exploitation”
- “CCK protects its consumers against overcharging”
- “CCK is able to protect consumers from poor service”
- “CCK provides effective channels for consumer complaints”

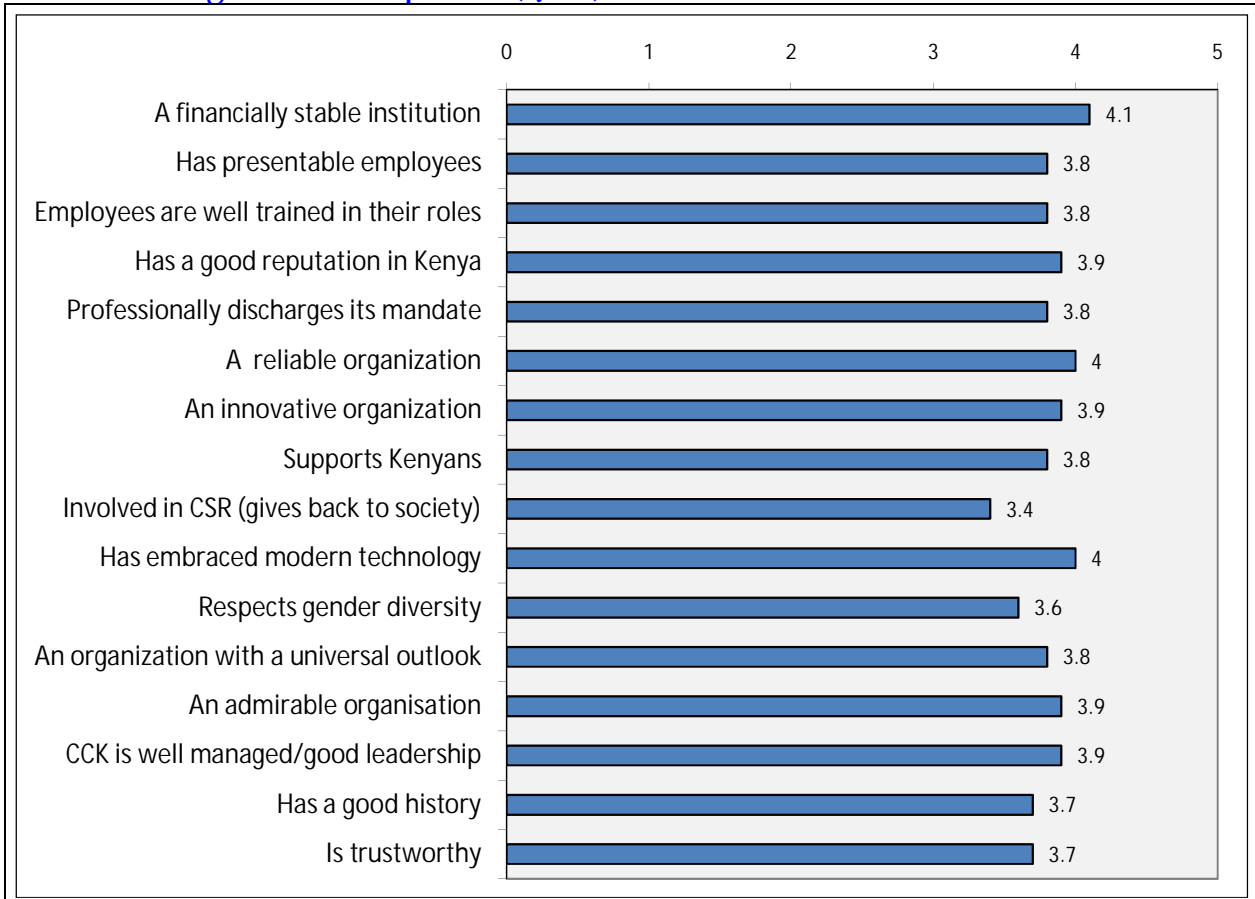
The above ratings indicate that consumer perceptions of CCK are fairly positive, hence the small difference in performance ratings versus expectations. However it must be borne in mind that consumers were not fully aware of the CCK mandate and thus the ratings reflect their perceptions of the organization.

3.5b CCK Service Satisfaction Index

Base: Total Aware of CCK	Expectation	Actual	Difference in Ratings
CCK enforces rules of fair play among operators	4.3	4.0	0.3
CCK is able to control prices of communication services to reasonable levels	4.2	3.7	0.5
CCK approves the right equipment to be used by operators	4.1	3.8	0.3
CCK ensures enough players (service providers) operate in the market	4.1	3.8	0.3
CCK professionally discharges its mandate (authority to perform certain tasks/policies)	4.1	3.7	0.4
CCK is effective in ensuring adherence to rules and regulations	4.2	3.8	0.4
CK is responsive to the needs of the market	4.2	3.7	0.5
CCK acts promptly in the discharge of its service	4.1	3.7	0.4
CCK is able to protect consumers from poor service	4.3	3.7	0.6
CCK provides effective channels for consumers complaints	4.2	3.6	0.6
CCK Protects consumers /customers against exploitation	4.3	3.6	0.7
CCK regularly advertises list of licensed providers of services	3.9	3.4	0.5
CCK protects consumers against overcharging	4.3	3.6	0.7
CCK acts independently from government or any other body	4.1	3.6	0.5
CCK controls the quality and content (topics and quality of language used) on radio	4.1	3.6	0.5
CCK controls the quality and content of programmes aired on TV	4.1	3.6	0.5
Total Score	66.6	58.9	7.7
Customer Satisfaction Index (CSI) -2009			
Option 1: Total score/ Maximum score X 100	100%	83.3%	
Option 2: CCK satisfaction Index = (Actual / Expect'n) x 100%	100%	88.4%	
Customer Satisfaction Index (CSI) -2007			
Option 1: Total score/ maximum score X 100	100%	75%	

As shown in table above, CCK Satisfaction Index (CSI) was compiled using two different methods -the first approach was the method used in the previous research and resulted in a score of 83.3% whilst the second approach used the ratio of actual ratings versus expectations and resulted in a CSI of 88.4%. Comparison with the CSI in the previous research shows a marked improvement in ratings from 73% to over 80%, thus indicating an improvement in the CCK services to consumers.

3.6a CCK Image and Perceptions (Q 14)



Base: Total Aware of CCK

CCK gained highest ratings for “being financially stable” (Score 4.1 on a 5-point scale), for “embracing modern technology” (Score 4.0) and for being a “reliable organization” (score (4.0).

It also generated fairly high ratings for:

- “An innovative organization”
- “Has a good reputation in Kenya”
- “An admirable organization”
- “Being a well managed organization/ good leadership”

CCK generated lowest ratings for “Being involved in CSR activities” (Score 3.4) and for “respecting gender diversity” (Score 3.6)

Thus CCK needs to ensure that its CSR activities are well covered by the media through the PR agencies. Among CCK’s strengths are its financial stability, being up to date with modern technology and being a reliable organization.

3.6b CCK Image and Perceptions Index (Q 14)

Base: Total Aware of CCK	Maximum Score	Actual Score
CCK is a financially stable institution	5.0	4.1
CCK has presentable employees	5.0	3.8
Employees at CCK are well trained in their roles	5.0	3.8
CCK has a good reputation in Kenya	5.0	3.9
CCK professionally discharges its mandate	5.0	3.8
CCK is a reliable organization	5.0	4
CCK is an innovative organization	5.0	3.9
CCK supports Kenyans	5.0	3.8
CCK is involved in corporate social responsibility activities	5.0	3.4
CCK has embraced modern technology	5.0	4
CCK respects gender diversity	5.0	3.6
CCK is an organization with a universal outlook	5.0	3.8
CCK is admirable	5.0	3.9
CCK is well managed/good leadership	5.0	3.9
CCK has a good history	5.0	3.7
CCK is trustworthy	5.0	3.7
Total Score	80	61.1
Image Perception Index- 2009	100	76.4%
Image Perception Index- 2007	100	80%

CCK ratings were comparatively low for:

- “CCK is involved in corporate social responsibility activities”
- “CCK respects gender diversity”
- “CCK has a good history”
- “CCK is trustworthy”

Among the attributes for which CCK was rated more favorably were:

- “ CCK is a financially stable institution”
- “CCK is a reliable organization”
- “CCK has embraced modern technology”

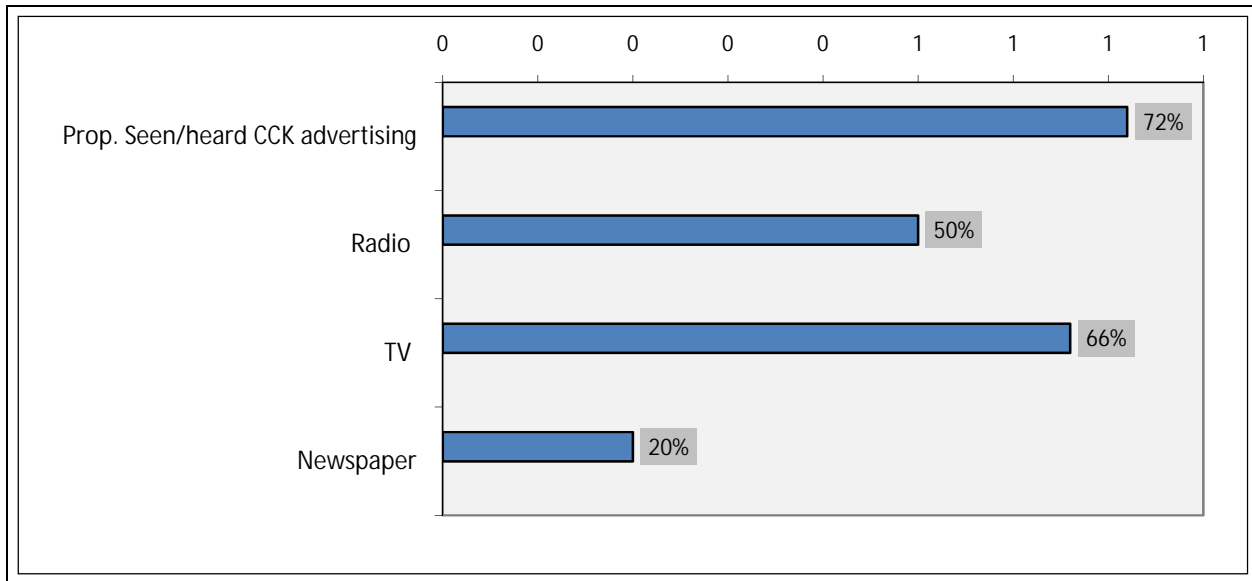
CCK needs to create goodwill amongst the consumers by publicizing its CSR activities through the media and to improve its image on being neutral in terms of gender issues. The banning of live broadcasts during the election violence in 2007/2008 and some of the news items on delays in giving out licenses to particular media owners and prospective mobile phone operators seems to have led to low ratings on “CCK has a good history” and for the attribute “CCK is trustworthy”

Thus the CCK achieved an Image and Perception Index (IPI) of 76.4% which is quite favorable in absolute terms. However the IPI index has declined slightly as compared to the IPI achieved in the previous survey (2007) - 80% in 2007 vs. 76.4% in the current survey i.e. the IPI has declined by 3.6%.

4. Advertising Awareness of CCK (15a)

4.1 Level of Awareness of CCK Advertising

Base: Total Aware of CCK

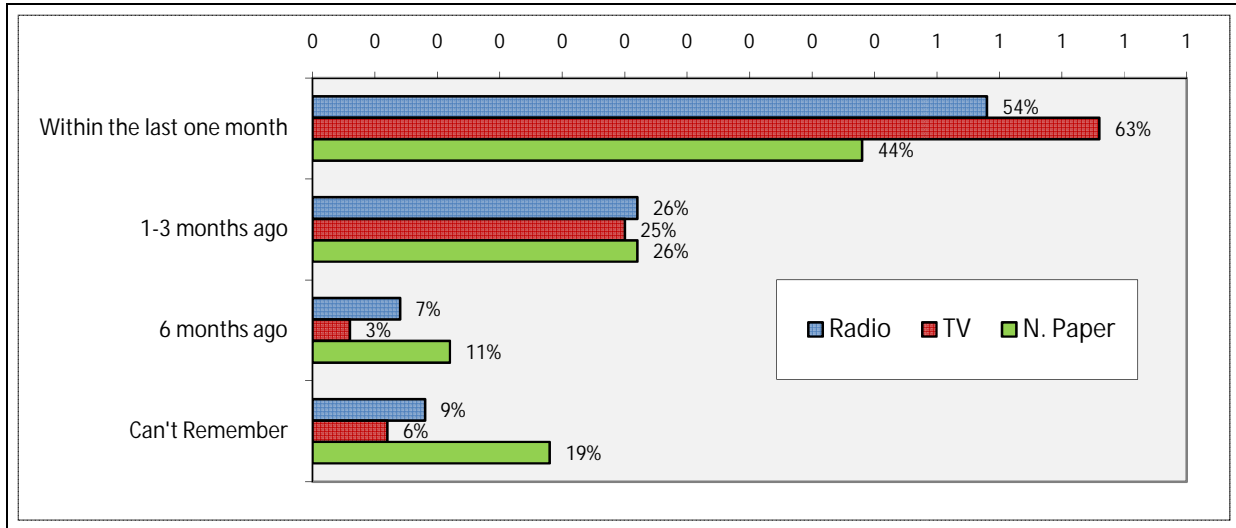


Almost three-quarters of all respondents aware of CCK had seen some advertising for the organization. A notable two-thirds of the respondents mentioned television followed by radio (50%) and a fifth mentioned newspapers.

Advertising awareness of CCK	Total	Male	Female	Urban	Rural
	601	321	280	198	403
Prop. Seen/ heard advertising for CCK	72%	72%	71%	83%	66%
Base: No. heard/seen CCK advertising	431	231	200	164	268
Radio (sp service)	50%	54%	45%	43%	55%
TV (sp station)	66%	65%	68%	75%	61%
Newspaper(sp)	20%	22%	18%	24%	18%
Can't Remember	8%	6%	10%	10%	6%

As shown in table above, mentions of radio were slightly higher amongst males and in rural areas, whilst television generated more frequent mentions in urban areas.

4.2 When CCK Advertising was last seen ((Q6)



It is interesting to note that a significant proportion of respondents interviewed (between 44%-63%) had seen CCK advertising 'within the last month' whilst a further 25-26% had seen/heard it '1-3 months ago'.

Thus amongst those who had seen CCK advertising on Television, 88% (63% +25%) had seen it 'within the last month'. The respective proportion for Radio was 80% (54% + 26%) and for Newspapers - 80% (44% +26%).

Note: It must be borne in mind that the fieldwork timing for this survey overlapped with a media campaign the Commission was running to celebrate 10 years of its existence.

4.3 Overall Opinion of Advertising seen/heard for CCK

Mean Scores based on 5-Point scale -Q15c

	Radio	Television	Newspaper
National Total	3.8	4.0	3.5
Urban	3.7	4.0	3.5
Rural	3.8	4.0	3.6

The television advertising featuring Churchill generated more favorable ratings than the radio and newspaper advertising. These findings are consistent with the qualitative research findings (amongst groups conducted after the CCK advertising was introduced) in which respondents spontaneously recalled the words 'Tume toka mbali...' and the message was well comprehended.

4.4 Recall of the message Communicated by CCK Advertising

	Radio	TV	Newspaper
CCK is celebrating 10 years of its existence/CCK has come from far	27%	38%	8%
CCK has embraced new technology/advanced technology	10%	6%	22%
Referred to consumer protection issues/of the equipment sold	2%	11%	-
CCK has advanced and are still developing/advancing	-	4%	22%
All idle frequencies will be repossessed	-	4%	1%
Don't Know/No Answer/ Can't remember	27%	26%	47%

The main message recalled was that CCK is ten years old and it has achieved a lot during this time in terms of technological advancement. Substantial proportions could not recall the message communicated by the respective media, particularly Newspapers.

4.5 Spontaneous Likes of the CCK Advertising

	Radio	TV	Newspaper
Good actors/funny/humorous/Churchill acted well	16%	31%	-
Language easy to understand	13%	4%	2%
Educative/informative	14%	12%	11%
Clear/precise/well explained/well organized	7%	4%	6%
Appealing/ Lively/ Interesting	3%	6%	-
Don't Know/No Answer	41%	33%	59%

The Television advertising generated relatively more likes than the Radio and Newspaper advertisements. The television advertisement was unique for being funny and humorous and thus easier to recall. In the qualitative research, respondents could actually recall the story in the advertisement i.e. how people used to communicate in the past - standing in long queues and one could make a maximum of two calls if he is lucky etc. - and how technology has improved and become so easy to communicate now.

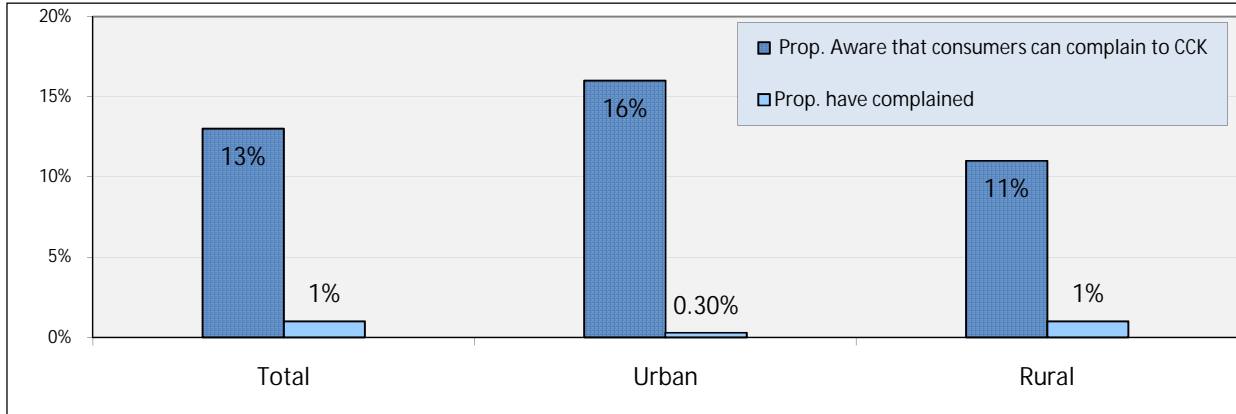
4.6 Attribute Ratings of the CCK Advertising (5-Point Scale)

	Radio	Television	Newspaper
Overall Opinion	3.6	4.0	3.3
Simple and easy to understand	3.6	4.0	3.3
Informative	3.7	3.9	3.2
Eye catching	3.5	4.1	3.4
Easy to remember/ memorable	3.6	4.1	3.2

Respondents were asked to rate the respective CCK advertising they had seen/watched with respect to particular attributes. Their ratings were based on a 5-point scale (1=least score ...5= maximum score). As shown in table above, the television advertisement generated notably higher ratings than the radio and newspaper advertisements respectively.

5. Complaints

5.1 Awareness and Extent of making complaints

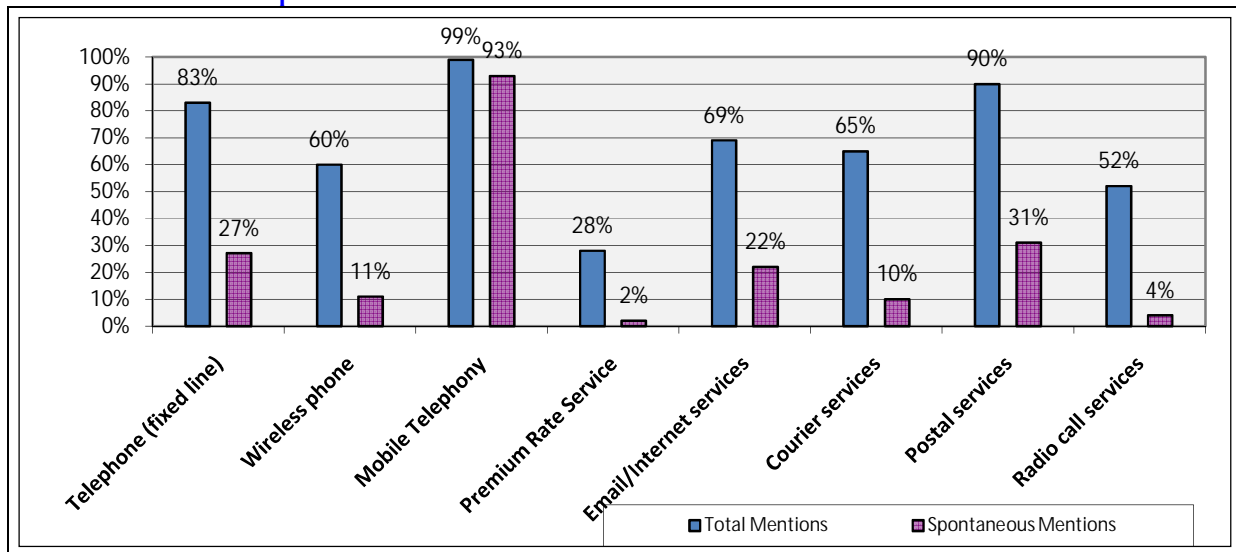


Only 13% of the respondents were aware that one can file a complaint about a service provider to CCK and only 1% claimed to have complained to CCK. The pattern of mentions was fairly similar amongst urban and rural respondents.

Section 2: Consumer Awareness, Usage and Attitudes towards Communication Methods

1. Awareness of Communication Methods

1.1. Awareness –Spontaneous and Total mentions



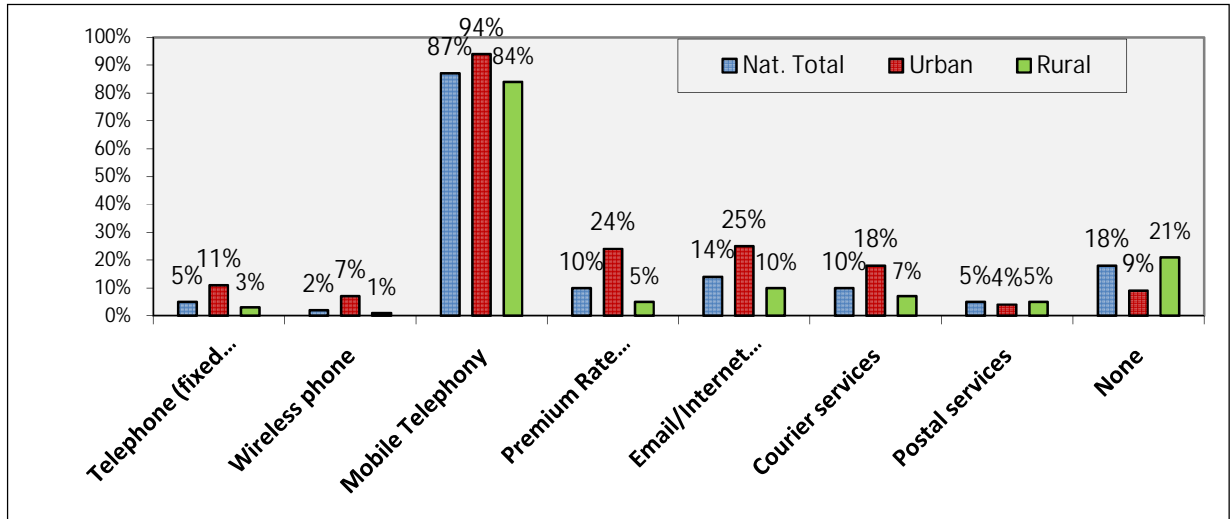
Awareness of most communication methods was quite high – particularly for Mobile Telephony, Postal Services and Fixed Line Telephones. Mobile Telephony generated the highest spontaneous mentions.

1.2 Spontaneous Awareness of Communication Methods

	TOTAL	ABC1	C2	DE	Male	Female	Urban	Rural
	1143	168	334	641	553	590	286	856
Telephone (fixed line)	27%	42%	34%	20%	29%	26%	33%	25%
Wireless phone	11%	17%	13%	8%	12%	10%	14%	10%
Mobile Telephony	93%	98%	97%	91%	95%	92%	95%	93%
Premium Rate Service	2%	1%	4%	1%	2%	2%	3%	2%
Email/Internet services	22%	47%	29%	12%	24%	20%	38%	16%
Courier services	10%	15%	14%	7%	10%	10%	13%	9%
Postal services	31%	35%	34%	29%	32%	31%	35%	30%
Radio call services	4%	5%	5%	4%	5%	4%	5%	4%
None	4%	0%	2%	6%	3%	5%	3%	4%

Spontaneous mentions indicate higher level of awareness of Email/Internet in urban areas and amongst upper and middle socio economic groups. The pattern of mentions of most of the other communication methods was fairly consistent between the respective demographic groups.

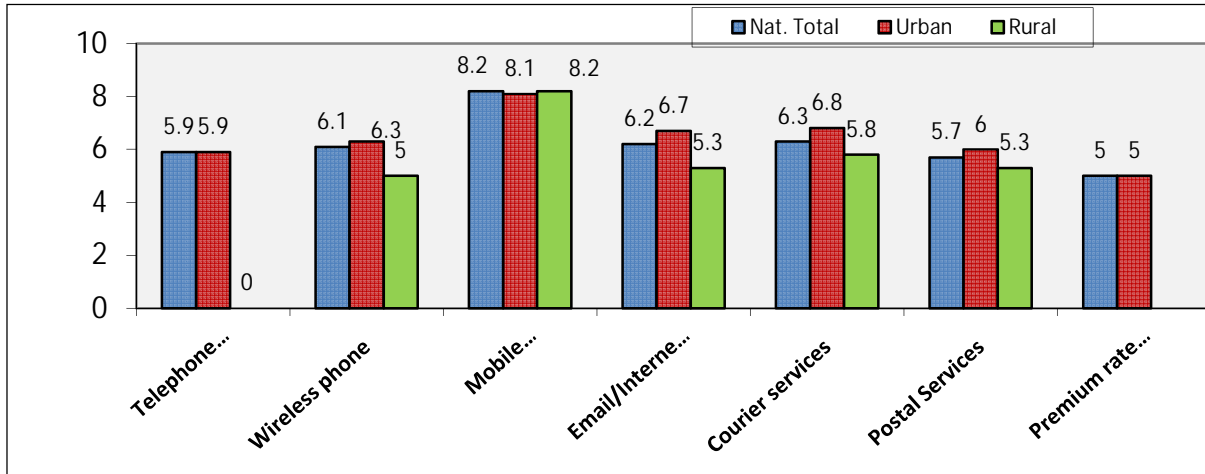
1.3 Extent of using Particular Communication Methods



A majority of respondents claimed to use mobile phones to communicate. The other methods of communicating were mentioned by smaller proportions of respondents most of whom were from urban areas as opposed to those in the rural areas, as shown in table below:

Extent of using different Communication Methods	Total	Urban	Rural	
	1143	286	856	
Telephone (fixed line)	5%	11%	3%	Mostly Telkom
Wireless phone	2%	7%	1%	Telkom –over 80%, Popote -5%,
Mobile telephony	87%	94%	84%	Safaricom -86%, Zain - 7%, Orange- 1%, Don't Know-6%
Premium Rate Service	10%	24%	5%	4024 –Inooro -42%
Email/Internet services	14%	25%	10%	Cyber -69%, Safaricom – 15%
Courier services	10%	18%	7%	Securicor-26%, Akamba -15% , G4S -14%
Postal services	5%	4%	5%	
Radio call services	0%	1%	0%	

1.4 Level of satisfaction with Communication Methods used



Note: Ratings based on 10-point scale

Mobile phones generated the highest level of satisfaction amongst respondents in urban and rural areas. Satisfaction levels with other communication methods were above average, except for Premium Rate Service which generated an average rating. Generally the urban consumers seemed more satisfied than their rural counterparts.

1.5 Where Particular Communication is usually accessed

	Telephone (fixed Line)	Wireless Phone	Mobile Phone	Premium Rate Service	Email/Internet Service	Courier Service	Postal Service
No. Use services	<u>17</u>	<u>17</u>	<u>931</u>	<u>46</u>	<u>107</u>	<u>145</u>	<u>53</u>
Home	70%	19%	10%	2%	11%	7%	5%
Work	30%	17%	2%	0%	13%	43%	33%
Cyber cafe	0%	0%	0%	0%	62%	1%	0%
Phone booths	0%	0%	0%	0%	0%	0%	0%
Use my personal phone/carry with me	0%	48%	84%	93%	13%	1%	0%
Do not access/ use this service/ No response /Don't know	3%	16%	9%	5%	8%	49%	62%

- Fixed line Telephones were mostly used at home and to some extent at work
- Wireless phones due to their portability are used at home and at work.
- Mobile phones are mostly personal phones so respondents carry them wherever they go.
- Premium rate Service is accessed through mobile phones which respondents carry with them.
- Email/ Internet services are accessed at Cyber cafes by almost two-thirds of the respective users.
- Couriers and postal services are mostly used at the respective place of work.

1.6 Level of Awareness of Terms and Conditions of Communication Methods Used

	Telephone (fixed Line)	Wireless Phone	Mobile Phone	Premium Rate Service (PRS)	Email/Internet Service	Courier Service	Postal Service
No. Use Communication Method	<u>17</u>	<u>17</u>	<u>931</u>	<u>46</u>	<u>107</u>	<u>145</u>	<u>53</u>
Proportion claim to be aware of terms and conditions	89%	73%	71%	73%	64%	60%	79%

A majority of almost 90% of the Telephone users (fixed line) claimed to be aware of the terms and conditions that apply to Fixed Line Telephone services. The awareness level of terms and conditions that apply to Postal Services was also notably high – almost 80% claimed to know the terms and conditions.

Aware of the terms and conditions that apply to Wireless Phones, PRS and Mobile Phones was just over 70% respectively. Awareness of the terms for Email/ Internet and Courier Services comparatively low – between 60 – 65% respectively.

1.5 Awareness of Terms and Conditions for Services Used

Communication Method – Terms and Conditions		
i. Telephone Fixed Line (TFL)		
Base	17	Almost 90% of the users were aware of the terms and conditions which apply to TFL's. About half i.e. around 50% mentioned that one has to pay for use of the service and to pay for installing extensions from the line respectively.
Pay for the extensions	48%	
Gave annual changes	5%	
Pay money for use of service	54%	
Have a booth/machine must be connected	3%	
Don't Know/None/can't remember	11%	
ii. Telkom Wireless		
Load credit before use	60%	The key requirement for use of Telkom wireless mentioned by substantial proportions of respondents was to load credit on the line before being able to use the line. Other requirements mentioned by smaller proportions (10-15%) were the need for a handset and to register with Telkom.
Have a handset	16%	
Buy Sim-Card	5%	
One must register with Telkom	11%	
Don't Know/None/ can't remember	27%	
iii. Mobile Telephony		
Load the phone (airtime) before using	50%	Most of the respondents were users of pre-paid services; hence the mentions of loading airtime and the need for a hand set to use the service.
Have a Handset	7%	
Don't Know/None/can't remember	29%	

Communication Method – Terms and Conditions contd....		
iv. Premium Rate Services (PRS)		
Base	46	The main awareness of the terms/ conditions for use of PRS was that the costs of using this service are between K Shs 4/= to 5/= (41% mentions) and the need for one to have a specific airtime.
Must send your request	3%	
Charges above 4/= charges are 5/= above normal rate	41%	
Must have a handset	9%	
Know the number /code to dial well	1%	
A specific amount of airtime	14%	
Be on a particular network or GPRS enabled	1%	
You need to subscribe or pay instantly	7%	
Don't Know/None/ can't remember	27%	
v. Internet/ Email		
Base	107	There seemed to be no specific term/condition known to a large proportion of users of internet/email. There were several mentions - each by a small proportion of the respective users. Among the terms mentioned were: <ul style="list-style-type: none"> - Need for an email address - Payment for use of service - To register to use the service e.g. Yahoo, Google etc. - Surfing rates
Don't send junk mail	1%	
Have surfing rates	11%	
Don't disclose password	5%	
Be registered	11%	
Pay to use the service	12%	
Must have email addresses	19%	
Must have a password	5%	
Be computer literate	1%	
Connect to ISP or by bundles	5%	
Most go to cyber cafes	1%	
Don't Know/None/ can't remember	36%	
vi. Courier Services		
Base	145	Courier Services generated several mentions about the terms and conditions of use, each by fairly small proportions. Among the key mentions were: <ul style="list-style-type: none"> - Payment for services - Need to give correct details about sender of courier and the recipient.
Must give correct details	19%	
Pay for the services	29%	
If undelivered return to sender	3%	
No sending cash	6%	
Must have ID to collect parcels	4%	
You have to call them	2%	
Once you pay no refunds	2%	
Have a physical address	2%	
Charges differ or vary in weight and distance	1%	
Don't Know/None/ can't remember	40%	

Postal Services		The key requirement for use of Postal Services was the need to buy stamps to send an item – letters, documents etc. and the need to have the correct postal address of the recipient of the mail or parcel.
	53	
Buy postal stamps before sending a parcel	47%	
Not responsible for any undisclosed valuables	1%	
Correct details (Address)	15%	
You must have a post office box	9%	
Has annual fee	8%	
You pay for maintenance of post office box	7%	
Must have an original ID on withdrawal of money	8%	
Don't Know/None/ can't remember	21%	

2. Attitudes towards Communications Service Providers

2.1 Attitudes towards Mobile Phone Operators

i. Likes of Service Providers used

	Total	Safaricom	Zain	Orange
Total use Mobile Phones	931	850	67	10 *
Approximate share of market (consumers) →	100%	91%	7%	1%
Prop. expressed like	96%	96%	96%	8
Wide network coverage	21%	21%	24%	2
M_PESA and ZAP services that allow one to bank and withdraw money	31%	33%	11%	-
Cheap calling rates	34%	31%	57%	5
Clear network	13%	11%	39%	2
The company is established and so its reliable	8%	9%	5%	-
They usually have promotions/offers	12%	13%	2%	-
Many of my friends used the network hence, make communication	16%	17%	8%	-
Offers credit advance - convenient	6%	6%	0%	-
Availability of affordable airtime cards e.g. Bamba 20/=	5%	6%	0%	-

Note*: Raw data (not percentage) for whole column

Analyzing the total number of Mobile Phone users by the brand usually used i.e. looking across the second row, gives rough estimates of the share of the market held by the respective Mobile Phone Company –thus Safaricom commands about 90% of the share of the market, and Zain accounts for about 7% of the market.

Safaricom is the most popular operator used by just over 90% of the users of mobile phones. It was liked because of its well advertised M-PESA service (33%) and the convenience offered to send/receive money. It is also perceived to have cheap calling rates by a third of the respondents and a wide network coverage (21%).

Zain's strength over Safaricom is its cheap calling rates (57%) and it has a clear network (39%). It generated similar mentions to Safaricom for having a wide network coverage.

ii. Dislikes of Service Providers used

	Total	Safaricom	Zain	Orange
Total use Mobile Phones	931	850	67	10 *
Prop. expressed dislike	56%	57%	42%	6
High call charges/rates	12%	12%	6%	2
Jamming of network/ congestion	16%	17%	0%	-
Unclear network sometimes	10%	11%	1%	-
SMS are sometimes charged if not delivered	1%	8%	10%	3
Poor customer service	5%	0%	1%	-
Expensive to call other network	9%	0%	3%	-
Don't Know/ None	44%	43%	58%	4

None of the Mobile Phone operators generated any major dislike but smaller proportions ranging from 10-20% complained especially about Safaricom charges being high, its network being congested and unclear.

iii. Customer Satisfaction with Mobile telephony

Note: Ratings based on 5-point scale	Maximum Score	Actual Rating
Response to maintenance calls	5	4.1
Range of services offered by operator	5	4.3
Reliability of services offered by operator	5	4.2
Availability of information relating to services offered by the operator	5	4.1
Details provided in billing information	5	4.1
Accuracy of bills	5	4.1
Signal strength of the (mobile) operators network/Clarity of calls	5	4.1
Geographic reach of services offered by the service provider	5	4
Provision made to serve people with disabilities	5	3.6
Response to fault reporting and maintenance procedures	5	3.8
Ease of reporting billing complaints	5	3.9
Method of resolving billing complaints	5	3.9
Quality of services offered by Call Centres	5	4
Effectiveness of complaints handling procedures in general	5	4
Account status confirmed before disconnecting (Post Paid) service	5	3.6
Quality of telecommunication equipment available in the market	5	4
Reliability of network overall	5	4
Ease of reaching the right person to handle a complaint	5	3.7
The customer help lines are manned at all times	5	3.7
Ease of getting through to Customer care helpline/Customer care help lines being answered promptly	5	3.5
Customer staff polite, greet callers and listen keenly to customer complaints	5	4.2
Customer care staff knowledgeable in handling complaints	5	4.2
Total Score	110	87.1
Service satisfaction Index -2009	100%	79.20%
Service satisfaction Index -2007	100%	73%

Respondents were quite satisfied with the “range of services that mobile phone service providers have” and “staff knowledgeable of in handling complaints”. As compared to other service related attributes, the ratings were relatively low for:

- “Ease of getting through to Customer care helpline”
- “Provision made to serve people with disabilities”
- “ Account status confirmed before disconnecting (Post Paid) service”
- “Ease of reaching the right person to handle a complaint”
- “The customer help lines are manned at all times”

The Mobile Phone Customer Satisfaction Index was calculated to be 79.2% as compared to 73% in the previous survey, thus indicating a small improvement in overall ratings.

2.2 Attitudes towards Fixed Line Telephone Service - (Telkom)

i. Likes of Telkom

	Total
Total use Telkom Fixed line Service	17
Prop. expressed like	100%
Their calling rates are cheap	70%
They have a good network coverage	21%
Calls connect fast and are clear	6%
The customer service is good and their follow up	3%
Readily available	11%

Virtually all Telkom Fixed Line users interviewed expressed some like for the service provider. One of the major perceived strengths of Fixed Line Telephone service is that the calling rates are perceived to be cheap/fair in price (70%) as compared to other similar services. About a fifth of the respondents referred to the good geographical spread of the Fixed Line Telkom services. Other likes were each expressed by a small number of respondents.

ii. Dislikes of Telkom

	Total
Total use Telkom Fixed line Service	17
Prop. expressed dislike	83%
They are not reliable	16%
Slow when needed for maintenance	27%
Has not developed in terms of technology	13%
Not portable	14%
Poor network	11%
Don't Know/None	17%

A majority of over 80% of the users of Telkom Fixed Line services expressed some dislike for the service provider. Among the dislikes expressed by small proportions were that "services rendered by Telkom are slow and unreliable". Secondly Telkom "has not embraced modern technology" in the telecommunication industry.

iii. Customer Satisfaction with Fixed line Operators –Telkom

Note: Ratings based on 5-point scale	Maximum Score	Actual Rating
Response to maintenance calls	5	3.3
Ranges of services offered by operator	5	3.3
Reliability of services offered by operator	5	3.6
Availability of information relating to services offered by the operator	5	3.4
Details provided in billing information	5	3.4
Accuracy of bills	5	3.2
Signal strength of the operator's network clarity of calls	5	3.6
Geographical reach of services offered by the service provider	5	3.7
Provision made to serve the people with disability	5	3.3
Response to fault reporting and maintenance procedures	5	3.3
Ease of reporting billing complaints	5	3.1
Method of resolving bill complaints	5	3.2
Quality of services offered by call centres	5	3.3
Effectiveness of complaints handling procedures in general	5	3.1
Accounts status confirmed before disconnecting (Post paid) service	5	3.2
Quality of telecommunication equipment (for service provider) available in the market	5	3.3
Reliability of network overall	5	3.3
Ease of reaching the right person to handle a complaint	5	3
The customer help lines are manned at all times	5	3.1
Ease of getting through to customer care help line/ being answered promptly	5	3.2
Customer staff polite, greet callers and listen keenly to customer complaints	5	3.4
Overall opinion of quality of customer care accorded by service provider/operator	5	3.5
Total Score	110	72.8
Service satisfaction Index -2009	100%	66.2%
Service satisfaction Index -2007	100%	65%

Fixed telephony service provider Telkom achieved a comparatively low Customer Satisfaction Index of 66.2%, the rating being almost similar to previous index of 65%. Generally the Telkom ratings were poor for almost all attributes but particularly for the attributes associated with customer service and complaints handling.

Telkom ratings were lowest for:

- “Ease of reaching the right person to handle a complaint”
- “The customer help lines are manned at all times”, “Ease of reporting billing complains”
- “Method of resolving bill complaints”,
- “Effectiveness of complaints handling procedures in general”
- “Ease of getting through to customer care help line/customer help lines being answered promptly”

2.3 Attitudes towards Internet/Email Service Providers (ISP's)

i. Likes of Internet/Email Service Providers

	Total	Cyber	Safaricom	Others (Small base nos.)
Total use ISP's	107	76	16	15
Approximate share of market (consumers) →	100%	71%	15%	14%
Prop. expressed like	92%	91%	91%	
Machines are faster and reliable	44%	43%	51%	
It is cheap	45%	42%	52%	
Conveniently location/easily accessible	11%	8%	22%	
Has a worldwide connection	9%	9%	3%	
Contain adequate information	7%	8%	3%	
One is able to get all the research materials one may want	6%	8%	0%	
One can get assistance whenever stuck	5%	6%	0%	
Easy to operate	6%	5%	8%	

It is interesting to note that Cybers account for 70% share of the ISP consumer market followed by 15% share by Safaricom. Considering that Safaricom introduced ISP service recently, it has taken off well in the market. Other mentions included Safaricom/ Zain modems, and mobile phones respectively.

The two key Internet/ Email service providers generated favourable reactions "for being cheap" and for "having fast and reliable equipment" – between 45-55% mentions respectively.

ii. Dislikes of Internet/Email Service Providers

	Total	Cyber	Safaricom	Others
Total users of ISP's	107	76	16	15
Approximate share of market (consumers) →	100%	71%	15%	14%
Prop. expressed dislike	57%	60%	56%	
At times there's no network	21%	24%	16%	
At times the computer may hang/ network breakdown	17%	20%	8%	
Rates are high	10%	6%	25%	
Misleading messages /information	4%	5%	3%	
Sometimes one has to queue for a very long time/ congestion	4%	3%	6%	
Poor response in case of network breakdown	2%	2%	3%	
There's no privacy when accessing the services	1%	2%	0%	
They are situated in urban areas only	1%	1%	0%	
Don't Know /None	43%	40%	44%	

There were complaints of "poor/no network at times" and the "computers often hang" or "there is a network breakdown", thus affecting access – both in cybers as well as safaricom services. The internet browsing rates were also perceived to be high –especially for Safaricom.. A substantial proportion (40-45%) did not express any dislike for respective operators used, i.e.they seemed satisfied with the respective operators.

iii. Customer Satisfaction with Internet Service Providers (ISP's)

	Maximum Score	Actual Rating
Note: Ratings based on 5-point scale		
Response to maintenance calls	5	3.9
Ranges of services offered by operator	5	3.9
Reliability of services offered by operator	5	3.8
Availability of information relating to services offered by the operator	5	3.7
Details provided in billing information	5	3.7
Accuracy of bills	5	3.6
Signal strength of the operator's network	5	3.5
Geographical reach of services offered by the service provider (operator)	5	3.7
Provision made to serve the people with disability	5	3.3
Response to fault reporting and maintenance procedures	5	3.6
Ease of reporting billing complaints	5	3.6
Method of resolving bill complaints	5	3.6
Quality of services offered by call centres	5	3.6
Effectiveness of complaints handling procedures in general	5	3.6
Accounts status confirmed before disconnecting (Post paid) service	5	3.5
Quality of telecommunication equipment available in the market	5	3.8
Reliability of network overall	5	3.6
Ease of reaching the right person to handle a complaint	5	3.5
The customer help lines are manned at all times/customer care staff always available to help at cyber	5	3.5
Ease of getting through to customer care help line/ customer help lines being answered promptly	5	3.5
Customer staff polite, greet callers and listen keenly to customer complaints	5	3.8
Overall opinion of quality of customer care accorded by service provider/	5	3.8
Total Score	110	80.1
Service satisfaction Index -2009	100%	72.8%
Service satisfaction Index -2007	100%	64%

Internet Services Providers achieved customer satisfaction index of 72.8% as compared to 64% in the previous survey thus indicating a notable improvement in the respective services.

The key attributed for which the ISP's were rated poorly were:

“Accounts status confirmed before disconnecting (Post paid) service”

“Ease of reaching the right person to handle a complaint”

“The customer help lines are manned at all times”

“Ease of getting through to customer care help line/customer help lines being answered promptly”

There were no particular attributes for which the ISP's gained high ratings i.e. mean scores above 3.9.

2.4 Attitudes towards Wireless Phone Service

Among the Wireless Phone Services used were Telkom, Popote, and Flashcom. The most popular service provider was Telkom with 80% mentions.

i. Likes of Wireless Phone Service

No. use Wireless Telephone	29
Prop. expressed like	92%
Cheap to make calls	55%
Clear network	17%
Cheaper to buy and maintain	15%
Cheap SMS	9%
Easy to carry	8%
Don't Know/None	8%

A majority of around 90% of the users expressed like for the Wireless Phone Services used. The services were liked mainly because they were perceived to be cheap. Smaller proportions also mentioned that the network was clear and it was cheaper to buy the phone and maintain the service.

ii. Dislikes of Wireless Phone Service

	Total
	29
Proportion expressed dislike	60%
No wide coverage	17%
Poor quality of network	15%
Rates are high	12%
One cannot send money	8%
Costly to call other lines especially abroad	5%
It is not popular with many people	5%
It is not popular with many people	5%
Don't Know/None	40%

A substantial proportion of the users expressed dislike for the Wireless Phone Services used - 60%. Respondents complained that Wireless Phone Services did not cover a wide area geographically and the quality of network was perceived to be poor. Another weakness with the service is that it cannot be used to send money (like M-Pesa/ZAP) and it is quite expensive to call users of competitive operators.

A substantial proportion of respondents (40%) did not respond to this question.

iii. Customer Satisfaction with Wireless Phone Services

Note: Ratings based on 5-point scale	Maximum Score	Actual Rating
Response to maintenance calls	5	3.9
Ranges of services offered by operator	5	3.7
Reliability of services offered by operator	5	3.8
Availability of information relating to services offered by the operator	5	3.7
Details provided in billing information	5	3.6
Accuracy of bills	5	3.9
Signal strength of the (mobile/ fixed line) operator's network /clarity of calls	5	3.5
Geographical reach of services offered by the service provider	5	3.5
Provision made to serve the people with disability	5	3.5
Response to fault reporting and maintenance procedures	5	3.6
Ease of reporting billing complaints	5	3.6
Method of resolving bill complaints	5	3.6
Quality of services offered by call centres	5	3.9
Effectiveness of complaints handling procedures in general	5	3.5
Accounts status confirmed before disconnecting (Post paid) service	5	3.7
Quality of telecommunication equipment (for service provider) available in the market	5	3.8
Reliability of network overall	5	3.5
Ease of reaching the right person to handle a complaint	5	3.5
The customer help lines are manned at all times	5	3.6
Ease of getting through to customer care help line/customer help lines being answered promptly	5	3.6
Customer staff polite, greet callers and listen keenly to customer complaints	5	4
Overall opinion of quality of customer care accorded by service provider/operator	5	3.8
Total Score	110	80.8
Satisfaction Index -2009	100	73.5%
Satisfaction Index - 2007	100	N/A

The Wireless Phone Services generated fairly positive ratings, especially as compared to Telkom Fixed Line ratings –satisfaction Index for Telkom Fixed Line Service was 66.2% as compared to 73.5% for Wireless Phone Services.

Attributes for which the ratings were comparatively low were:

- “ Signal strength of the (mobile) operator's network clarity of calls”
- “ Geographical reach of services offered by the service provider ”
- “ Provision made to serve the people with disability”
- “ Effectiveness of complaints handling procedures in general”
- “ Reliability of network overall ”
- “Ease of reaching the right person to handle a complaint ”

2.5 Attitudes towards Postal Corporation of Kenya (PCK)

i. Likes of PCK

Note: Ratings based on 5-point scale	Total
No. use PCK	53
Proportion expressed like at all	97%
It is cheap/affordable/ over long distance	29%
Reliable - they ensure all mails are delivered on time	22%
It is easy to send a parcel	20%
They are secure	19%
They are all over the country	16%
They have a very good customer care service	9%
Easy to access	7%
Offers a wide range of services	2%
Quick delivery of letters nowadays	3%
Has been there for a long time	3%
They are giving postal codes	3%
Have to own a rental/ postal box	1%

A majority of over 90% of the PCK users made a positive comment about the corporation. Almost 30% commented that it was "cheap/affordable", whilst about a fifth described it as being "reliable", "convenient" and a "it is 'safe to use their services'". The other advantage it offers is that PCK has branches all over the country.

ii. Dislikes of PCK

Postal Corporation of Kenya (PCK)	Total
Base: No. use PCK	53
Prop. expressed dislike at all	64%
They are very slow in their delivery services	49%
Old fashioned	8%
Its time consuming	5%
Loss of parcels/mail	5%
Uncooperative staff (poor PR)	4%
No feedback if parcel was lost	2%
Lack of privacy	2%
Don't Know/None	36%

A substantial proportion of PCK users- almost two-thirds expressed dislike for the service provider – the normal expected level is between 20-30%. One of the key complaints about PCK was that it was that its services are very slow in terms of deliveries of mail and other items/ letters sent via PCK are often lost. This finding conforms with the qualitative research findings.

iii. Customer Satisfaction with Postal Corporation of Kenya

Postal Corporation of Kenya	Maximum Score	Total
Note: Ratings based on 5-point scale	Maximum Score	Actual Rating
Response to maintenance calls	5	3.6
Range of services offered by operator	5	3.7
Reliability of services offered by operator	5	3.8
Availability of information relating to services offered by the operator	5	3.8
Details provided in billing information	5	3.9
Accuracy of bills	5	3.7
Geographical reach of services offered by the service provider (operator)	5	4
Provision made to serve the people with disability	5	3.6
Response to fault reporting and maintenance procedures	5	3.8
Ease of reporting billing complaints	5	3.7
Method of resolving bill complaints	5	3.9
Quality of services offered by call centres	5	3.6
Effectiveness of complaints handling procedures in general	5	3.7
Accounts status confirmed before cancellation of (Post paid) service	5	3.5
Quality of telecommunication equipment (for service provider) available in the market	N/A	N/A
Reliability of network overall	N/A	N/A
Ease of reaching the right person to handle a complaint	5	3.7
The customer help lines are manned at all times	5	3.5
Ease of getting through to customer care help line/customer help lines being answered promptly	5	3.6
Customer staff polite, greet callers and listen keenly to customer complaints	5	3.8
Overall opinion of quality of customer care accorded by service provider/operator	5	3.8
Total score	100	74%
Satisfaction Index -2009	100	74%
Satisfaction Index - 2007	100	69%

Despite the high proportions of users who expressed dislike for PCK (see previous page), the Customer satisfaction Index was quite encouraging – 74% as compared to 69% in previous survey. PCK was rated poorly for:

- “Accounts status confirmed before cancellation of (Post paid) service”
- “ The customer help lines are manned at all times “
- “ Ease of getting through to customer care help line “
- “ Provision made to serve the people with disability”

2.6 Attitudes towards Courier Services

i. Likes of Courier Companies used

	Total	Easy coach	Akamba	Securicor	G4S
No. use Courier Service	145	16	23	41	22
Approximate share of market (consumers) →	100%	11%	16%	28%	15%
Proportion expressed like	92%	71%	100%	95%	87%
They return your parcels if not delivered / collected	6%	0%	2%	0%	4%
Cheap	20%	18%	32%	5%	4%
Its secure and safe (Your parcel can't be opened)	36%	32%	36%	40%	37%
It's reliable and fast because they send and deliver parcel	56%	30%	67%	67%	68%
It has a widespread network countrywide	13%	9%	23%	13%	10%
It has a polite pleasant customer care services	4%	9%	0%	6%	2%
Don't Know/None	8%	29%	0%	5%	13%

Among the main courier companies used were Securicor, Akamba, G4S and Easy Coach. From the consumer information gathered, Securicor accounts for a large share of the market i.e. almost 30% followed by Akamba and G4S –both seem to have 15% and 16% share respectively.

In total around 90% of the users expressed like for the respective couriers although the respective proportion for Easy Coach was comparatively low -71%. Just over half of all users liked the respective courier services because “they are reliable and fast” – they comprised over two-thirds of the Akamba, securicor and G4S users respectively and only 30% of the Easy Coach users. The respective service providers were also appreciated for “being secure and safe” (30-40% mentions respectively), thus gaining a lot of goodwill from customers.

ii. Dislikes of Courier Companies used

	Total	Easy coach	Akamba	Securicor	G4S	2NK
No. use Courier Companies	145	16	23	41	22	12 [*]
Approximate share of market (consumers) →	100%	11%	16%	28%	15%	
Proportion expressed dislike	45%	15%	59%	47%	30%	9
It's expensive	14%	3%	10%	21%	17%	3
IF the parcel is not delivered, they return it but without	3%	0%	2%	2%	0%	0
The parcels might sometimes get lost on the way or go to another place	8%	0%	2%	14%	6%	3
They are slow	10%	9%	37%	2%	5%	7
Not widely available	3%	3%	5%	4%	2%	5
Don't Know/None	59%	85%	41%	53%	70%	3

Note^{*} -Raw data (not percentage)

Akamba, Securicor and 2 NK (although a small base number) generated higher levels of dislike than the other courier companies. Apart from being fair mentions of being “expensive” (14%) and “slow” (10%) – particularly Akamba, the other dislikes were each mentioned by fairly small proportions.

iii. Customer Satisfaction Index with Couriers

Courier Companies	Maximum Score	Actual Rating
Note: Ratings based on 5-point scale		
Response to maintenance calls		
Ranges of services offered by operator	5	4.2
Reliability of services offered by operator	5	4.2
Availability of information relating to services offered by the operator	5	4
Details provided in billing information	5	4.1
Accuracy of bills	5	4.1
Signal strength of the (mobile) operator's network clarity of calls		
Geographical reach of services offered by the service provider (operator)	5	4
Provision made to serve the people with disability	5	3.7
Response to fault reporting and maintenance procedures		
Ease of reporting billing complaints	5	4.1
Method of resolving bill complaints	5	4.1
Quality of services offered by call centres		
Effectiveness of complaints handling procedures in general	5	3.9
Accounts status confirmed before disconnecting (Post paid) service		
Quality of telecommunication equipment (for service provider) available in the market		
Reliability of (geographical network overall)	5	4.1
Ease of reaching the right person to handle a complaint	5	4
The customer help lines are manned at all times	5	4
Ease of getting through to customer care help line/customer help lines being answered promptly	5	3.9
Customer staff polite, greet callers and listen keenly to customer complaints	5	4.2
Overall opinion of quality of customer care accorded by service provider/operator	5	4.2
Total score	80	64.8
Satisfaction Index -2009	100%	81%
Satisfaction Index -2007		N/A

For courier services several attributes in the Attribute List above were not applicable and thus were excluded from the calculations of Satisfaction Index for Courier companies (the ones highlighted in blue) Generally the respective Courier Companies generated high ratings overall and the satisfaction Index compiled was 81% which in absolute terms is quite favorable

2.7 Premium Rate Service Providers (PRS)

i. Likes of PRS used

PREMIUM RATE SERVICE USERS	Total
No. use PRS	46
Proportion expressed like	80%
Fast and easy cash	25%
They give hopes of winning during competitions	20%
Help one give opinion of something being aired on radio/TV	13%
Convenient	8%
Easy to SMS	6%
Access to beautiful and inspiring messages whenever, wherever	4%

Almost half (22) of total users (47) of PRS services used were using Inooro i.e 48% of total users. Various other services were mentioned, each by a negligible proportion of respondents. The service was described as giving “fast and easy cash ” and “gives one hope of winning”.

ii. Dislikes of PRS Used

PREMIUM RATE SERVICE USERS	Total
No. use PRS	46
Proportion expressed dislike	74%
It is expensive	45%
I have never won a single prize	13%
You can spend a lot of money without winning	7%
Sometimes SMS are not delivered.	5%
I have been unable to unsubscribe the service	4%

A substantial proportion of the PRS users expressed dissatisfaction with the service. The major complaint was that the service was too expensive -45%.

iii. Customer Satisfaction Index – Premium Rate Services

Note:

The results of Qualitative Research and the Pilot Study established that most of the Customer Service Attributes did not apply to Premium Rate Services because one never visits a Customer Care department in person, one never sees the employees nor is there a facility one can as opposed to the facilities Mobile Phone Operators have i.e. call centres working 24hours and Customer Call Centres one can visit in person to seek help in case of having a related problem.

Thus after considering the various options, it was decided that this question on Attribute Ratings be excluded from the Final Questionnaire.

The findings of qualitative research showed that consumers had a serious problem when they want to unsubscribe to a particular service i.e. their money is deducted every day despite having cancelled the PRS they subscribed to. Some consumers were under the impression that the PRS services were being run by the Mobile Phone operators. When they did not succeed in cancelling their contract with a particular PRS Service, they sought help from the respective Mobile Phone Operators who directed them on the correct procedure to follow and the numbers to dial.

2.8. Customer Service Ratings

Customer Service Ratings							
	Mobile Phone Service providers	Fixed Line/Landline	Wireless Phone	Internet	Premium Rate Services	Postal Corporation of Kenya	Courier Services
Ease of accessing a person in customer care department	3.6	2.9	3.4	3.5	3	3.4	4
Politeness and helpfulness of a person dealing with you	4.1	3.1	3.7	3.7	3.1	3.2	4
Language used is appropriate	4.1	3.5	3.6	3.8	3.3	3.4	4
Accuracy and reliability of information provided	4	3.2	3.5	3.7	3.2	3.4	3.9
Ability to solve problems quickly	3.8	2.7	3.4	3.6	2.8	3.3	3.7
Customer care staff listens to you (when you have a problem)	4.1	3.3	3.5	3.8	3.2	3.3	3.9
Customer care staff able to solve problem	4	3.2	3.5	3.8	2.9	3.3	3.9
Overall satisfaction with customer service	4	3.1	3.5	3.7	2.9	3.4	3.9
Total Score out of 40	31.7	25	28.1	29.6	24.4	26.7	31.3
Customer Satisfaction Index (%)	79.3%	62.5%	70.1%	74%	61%	67%	78.3%

In this last section respondents' ratings were established particularly in reference to the kind of customer service extended to their Customers. The ratings were based on a 5-point scale ranging from "Very good" (score 5) to "Very poor" (score 1). Mean scores compiled from the ratings are summarized in table above.

As shown in table above:

Premium Rate Service generated the poorest rating (61%) followed closely by Telkom Fixed Line Service (62.5%) and Postal Corporation of Kenya (67%) respectively. PRS ratings were the least for virtually all the attributes above.

Fixed Line ratings were also poor especially for:

- "Ease of access to a person in Customer care department"
- "Politeness and helpfulness of staff"
- "Accuracy/ Reliability of information provided"
- "Ability to solve problems quickly"

Overall the respective ratings were most favorable for Mobile Phone Service providers and scored the highest rating (79%) followed closely by Couriers (78%).

2.9 Overall Rating of Service Providers used

Respondents' overall rating (i.e. taking everything into consideration about the particular Service Provider) was established on a 10-Point scale ranging from 1 (very poor) to 10 (very good). The respective ratings gained by respective service providers are summarised in table below:

	Total
Telephone Fixed Line	5.9
Wireless Phone	6.1
Mobile telephony –total	8.2
Safaricom	8.2
Zain	8.3
Orange	8.0
Email/ Internet -Total	6.2
At Cyber	6.1
Safaricom	6.4
Courier Service	6.3
Easy Coach	6.6
Akamba	6.7
Securicor	6.3
G4S	6.3
Postal services	5.7
Premium Rate Service	5.3

Mobile telephony generated the most favorable rating of 8.2 – the pattern of ratings was strikingly similar for Safaricom, Zain and Orange service providers respectively. Premium Rate Services emerged with the lowest score (5.3). Telephone Fixed Line and Postal services ratings were just above average – 5.9 and 5.7 respectively. The ratings for Wireless phones, Email/Internet services and Courier Services, were generally positive i.e. over 6.0.

SUMMARY OF FINDINGS AND RECOMMENDATIONS

I. Key Findings – Licensees/ Stakeholders’ Perceptions and Satisfaction with CCK

- i. Virtually all Licensees and Stakeholders were aware of CCK. A majority –about three-quarters - came to know of CCK through their work as it involved contact with CCK for various reasons.
- ii. The licensees/Stakeholders were well-informed of the role of CCK. Reference was made to its role of being “a regulator of the Communications Industry” (94%), “approves Licensees for Media Houses, Radio and Television Stations” (39%) and “ensures fair play amongst the organizations in the communications industry” (27%).
- iii. The Licensees/Stakeholders’ overall ratings of CCK were quite favorable. One of the biggest perceived achievements of CCK was that “CCK has made communication much easier” (28%). CCK was also commended for having “kept in touch with the developments in the communication industry” (17%) and for “being fair to all players in the market” (16%).

However there was some concern amongst the Licensees/ Stakeholders who believe that CCK is not working independently i.e. it was alleged that it is being controlled by ‘outside forces’. In addition CCK was perceived to favor some of the players in the market. Reference was also made to delays in issuing of licenses and frequencies.

There were suggestions for CCK to reduce bureaucracy, to act independently, control the price of communications services, to create awareness of its role amongst the public and last but not least to involve/update the Licensees/ Stakeholders on new developments in the market.

The licensees and Stakeholders would like CCK to hold seminars and workshops where ideas can be exchanged/ shared, where Licensees can bring up some of the issues affecting their businesses and where some of the stakeholders can also contribute to the workshops as they have expertise in the field of communication.

In terms of expectations from a regulatory body such as CCK, respondents reiterated the need for Transparency, Accountability, Professionalism and on Building a partnership with their customers and Stakeholders. The need for CCK to work independently and to protect the consumers/ customers was also emphasized.

- iv. The Customer Satisfaction Index (CSI) was calculated based on their ratings of key attributes of importance according to the Licensees and Stakeholders. The CSI was 74% as compared to 68% in the previous survey, thus indicating some improvement in customer satisfaction levels.

CCK generated a remarkable Image Perception Index (IPI) of 79.7% among the Licensees/ Stakeholders – this is an increase of about 6% over the IPI achieved in the previous survey (72.7%). Thus there is an improvement in the perceptions of CCK.

- v. Over 90% of the Licensees and Stakeholders had seen/heard the recent CCK adverting - virtually all of them mentioned the Television adverting whilst 50-60% mentioned the Radio and Newspaper advertising respectively.

II. Key Findings – Consumers

Consumer Perceptions and Satisfaction with CCK

- i. Spontaneous awareness of CCK was fairly low. Only 18% of the consumers mentioned CCK spontaneously as compared to 28% for Central Bank of Kenya and KEBS respectively. However upon prompting, CCK's awareness increased to 53%.
- ii. CCK is best known as an organization which "regulates/controls the telecommunication communication industry" –almost 80% mentions. In addition it is known to "give licenses to Media Houses/ Radio Stations /Television Stations" – particularly in urban areas (Urban- 47%, Rural -28%, Total -34%). Small numbers were aware that CCK "controls/ approves radio frequencies".

It must be noted that none of the consumers were aware about CCK gives licenses to Courier/ Transport Companies and Postal services.

- iii. The most frequently mentioned source of awareness of CCK was through advertising (60%) - the recent CCK television advertising "Tumetoka mbali" referring to 10 years of existence of CCK and featuring the comedian Churchill generated high mentions (32%) followed by the respective Radio advertising (21%).

There were negligible mentions of the Consumer Outreach programme brochures under the headline "CHUKUA HATUA". When the brochures were shown during the Focus Group Discussions, most respondents associated them with the HIV/AIDS campaign.

- iv. CCK generated favorable spontaneous comments for the progress it has made in the last few years in the telecommunication industry i.e. it has 'Revolutionized the telecommunication industry' (20%), 'has given out licenses to an increasing number of radio and TV stations' (19%), and "controls the contents of programmes broadcasted on the radio' (21%).
- v. In terms of dislikes, consumers complained about CCK being "biased in giving out frequencies to investors/ prospective clients" (20%) and "CCK has the power to ban both TV and Radio stations" (13%). Reference was made to past incidents/ news when some media owners were denied radio frequencies and a prospective Mobile Phone operator was denied license to operate. Both parties were said to have struggled before they finally got the respective licenses.
- vi. CCK was rated favorably for its image perception and achieved an Image Perception Index of 76.4% which can be described as favorable. It was rated favorably for being "a financially stable institution", "a reliable organization", "has embraced modern technology".
- vii. CCK achieved a favorable Customer Service Satisfaction Index (CSI) of 88.4% - this is remarkable in absolute terms as well as in comparison with the CSI in previous survey (75%). CCK was commended particularly for allowing new players in the telecommunications market – particularly the Mobile Phones Operators -, for enforcing rules of fair play among operators and approving the right equipment to be used by operators.

Consumer Satisfaction with Service Providers in the Communication Industry

- i. Mobile telephony (99%), Postal Services (90%) and Fixed Line telephone (83%) services were among the most frequently mentioned methods of communication consumers were aware of.
- ii. Mobile telephony was the most widely used communication method in urban as well as rural areas –total usage level was 87%. The extent of use of Telephone Fixed Lines, Wireless Phones, Premium Rate services, Email/Internet, Courier services and Postal services respectively was comparatively low.
- iii. Among the users of the respective communication methods, Mobile telephony generated the highest level of satisfaction and generated a mean score of 8.2 on a 10-point scale. Postal Services and Telephone Fixed Line Services generated the poorest ratings respectively.
- iv. Customer satisfaction with Service Providers Used:

The table below summarizes the Customer satisfaction Index and Customer Service Index for the respective communication methods used:

	Telephone (fixed Line) Service	Wireless Phone Service	Mobile Phone Service	Premium Rate Service	Email/Internet Service	Courier Service	Postal Service
Customer Satisfaction Index	66%	74%	79%	-	64%	81%	74%
Customer Service Index	63%	70%	79%	61%	74%	78%	67%
Overall satisfaction (10-point scale)	5.9	6.1	8.2	5.3	6.2	6.3	5.7

Note:

Customer satisfaction Index includes all aspects of customer care ranging from handling of complaints, billing issues, ease of getting through to customer help lines etc. This question was not asked to PRS users as most of the attributes were not applicable.

Customer Service Index refers specifically to certain particular aspects of customer care, for example "Ease of accessing a customer care staff", "politeness and helpfulness of customer care staff", "accuracy of information provided" etc.

Overall Rating on a 10-point scale refers to respondents' rating of CCK "taking everything into consideration about CCK"

RECOMMENDATIONS

The following are the key recommendations from the findings of the research which also take into consideration the findings of the Qualitative Research:

Licenses/ Stakeholders

- i. Generally the licenses/Stakeholders seem fairly satisfied with CCK overall. However it is important to have regular communication/dialogue between CCK and the Licensees/ Stakeholders through regular workshops and seminars between the parties concerned – in a bid to foster better business partnership.
- ii. It is important that CCK restores its positive image amongst the Licensees and Stakeholders by exhibiting fairness in its dealings. This will help strengthen CCK's image in terms of being transparent and accountable as at present CCK is not perceived to be acting independently.
- iii. There is need for CCK to be more closely linked with its key partners, particularly organizations such as NEMA and KCA (Kenya Civil Aviation) so that the right procedure is followed when approving particular licenses or approving erection of telecommunication masts and any other situations which need consultations between the relevant bodies.
- iv. CCK needs to control the erecting of telecommunication masts. It is suggested that CCK advocates for co-location of telecommunication sites i.e. different telecommunication operators to share the same site. Licensee/Stakeholders mentioned that CCK needs to check for radioactive interference of telecommunication masts. It was alleged that some telecommunication masts erected in residential areas can be a health hazard (emit radiation) if not properly tested. In addition, some stakeholders mentioned that the current pattern of erecting masts has been done haphazardly and thus can be detrimental health-wise to the surrounding population –it was believed that children born in future in some of the affected areas (including Limuru) can be deformed due to effects of radiation.
- v. CCK needs to meet the Licensees/ Stakeholders' expectations to a higher level for:
 - “Provides sufficient and relevant information to stakeholders”
 - “Informs licensees what services are available/ offered”
 - “Acts independently from government or any other body”
 - “Provides effective channels for licensees' complaints”
 - “Puts in place a simple Licensing application process”

Consumers:

- i. It is evident that the recent CCK advertising commemorating 10 years of CCK's existence has created a high awareness of CCK – especially the Television advertisement. However consumers are still not clear on the role of CCK/CCK mandate especially with regard to protecting the rights of the consumer in the communication industry. In addition, they are not aware of the fact that CCK can deal with consumer complaints when efforts to solve the issue with the service provider fails.
- ii. It is important to inform/ educate the public that CCK also issues licenses for Postal/Courier services and for other transport services such as Akamba. In addition the public should be educated on the consumer rights associated with these modes of communication/ transport. (Nil awareness on the fact that CCK issues licenses to operate to Postal and Courier services respectively.)
- iii. There is a strong need for CCK to open some branch offices outside Nairobi in the key urban centres – this will help create more awareness of CCK and in turn attract more interest in the organization. Customers do not have to travel to Nairobi to file their complaints or to make enquiries.
- iv. CCK should consider having Open Days in major towns/ cities in Kenya. This would help educate wanainchi on the role of CCK particularly its role in protecting consumer Rights.
- v. In addition CCK should also consider putting up a contravision outside their offices on Waiyaki Way which is passed by thousands of Kenyans from upcountry – somewhere near the CCK signboard is currently erected. This will create a higher awareness of CCK and its role.
- vi. The idea of sponsoring Radio programmes or Television shows can also be considered by CCK on some of the most popular Radio/Television Stations. The programmes can be based on a social setting with a built-in message about the role of CCK for example.

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- vii. All the above options can be used to educate the consumers on their rights as well as direct them to the right offices in case of having issues they have not been able to sort out with their Service Providers.
- viii. In order to adopt some of the suggestions above there is a strong need for a consumer complaints desk/ department which should be easily accessible to customers in addition to having a responsible team of customer service attendants who are conversant with the respective issues and are able to sort out the issues or alternatively advise the complainants on the next course of action.
- ix. As a regulatory body, CCK does not have a platform upon which it can be able reach a greater proportion of the general public compared to other regulatory bodies - for example all consumer products sold in Kenya have a Kenya Bureau of Standards (KEBS) logo and standardization mark of quality imprinted on the respective brands/packs, all Kenya currency notes have a Central Bank of Kenya name/logo imprinted on them etc.

It is recommended that CCK adapts a similar route as KEBS for example by:

- Imprinting the CCK logo or including a short message regarding CCK on any approved TV programmes or movies. This will extensively increase awareness of CCK among the general public. In addition to making the public aware of CCK, it will also inform them of one of its roles i.e. to control of electronic media contents.
- Upon checking and approving the standards of telecommunication equipments being sold in Kenya, CCK can imprint a CCK approved mark of quality on the respective equipment including mobile phones. This approach will also aid in creating awareness and inform the public on the role of CCK in the Communication Industry.

Similarly CCK should consider asking all licensees (including Telecommunication/ Mobile phone companies, Courier companies, Postal services, Cybers etc.) to have a small CCK approval logo on all their stationery for example Receipt Books, Invoice Books etc.